**Salesforce Terminology**

**A**

**Account**

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

**C**

**Contact**

*Contacts* are the individuals associated with your accounts.

**Contact Manager Edition**

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

**Contact Role**

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

**Content Delivery**

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

**Content Pack**

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

**Custom Console Component**

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

**Custom Controller**

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

**Custom Field**

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

**Custom Help**

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

**Custom Labels**

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

**Custom Links**

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

**Custom Object**

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

**Custom Report Type**

See Report Type.

**Custom Settings**

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

See also Hierarchy Custom Settings and List Custom Settings.

**Custom View**

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

**D**

**Dashboard**

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

**Dashboard Builder**

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

**Dashboard Filters**

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

**M**

**Managed Package**

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

**Managed Package Extension**

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

**O**

**Object**

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

**Object-Level Help**

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

**Object-Level Security**

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

**Organization**

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

**Org**

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

**Organization-Wide Defaults**

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

**Organization-Wide Address**

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

**P**

**Package**

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

**Package Dependency**

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

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

Permissions and preferences can include but aren’t limited to:

* Divisions
* Multicurrency
* Record types

**Package Installation**

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

**Package Publication**

Publishing your package makes it publicly available on AppExchange.

**Package Version**

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

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

**Parent Account**

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

**Parent Category**

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

**Permission**

A permission is a setting that allows a user to perform certain functions in Salesforce. Permissions can be enabled in permission sets and profiles. Examples of permissions include the “Edit” permission on a custom object and the “Modify All Data” permission.

**Permission Set**

A collection of permissions and settings that gives users access to specific tools and functions.

**Permission Set License**

Permission set licenses incrementally entitle users to access features that aren’t included in their user licenses. Users can be assigned any number of permission set licenses.

**Profile**

Defines a user's permission to perform different functions within Salesforce. For example, the Solution Manager profile gives a user access to create, edit, and delete solutions.

**R**

**REST (Representational State Transfer)**

A software architecture that lets clients and servers communicate resources, usually via HTTP.

**REST API**

A Web services application programming interface that uses REST to provide access to your Salesforce organization's information.

**Role**

Assigned responsibility of a user, partner account, or contact for specific accounts and opportunities. Administrators can define user roles in Setup. Individual users can assign specific partner and contact roles for accounts and contacts.

**Role Hierarchy**

A record-level security setting that defines different levels of users such that users at higher levels can view and edit information owned by or shared with users beneath them in the role hierarchy, regardless of the organization-wide sharing model settings.

**S**

**Sandbox**

A nearly identical copy of a Salesforce production organization for development, testing, and training. The content and size of a sandbox varies depending on the type of sandbox and the edition of the production organization associated with the sandbox.

**Sandbox Templates**

Sandbox templates give you control over which objects are copied to your sandbox.

**Service**

A service is an offering of professional assistance. Services related to Salesforce and the Lightning Platform, such as enhanced customer support or assistance with configuration can be listed on AppExchange.

**Service Cloud Portal**

The Service Cloud portal is the Customer Portal intended for many thousands to millions of users. After you purchase Service Cloud portal licenses, you can assign them to Customer Portal-enabled contacts so that large numbers of users can log in to a Customer Portal without affecting its performance.

**sObject**

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

**SOQL (Salesforce Object Query Language)**

A query language that allows you to construct simple but powerful query strings and to specify the criteria that selects data from the Lightning Platform database.

**SOSL (Salesforce Object Search Language)**

A query language that allows you to perform text-based searches using the Lightning Platform API.

**U**

**Unit Test**

A unit is the smallest testable part of an application, usually a method. A unit test operates on that piece of code to make sure it works correctly. See also Test Method.

**Unmanaged Package**

A package that can’t be upgraded or controlled by its developer.

**User Acceptance Testing (UAT)**

A process used to confirm that the functionality meets the planned requirements. UAT is one of the final stages before deployment to production.

**Roles and Profiles in Salesforce**

There are certain security measures has been put to restrict the access to the data either at Object level or at record level. Roles and Profiles provides such level of security and permissions in Salesforce and are important topic to understand.

Users must be able to access your Salesforce, roles, and profiles either with your permission or without it. User profiles and roles in a Salesforce organization controls the level of access an user can have.

**Roles in Salesforce**

A role in Salesforce defines a user’s visibility **access at the record level**. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

For each asset in your Salesforce organization, the default visibility setting will be “Org Wide Default” (organization-wide default).

When OWD is set as

* 1. Private - roles are utilized.
  2. Personal - there are two ways to improve data visibility:
     + Role hierarchies, and
     + Sharing rules in Salesforce

**Profiles in Salesforce**

In Salesforce, user profiles decide which objects and data they have access to.

The four actions

1. Create,
2. Read,
3. Edit, and
4. Delete, one may choose the Salesforce profile controls.

Based on a user’s profile, you may provide them access to perform any of these operations (create, read, modify, or delete).

There are two categories of profiles exist in Salesforce:

* Standard Profiles
* Custom Profiles

Difference between Roles and Profiles

|  |  |
| --- | --- |
| **Roles** | **Profiles** |
| Roles enable people to sight and access to records. | Access control for CRED (create, read, edit, delete) records of users are provided via profiles. |
| In essence, it is a record-level access. | In essence, it is an access at the object and field levels. |
| It adheres to a hierarchy. Data visibility rights are assigned according to hierarchy. | There is no hierarchy in it. Based on the profile, permissions are granted. |
| These can be seen as a hierarchy, with a higher role having more authority than a lower one. | These may be seen as circular structures where all profiles serving the same purpose join together to form a circle and have equal access. |
| The profile is always a factor in the function. | The profile may exist separately from the position. |
| Users are not required to have roles. | Roles are not necessary for users. |
| Roles limit who has access to specific records and fields. | Access to objects, field-level security, page designs, record kinds, and applications are all controlled by the profile. |

It’s important to note that permission sets in Salesforce do not override the permissions granted by a user’s profile or role. Instead, they supplement those permissions with additional access.

**Salesforce Offerings**



**Sales Cloud:**

* The core components of Salesforce built for Sales team
* Used to track customer information and Sales activities
* Analyze the sales data to make informed decisions

**Key Features of Sales Cloud include:**

* Lead Management
* Accounts Management
* Contacts Management
* Opportunity Management - help businesses manage the sales pipeline, including tracking opportunities and forecasting sales
* Mobile-friendly - allows for sales teams to access customer details while traveling

**CPQ (Configure Price Quote)** an extension to the Sales Cloud and helps streamline the quote creation and proposal generation process

**Key features of CPQ:**

* Product Configuration
* Pricing Configuration
* Discounts Management
* Approval workflow automation
* Quoting and Proposal generation
* Subscription, Amendments and Renewals Management

**Salesforce Billing:** is an extension to Salesforce CPQ and is used mainly by the Billing and finance teams for invoice generation and payments collection.

**Key functionalities of Salesforce Billing**:

* Tax management
* Invoice Management
* Payments Management
* Integrated with Sales Cloud and CPQ allowing for managing the entire lead to cash process from within the salesforce platform.

**Service Cloud:**

* Directed towards the support and service representatives
* Enable support teams to manage customer support activities (Eg: handling customer inquiries, issues, complaints).

**Key functionalities of Service Cloud include:**

* Case Management: enables reps to create and track customer cases efficiently
* Knowledge Management: - enables self-service capabilities for customers  
  Example: FAQ section in websites
* Omnichannel support: Enables multiple channel support such as chat, email, phone, social media
* Fully integrated with the Sales cloud functionalities - enabling Customer support reps to get a complete view of their customer's purchase and payment history.

**Field Service Lightning** helps businesses to manage their field service operations efficiently.

**Key Functionalities:**

* Scheduling and dispatching - enables technicians based on their availability, location and skills to be dispatched based on customer needs
* Mobile Access: Allows technicians to create or update work orders, update customer information etc when they are onsite providing service
* Analytics: Provides real-time insights into a technician's utilization, customer satisfaction etc.

**Different Roles available in Salesforce**

|  |  |
| --- | --- |
| Roles | Knowledge Required |
| Administrator | Helps in ongoing enhancements and maintenance of the apps  Good knowledge of the declarative capabilities |
| Business Analyst | Requirement Elicitation, User Story Documentation, Fit/Gap Analysis  Light – Medium Configuration  Provide functional oversight / assist in UAT |
| Project Manager | Manage overall project  Manage stakeholder relationships  Works closely with BA to ensure solution delivery alignment with business requirements |
| Configuration Consultant | Understand out of the box capabilities  Responsible for Configurations, customer demos, deployments  Role variations – Sales Cloud Consultant, CPQ Consultant, Experience Cloud Consultant etc |
| Architect / Sr. Architect | Knowledge of various clouds, out of the box functionalities, and Force.com capabilities  Ability to build scalable solutions, oversee the implementation |
| Developer / Sr. Developer | Knowledge of platform development capabilities (Apex, Visualforce pages etc) |
| Technical Architect | Provide technical architecture expertise in multi-cloud mplementations and complex custom implementations |
| Sales Executives | Help potential customers of Salesforce understand the art of the possible using the Salesforce platform  Good knowledge of Salesforce offerings and industry business process |
| Pre-Sales | Help potential customers of Salesforce understand the art of the possible using the Salesforce platform  Ability to offer solution options using a combination of Salesforce offerings, platform capabilities (config./Customiz.)  Write Statement of Work (SOW), respond to RFP’s etc |
| Data Consultant | Play crucial role during data migration. A good knowledge of Salesforce Object relationships along with ETL tools (Extract / Transfer / Load) and data migration knowledge |
| Integration Consultant | Integration to external systems (home grown systems, ERPs, Other upstream and downstream systems) |