Glossary Terms

Salesforce Ecosystem

- Projects (In Trailhead): Hands-on practice with Salesforce tools with step-by-step instructions.
- Modules (In Trailhead): Short learning tutorials for individual topics.
- Trailmixes (In Trailhead): Learning journeys that use combinations of badges, projects, and linked resources.
- Quests (In Trailhead): Challenges for learning new skills with the chance to win prizes.
- Trailblazer Community: A community to learn relevant skills, connect to Trailblazers around the world, and give back together.
- Trailhead playground: A Salesforce environment with preloaded data is connected to Trailhead to allow for hands-on challenges.
- Trailhead Academy: Salesforce's solution to accelerating your learning with the help of Salesforce experts. This is different than the free Trailhead. Trailhead Academy also helps your company with user adoption for Salesforce.
- Salesforce Help: Salesforce offers helpful 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 helpful resources.
- Salesforce Customer 360: Salesforce Customer 360 is Salesforce's solution that connects all information about the customer in an easy-to-access system.
- Salesforce: The leading CRM (Customer Relationship Management) provider with many products to help serve your customer.
- Multi-Tenant Environment: Salesforce uses a multi-tenant environment for its customers. This means that cloud server resources are shared with other customers. However, other users on your same server can never access your company's instance. There are many servers.
- Nonprofit Cloud: Salesforce's product to support nonprofits.
- Experience Cloud: Salesforce's product for building secure websites, portals, and apps with connected data quickly.
- Sales Cloud: Salesforce's product enables Sales Teams to manage customer data and sell effectively.
- Marketing Cloud: Salesforce's product enables companies to market to customers.
- Commerce Cloud: Salesforce's product for selling B2B or B2C.
- Einstein Analytics: Salesforce's product that does enterprise-level analytics on your customer data.
- Mulesoft: Salesforce's product that is used to integrate systems.
- Sustainability Cloud: Salesforce's product is used to track, report, and analyze environmental data.

- Health Cloud: Salesforce product to Connect the Patient Journey for Healthcare Providers
- Clicks vs. Code within Salesforce: 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: Point and click development.
- Programmatic Development: Code development.
- Salesforce Careers: Career paths include Administrator, Developer, Architect, Business Analyst, Sales Manager, Marketing Manager, and UX (user experience) Designer.
- Salesforce Trust: Real-time information on the system performance and security of your Salesforce Organization.
- Scrum Development: An agile project management methodology where work (User Stories) is delivered in sprints. Scrum teams continuously test and improve their products and processes.
- Agile Development: A way to quickly and efficiently methodology to deliver projects in a flexible way.

Navigation

- App Launcher: When logged in, this is the top left navigation 3x3 matrix icon. Click on it to access objects, apps like the service or sales console, and the recycle bin.
- Personal Navigation Bar: If enabled, users can customize their own navigation bar to add, reorder, remove, and rename different items. See the linked article for what that looks like in the Salesforce interface.
- AppExchange: Salesforce's marketplace for apps and components for your Salesforce org, along with the ability to purchase consulting services.
- Sandbox: 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: 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: When logged in, personal settings are accessed by clicking your profile image at the top right of the page. Personal settings are where time zone, name, email, and email signature are changed or configured.

- Company Information: 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: To add new users in Salesforce, an administrator accesses the User section under the Setup menu. A Salesforce license must be available, a username must be unique, an email must be provided, and select a profile for the user.
- Salesforce Global Search: Salesforce Global Search allows users to search all objects a user has access to. Use an asterisk (*) to find items that match zero or more characters in the middle or at the end of your query. Use a question mark (?) to match only one character in the middle or at end of your query.
- Lightning Page Customization: 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 business needs.
- Creating a Lightning App: 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's top navigation tabs.
- Lightning Knowledge Setup: To enable Lightning Knowledge, go to Setup, search for 'Knowledge Settings', and check the 'Enable Lightning Knowledge' checkbox. Lightning Knowledge contains helpful articles that can be accessed internally and also externally if your company chooses to do so.
- Lightning Console: A type of app can be created that allows users to view multiple records and related records on the same screen.

Data Model

- Standard Objects: 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: Custom Objects are any data tables that are not Standard Objects. They are data tables used to store information specific to your company.
- Picklist Fields: Picklist fields are field datatypes that present a list of values to select from. Admins can configure picklist fields so that users can add values to picklist fields. Admins also can restrict the addition of other values. Picklists can default to a specific value.
- Formula Fields: Formula fields are fields that are calculated based on a formula that you define. They allow you to display values that are derived from other fields in your Salesforce record, or from other sources such as a custom formula or a function.

- Master-Detail Relationship Field: This field type links two records together in a similar way that lookup relationship fields do. However, a master-detail relationship field child record must have the parent record defined. An example of a master-detail relationship is the relationship between accounts and contacts. One account can have many contacts.
- Rollup Field: Roll-up summary fields are fields that allow for performing summary calculations on a set of records. The records must be parent records related to a child record through a master-detail relationship. Summary options include sum, average, minimum, or maximum.
- Page Layouts: Page layouts in Salesforce are used to control the way that fields, related lists, and other components are displayed on the record detail and edit pages. Page layouts allow you to customize the layout and organization of fields on a page, as well as specify which fields are required, read-only, or hidden. A page layout is assigned based on a user's profile. Additionally, each record type can have a specific page layout assigned to it.
- Record Types: Record types are used to support different business processes on the same object. Record types allow admins to define different sets of picklist values and page layouts for a particular object. An example of when you would use record types would be on the Opportunity object to support the different picklists and page layouts for "New Business" versus "Existing Business".
- Accounts: Accounts are a Standard Object that stores information about customer accounts. They are related to Contacts through a lookup relationship. If an account is deleted, the contacts related to it are also deleted (moved to the recycle bin).
- Contacts: 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: Opportunities are a Standard Object that is 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: 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: 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: 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: Sharing Rules are used to grant access to records. Sharing Rules can be used in Public Groups, Roles, and Territories.
- Public Groups: Administrators or delegated Administrators can create and edit public groups. Public groups are used to share records.
- Manual Sharing: 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: 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: 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: 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: Field-Level Security, often referred to as FLS, allows for restricting a user's access to view and edit specific fields. FLS is defined within profiles and permission sets.
- Sharing Sets: 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.
- Schema Builder: The schema builder is used to visually see how objects are related. For objects, it shows all their fields and their respective datatypes. The schema builder can also be used to create new objects and custom fields very quickly.
- Metadata: Metadata is data that describes other data. It is not record data like an account record. It is data that defines the Salesforce org's configuration.

Reports & Dashboards

- Reports: Reports allow you to understand your company data by 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: Dashboards help you visually understand the data in your company in real time. Dashboard components are built off reports.
- Report Types: Report Types are the data sets that reports are based on. Report Types can be from one object, parent records with child records, or parent records with or without child records.

- Report Formats: 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: Report filters are used to filter, or pare down the data in the report to show only the desired data.
- Report Bucket Columns: Bucket Columns are used to group values into multiple categories without using a formula or a custom field. This allows users to easily transform the data for reporting analysis.
- Dashboard Components: Dashboard components are used to visualize your data. Dashboard components include charts, tables, gauges, metrics, line charts, vertical bar charts, horizontal bar charts, pie, funnels, donuts, and other components that can be made with code.
- Dashboard Filters: 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 users to see dashboards with the data that a specific user has access to. They can also be used to see the dashboard from the perspective of a logged-in user.
- Subscribing to Reports and Dashboards: Reports and dashboards can be subscribed to in order to automate the 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: 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.