**Glossary Terms**

**Salesforce EcoSystem**

● [Projects](https://trailhead.salesforce.com/projects) (In Trailhead): Hands-on practice with Salesforce tools with step-by-step instructions.

● [Modules](https://trailhead.salesforce.com/modules) (In Trailhead): Short learning tutorials for individual topics.

● [Trailmixes](https://trailhead.salesforce.com/trailmixes) (In Trailhead): Learning journeys that use combinations of badges, projects, and linked resources.

● [Quests](https://trailhead.salesforce.com/quests) (In Trailhead): Challenges for learning new skills with the chance to win prices.

● [Trailblazer Community](https://trailhead.salesforce.com/en/trailblazercommunity): A community to learn relevant skills, connect to Trailblazers around the world, and give back together.

● [Trailhead playground:](https://trailhead.salesforce.com/content/learn/modules/trailhead_playground_management/create-a-trailhead-playground) A Salesforce environment with preloaded data that are connected to Trailhead to allow for hands-on-challenges.

● [Salesforce Help](https://help.salesforce.com/s/articleView?id=000313974&type=1): Salesforce offers help resources. To access it in the user interface, click on the “?” mark in the top right after logging in to submit cases and find other help resources.

● [Salesforce Customer 360](https://www.salesforce.com/products/): Salesforce Customer 360 is Salesforce’s solution that connects all information about the customer in an easy to access system.

● [Salesforce](https://www.salesforce.com/products/what-is-salesforce/): The leading CRM (Customer Relationship Management) provider with many products to help serve your customer.

● [Nonprofit Cloud](https://www.salesforce.org/nonprofit/): Salesforce’s product to support nonprofits.

● [Experience Cloud](https://www.salesforce.com/products/experience-cloud/overview/): Salesforce’s product for building secure websites, portals, and apps with connected data quickly.

● [Sales Cloud](https://www.salesforce.com/products/sales-cloud/overview/): Salesforce’s product to enable Sales Teams to manage customer data and sell effectively.

● [Marketing Cloud](https://www.salesforce.com/form/sem/marketing-cloud-demo-overview/?gclid=CjwKCAjw1ICZBhAzEiwAFfvFhDdxqU1iS9bdHClkX7b-sqB8FjEgb8tPiw3-LTd38V4eBP2OxEGmZRoCXRMQAvD_BwE&d=7010M000002QXIt&nc=7010M000000jIPQ&DCMP=KNC-Google&ef_id=CjwKCAjw1ICZBhAzEiwAFfvFhDdxqU1iS9bdHClkX7b-sqB8FjEgb8tPiw3-LTd38V4eBP2OxEGmZRoCXRMQAvD_BwE:G:s&s_kwcid=AL!4604!3!609080080549!e!!g!!marketing%20cloud&pcrid=609080080549&pdv=c): Salesforce’s product to enable companies to market to customers.

● [Commerce Cloud](https://www.salesforce.com/products/commerce-cloud/overview/): Salesforce’s product for selling B2B or B2C.

● [Einstein Analytics](https://www.salesforce.com/products/crm-analytics/features/): Salesforce’s product that does enterprise-level analytics on your customer data.

● [Mulesoft](https://www.mulesoft.com/): Salesforce’s product that is used to integrate systems.

● [Sustainability Cloud](https://www.salesforce.com/form/sustainability/net-zero-cloud-demo/?gclid=CjwKCAjw1ICZBhAzEiwAFfvFhHIbYp3sD7vr9X5AGALIzHAr2aeB9mhD89qSQh0n7ZGLYW-Abu2r_BoCMm0QAvD_BwE&d=7013y000002R8T4&nc=7013y000002ELRE&DCMP=KNC-Google&ef_id=CjwKCAjw1ICZBhAzEiwAFfvFhHIbYp3sD7vr9X5AGALIzHAr2aeB9mhD89qSQh0n7ZGLYW-Abu2r_BoCMm0QAvD_BwE:G:s&s_kwcid=AL!4604!3!585167538943!e!!g!!sustainability%20cloud&gclsrc=aw.ds): Salesforce’s product used to track, report, and analyze environmental data.

● [Health Cloud](https://www.salesforce.com/form/industries/health-demo-form/?gclid=Cj0KCQjw94WZBhDtARIsAKxWG--U5Yv40Q3Ijv7tMLeTOZROrdJG2l8irqR3Vnx2SkuGRVTjz_Y8oxMaAo1vEALw_wcB&d=7010M000000iYZE&nc=7010M000002QYf9&DCMP=KNC-Google&ef_id=Cj0KCQjw94WZBhDtARIsAKxWG--U5Yv40Q3Ijv7tMLeTOZROrdJG2l8irqR3Vnx2SkuGRVTjz_Y8oxMaAo1vEALw_wcB:G:s&s_kwcid=AL!4604!3!590338816022!e!!g!!salesforce%20healthcare%20cloud): Salesforce product to Connect the Patient Journey for Healthcare Providers

● [Clicks vs. Code within Salesforce](https://developer.salesforce.com/docs/atlas.en-us.214.0.salesforce1.meta/salesforce1/dev_salesforce1_clicks_vs_code.htm): Using click based tools is usually the best way to go due to their simplicity in creation and maintenance. Code is more powerful, but harder to make and harder to maintain.

● [Declarative Development](https://www.salesforce.com/products/platform/best-practices/declarative-programming-vs-imperative-programming/): Point and click development. ● [Programmatic Development](https://www.salesforce.com/products/platform/best-practices/declarative-programming-vs-imperative-programming/): Code development.

● [Salesforce Careers](https://trailhead.salesforce.com/en/career-path): Career paths include Administrator, Developer, Architect, Business Analyst, Sales Manager, Marketing Manager, UX (user experience) Designer.

● [Salesforce Trust](https://trust.salesforce.com/en/): Real-time information on system performance and security of your Salesforce Organization.

● [Scrum Development](https://trailhead.salesforce.com/content/learn/modules/scrum-and-kanban-at-salesforce/learn-about-scrum): An agile project management methodology where work (User Stories) are delivered in sprints. Scrum teams continuously test and improve their products and processes.

● [Agile Development](https://trailhead.salesforce.com/content/learn/modules/salesforce-agile-basics?trail_id=learn-salesforce-agile-practices): A way to quickly and efficiently methodology to deliver projects in a flexible way.

**Navigation**

● [App Launcher](https://help.salesforce.com/s/articleView?id=sf.identity_app_launcher.htm&type=5): When logged in, this is the top left navigation 3x3 matrix icon. Click on it to access objects, apps like service or sales console, and the recycle bin.

● [Appexchange](https://developer.salesforce.com/docs/atlas.en-us.appExchangeInstallGuide.meta/appExchangeInstallGuide/appexchange_install_whatis.htm): Salesforce’s marketplace for apps and components for your Salesforce org along with the ability to purchase consulting services.

● [Sandbox](https://help.salesforce.com/s/articleView?id=sf.data_sandbox_create.htm&type=5): A sandbox is a testing environment typically copied from your production org. New changes should be developed here first and promoted into production. The login credentials for the sandbox environment are different from production. This is because all usernames must be unique across all orgs. Additionally, users can exist in sandboxes and not in production. The opposite is also true.

● [Salesforce Setup](https://help.salesforce.com/s/articleView?id=sf.basics_nav_setup.htm&type=5): When logged in, the setup menu is accessed from the cog icon in the top right. This is where most of the changes administrators perform are accessed.

● [Personal Settings](https://help.salesforce.com/s/articleView?id=sf.basics_nav_personal_settings_lex.htm&language=en_US&r=https%3A%2F%2Fwww.google.com%2F&type=5): When logged in, personal settings are accessed by clicking your profile image in the top right of the page. Personal settings is where timezone, name, email, and email signature are changed or configured.

● [Company Information](https://help.salesforce.com/s/articleView?language=en_US&id=sf.admin_profile.htm&r=https%3A%2F%2Fwww.google.com%2F&type=5): This page, inside of setup, contains important information about your Salesforce instance. Information includes location, currencies, and user licenses available and consumed.

● [Add New Users](https://help.salesforce.com/s/articleView?id=sf.adding_new_users.htm&language=en_US&r=https%3A%2F%2Fwww.google.com%2F&type=5#:~:text=From%20Setup%2C%20in%20the%20Quick,same%20as%20the%20email%20address.): To add new users in Salesforce, an administrator accesses the user section under the Setup menu. A Salesforce license must be available, username must be unique, an email be provided, and select a profile for the user.

● [Lightning Page Customization](https://trailhead.salesforce.com/content/learn/modules/lightning_app_builder/lightning_app_builder_recordpage): To customize a Lightning Page, when on a record page, click the gear icon in the top right and select ‘Edit Page’. This will allow you to use different components to customize the Lightning Page to meet the business’ needs.

● [Creating a Lightning App](https://help.salesforce.com/s/articleView?language=en_US&id=sf.dev_apps_lightning_create.htm&r=https%3A%2F%2Fwww.google.com%2F&type=5): A lightning App is created under Setup. Search for ‘App Manager’ and create the Lightning App. You can define supported form

factors, like mobile or desktop, and specify all objects that should be accessible in the app top navigation tabs.

● [Lightning Knowledge Setup](https://help.salesforce.com/s/articleView?language=en_US&id=sf.knowledge_lightning_enable.htm&r=https%3A%2F%2Fwww.google.com%2F&type=5): To enable Lightning Knowledge, go to Setup, search for ‘Knowledge Settings’, and check the ‘Enable Lightning Knowledge’ checkbox. Lightning Knowledge are help articles that can be accessed internally and also externally, if your company chooses to do so.

**Data Model**

● [Standard Objects](https://trailhead.salesforce.com/content/learn/modules/data_modeling/objects_intro): Objects in Salesforce are the same thing as data tables in Excel or SQL. A standard object is an object that comes out-of-the-box with your Salesforce.

● [Custom Objects](https://trailhead.salesforce.com/content/learn/modules/data_modeling/objects_intro): Custom Objects are any data tables that are not Standard Objects. They are data tables used to store information specific to your company.

● [Accounts](https://help.salesforce.com/s/articleView?id=sf.accounts.htm&language=en_US&r=https%3A%2F%2Fwww.google.com%2F&type=5): Accounts are a Standard Object that store information about customer accounts. They are related to Contacts through a lookup relationship.

● [Contacts](https://help.salesforce.com/s/articleView?id=sf.sales_core_manage_accounts_contacts.htm&language=en_US&r=https%3A%2F%2Fwww.google.com%2F&type=5): Contacts are a Standard Object that store the contact information for customers. Contacts can be created without an associated account. These contacts are called orphan contacts.

● [Opportunities](https://help.salesforce.com/s/articleView?language=en_US&id=sf.opportunities.htm&r=https%3A%2F%2Fwww.google.com%2F&type=5): Opportunities are a Standard Object that are used to track and manage potential deals. An account can have many opportunities at the same time, with multiple contacts that are related and relevant to the opportunity.

● [Cases](https://help.salesforce.com/s/articleView?language=en_US&id=sf.cases_def.htm&r=https%3A%2F%2Fwww.google.com%2F&type=5): Cases are a Standard Object and are used to track and resolve customer issues. An Account can have many cases, and a case is related to a contact that raised the issue.

● [Leads](https://help.salesforce.com/s/articleView?language=en_US&id=sf.faq_leads_what_is_a_lead.htm&r=https%3A%2F%2Fwww.google.com%2F&type=5): Leads are a Standard Object that is used to identify and engage with potential customers. Once a lead is sufficiently nurtured, it is converted into an account, a contact is created, and optionally, an opportunity is made.

● [Roles and Role Hierarchies](https://trailhead.salesforce.com/content/learn/modules/data_security/data_security_roles#:~:text=A%20role%20hierarchy%20works%20together,below%20them%20in%20the%20hierarchy.): A Role is defined on a user’s record. Role Hierarchies open up access to data records. Users above another user in the Role Hierarchy can see the same data that they can see.

● [Sharing Rules](https://help.salesforce.com/s/articleView?id=sf.security_about_sharing_rules.htm&language=en_US&r=https%3A%2F%2Fwww.google.com%2F&type=5): Sharing Rules are used to grant access to records. Sharing Rules can be used in Public Groups, Roles, and Territories.

● [Public Groups](https://help.salesforce.com/s/articleView?id=sf.creating_and_editing_groups.htm&language=en_US&r=https%3A%2F%2Fwww.google.com%2F&type=5): Administrators or delegated Administrators can create and edit public groups. Public groups are used to share records with.

● [Manual Sharing](https://help.salesforce.com/s/articleView?id=sf.granting_access_to_records.htm&language=en_US&r=https%3A%2F%2Fwww.google.com%2F&type=5): Manual Sharing is used to grant access to another user. Manual Sharing must be enabled for your organization. Also, at least one of the following must be true-- you are the record owner, you are a user above the owner in the hierarchy, you have full access to the record, and or you are an Administrator.

● [Profiles](https://help.salesforce.com/s/articleView?id=sf.admin_userprofiles.htm&language=en_US&r=https%3A%2F%2Fwww.google.com%2F&type=5): Profiles define the level of access a user has to different objects and data along with general application access. A user can only have one profile.

● [Permission Sets](https://help.salesforce.com/s/articleView?id=sf.perm_sets_overview.htm&language=en_US&r=https%3A%2F%2Fwww.google.com%2F&type=5): Permission Sets grant additional access to objects and data along with general application access. These are used with profiles to grant the exact level of access a user needs. A user can have multiple permission sets assigned to them.

● [Permission Set Groups](https://help.salesforce.com/s/articleView?id=perm_set_groups.htm&language=en_US#:~:text=A%20permission%20set%20group%20streamlines,permission%20sets%20in%20the%20group.): A Permission Set Group is multiple permission sets paired together. They accomplish the same thing as permission sets, but are combined in one group to make it more efficient to assign multiple permission sets that are commonly assigned together.

● [Field Level Security](https://help.salesforce.com/s/articleView?id=sf.admin_fls.htm&type=5): Field-Level Security, often referred to as FLS, allows for restricting a users’ access to view and edit specific fields. FLS is defined within profiles and permission sets.

● [Sharing Sets](https://trailhead.salesforce.com/content/learn/projects/communities_share_crm_data/external_user_sharing): For the purposes of this exam, you only need to know that Sharing Sets are a record access sharing tool that is used with Salesforce Experience Cloud for customer portals.

**Reports & Dashboards**

● [Reports](https://help.salesforce.com/s/articleView?id=sf.rd_reports_overview.htm&language=en_US&r=https%3A%2F%2Fwww.google.com%2F&type=5): Reports allow you to understand your company data through displaying it in easy-to-understand formats. You can choose what fields to include, filter data, set notification logic, email, and export reports. Reports can have a maximum of 2,000 records before requiring a data export.

● [Dashboards](https://help.salesforce.com/s/articleView?language=en_US&id=sf.rd_dashboards_overview.htm&r=https%3A%2F%2Fwww.google.com%2F&type=5): Dashboards help you visually understand the data in your company in real-time. Dashboard components are built off reports.

● [Report Types](https://admin.salesforce.com/blog/2017/ultimate-guide-report-types): Report Types are the data sets that reports are based off of. Report Types can be from one object, parent records with child records, or parent records with or without child records.

● [Report Formats](https://trailhead.salesforce.com/content/learn/modules/reports_dashboards/reports_dashboards_report_types#:~:text=There%20are%20four%20report%20formats,Tabular%20is%20the%20default%20format.): There are four report formats. Tabular, Summary, Matrix, and Joined. Tabular is used to make a list, Summary is for grouping and summarizing, Matrix is for grouping and summarizing by row and column, and Joined is for showing reports side-by-side in blocks.

● [Report Filters](https://help.salesforce.com/s/articleView?id=sf.reports_filter.htm&language=en_US&r=https%3A%2F%2Fwww.google.com%2F&type=5): Report filters are used to filter, or pare down the data in the report to show only the desired data.

● [Dashboard Components](https://help.salesforce.com/s/articleView?id=sf.dashboards_component_types.htm&language=en_US&r=https%3A%2F%2Fwww.google.com%2F&type=5): Dashboard components are used to visualize your data. Dashboard components include charts, tables, gauges, metrics, line chart, vertical bar chart, horizontal bar chart, pie, funnel, donut, and other components that can be made with code.

● [Dashboard Filters](https://help.salesforce.com/s/articleView?language=en_US&id=sf.dashboard_filters_overview.htm&r=https%3A%2F%2Fwww.google.com%2F&type=5): Dashboard filters allow for easy filtering of the entire dashboard. Said another way, the data across all reports that make up the dashboard are all filtered based on the dashboard filter. Dynamic dashboards allow each user to see the data they have access to. You can run a dashboard as a specific user or run as the logged-in user.

● [Subscribing to Reports and Dashboards](https://help.salesforce.com/s/articleView?id=sf.reports_subscribe_overview.htm&type=5): Reports and dashboards can be subscribed to in order to automate dashboard or report results via email on a defined schedule. The schedule could be daily, weekly, monthly, or even only during certain data conditions.

● [Folder for Reports and Dashboards](https://help.salesforce.com/s/articleView?id=analytics_sharing.htm&type=5&language=en_US): Both reports and dashboards are placed within folders. Folders are used for grouping reports and for security. Folders can be shared with groups, users, territories, and roles.

**Lookup:** the relationship between an Account and a Contact is a lookup relationship. This means that a contact can be related to only one account, but an account can have multiple related contacts.(One to Many)

**Junction:** A junction relationship would refer to a many-to-many relationship between two objects, where a third object acts as a junction between them

**Master-detail:** A master-detail relationship would mean that the detail object (Contact) cannot exist without the master object (Account), which is not the case for these two objects in Salesforce.

**Account Hierarchies** allow you to create parent-child relationships between accounts, enabling you to visually organize and report on them.

**Account Relationships** do allow you to create one-to-one relationships between accounts, it is not the most appropriate feature to use for creating hierarchies.

**Account Teams,** on the other hand, enable you to add multiple team members to an account and share information among them, but they do not provide the ability to create relationships between accounts.

**Profiles' object-level permissions**. Salesforce documentation states that profiles are a way of granting access to records, but specifically through permissions such as object-level, field-level, and record-level permissions.

**Quick Find** is a feature specifically designed to help users locate Setup pages quickly and easily.

**The Global Search Bar** can also be used to search for Setup pages, but it searches across all objects and records in the organization, which may return too many results to be useful in certain situations.

**Einstein Search**, on the other hand, is an advanced search feature that uses artificial intelligence to provide more sophisticated search results.

**Record** is a set of related fields that store data about a specific entity, such as a company, contact, or opportunity.

An **object** is a database table that represents a specific type of entity and contains records.

A **field** is a single piece of data that represents a specific attribute of an entity and is contained within a record.

**Conditional Formatting.** This feature allows users to highlight different summarized values in a report based on certain conditions such as values falling within a certain range, meeting certain criteria or even custom formulas.

**Unique Count** function helps in identifying how many distinct values are in a column.

**Distinct Count** would give the count of unique combinations of values in multiple columns.

**Trust.Salesforce.com** is the official website for real-time system performance, security, and reliability information for Salesforce orgs. This site provides users with live updates on any service disruptions, planned maintenance, or security incidents that may impact their Salesforce environment.

**Security.Salesforce.com** is focused on providing security-related information and resources, such as security advisories, best practices, and compliance information, but not real-time information on system performance.

**IdeaExchange** is a platform where Salesforce users can suggest ideas to add new features, create changes, and upvote/downvote other user's ideas.  It is a platform for innovating and collaborating to improve Salesforce products.

**Experience Cloud**, previously known as Community Cloud, is designed to foster customer and partner engagement by providing online communities and portals.

**Multitenancy** is the ability for a single instance of a software application to serve multiple customers, or tenants, while keeping their data and configuration separate. In a multitenant environment, governor limits are in place to prevent any single tenant from monopolizing shared resources and impacting the performance and availability of the application for other tenants.

**Salesforce Develope**r is responsible for using imperative programming to customize Salesforce solutions. They are responsible for developing solutions that extend the functionality of the Salesforce platform and address business needs.

**Salesforce Administrators** are responsible for managing and configuring the Salesforce platform for their organization. While they may perform some customizations using declarative tools, they do not typically use imperative programming.

**Kanban List View** is a visual representation of opportunities as cards stacked in columns representing different stages of the sales process. This feature allows users to quickly identify which opportunities are in which stage of the sales process and move them by drag and drop from one stage to another.

**Pinning** a list view will make it the default view for that object's tab.

**Cloning** creates a new list view, which could be useful when you want to make minor changes to an existing view.

**"Comfy"** display density setting provides more space between elements, resulting in a more spacious view for easier viewing. This is ideal for users who want a more comfortable and relaxed viewing experience when working with Salesforce Lightning Experience.

**"Dense"** setting would provide less space between elements, making it more difficult to view and interact with information.

**"Compact"** setting would provide even less space between elements, resulting in a cluttered and cramped view that may be overwhelming and difficult to navigate for some users.

**Trailblazer Community Group** is a local community of Salesforce users and professionals who come together to share knowledge, experience, and best practices.

**Dreamforce** is a large annual conference hosted by Salesforce,

**Trailhead Community Group** is an online platform for learning and sharing Salesforce skills.

**Experience Cloud** (formerly known as Community Cloud) allows companies to create self-service portals for their customers, where they can find information, ask questions, and collaborate with other customers. This can help reduce the workload on the helpdesk and improve customer satisfaction.

**Roll-up summary fields** summarize data from child records and display it on the parent record, and this functionality can only be enabled through a Master-Detail relationship.

**Organization-wide defaults** determine the baseline level of access to an object's records for all users in the organization.

**Question mark (?)** is used as a wildcard to match only one character at the middle or end of a query when searching in the global search.

**Underscore (\_)** is used as a wildcard to match a single character at any position in a search

**Asterisk (\*)** is used to match multiple characters at any position in a search

**Sharing sets,** are used to grant access to records that don't meet the criteria of sharing rules or to extend sharing access that is outside the organization-wide default settings. Sharing sets aren't recommended for granting base access for respective departments