



Sales Basics



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Sales Basics

Generate the best leads, manage opportunities through the sales pipeline, and cultivate relationships with existing accounts. Plus, forecast revenues, set up sales territories, and organize your reps into selling teams.

- Note** For usage restrictions that apply to this product, see [this document](#).
- Note** Sales Cloud is now Agentforce Sales. You may see references to Sales Cloud in our application and documentation.

[Learn About, Implement, and Optimize Sales Cloud Features](#)

Sales Cloud provides everything for the sales side of your business. Get started configuring Salesforce so your sales teams can generate the best leads, manage opportunities through the sales pipeline, and cultivate relationships with accounts. Plus, help your sales leaders forecast incoming revenue and manage sales territories.

[See an Overview of Metrics, Goals, Suggestions, Tasks, and Activities in Seller Home](#)

Sales team members can start their day with a bird's eye view of their business. Seller Home shows users an overview of their opportunities, accounts, leads, and contacts, along with their day's agenda. Seller Home also lets users set goals and track progress and view their to-do items, recent records, and contact suggestions from Einstein.

[Get AI-Generated Summaries of Accounts, Contacts, Leads, and Opportunities](#)

Harness the power of generative AI to help sales teams access key information about essential records. With Einstein Summary, sales reps can get up to speed, stay up to date, and better prepare for customer conversations. They don't have to manually sift through details or leave the record page so they can save time and effort.

[Organize and Find Records Easily with Personal Labels](#)

Apply your own labels to records to help you organize, track, and find the records you need quickly and easily. Add labels to records related to a region, project, campaign, or anything else that helps keep work organized. Labels that you add to records are separate from labels added to To Do List items.

[Sales Workspace](#)

Focus on what matters most with a guided, AI-driven workspace that surfaces key insights and recommends the next best actions. Sales Workspace replaces the traditional Seller Home and provides a unified view of important metrics and prioritized, AI-driven tasks. With this intelligence, sales teams can spend less time figuring out what to do and more time building relationships and closing deals.

[Capture ROI with Campaigns](#)

Organize and track your marketing efforts with Salesforce campaigns. When you align your campaign structure to your business processes and strategies, you can report ongoing marketing performance and ROI across activities and segments.

Turn Opportunities into Deals

Move opportunities through the sales process, and track exactly what you're selling and for how much.

Manage Accounts and Contacts

Track the people and companies you do business with. Store information, collaborate on accounts, access the records you need.

Showing Customers and Prospects on a Map

Let your reps identify customers and prospects on a map. That way, your reps can better plan their routes with fewer miles and set up appointments with fewer gaps in their schedules using Salesforce Maps Lite.

Manage a Sales Team

Forecast sales based on your opportunity pipeline, set up sales territories, and organize reps into selling teams. Split revenue and credit for deals even if you use multiple currencies. Use Path and WDC to help reps follow your business process and increase performance.

Artificial Intelligence and Sales Cloud

AI makes the sales process smarter at every step. Salesforce's AI technology—Einstein—automates data entry and predictive analysis so you can make every selling moment count.

Digital Engagement for Sales Cloud

Sales reps who use the Lightning Sales Console can use digital channels to stay in touch with prospects. Digital channels include multiple types of messaging apps and chat. Plus, Omni-Channel lets sales managers route communications to the right sales team. Sales Engagement users can use digital channels from the workflow queue. Learn about the digital channels that are available for the Sales Console.

Contact and Lead Imports

If you have permission to import data, you can import up to 50,000 contacts and leads at a time using a CSV file and a simplified import flow. If you have access to the Data Import Wizard, or are part of an Einstein Activity Capture configuration that allows contact syncing, you can choose the method you want to use at the time of import.

More Sales Features

Locate documentation for earlier versions of features we've upgraded.

Resources for the Sales Professional

In addition to Salesforce Help, Salesforce creates guides and tip sheets to help you learn about our features and successfully administer Salesforce.

Learn About, Implement, and Optimize Sales Cloud Features

Sales Cloud provides everything for the sales side of your business. Get started configuring Salesforce so your sales teams can generate the best leads, manage opportunities through the sales pipeline, and cultivate relationships with accounts. Plus, help your sales leaders forecast incoming revenue and manage sales territories.



All resources indicated with an asterisk (*) require a Premier Success Plan or higher.

<i>Set Your Team Up for Success</i>		
 Explore Capabilities & Use Cases Video: Lightning Experience: Take It for a Spin Trailhead: Sales Cloud Basics	 Gauge Implementation Readiness Plan Your Rollout Video: Define Your Sales Processes Trailblazer Community: Sales Cloud Getting Started	 Manage Changes Trailhead: Sales Cloud Rollout Strategy Trailhead: Sales Operations Use Case and Best Practices Salesforce Blog: Build Your Admin Skills: User Management, Communication, and Change Management

<i>Implement It Right the First Time</i>		
 Set Up and Configure Set Up and Maintain Your Salesforce Org Video: Data Visibility and Access Trailhead: Sales Cloud Configuration Basics Video: New Admin Fast Start	 Design Reports & Dashboards Reports and Dashboards Video: Design Reports and Dashboards Trailhead: Reports & Dashboards for Lightning Experience Video: Get Started with Sales Engagement Reporting	 Plan for Go Live Trailhead: User Management Manage Users Passwords Trailhead: Salesforce Adoption Strategies

Manage Accounts and Contacts Video: Manage Leads Opportunities Email and Calendar Integrations		
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Get the Most from Sales Cloud

		
Train and Enable Users Trailhead: User Training and Enablement Trailhead: Lightning Experience for Salesforce Classic Users	Improve and Customize Get to Know Salesforce Campaigns Salesforce Forecasting Enterprise Territory Management Expert Coaching Session: Territory Management* Trailhead: Salesforce Mobile App Basics	Measure and Optimize System Performance Expert Coaching Session: Health Check*

Keep Learning

	Explore more in Salesforce Help. Sales Cloud Basics
	Drive successful outcomes with Salesforce resources. <ul style="list-style-type: none"> • Salesforce Release Readiness • Video: How to Get Help in the Trailblazer Community • Trailblazer Community: Sales Cloud Best Practices

See an Overview of Metrics, Goals, Suggestions, Tasks, and Activities in Seller Home

Sales team members can start their day with a bird's eye view of their business. Seller Home shows users

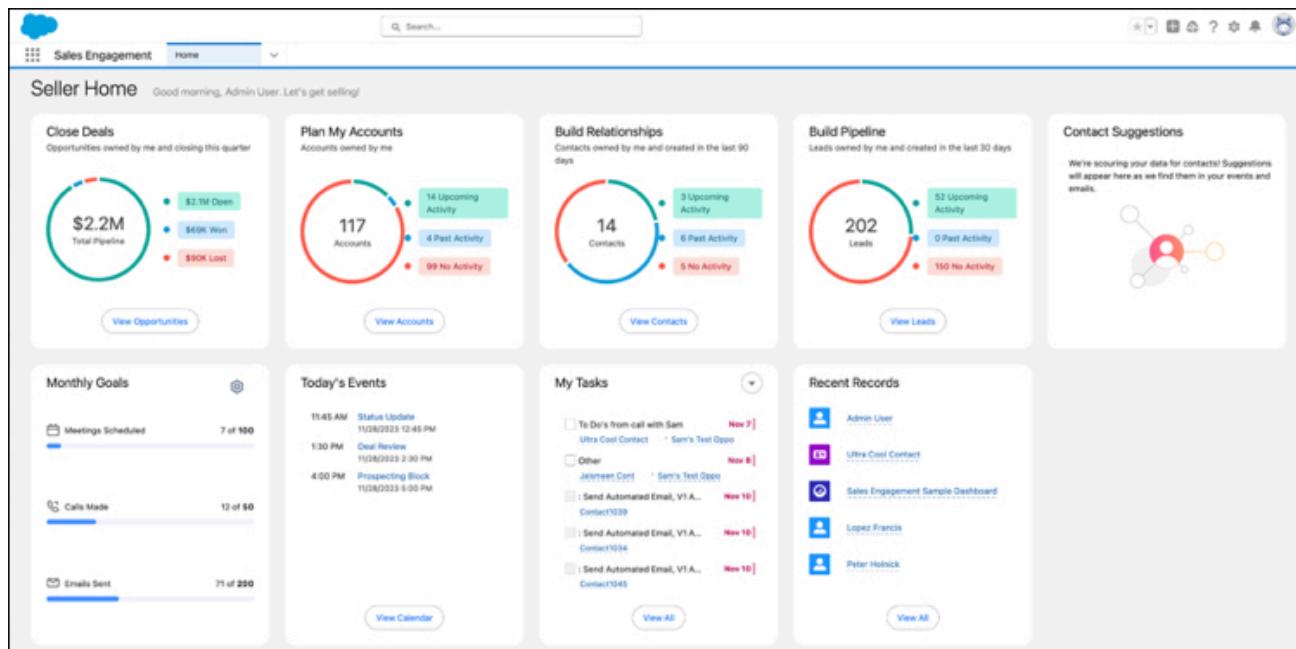
an overview of their opportunities, accounts, leads, and contacts, along with their day's agenda. Seller Home also lets users set goals and track progress and view their to-do items, recent records, and contact suggestions from Einstein.

REQUIRED EDITIONS

Available in: Developer, Enterprise, Professional, Unlimited editions

With useful information available at a glance, sales reps can get oriented faster and choose what to do next. Seller Home includes:

- Opportunity overview
- Account overview
- Lead overview
- Contact overview
- Weekly or monthly goals
- Today's Events
- To-do items
- Recent Records
- Contact suggestions—identified by Einstein from a user's emails and events



Seller Home is the default Home page for the Sales, Sales Console, and Sales Engagement apps. It appears automatically if you haven't applied a custom home page to these apps or as your org-wide default. If you've customized these pages, you can manually enable Seller Home on the Home page in Setup.

Get AI-Generated Summaries of Accounts, Contacts, Leads, and Opportunities

Harness the power of generative AI to help sales teams access key information about essential records. With Einstein Summary, sales reps can get up to speed, stay up to date, and better prepare for customer conversations. They don't have to manually sift through details or leave the record page so they can save time and effort.

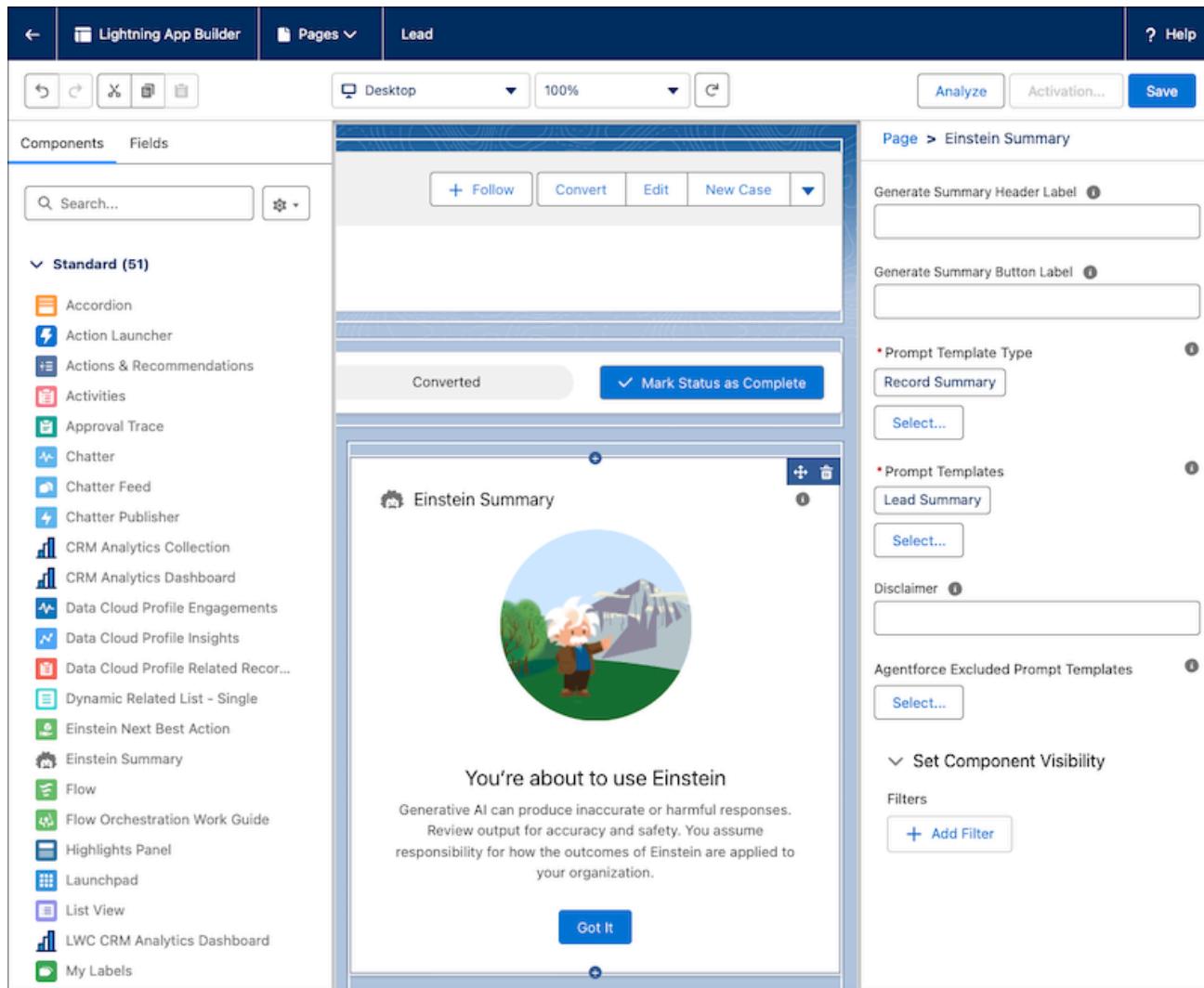
REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions with the Agentforce for Sales or Industry add-on license or included in Agentforce 1 Sales Edition

Adding Einstein Summary to Sales Record Pages

Add the [Einstein Summary Lightning component](#) to account, contact, lead, or opportunity record page layouts via Lightning App Builder. For Salesforce orgs created after August 6, 2025, the component is automatically added to the default record page layouts for these objects.



Generating Summaries on Sales Records

Users assigned the Einstein for Service Innovations and Einstein Sales Summaries User permissions sets can generate and copy summaries. After generating a summary, users can continue with Agentforce to get more information, ask follow-up questions, or take more actions.

The screenshot shows the Einstein Summary page for an account named 'Acme'. The page includes sections for Account Overview, Opportunities, Open Cases, Activity, and Contacts. It also features social sharing icons (Facebook, Twitter, LinkedIn) and a 'Copy' button. A note at the bottom states: 'This tool uses generative AI, which can produce inaccurate or harmful responses. Review the output for accuracy and safety before using.'

Einstein Summary

Generated on Tue Jul 08 2025 [Generate](#)

Account Overview Acme operates in the manufacturing industry with 680 employees. The account has an annual revenue of USD 100,000,000 and an open pipeline amount of 230,000. The account is managed by Admin User.

Opportunities There are no won or lost opportunities recorded over the last year. Top opportunities include Acme - 1,200 Widgets, currently in the *Value Proposition* stage, Acme - 600 Widgets, in the *Needs Analysis* stage, and Acme - 200 Widgets, in the *Prospecting* stage.

Open Cases There are 2 open cases, none of which are escalated.

Activity There are no recent activities, open tasks, or future events recorded.

Contacts Key contacts include Edward Stamos, President and CEO, and other contacts such as Howard Jones, Buyer, and Leanne Tomlin, VP Customer Support.

[Like](#) [Unlike](#) [Copy](#)

[Continue with Agentforce](#)

This tool uses generative AI, which can produce inaccurate or harmful responses. Review the output for accuracy and safety before using.

Users who have access to multiple employee agents don't see the Continue with Agentforce button. To make sure that users have this option when your org has multiple employee agents, assign them permissions to only one employee agent.

See Also

- [Einstein Summary](#)
- [Manage Permission Set Assignments](#)

Organize and Find Records Easily with Personal Labels

Apply your own labels to records to help you organize, track, and find the records you need quickly and

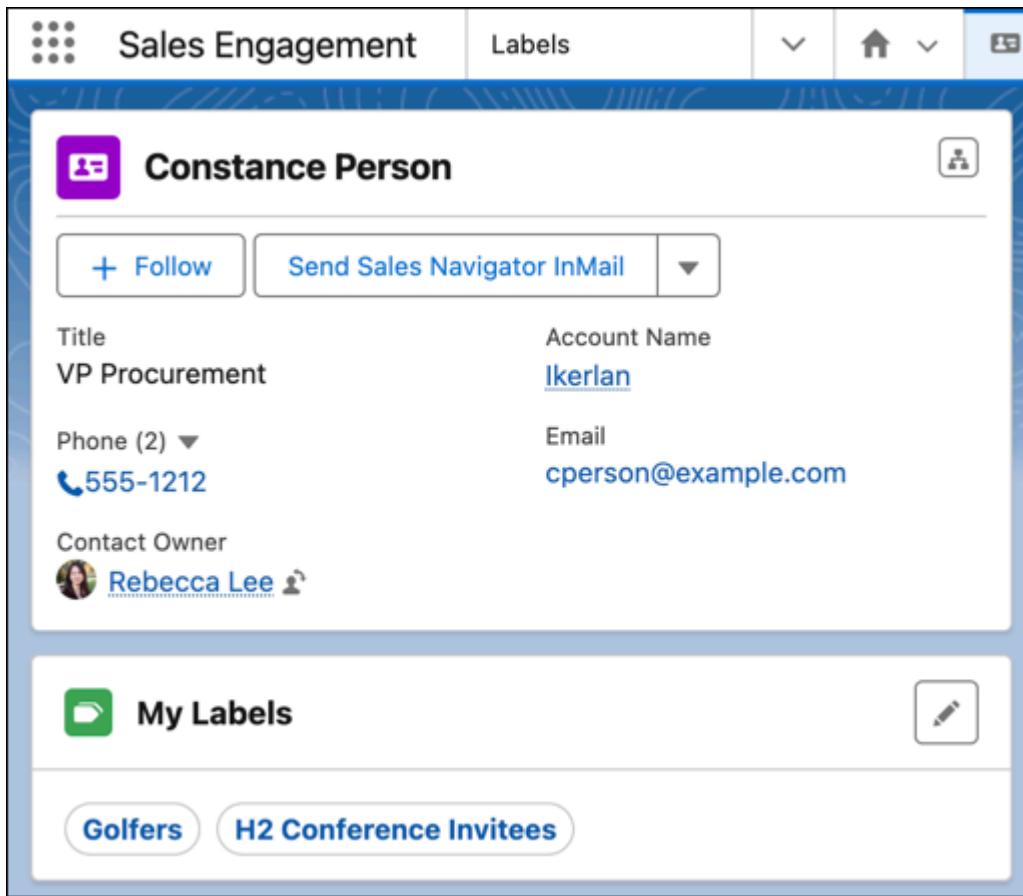
easily. Add labels to records related to a region, project, campaign, or anything else that helps keep work organized. Labels that you add to records are separate from labels added to To Do List items.

REQUIRED EDITIONS

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

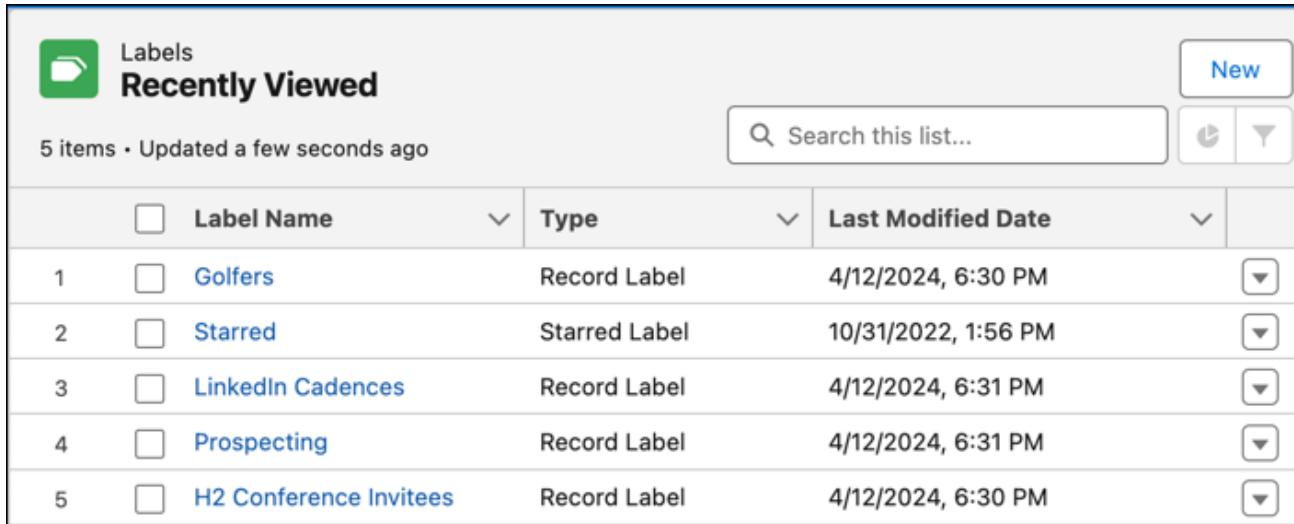
When you add labels to records, you can quickly view all records with a specific label, as well as the list of labels you've created. Each user creates and manages their own set of labels.

When your Salesforce admin adds the My Labels component to record page layouts, you can see the labels you've added to a record.



The screenshot shows a Salesforce page for a contact named "Constance Person". At the top, there's a "Labels" button. Below it, the contact information includes: Title (VP Procurement), Account Name (Ikerlan), Phone (2) (555-1212), Email (cperson@example.com), and Contact Owner (Rebecca Lee). A "My Labels" section at the bottom contains two labels: "Golfers" and "H2 Conference Invitees".

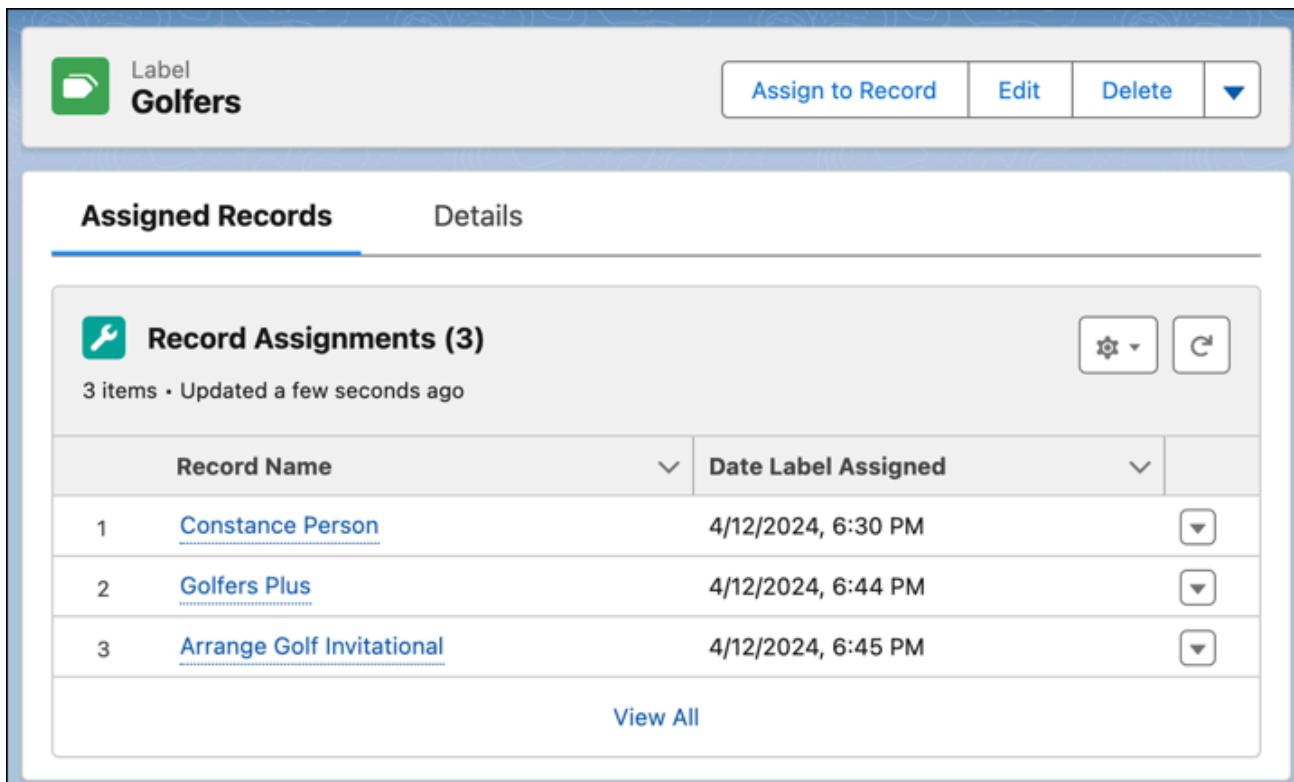
View the list of labels you've created on the Labels home page.



A screenshot of a web-based application showing a list of recently viewed labels. The title bar says "Labels Recently Viewed". It shows 5 items updated a few seconds ago. The columns are "Label Name", "Type", and "Last Modified Date". The data is as follows:

	Label Name	Type	Last Modified Date	
1	Golfers	Record Label	4/12/2024, 6:30 PM	▼
2	Starred	Starred Label	10/31/2022, 1:56 PM	▼
3	LinkedIn Cadences	Record Label	4/12/2024, 6:31 PM	▼
4	Prospecting	Record Label	4/12/2024, 6:31 PM	▼
5	H2 Conference Invitees	Record Label	4/12/2024, 6:30 PM	▼

On a label's record page, view the list of records with the label assigned.



A screenshot of a web-based application showing the "Assigned Records" section for the "Golfers" label. The title bar says "Label Golfers". The "Assigned Records" tab is selected. It shows 3 items updated a few seconds ago. The columns are "Record Name" and "Date Label Assigned". The data is as follows:

	Record Name	Date Label Assigned	
1	Constance Person	4/12/2024, 6:30 PM	▼
2	Golfers Plus	4/12/2024, 6:44 PM	▼
3	Arrange Golf Invitational	4/12/2024, 6:45 PM	▼

[View All](#)

You can add labels to records on these objects.

- Account
- Cadence
- Cadence Step Tracker
- Call Script
- Campaign
- Contact
- Case

- Email Template
- Lead
- Opportunity
- Orchestration Work Item
- Task
- Custom objects

Personal labels added to records are separate from Topics, which other users can see.

Each user can create up to 20 labels per object and a total of up to 200 labels. Users can assign each label to up to 500 records. Record labels are separate from To Do List item labels, which are limited to 10 per user. Labels don't count against your organization's data storage limits.

The Label object can't be edited with the Object Manager. The page layout for label records also isn't editable.

 **Note** Standard user profiles include access to the Label object. If you use custom profiles, to ensure users have access to both record labels and To Do List labels, add access to the Label object.

Sales Workspace

Focus on what matters most with a guided, AI-driven workspace that surfaces key insights and recommends the next best actions. Sales Workspace replaces the traditional Seller Home and provides a unified view of important metrics and prioritized, AI-driven tasks. With this intelligence, sales teams can spend less time figuring out what to do and more time building relationships and closing deals.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Unlimited**, and **Agentforce 1 Sales** editions with the Sales Foundation add-on.

Sales Workspace helps you:

- Track your performance with real-time insights.
- Keep your sales team aligned with shared visibility into progress.
- Focus on the right actions with smart recommendations.
- Move deals forward faster with timely guidance.
- Know what your agents are doing.

Considerations for Setting Up Sales Workspace

Keep these considerations in mind before setting up Sales Workspace.

Learn About Sales Workspace Permissions

Understand the permissions you need to set up Sales Workspace and the permissions your sales users need to access it.

Set Up Sales Workspace

Set up Sales Workspace for your sales users from Salesforce Go.

Guide Your Day with Sales Workspace

Use Sales Workspace to monitor key performance metrics, get AI-driven recommendations for your next steps, and act on them directly from your home page. This single, consolidated view helps you prioritize the right activities to hit your quota, build pipeline, close deals faster, and grow customer relationships more effectively.

Considerations for Setting Up Sales Workspace

Keep these considerations in mind before setting up Sales Workspace.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Unlimited**, and **Agentforce 1 Sales** editions with the Sales Foundation add-on.

General Considerations

- Sales Workspace isn't turned on by default and requires a Salesforce admin to complete a setup process.
- When you turn on Sales Workspace, it becomes the new default home page for assigned users in the Sales, Sales Console, and Sales Engagement apps. Sales Workspace replaces the traditional Seller Home experience.
- Recommended features, such as the Agentforce Lead Nurturing and Agentforce Pipeline Management, are optional. You must configure them separately.
- If you use Agentforce Pipeline Management, deactivating your Sales Management overnight isn't recommended. Sales Workspace feed suggestions refresh overnight, and if the agent isn't active during the refresh, event insights, such as suggestions to prepare for meetings, are lost.

Usage Considerations

Sales Workspace is powered by Data 360. Frequent updates to records can increase your org's costs for Data 360 credit consumption when you use this feature. See [Data Cloud Billable Usage Types](#).

To better understand cost impacts, work with your account executive before turning on Sales Workspace.

Limitations

Sales Workspace isn't supported if Advanced Currency Management (ACM) is turned on.

Learn About Sales Workspace Permissions

Understand the permissions you need to set up Sales Workspace and the permissions your sales users need to access it.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Unlimited**, and **Agentforce 1 Sales** editions with the Sales Foundation add-on.

Admin Permissions

Make sure that you have these permission sets assigned to you.

Permission Set	Use
Customize Application	Modify application settings.
Data Cloud Architect	Manage data governance.
Tableau Next Admin	Access the Tableau Next Administration page and enable Tableau Next in your org.  Note This permission set is assigned to you when you turn on Sales Workspace.
View Setup	View setup pages in Salesforce.

Seller Permission Set Group

The Sales Workspace permission set group includes these permissions sets.

Permission Set	Use
Data Cloud User	Gives sales users view access to Data Cloud.
Pipeline Inspection User	Allows sales users to access Pipeline Inspection.
Sales Workspace User	Access sales metrics, recommended actions, and agent activity in Sales Workspace.
Tableau Next Limited Consumer	Provides user read-only access to freemium Tableau Next Intel Apps.

Set Up Sales Workspace

Set up Sales Workspace for your sales users from Salesforce Go.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Unlimited**, and **Agentforce 1 Sales** editions with the Sales Foundation add-on.

[Prepare Data to Show Insights on Sales Workspace](#)

To set up Sales Workspace, first turn on and configure Data 360, which provides data visualization and insights for your sales users.

[Turn On Sales Workspace](#)

Turning on Sales Workspace also turns on Einstein Activity Capture (EAC) and Einstein Conversation Insights (ECI) and assigns admin the Tableau Next Admin permission set.

[Enable Data Governance Permissions for Sales Workspace](#)

To use Data 360 Data Governance features for Sales Workspace, you need to grant access to the impacted objects according to an access policy.

[Connect Salesforce to Your Email and Recording Providers](#)

To let EAC and ECI tools access your teams' email data, calendar data, and meeting recordings, connect Salesforce to your company's email and call recording systems. The essential activity data from EAC and ECI is fed into Sales Workspace to show sellers actionable insights.

[Set Up Data Governance for Sales Workspace](#)

To give your sales users access to the data they need while restricting access to other data, add the Sales Workspace Data Governance permission set to the Sales Workspace permission set group.

[Grant Sales Users Access to Sales Workspace](#)

To use Sales Workspace, sales users need specific permissions, which are assigned through the Sales Workspace permission set group. The Sales Workspace go page lets you assign it quickly.

[Create an Opportunity Revenue Forecast Type](#)

To show sellers their key performance insights on the Sales Workspace page per forecast period, create an opportunity revenue forecast type.

[Turn on Recommendations for Your Sellers \(Optional\)](#)

To recommend sellers the next best actions in Sales Workspace to meet their sales goals, turn on Agentforce Lead Nurturing and Agentforce Sales Management. This step is optional.

Prepare Data to Show Insights on Sales Workspace

To set up Sales Workspace, first turn on and configure Data 360, which provides data visualization and insights for your sales users.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Unlimited**, and **Agentforce 1 Sales** editions with the Sales Foundation add-on.

See [Turn On Data Cloud](#).

 **Note** Sales Workspace supports only the default Data Space.

Turn On Sales Workspace

Turning on Sales Workspace also turns on Einstein Activity Capture (EAC) and Einstein Conversation Insights (ECI) and assigns admin the Tableau Next Admin permission set.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Unlimited**, and **Agentforce 1 Sales** editions with the Sales Foundation add-on.

1. From the gear menu, select **Salesforce Go**, and then search for Sales Workspace on the Salesforce Go Home page.
2. Turn on Sales Workspace.

Wait for a few seconds to get all actions marked with a green check, then proceed with the next steps.

 **Note** Data can take up to 12 hours to appear after you set up Data Cloud.

Enable Data Governance Permissions for Sales Workspace

To use Data 360 Data Governance features for Sales Workspace, you need to grant access to the impacted objects according to an access policy.

REQUIRED EDITIONS

Select from either attribute-based access control (ABAC) or role-based access control (RBAC) for more granular control over users' access to data. Follow instructions in [Grant Access to Data Cloud Objects](#) to assign these objects to an available policy.

Available in: Lightning Experience in **Enterprise**, **Unlimited**, and **Agentforce 1 Sales** editions with the Sales Foundation add-on.

Associated Data 360 Objects

Object Type	Name
Data Lake Objects (DLOs)	Lead
	Opportunity
	OpportunityHistory
	Forecasting Fact
	Forecasting Item
	Business Period
	User
	Account
Data Model Objects (DMOs)	Opportunity
	Opportunity History
	Lead
	Forecasting Fact
	Forecasting Item
	Business Period
	User
	Account

- (✓) **Note** To use Data Governance features, grant permissions to the listed objects according to [Assign Data Access](#). If you have more than one data space, grant access to objects in each data space. Object names in non-default data spaces follow the convention of <DataSpace Prefix>_<ObjectName>.
- (✓) **Note** Data 360 governance features are enabled by default for new orgs, but you must create policies to grant data access. Create an Allow All policy if granular control isn't needed. In existing orgs, Data 360 includes a day zero Allow All policy out of the box to preserve access based on current permission sets and data space mappings. Review [Data Governance Considerations](#) to learn about data spaces, permission sets, and access policies.
- (✓) **Note** Custom org configurations, customizations, and existing policies can impact data masking policies and behavior. Learn more in [Data Governance Considerations](#).

For more details, see

[Data Governance in Data Cloud.](#)

Connect Salesforce to Your Email and Recording Providers

To let EAC and ECI tools access your teams' email data, calendar data, and meeting recordings, connect Salesforce to your company's email and call recording systems. The essential activity data from EAC and ECI is fed into Sales Workspace to show sellers actionable insights.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Unlimited**, and **Agentforce 1 Sales** editions with the Sales Foundation add-on.

See [Admin Setup for Einstein Activity Capture](#) and [Set Up the Basics for Einstein Conversation Insights](#).

Set Up Data Governance for Sales Workspace

To give your sales users access to the data they need while restricting access to other data, add the Sales Workspace Data Governance permission set to the Sales Workspace permission set group.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Unlimited**, and **Agentforce 1 Sales** editions with the Sales Foundation add-on.

See [Add Permission Sets to Permission Set Groups](#).

Grant Sales Users Access to Sales Workspace

To use Sales Workspace, sales users need specific permissions, which are assigned through the Sales Workspace permission set group. The Sales Workspace go page lets you assign it quickly.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Unlimited**, and **Agentforce 1 Sales** editions with the Sales Foundation add-on.

1. On the Salesforce Go Sales Workspace page, in the Manage Access for Managers and Users section, click **Manage**.
2. Click the **SalesWorkspacePSG** tab.
3. Select the users to whom you want to assign the permission set group and click **Assign**.
4. Click **Done**.

Create an Opportunity Revenue Forecast Type

To show sellers their key performance insights on the Sales Workspace page per forecast period, create an opportunity revenue forecast type.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Unlimited**, and **Agentforce 1 Sales** editions with the Sales Foundation add-on.

See [Configure and Activate Pipeline Forecast Types](#).

 **Note** Make sure that the forecast type name contains “Opportunity Revenue”.

Quota Settings

To show sellers the progress of their quota attainment per forecast period, enable Show Quotas on the Forecast Settings page and define quotas to your team.

See [Set Up Forecast Quotas](#).

Turn on Recommendations for Your Sellers (Optional)

To recommend sellers the next best actions in Sales Workspace to meet their sales goals, turn on Agentforce Lead Nurturing and Agentforce Sales Management. This step is optional.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Unlimited**, and **Agentforce 1 Sales** editions with the Sales Foundation add-on.

See [Set Up Agentforce Lead Nurturing](#) and [Set Up Agentforce Pipeline Management](#).

Guide Your Day with Sales Workspace

Use Sales Workspace to monitor key performance metrics, get AI-driven recommendations for your next steps, and act on them directly from your home page. This single, consolidated view helps you prioritize the right activities to hit your quota, build pipeline, close deals faster, and grow customer relationships more effectively.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Unlimited**, and **Agentforce 1 Sales** editions with the

Sales Foundation add-on.

Get Ready to Use Sales Workspace

Connecting your email and calendar allows Sales Workspace to sync your activities, helping to automate CRM updates and provide a complete view of your customer interactions.

Track Your Agents' Activities

Stay informed about the automated actions taken on your behalf to help you achieve your sales goals.

Understand Key Metrics in Sales Workspace

Use key metrics in Sales Workspace to see how you're progressing toward your goals and where to focus next. Each metric gives you quick insight into quota progress, leads converted, and account engagement. Recommended actions help you turn these insights into results directly from your workspace.

Manage Your Prioritized Suggestions

To help you focus on the work that matters most, Sales Workspace shows sellers a prioritized feed of suggested actions. Each entry in the feed shows a suggestion, contextual details such as the related record, and the suggested action to take.

Get Ready to Use Sales Workspace

Connecting your email and calendar allows Sales Workspace to sync your activities, helping to automate CRM updates and provide a complete view of your customer interactions.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Unlimited**, and **Agentforce 1 Sales** editions with the Sales Foundation add-on.

Before you begin, make sure that your Salesforce admin has turned on Sales Workspace for your org and assigned you the necessary permissions.

When you log in to Salesforce for the first time after Sales Workspace is enabled, you are guided through a short setup process.

Connect Your Email and Calendar

Connecting your email and calendar allows Sales Workspace to sync your activities, helping to automate CRM updates and provide a complete view of your customer interactions.

- When prompted, choose your email provider such as Google or Microsoft.
- Follow the on-screen instructions to sign in and authorize the connection.

Connect Your Conversation Tools (Optional)

Connect your video conferencing tools to get insights from your sales calls, such as call summaries and automated follow-ups. This step is optional and you only need to connect one provider to get started.

- Select a video provider to connect, such as Google Meet, Microsoft Teams, or Zoom.
- Follow the prompts to authorize the connection.
- You can connect more providers later from your personal settings.

After you complete the setup, you're ready to see your performance insights, get AI-driven recommendations, and act on your next steps, all from the Sales Workspace home page.

Track Your Agents' Activities

Stay informed about the automated actions taken on your behalf to help you achieve your sales goals.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Unlimited**, and **Agentforce 1 Sales** editions with the Sales Foundation add-on.

Agents are your partners in selling and automate many basic selling tasks so you can focus on customers. Tracking their completed work is simple.

On the Sales Workspace page, click **Agent Completed**.

A summary of the tasks your agents have completed for you in the last 14 days appears, giving you a clear view of their recent contributions to your sales efforts. The tasks completed list gets refreshed every 1 hour to keep you updated with the latest details.

Understand Key Metrics in Sales Workspace

Use key metrics in Sales Workspace to see how you're progressing toward your goals and where to focus next. Each metric gives you quick insight into quota progress, leads converted, and account engagement. Recommended actions help you turn these insights into results directly from your workspace.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Unlimited**, and **Agentforce 1 Sales** editions with the Sales Foundation add-on.

 **Note** Metrics can take up to 12 hours to appear after Data Cloud is set up.

Metrics	Description	Recommended Actions
Quota Attainment	Shows how much closed-won business you have against your quota for the current period and shows a revenue forecast based on expected revenue.	<ul style="list-style-type: none"> Consider opportunities with the close date in the next period that can help you hit quota in this period. Review overdue opportunities without any activity in the last 14 days.
Converted Leads	Shows how many of your leads have converted into opportunities during the selected time period.	<ul style="list-style-type: none"> Follow up on idle leads that haven't responded in the last 30 days to uncover new opportunities. Reach out to leads that you haven't contacted yet to uncover new opportunities. Assign an agent to reach out leads that you haven't contacted yet to increase your lead conversions. Assign an agent to reach out leads that are waiting for follow up to re-engage for new opportunities.
Active Accounts	Shows how many of your assigned accounts have open opportunities in the pipeline closed-won opportunities this fiscal year.	Re-engage accounts without any activity in the last 30 days to maintain relationships and open new opportunities.

Manage Your Prioritized Suggestions

To help you focus on the work that matters most, Sales Workspace shows sellers a prioritized feed of suggested actions. Each entry in the feed shows a suggestion, contextual details such as the related record, and the suggested action to take.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Unlimited**, and **Agentforce 1 Sales** editions with the Sales Foundation add-on.

 **Note** Depending on the scenario, the wording of suggestions that come from Pipeline Management can differ from what's in the table.

display criteria	suggestion	suggested action
You were assigned as the owner of a lead, or multiple leads, in the last 24 hours.	Contact New Lead or Contact New Leads	Assign to Agent or Send Email
You're the assigned owner of a lead, or multiple leads, created within the last 90 days and doesn't have any completed activities.	Engage Uncontacted Lead or Engage Uncontacted Leads	Assign to Agent or Send Email
You're attending an event within the next 24 hours and the event has an opportunity or account associated with it.	Prepare for Meeting or Prepare for All Day Meeting	Prepare
You have Pipeline Management turned on and have a suggestion from the agent to update the Next Step field for an opportunity.	Update Next Step	Review
You have Pipeline Management turned on and have a suggestion from the agent to update the Stage field for an opportunity.	Update Stage	Review
You have Pipeline Management turned on and have a suggestion from the agent to update a custom opportunity field or multiple opportunity fields.	Update Opportunity Fields	Review
You have Pipeline Management turned on and have a suggestion from the agent to send a follow-up email to someone or multiple people.	Send Follow-Up Emails	Draft Email
You have Pipeline Management turned on and have a suggestion from the agent to schedule a follow-up meeting with someone or multiple people.	Schedule Follow-Up Meetings	Draft Email

Take Actions on Suggestions

Depending on the features turned on and the permissions you have, the suggested actions for a suggestion can differ. Click the suggested action to complete it, either manually or by routing the action to an agent.

Take Actions on Suggestions

Depending on the features turned on and the permissions you have, the suggested actions for a suggestion can differ. Click the suggested action to complete it, either manually or by routing the action to an agent.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Unlimited**, and **Agentforce 1 Sales** editions with the Sales Foundation add-on.

- Assign to Agent: Assign leads to the Lead Nurturing agent. This action is available if Agentforce Lead Nurturing is turned on and you have access to the agent.
- Send Email: Draft and send a list email to leads. This action is available if Agentforce Lead Nurturing is turned off or you don't have access to the agent.
- Prepare: Summarize information about the meeting.
- Review: View and accept or decline opportunity field update suggestions. This action is available if Agentforce Pipeline Management is turned on and you have access to the agent.
- Draft Email: Get the Sales Management agent to draft a follow-up email or meeting request. This action is available if Agentforce Pipeline Management is turned on and you have access to the agent.

Hide a suggestion to remove it from the feed for 30 days. If the suggestion is still relevant after 30 days, it reappears.



Note Actions are unavailable if an agent lacks access to the necessary records or objects. For example, you can't assign a lead to the Lead Nurturing agent if the lead is private or the agent doesn't have permission to view it. Also, selecting an action results in an error if the lead's email domain is blocked.

Capture ROI with Campaigns

Organize and track your marketing efforts with Salesforce campaigns. When you align your campaign structure to your business processes and strategies, you can report ongoing marketing performance and ROI across activities and segments.

Get to Know Salesforce Campaigns

Many cross-functional teams struggle to adequately communicate and hand off important data and resources. Use Salesforce campaigns to bridge the gap between marketing and sales and promote

your successes to internal stakeholders. You can define campaign types, organize assets, add members, create campaign hierarchies, and then track and report on campaign performance. Tools like Campaign Influence and Einstein Attribution help attribute success and optimize future campaigns.

Set Up Campaigns in Salesforce

Salesforce campaigns help you track engagement and report on your marketing efforts. They're fully customizable to meet your business needs, which means it takes some planning and a few steps to configure the Campaign object to support effective marketing campaigns.

Working with Campaigns

Salesforce campaign records support your team throughout the campaign lifecycle. Use campaigns to communicate and share resources with coworkers during planning and execution, and then monitor and report on campaign successes.

Manage Campaign Members

Add members to campaigns and update member statuses to keep your campaigns humming.

Campaign Influence

Understand how your campaigns are affecting your opportunity pipeline.

Connect Account Engagement and Salesforce Campaigns

If you're new to Salesforce and Account Engagement, the Connected Campaigns feature is already partially enabled. Connect campaigns to save time, reduce clutter, and access valuable cross-product features. For example, work with Campaign Influence attribution models, Engagement History, and Einstein Campaign Insights for a complete view of your business. Plus, you can work with prospects and engagement data without leaving Salesforce.

Leads

Track prospects apart from your contacts and opportunities with Salesforce lead records. After you've qualified your lead records, convert them to contacts and create accounts for them (if you don't already have the accounts in Salesforce). And hopefully, create opportunities to bolster your pipeline.

Get to Know Salesforce Campaigns

Many cross-functional teams struggle to adequately communicate and hand off important data and resources. Use Salesforce campaigns to bridge the gap between marketing and sales and promote your successes to internal stakeholders. You can define campaign types, organize assets, add members, create campaign hierarchies, and then track and report on campaign performance. Tools like Campaign Influence and Einstein Attribution help attribute success and optimize future campaigns.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

By using campaigns, you can:

- Identify where money goes and where it comes in.

- Communicate ROI to internal stakeholders.
- Understand how leads and contacts engage at multiple touchpoints.
- Make smarter budgeting decisions based on past campaign performance.
- Get access to Account Engagement engagement data, Einstein AI tools, and more.

Tour the Campaigns Object

To get familiar with the data in your campaign records, let's take a tour of the Campaign object.

How Campaigns Can Help

You can use Salesforce campaigns in a variety of businesses and marketing processes throughout the marketing cycle. Campaigns help organize your marketing plan and assets. Plus, when you set up your campaign records effectively, they contain valuable data that you can use to optimize future efforts.

Use Campaigns with Other Clouds

For a more comprehensive picture of your marketing-to-sales funnel, you can align Salesforce campaigns to Marketing Cloud Engagement and Account Engagement.

Understand Campaign Hierarchy

To organize and link individual marketing campaigns together, use parent and child relationships to associate campaigns in a campaign hierarchy. You can think of a hierarchy as a family tree. Metrics from child campaigns roll up to the parent, so you can access data for individual campaigns or in aggregate. You can build a hierarchy to focus on marketing channels, fiscal periods, long-term projects, or any other factor that makes sense for your business. A campaign hierarchy can support up to five levels.

Getting Started Worksheet

Before you begin creating campaigns, think about your business goals, existing processes, and the tactics that your marketing team uses most. Campaign management is most effective when it aligns with the way your business already works. A Salesforce admin can help customize the tactical components of your campaigns that marketers use every day.

Campaign Fields

Understand what each field in a campaign represents. Depending on your page layout and field-level security settings, some fields may not be visible or editable.

Things to Know About Campaigns

Review these considerations before you work with campaigns. Learn more about campaigns, campaign members, and their fields.

Tour the Campaigns Object

To get familiar with the data in your campaign records, let's take a tour of the Campaign object.

REQUIRED EDITIONS

Available in: Sales Cloud, Service Cloud, Experience Cloud, and Account Engagement with any Salesforce edition

The Campaign object contains all the settings associated with how campaign records appear, the actions

that users can take on campaigns, field access, and more. Check out a sample campaign record layout in the video.  [Play Video \(2 min\)](#)

To customize the layout, related lists, and fields included on campaign records, an admin can access Campaign object settings in Salesforce Setup. From Setup, find Campaigns in the Object Manager, or open a campaign and select **Edit Object** from the Setup menu.

How Campaigns Can Help

You can use Salesforce campaigns in a variety of businesses and marketing processes throughout the marketing cycle. Campaigns help organize your marketing plan and assets. Plus, when you set up your campaign records effectively, they contain valuable data that you can use to optimize future efforts.

REQUIRED EDITIONS

Available in: all editions

-  **Example** One way that Happy Homes LLC generates leads is by sharing white papers for first-time home buyers and aspiring real estate investors. Its marketing manager, Kamal, creates two campaigns: Whitepaper - First Timers and Whitepaper - New Investors, which roll up to the parent campaign Whitepapers. When a buyer enters information in the web-to-lead form on the Happy Homes website, the submission creates a lead record. The lead record can be added as a campaign member with a status of Downloaded. Over time, the two white papers get a lot of traffic. The sales team follows up on the leads while Kamal reviews which audience segment is more engaged. Because he organizes his campaigns by the Campaign Type field, he can also investigate how white papers stack up against emails, webinars, and other marketing efforts.

Use Campaigns with Other Clouds

For a more comprehensive picture of your marketing-to-sales funnel, you can align Salesforce campaigns to Marketing Cloud Engagement and Account Engagement.

REQUIRED EDITIONS

Available in: all editions

-  **Salesforce Campaigns + Account Engagement** Socks Unlimited supplies socks to a variety of retailers in the United States. The company wants to nurture prospects that they met at a recent trade show in Boston. Marketing manager Priya wants to use Engagement Studio to automate the process. Before Priya builds her engagement program, she creates a Salesforce campaign called Trade Shows. She uses this campaign as a parent campaign and creates child campaigns to track events including NE Trade Show 2021. In Account Engagement, she builds an engagement program that sends a series of emails, forms, and event invitations. When Engagement Studio sends an email, the prospect is added as a campaign member to NE Trade Show 2021 with a Sent status.

Other actions update the custom campaign member status each time the prospect interacts with another asset. Another action scores prospects as they move through the program. When a prospect's score is good enough to be considered marketing qualified, the prospect is assigned to a Socks Unlimited sales rep. Then, tracking continues into the sales funnel. When it comes time to report her progress, Priya can use Engagement Studio reporting together with Salesforce campaign reports to identify where the trade show prospects are responding best. The rollup metrics in the hierarchy that she created can also tell her whether the Boston trade show yielded more engagement than other events that her team attended.



Salesforce Campaigns and Marketing Cloud Engagement Floor manager Don just learned that his car dealership is finally getting more inventory of the newest hatchback that people come in asking about. He wants to set up his sales reps for success. They need high-quality, branded content so that they can follow up with folks who expressed interest. He calls Liliana in corporate marketing and finds out that she's already a step ahead. A while back, Liliana used Distributed Marketing tools to create a personalized customer journey in Marketing Cloud Engagement and connected it to a Sales Cloud campaign. She gives Don the name of the campaign, which he can share with his reps. Now anyone with access to the Sales Cloud campaign can add a campaign member and customize the email content from Liliana's marketing journey. Don's potential customers get great looking content from his sales reps, and Liliana can track the journey metrics and campaign performance from corporate.

Connect Salesforce campaigns to Account Engagement with [Connected Campaigns](#).

Connect Salesforce campaigns to Marketing Cloud Engagement with [Distributed Marketing](#).

Understand Campaign Hierarchy

To organize and link individual marketing campaigns together, use parent and child relationships to associate campaigns in a campaign hierarchy. You can think of a hierarchy as a family tree. Metrics from child campaigns roll up to the parent, so you can access data for individual campaigns or in aggregate. You can build a hierarchy to focus on marketing channels, fiscal periods, long-term projects, or any other factor that makes sense for your business. A campaign hierarchy can support up to five levels.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To view campaigns: Read on campaigns

To view campaign hierarchies: Read on campaigns

To add, edit, or delete hierarchy columns: Modify All Data

Before users can create a hierarchy, an admin adds the Parent Campaign field to campaign records. To build a tree of campaigns, a user enters the name of the campaign into the Parent Campaign field and repeats the process to create family units.

- A campaign hierarchy can support only one currency in its child campaigns.
- A parent campaign's statistics include aggregate values based on all its child campaigns, regardless of the current user's sharing settings. To limit what's shown to users, an admin can hide fields from the Campaign Hierarchy related list.
- A user without access to a particular campaign can't access its detail page from the Campaign Hierarchy related list.
- All fields and values remain available in reports, even if items have been hidden on campaign records.

See Also

- [Allow Users to Create Campaign Hierarchies](#)
- [Create a Campaign Hierarchy](#)

Getting Started Worksheet

Before you begin creating campaigns, think about your business goals, existing processes, and the tactics that your marketing team uses most. Campaign management is most effective when it aligns with the way your business already works. A Salesforce admin can help customize the tactical components of your campaigns that marketers use every day.

REQUIRED EDITIONS

Available in: all editions

We recommend completing these tasks before you begin.

- Define your business goals and related metrics.
- Describe your target audiences.
- Identify your stakeholders.
- Inventory your marketing channels and asset types.
- Organize upcoming campaigns in hierarchies.



Example Download the interactive PDF worksheet: [Getting Started with Salesforce Campaigns](#).

Campaign Fields

Understand what each field in a campaign represents. Depending on your page layout and field-level security settings, some fields may not be visible or editable.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Field	Description
Active	Checkbox to mark whether the campaign is active or not.
Actual Cost	Amount of money spent to run the campaign.
Budgeted Cost	Amount of money budgeted for the campaign.
Campaign Currency	The default currency for currency amount fields in the campaign. Amounts display in the campaign currency and are also converted to the user's personal currency. Available only for organizations that use multiple currencies.
Campaign Member Type	Record type for campaign members; determines the page layout of the members of the campaign.
Campaign Name	Identifying name for the campaign.
Campaign Owner	Assigned owner of the campaign.
Campaign Record Type	Record type for the campaign; determines the picklist values available for the campaign.
Campaign Stage	This field is available with Marketing Cloud Growth and Advanced editions. The lifecycle stage of the campaign based on the status of all of its related flows. See Tools for Tracking and Reporting on Campaigns .
Converted Leads in Campaign	Number of leads that were converted to accounts due to the marketing efforts in the campaign. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. For more information on converting leads, see Convert Qualified Leads . This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Created By	User who created the campaign including creation

Field	Description
	date and time. (Read only)
Custom Links	Listing of custom links for campaigns as set up by your administrator.
Description	Description of the campaign. Up to 32KB of data are allowed in this field. Only the first 255 characters display in reports.
End Date	Ending date for the campaign. Responses received after this date are still counted.
Expected Response (%)	Percentage of responses you expect to receive for the campaign.
Expected Revenue	Amount of money you expect to generate from the campaign.
Last Modified By	User who last changed the campaign fields, including modification date and time. This does not track changes made to any of the related list items on the campaign. (Read only)
Opportunities in Campaign	Calculated field for number of opportunities associated with the campaign. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Num Sent	Number of individuals targeted by the campaign. For example, the number of emails sent.
Won Opportunities in Campaign	Calculated field for number of closed/won opportunities associated with the campaign. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.

Field	Description
Parent Campaign	The campaign above the selected campaign in the campaign hierarchy.
Start Date	Starting date for the campaign.
Status	Status of the campaign, for example, Planned, In Progress. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.
Total Actual Cost in Hierarchy	Calculated field for the total amount of money spent to run a campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Budgeted Cost in Hierarchy	Calculated field for the total amount of money budgeted for a campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Contacts in Campaign	Number of individuals on accounts that are associated with the campaign. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Contacts in Hierarchy	Calculated field for number of contacts associated with the campaign hierarchy. (Read only) Salesforce automatically calculates this amount

Field	Description
	using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Converted Leads in Hierarchy	Calculated field for the total number of leads associated with the campaign hierarchy that were converted into accounts, contacts, and opportunities. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Expected Revenue in Hierarchy	Calculated field for the total amount of money you expect to generate from a campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Leads in Campaign	Number of potential opportunities (leads) associated with the campaign. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Leads in Hierarchy	Calculated field for the total number of leads associated with the campaign hierarchy. This number also includes converted leads. (Read only)

Field	Description
	Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Num Sent in Hierarchy	Calculated field for the total number of individuals targeted by a campaign hierarchy, for example, the number of emails sent. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Opportunities in Hierarchy	Calculated field for the total number of opportunities associated with the campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Responses in Campaign	Calculated field for the total number of contacts and unconverted leads that have a Member Status equivalent to “Responded” for the campaign. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Responses in Hierarchy	Calculated field for number of contacts and

Field	Description
	<p>unconverted leads that have a Member Status equivalent to “Responded” for the campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.</p>
Value Opportunities in Campaign	<p>Calculated field for the amount of all opportunities associated with the campaign, including closed/won opportunities. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them.</p> <p>For organizations using multiple currencies, opportunity amounts are converted to the campaign currency. If your currency does not match the campaign currency, the amount is converted to your currency and displays in parentheses.</p> <p>For organizations using advanced currency management, opportunity amounts are converted to the campaign currency via dated exchange rates. If the campaign currency does not match your currency, the total of the opportunity amounts are converted using standard exchange rates, not dated exchange rates, and that amount displays in parentheses.</p> <p>This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.</p>
Total Value Opportunities in Hierarchy	<p>Calculated field for total amount of all opportunities associated with the campaign</p>

Field	Description
	<p>hierarchy, including closed/won opportunities. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them.</p> <p>All campaigns in a hierarchy must use the same currency.</p> <p>For organizations using multiple currencies, opportunity amounts are converted to the campaign currency. If your currency does not match the campaign currency, the amount is converted to your currency and displays in parentheses.</p> <p>For organizations using advanced currency management, opportunity amounts are converted to the campaign currency via dated exchange rates. If the campaign currency does not match your currency, the total of the opportunity amounts are converted using standard exchange rates, not dated exchange rates, and that amount displays in parentheses.</p>
Value Won Opportunities in Campaign	<p>Calculated field for amount of all closed/won opportunities associated with the campaign. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them.</p> <p>For organizations using multiple currencies, opportunity amounts are converted to the campaign currency. If your currency does not match the campaign currency, the amount is converted to your currency.</p> <p>For organizations using advanced currency management, opportunity amounts are converted to the campaign currency via dated exchange rates. If the campaign currency does not match your currency, the total of the opportunity amounts are converted using standard exchange rates, not dated exchange rates, and that amount</p>

Field	Description
	<p>displays in parentheses. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.</p>
Total Value Won Opportunities in Hierarchy	<p>Calculated field for amount of all closed/won opportunities associated with the campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them.</p> <p>All campaigns in a hierarchy must use the same currency.</p> <p>For organizations using multiple currencies, opportunity amounts are converted to the campaign currency. If your currency does not match the campaign currency, the amount is converted to your currency.</p> <p>For organizations using advanced currency management, opportunity amounts are converted to the campaign currency via dated exchange rates. If the campaign currency does not match your currency, the total of the opportunity amounts are converted using standard exchange rates, not dated exchange rates, and that amount displays in parentheses. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.</p>
Total Won Opportunities in Hierarchy	<p>Calculated field for the total number of won opportunities associated with the campaign hierarchy. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow</p>

Field	Description
	rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Type	Type of campaign, for example, Direct Mail or Referral Program. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.

Things to Know About Campaigns

Review these considerations before you work with campaigns. Learn more about campaigns, campaign members, and their fields.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

[Considerations for Using Campaigns](#)

Review the available options and functionalities before working with campaigns in Salesforce Classic, mobile devices, and Experience Cloud sites.

[Campaigns FAQ](#)

Find answers to frequently asked questions about campaigns.

Considerations for Using Campaigns

Review the available options and functionalities before working with campaigns in Salesforce Classic, mobile devices, and Experience Cloud sites.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: Salesforce **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Using Campaigns in Salesforce Classic and Mobile Devices

The Salesforce mobile app doesn't include all the functionality that's available in Lightning Experience on desktop.

- The Manage Members and Advanced Setup buttons aren't available.
- Bulk actions on campaign members aren't supported on mobile.
- Campaign Hierarchy is available only as a related list.
- The View Hierarchy option in a link on the campaign detail page isn't available. When you view a parent campaign, the Campaign Hierarchy related list shows only the child campaigns. The desktop Salesforce site displays both the parent and child campaigns.
- When viewing the Campaign Members related list, only the members' Status appears. However, you can tap members to see more details about them.
- The Clone function in Salesforce Classic includes campaign member statuses automatically. To include these statuses when you clone in Lightning Experience, use **Clone with Related** and select the data to copy.

Experience Cloud Sites

When working with campaigns within an Experience Cloud site, there are some limitations.

- The View Campaign Hierarchy action doesn't appear on campaign detail pages.
- The Campaign Influence and Campaign Member Status related lists don't appear.
- You can't drill into the Campaign Hierarchy related list.
- The Add to Campaign action doesn't appear on the Lead Home or Contact Home pages.

Campaigns FAQ

Find answers to frequently asked questions about campaigns.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

[Can I use list email or mass email for my email campaigns?](#)

List email and mass email are designed for small-scale sales campaigns and basic marketing emails.

[How do I add contacts and leads to campaigns?](#)

Your company's campaigns typically target existing customers (contacts) and prospective customers (leads). You can associate contacts and leads with campaigns as campaign members.

[How can I calculate the ROI for my campaigns?](#)

The Campaign ROI Analysis Report is on the Reports tab in the Campaign Reports folder. It calculates your campaigns' performance by return on investment (ROI) and average cost.

How can I track which opportunities resulted from campaigns?

One key benefit of campaigns is the ability to track how much business has been generated from each campaign. When you create an opportunity, you can fill in the Primary Campaign Source field to indicate that the opportunity resulted from a specific campaign.

How is Campaign influence different from ROI reports?

Campaign influence tracks pipeline and revenue for multiple campaigns, and ties all campaigns of a contact role to that opportunity for pipeline and ROI reporting. It's helpful for longer deal cycles when more than one campaign contributes to a closed deal or a converted lead.

Who has access to Campaigns?

Depending on your sharing settings, users in your org can view campaigns, view the advanced campaign setup, or run campaign reports. However, only designated marketing users with the appropriate user permissions can create, edit, and delete campaigns and configure advanced campaign setup.

Can I use list email or mass email for my email campaigns?

List email and mass email are designed for small-scale sales campaigns and basic marketing emails.

For more robust marketing applications, we recommend that you use Salesforce Marketing Cloud, Marketing Cloud Account Engagement (Pardot), or a third-party application in the [AppExchange](#) that allows you to centrally manage email campaigns and track responses.

See Also

[Send List Email in Lightning Experience](#)

[Email a Group with List Email and Mass Email](#)

How do I add contacts and leads to campaigns?

Your company's campaigns typically target existing customers (contacts) and prospective customers (leads). You can associate contacts and leads with campaigns as campaign members.

- To add an individual contact or lead to a campaign, click **Add to Campaign** on the contact or lead record, and then select a campaign.
- To add multiple contacts or leads to a campaign, use these tables to find the steps recommended for the source of contact or lead information that you're using.

Contact Source	Steps for Adding Contacts to Campaigns	Maximum Number of Records You Can Add
A report of existing contacts	Add Campaign Members from Standard and Custom Reports	50,000 per report
A .csv file of existing contacts	Add Campaign Members from Standard and Custom Reports	50,000 per import file
A .csv file of new contacts	Create Contacts and Add Them	50,000 per import file

Contact Source	Steps for Adding Contacts to Campaigns	Maximum Number of Records You Can Add
	to a Campaign with the Data Import Wizard	
A list view of existing contacts	Add Multiple Members to a Campaign from a List View	250 per list page
The Contacts related list on an Account	Add Members to Campaigns from Accounts	200 per list page

Lead Source	Steps for Adding Leads to Campaigns	Maximum Number of Records You Can Add
A report of existing leads	Add Campaign Members from Standard and Custom Reports	50,000 per report
A .csv file of existing leads	Add Existing Leads to a Campaign with the Data Import Wizard	50,000 per import file
A .csv file of new leads	Create Leads and Add Them to a Campaign with the Data Import Wizard	50,000 per import file
A list view of existing leads	Add Multiple Members to a Campaign from a List View	250 per list page

How can I calculate the ROI for my campaigns?

The Campaign ROI Analysis Report is on the Reports tab in the Campaign Reports folder. It calculates your campaigns' performance by return on investment (ROI) and average cost.

For each campaign in the report:

- ROI, which is expressed as a percentage, is calculated as the net gain (Value Won Opportunities in Campaign - Actual Cost) divided by the Actual Cost.
- Value Won Opportunities in Campaign is the calculated amount of all closed or won opportunities where the campaign is the Primary Campaign Source on the opportunity.

How can I track which opportunities resulted from campaigns?

One key benefit of campaigns is the ability to track how much business has been generated from each campaign. When you create an opportunity, you can fill in the Primary Campaign Source field to indicate that the opportunity resulted from a specific campaign.

When you create an opportunity, you can fill in the Primary Campaign Source field to indicate that the

opportunity resulted from a specific campaign.

In addition, when you convert a lead that is linked to a campaign, that campaign is automatically inserted into the opportunity **Primary Campaign Source** field.

If a lead or contact is linked to multiple campaigns, the campaign with which he or she is most recently associated is inserted into the opportunity **Primary Campaign Source** field.

The Opportunities related list on a campaign shows every opportunity that is linked to that campaign. You can also run the Campaign Revenue Report to track which opportunities are linked to your campaigns.

How is Campaign influence different from ROI reports?

Campaign influence tracks pipeline and revenue for multiple campaigns, and ties all campaigns of a contact role to that opportunity for pipeline and ROI reporting. It's helpful for longer deal cycles when more than one campaign contributes to a closed deal or a converted lead.

Who has access to Campaigns?

Depending on your sharing settings, users in your org can view campaigns, view the advanced campaign setup, or run campaign reports. However, only designated marketing users with the appropriate user permissions can create, edit, and delete campaigns and configure advanced campaign setup.

An administrator must select the **Marketing User** option on a user's personal information to designate that user as a marketing user.

In addition, marketing users with the appropriate user permissions can use the Data Import Wizard to add contacts, leads, and person accounts as campaign members. They can also use the Data Import Wizard to update the statuses of campaign members.

Set Up Campaigns in Salesforce

Salesforce campaigns help you track engagement and report on your marketing efforts. They're fully customizable to meet your business needs, which means it takes some planning and a few steps to configure the Campaign object to support effective marketing campaigns.

Customize Campaign Types

The Type field on your campaign indicates the general method or channel for your campaigns, such as Direct Mail or Referral Program. To organize the types of campaigns that your business runs, customize the picklist for this field. When marketers monitor campaign performance, they can use the Type field to see how specific campaign types are performing against others.

Campaign Member Statuses

Campaigns can help you monitor prospects as they interact with your marketing assets. After a person or an account is added as a campaign member, users can apply a member status that reflects their recent activity. To allow users to create a member status at any time, a Salesforce admin must add a

related list to campaign records.

Allow Users to Create Campaign Hierarchies

Before users can associate campaigns in a hierarchy, an admin must configure campaign page layouts to support it. Set up field-level security, and then add the Parent Campaign field and related list to campaign records.

Customize Campaign Types

The Type field on your campaign indicates the general method or channel for your campaigns, such as Direct Mail or Referral Program. To organize the types of campaigns that your business runs, customize the picklist for this field. When marketers monitor campaign performance, they can use the Type field to see how specific campaign types are performing against others.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To view campaigns: Read on campaigns

To customize member status values: Edit on campaigns
AND

Marketing User selected in User Detail

The default values on the Type field are Advertising, Direct Mail, Email, Telemarketing, Banner Ads, Seminar/Conference, Public Relations, Partners, Referral Program, and Other.

You can also create dependent picklists to define subcategories of your campaigns. When you customize the Type picklist values, try to use 10 or fewer values.

-  **Note** The Record type field makes certain picklist values available only to certain user groups. If you plan to manage picklist access with record types, set up the record types before your other picklist values. Check out Salesforce Help: [Tailor Business Processes to Different Users Using Record Types](#)

1. From Setup, open Object Manager, and in the Quick Find box, enter *Campaign*.
If you're using Salesforce Classic, open Setup, and in the Quick Find box, enter *Campaign*.
2. Select **Campaign**, and click **Fields & Relationships**.
3. Find and select **Type**.
4. Edit the picklist values or add a picklist value.
5. To create a dependent type, click **New** under Field Dependencies.



Example Ami's company places ads in many places. She uses the default picklist value Advertising and then creates a dependent picklist. The dependent picklist includes Billboards, Transit, Print, and Digital. She's also considering adding a second dependent picklist under Digital to track efforts on social media versus traditional websites.

Customize Campaign Types in Lightning Experience

For your campaigns, you can set up campaign types to categorize the kinds of campaigns your business runs.

Customize Campaign Types in Salesforce Classic

For your campaigns, you can set up campaign types to categorize the kinds of campaigns your business runs.

See Also

[Add or Edit Picklist Values](#)

Customize Campaign Types in Lightning Experience

For your campaigns, you can set up campaign types to categorize the kinds of campaigns your business runs.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Salesforce **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS NEEDED

To view campaigns: Read on campaigns

To customize type values: Edit on campaigns

AND

Marketing User selected in User Detail

-
1. From Setup, enter *Object Manager* in the Quick Find box. Then click **Object Manager**.
 2. Click **Campaign**.
 3. Click **Fields & Relationships**.
 4. Click the **Type** field.
 5. Modify the campaign type picklist values as needed.

Customize Campaign Types in Salesforce Classic

For your campaigns, you can set up campaign types to categorize the kinds of campaigns your business runs.

REQUIRED EDITIONS

Available in: Salesforce Classic

Available in: Salesforce **Professional, Enterprise, Performance, Unlimited** Editions

USER PERMISSIONS NEEDED

To view campaigns: Read on campaigns

To customize type values: Edit on campaigns
AND

Marketing User selected in User Detail

1. From Setup, enter *Campaigns* in the Quick Find box. Then click **Campaigns**.
2. Under Campaigns, click **Fields**.
3. Click the **Type** field.
4. Modify the campaign type picklist values as needed.

Campaign Member Statuses

Campaigns can help you monitor prospects as they interact with your marketing assets. After a person or an account is added as a campaign member, users can apply a member status that reflects their recent activity. To allow users to create a member status at any time, a Salesforce admin must add a related list to campaign records.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To create, edit, or delete campaign member statuses: Read and Edit on campaigns

AND

Marketing User selected in User Detail

Planning for Campaign Member Statuses

Before you start using campaign member statuses, think about your campaign types and which statuses you want to include for each type. For example, statuses for an event can include Invited, Registered, and Attended. Do you want to include Declined or No Show? For consistency, we recommend that you create a single set of campaign member statuses for each type of campaign that you run. Document the statuses for internal use.

To allow users to create their own campaign member statuses, an admin adds the Campaign Member Statuses related list to campaign records.

Using the Campaign Member Status Field

From a campaign's Campaign Member Statuses related list, users can create a status, select a default status, and indicate whether the status is considered a response. Salesforce tallies response records together in the Responses in Campaign field.

When someone interacts with your campaign, their member status doesn't change automatically. After you create campaign member statuses, you can apply a status to campaign member records manually, in bulk, or with Account Engagement automation tools.

You can use the Campaign Member Status field to filter and sort your campaign data. For example, target your audiences based on campaign member status, or generate reports to track RSVPs or awareness.

Updating Campaign Member Statuses

If you plan to use campaign member status as a filtering mechanism in reporting or automation, don't edit the available member statuses and their settings. If you change the status value or its response setting, it can cause problems where the status is in use and trigger statistics recalculation throughout your reports.

-  **Tip** To encourage consistency, document your default campaign statuses for internal users. You can also use the Clone with Related tool to copy a campaign and its member statuses the next time you create a similar campaign.

See Also

[Add or Edit Picklist Values](#)

[Field Handling for Cloning Campaigns with Related Records](#)

Allow Users to Create Campaign Hierarchies

Before users can associate campaigns in a hierarchy, an admin must configure campaign page layouts to support it. Set up field-level security, and then add the Parent Campaign field and related list to campaign records.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To create a campaign hierarchy:

Create on campaigns

AND

Marketing User selected in User Detail

To set up campaign hierarchies:

Customize Application

To add, edit, or delete hierarchy columns:

Modify All Data

1. In Object Manager, find and select **Campaign**.
2. Select **Fields & Relationships**, and then select **Parent Campaign**.
3. Click **Set Field-Level Security**, indicate who has access to the field, and save your work.
4. Select **Page Layouts** and add the Parent Campaign field to a campaign page layout.
5. To allow users to see parent and child campaigns on a campaign record, add the Campaign Hierarchies related list to a campaign page layout.

Working with Campaigns

Salesforce campaign records support your team throughout the campaign lifecycle. Use campaigns to communicate and share resources with coworkers during planning and execution, and then monitor and report on campaign successes.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

[Create or Edit a Campaign](#)

To get started with a new campaign, create a record by filling in the required fields Campaign Name and Currency. To optimize your campaign records for monitoring and reporting, provide details in the remaining fields, such as type and budget. You can also create a campaign by cloning another campaign record.

[Clone a Campaign with Related Records](#)

Clone a campaign record when it contains helpful details you want to use again. When you use the Clone with Related operation, you can choose which field values and related marketing assets to copy to the new campaign.

Create a Campaign Hierarchy

To organize campaigns and link them together, you can associate them with parent and child relationships in a campaign hierarchy. When you run reports, metrics from the child campaigns roll up to the parent.

Share Campaigns

Like all Salesforce objects, your sharing model governs campaigns access. To make sure that the right colleagues have access to the right campaigns, a campaign owner or Salesforce admin can extend sharing for your own campaigns one by one.

Track Campaign Field History

You can track the changes made to selected fields on the campaign. Each time a user modifies a tracked field, the date, time, user, and changes appear in the related list.

Create or Edit a Campaign

To get started with a new campaign, create a record by filling in the required fields Campaign Name and Currency. To optimize your campaign records for monitoring and reporting, provide details in the remaining fields, such as type and budget. You can also create a campaign by cloning another campaign record.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To view campaign lists: Read on campaigns

To create or edit campaigns: Edit on campaigns

AND

Marketing User selected in User Details

-
-  **Note** If the Campaigns tab isn't displayed, edit the navigation bar to add it. If you're not able to edit the navigation bar, contact your admin for access.

Work with your team and admin to customize the Campaign object with fields that are relevant to your business. When you provide the right information on a campaign record, you can save time and create more detailed reports. Check out the [Getting Started with Salesforce Campaigns Worksheet](#) to organize your ideas.

1. On the Campaigns tab, click **New**.
2. Select a record type, and click **Next**.

3. Enter the relevant information, and click **Save**.

You can edit a campaign field at any time, but changes can affect active automation tools or trigger a statistics recalculation. Verify where a campaign is used before you make changes. To edit a campaign, open it from a list view or related list, and click **Edit**.

Editing is restricted to users with Read access to the selected campaign's parent.

See Also

- [Clone a Campaign with Related Records](#)
- [Campaign Fields](#)

Clone a Campaign with Related Records

Clone a campaign record when it contains helpful details you want to use again. When you use the Clone with Related operation, you can choose which field values and related marketing assets to copy to the new campaign.

REQUIRED EDITIONS

Available in: All Salesforce editions and all Account Engagement editions using a Salesforce connector

USER PERMISSIONS NEEDED

To clone a campaign:

Edit on campaigns

AND

Marketing User selected in User Details

When you clone a campaign using the Clone with Related action, you can choose which types of related records to clone. For Salesforce-only users, you can include campaign member statuses. If you're also using Account Engagement, you can select from snippet assignments, marketing forms, marketing links, and landing pages.

- Only records from the current, selected business unit are cloned.
- When you create records through a clone operation, the new records count toward storage limits in Account Engagement and Salesforce.
- Marketing form records include forms and form handlers.
- Marketing link records include custom redirects and files.
- To continue using previously used snippets in a cloned campaign, select Snippet Assignments during the clone operation.



Warning In the new campaign record, some related record fields are overwritten with new or altered data. Review [Field Handling for Clone with Related](#) for more information.

1. Open a campaign record, and click the action menu.
2. Select **Clone with Related**.
3. Select the types of related records that you want to clone, and save your work.

Field Handling for Cloning Campaigns with Related Records

The Clone with Related operation saves campaign field values and relationships to available asset records. Some fields are altered during the clone process, such as the new campaign and asset IDs. Some fields can't be duplicated, and appear blank on the new campaign or asset records.

Allocations for Cloning Campaigns with Related Records

Each campaign cloning operation can support a certain number of related records.

Field Handling for Cloning Campaigns with Related Records

The Clone with Related operation saves campaign field values and relationships to available asset records. Some fields are altered during the clone process, such as the new campaign and asset IDs. Some fields can't be duplicated, and appear blank on the new campaign or asset records.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Usually, fields on a cloned asset record are copied to the new campaign 1:1. However, some records handle certain fields differently in the cloned asset records, which are noted in this table.

Field	What Appears in the Cloned Record	Affected Records
Name	Formatted as “Old Record Name + Date_Time”	All
Campaign	Cloned campaign ID	All
Created At	Time when clone operation created the campaign	All
Updated At	Time when clone operation created the campaign	All
Created By	User who initiated clone operation	All
Updated By	User who initiated clone operation	All
Archive Date	This field is blank	All
Bitly URL	This field is blank	Landing pages, custom redirects, files
Vanity URL	This field is blank	Landing pages, custom redirects,

Field	What Appears in the Cloned Record	Affected Records
		files
Other content fields	URL strings are replaced with the URL of the cloned records, using the primary domain used with Account Engagement	Landing pages, forms, form handlers, custom redirects, files
Form	Cloned form ID	Landing pages only

Allocations for Cloning Campaigns with Related Records

Each campaign cloning operation can support a certain number of related records.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

The related items included in this table refer to assets that are created in Account Engagement.

Type	Related Item Description	Maximum
Form	A form	10
Form field	An individual field from a form	50
Form field value	An individual value used in form field picklists	350
Form field conditional	A conditional field in a form	5
Completion action	A completion action that's used with a form, form handler, custom redirect, or file	5
Form handler	A form handler	10
Form handler field	An individual field from a form handler	25
File	A file stored in Account Engagement	10
Custom redirect	A custom redirect	10
Prospect field dependency	A dependent field in a form	25
Landing page	A landing page	10

Type	Related Item Description	Maximum
Layout template region	A saved region that's used in a landing page template	10

Create a Campaign Hierarchy

To organize campaigns and link them together, you can associate them with parent and child relationships in a campaign hierarchy. When you run reports, metrics from the child campaigns roll up to the parent.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To view campaigns: Read on campaigns

To view campaign hierarchies: Read on campaigns
AND

Read on the Parent Campaign field on campaigns

To add, edit, or delete hierarchy columns: Modify All Data

You can create a robust hierarchy up to five levels deep.

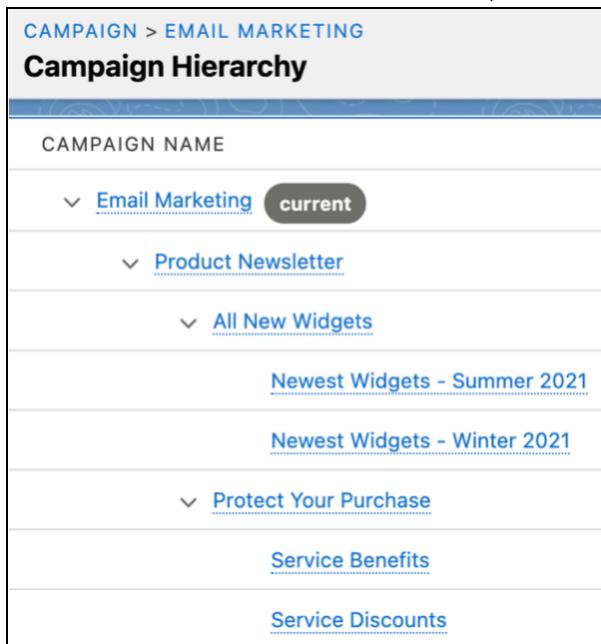
1. Create or open the campaign record of a campaign that you want to use as a child.
2. In the Parent Campaign field, select the campaign to use as the parent.

The screenshot shows the Salesforce Campaign Record page. The 'Campaign Name' field is highlighted with a yellow box and contains 'Product Newsletter'. The 'Parent Campaign' field is also highlighted with a yellow box and contains a search bar with the placeholder 'Search Campaigns...'. Below the search bar, a list of campaigns is visible, including 'New Product Launch', 'Annual Marketing Plan', 'Email Marketing', and 'Product Launch Webinar'. The 'Email Marketing' campaign is currently selected, indicated by a blue border around its row. Other fields visible include 'Campaign Owner' (Christo Galanis), 'Status' (In Progress), 'Business Unit' (United States), 'Start Date', 'End Date', and 'Budgeted Cost in Hierarchy' (\$0).

3. To see where in the hierarchy a campaign appears, open the campaign record and click **View**

Campaign Hierarchy.

-  **Example** Christo wants to track his team's email marketing efforts, so he creates the top-level campaign called Email Marketing. To organize his product communications, he creates several campaigns to use as parents: Product Newsletter, All New Widgets, and Protect Your Purchase. He also creates quarterly campaigns for new products and separate campaigns to promote service contracts. Each time he creates a new quarterly campaign, he adds the correct parent campaign. For his campaign hierarchy, he makes Product Newsletter the parent campaign for All New Widgets and Protect Your Purchase. When he's done, his hierarchy looks like this.



See Also

[Understand Campaign Hierarchy](#)

Share Campaigns

Like all Salesforce objects, your sharing model governs campaigns access. To make sure that the right colleagues have access to the right campaigns, a campaign owner or Salesforce admin can extend sharing for your own campaigns one by one.

REQUIRED EDITIONS

Available in: Salesforce Lightning Experience and Salesforce Classic

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

USER PERMISSIONS NEEDED

To view campaigns:

Read on campaigns

USER PERMISSIONS NEEDED

To share campaigns:

Read on campaigns

AND

Marketing User selected in User Detail

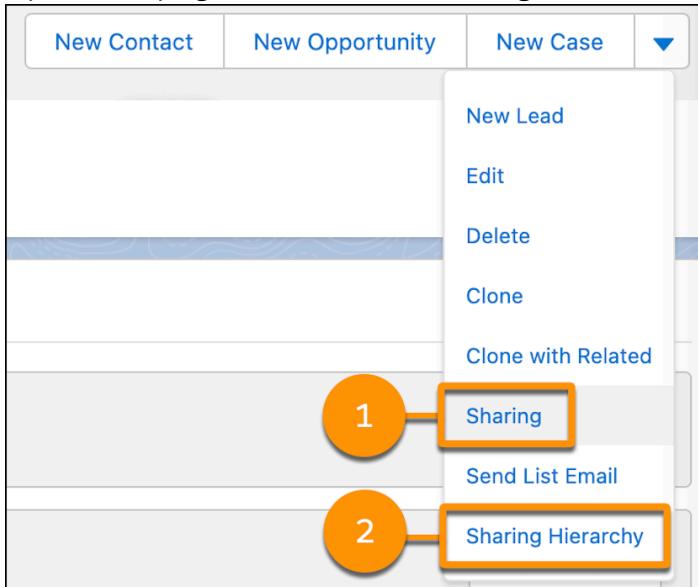
AND

Campaign Owner on the record

A campaign's members and related assets are also governed by org-wide sharing settings. A campaign owner can share a campaign with another user who can't access certain related records.

When org-wide sharing settings are set to Public Full Access, the sharing options don't appear on individual campaigns because they can't be shared further.

1. Open a campaign record and click **Sharing** (1).



2. Click **Add**, and then select a user, group, role, or territory.
3. Save your work.

To view everyone with access to the campaign, open the action menu and select **Sharing Hierarchy** (2).

See Also

[Set Your Internal Organization-Wide Sharing Defaults](#)

Track Campaign Field History

You can track the changes made to selected fields on the campaign. Each time a user modifies a tracked field, the date, time, user, and changes appear in the related list.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To view campaigns: Read on campaigns

1. From the object management settings for campaigns, go to **Fields & Relationships**.
2. Click **Set Tracking History**.
3. Select **Enable Campaign Field History**.
4. Select the fields that you want to monitor, and save your work.
5. Go to Page Layouts for the campaign object, and add the Campaign Field History related list.

Manage Campaign Members

Add members to campaigns and update member statuses to keep your campaigns humming.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Campaign Member Fields

These fields (in alphabetical order) make up a campaign member.

Add Members to Campaigns

Add members to campaigns to target the customers you want.

Accounts as Campaign Members

To support your account-based marketing efforts, you can add an account or a person account to a campaign as a campaign member. Add accounts anywhere you normally add a campaign member, such as reports and related lists.

Work with Campaign Members

Update campaign members to accurately track your prospects.

Campaign Member Fields

These fields (in alphabetical order) make up a campaign member.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

You can edit most campaign member fields from the related record that the campaign member was created from. Some aren't visible or editable based on your page layout and field-level security settings.

Field	Description
Account ID	The name of the account if the campaign member is based on an account. This field is available only if the Accounts as Campaign Members setting is enabled.
Campaign	The campaign that the lead or contact is related to.
Campaign Member Currency	The default currency for relevant fields on the campaign member. Amounts display in the campaign member's currency and are also converted to the user's personal currency. Available only for organizations that use multiple currencies.
Campaign Member Type	The record type of the campaign member, which determines the page layout available for the campaign member. (Read only)
City	City portion of the lead or contact's address.
Company (Account)	The company, if the campaign member is based on a lead, or the account, if the campaign member is based on a contact.
Contact	The name of the contact, if the campaign member is based on a contact.
Country	The country for the lead or contact. Entry is selected from a picklist of standard values or entered as text. The limit is 80 characters.
Created By	The user who created the campaign member. (Read only)
Created Date	The date that the campaign member was created. (Read only)
Description	Description of the lead or contact.
Do Not Call	Indicates whether the contact wants to be called.
Email	Email address of the lead or contact.
Email Opt Out	Indicates whether the contact wants to receive emails.
Fax	Fax number of the lead or contact.
Fax Opt Out	Whether the contact wants to be included in broadcast faxes.
First Name	First name of the lead or contact.
First Responded Date	Date the campaign member first responded. (Read only)
Last Modified By	User who last changed the campaign member record. (Read only)

Field	Description
Last Modified Date	The date that the campaign member record was last modified. (Read only)
Last Name	Last name of the lead or contact.
Lead	The name of the lead, if the campaign member is based on a lead.
Lead Source	Source of lead, for example, Advertisement, Partner, or Web. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.
Mobile	The mobile phone number for the lead or contact.
Phone	The phone number for the lead or contact.
Related Record	The lead or contact related to this campaign. If the Accounts as Campaign Members setting enabled, the related record can be an account.
Responded	Indicates whether the campaign member has responded.
Salutation	The salutation for addressing the person, for example, Mr., Ms., Dr., or Prof.
State/Province	State or province portion of user's address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.
Status	The status of the campaign member, for example, sent or responded.
Street	Street portion of the lead or contact's address.
Title	The title of the lead or contact, for example, President.
Zip/Postal Code	Zip or postal code portion of the lead or contact's address.

Add Members to Campaigns

Add members to campaigns to target the customers you want.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

[Add Individual Leads, Contacts, or Person Accounts to Campaigns](#)

Hand-pick individual campaign members from contact, lead, or person account detail pages.

Add Campaign Members with Manage Members

Learn how to add campaign members from the Manage Members page.

Add Members by Account from a Campaign Page

Quickly add some or all of an account's contacts to a campaign from the campaign detail page.

Add Campaign Members from an Account Page

Select campaign members from the Contacts related list on your accounts.

Add Multiple Contacts and Leads to Campaigns

Quickly add lots of contacts, leads, and person accounts as members to your campaigns at one time.

Add Multiple Members to a Campaign from a List View

Save time by adding up to 200 members to a campaign at once from your lead or contact list views.

Or update the member status for members already associated with the campaign.

Add Campaign Members from Standard and Custom Reports

Adding members to a campaign is quick and easy when you add them from your lead, contact, and person account tabular, summary, and matrix reports.

Import Campaign Members

Add contacts, leads, and person accounts to campaigns via the Data Import Wizard.

Add Existing Contacts to a Campaign with the Data Import Wizard

To add multiple contacts as members of a campaign, launch the Data Import Wizard from the campaign detail page.

Add Existing Leads to a Campaign with the Data Import Wizard

To add multiple leads as members of a campaign, launch the Data Import Wizard from the campaign detail page.

Add Existing Person Accounts to a Campaign with the Data Import Wizard

To add multiple person accounts as members of a campaign, launch the Data Import Wizard from the campaign detail page.

Create Contacts and Add Them to a Campaign with the Data Import Wizard

With a single import file, you can create multiple contacts at once and make them members of a campaign.

Create Leads and Add Them to a Campaign with the Data Import Wizard

To add multiple leads as members of a campaign, launch the Data Import Wizard from the campaign detail page.

Add Individual Leads, Contacts, or Person Accounts to Campaigns

Hand-pick individual campaign members from contact, lead, or person account detail pages.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To add or clone a campaign member:

Read on campaigns

AND

Edit on leads and contacts

AND

Marketing User selected in User Detail

To edit individual campaign members:

Read on campaigns

AND

Read or Edit on leads or contacts

AND

Marketing User selected in User Detail

1. From a contact, lead, or person account detail page, go to the Campaign History related list and click **Add to Campaign**.
2. Specify the campaign.
3. On the Campaign Member Edit page, specify the campaign member status.
4. Save your work.

Add Campaign Members with Manage Members

Learn how to add campaign members from the Manage Members page.

REQUIRED EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS NEEDED

To add campaign members:

Edit on campaigns

AND

Edit on leads and contacts

USER PERMISSIONS NEEDED

AND

Marketing User selected in User Detail

To remove campaign members:

Read on campaigns

AND

Edit on leads or contacts

You can add leads and contacts as members of a campaign from the Manage Members page. To add contacts to a campaign, the **Add to Campaign** checkbox must be enabled.

 **Note** Before using the Manage Members page, verify that you're using a supported browser.

1. On a campaign detail page or the Campaign Members related list, click **Manage Members** and select **Add Members - Search**.
2. On the Add Members subtab, select the **Leads or Contacts** option to add leads or contacts, respectively.
3. Search for leads or contacts:
 - You can specify search filters and click **Go!**
 - Alternatively, you can select an existing view, such as all open leads, from the Use Existing View dropdown list. Your results show automatically. If you select an existing view, you can modify its criteria by adding or changing filters, and clicking **Go!**.
4. Select the checkboxes next to the records that you want to add. To select all records on the current page, select the checkbox in the header row.
5. Select a status from the **Add with Status** dropdown list.

A confirmation message appears and you see the members that you added on the Existing Members subtab.

 **Note** If you're unable to add contacts, turn on the **Add to Campaign** checkbox. From the object management settings for contacts, go to Search Layouts. Then, edit the Contacts list view, select **Add to Campaign**, and save your changes.

The latest Manage Members page isn't available in accessibility mode. In accessibility mode, you can still [add contacts or leads to a campaign](#), [update campaign members](#), and [remove campaign members](#) using the campaign member wizards.

Add Members by Account from a Campaign Page

Quickly add some or all of an account's contacts to a campaign from the campaign detail page.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To add multiple contacts, leads, and person accounts to campaigns:

Marketing User selected in User Detail

AND

Edit on campaigns

AND

Read on contacts, leads, and person accounts

1. From the Campaign Members related list on a campaign, click **Add Contacts**.
2. Search for an account name.
3. Select some or all of the contacts that appear for the account.
4. Click **Next**.
5. Select a member status for the added members.
6. Choose whether to apply the member status to selected leads or contacts who are already members of the campaign.
7. Submit your changes.

Add Campaign Members from an Account Page

Select campaign members from the Contacts related list on your accounts.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To add or clone a campaign member:

Read on campaigns

USER PERMISSIONS NEEDED

AND

Edit on leads and contacts

AND

Marketing User selected in User Detail

To edit individual campaign members:

Read on campaigns

AND

Read or Edit on leads or contacts

AND

Marketing User selected in User Detail

1. From an account detail page, go to the Contacts related list.
2. Add one or more contacts as campaign members.
 - To add a single campaign member, select **Add to Campaign** from the Actions menu next to the contact.
 - To add more than one member, click **View All**, then select campaign members and click **Add to Campaign**. The maximum number of contacts viewable per page is 200.
3. Specify the campaign.
4. Specify the campaign member status.
5. Choose whether to apply the member status to selected leads or contacts who are already members of the campaign.
6. Submit your changes.

Add Multiple Contacts and Leads to Campaigns

Quickly add lots of contacts, leads, and person accounts as members to your campaigns at one time.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To add multiple contacts, leads, and person accounts to campaigns:

Marketing User selected in User Detail

USER PERMISSIONS NEEDED

AND

Edit on campaigns

AND

Read on contacts, leads, and person accounts

1. From the Campaign Members related list on a campaign, click **Add Leads or Add Contacts**.
2. Select leads or contacts from the list, or search for specific leads or contacts.
3. Click **Next**.
4. Select a member status for the added members.
5. Choose whether to apply the member status to selected leads or contacts who are already members of the campaign.
6. Click **Submit**.

Add Multiple Members to a Campaign from a List View

Save time by adding up to 200 members to a campaign at once from your lead or contact list views. Or update the member status for members already associated with the campaign.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To add contacts to a campaign:

Marketing User selected in User Detail

AND

Edit on campaigns

AND

Edit on contacts

To add leads to a campaign:

Marketing User selected in User Detail

AND

USER PERMISSIONS NEEDED

Edit on campaigns

AND

Edit on leads

To add person accounts to a campaign:

Marketing User selected in User Detail

AND

Edit on campaigns

AND

Edit on contacts

1. Navigate to a contact or lead list view.
2. Select up to 200 records to add to a campaign.
3. Click **Add to Campaign**.
4. Enter the name of a campaign.
5. Select a member status for the new members.
6. Choose whether members already associated with the campaign keep their current status. If you want, update their status with the one you selected for new members.
7. Add the members.

Add Campaign Members from Standard and Custom Reports

Adding members to a campaign is quick and easy when you add them from your lead, contact, and person account tabular, summary, and matrix reports.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To add campaign members from a contact report:

Marketing User selected in User Detail

AND

Edit on campaigns

USER PERMISSIONS NEEDED

AND

Read on contacts

AND

Read on reports

To add campaign members from a lead report:

Marketing User selected in User Detail

AND

Edit on campaigns

AND

Read on leads

AND

Read on reports

To add campaign members from a person account report:

Marketing User selected in User Detail

AND

Edit on campaigns

AND

Read on contacts

AND

Read on reports

You can add campaign members from a report that returns lead, contact, or person account records.

Verify that Detailed Rows is turned on before you begin.

1. Make sure that the Detailed Rows setting is turned on.
2. Click the report's action menu, and then select **Add to Campaign**. If the **Add to Campaign** button is disabled, modify your report to return fewer than 50,000 records.
3. Enter or select the campaign to add these members.
4. Select a member status for the new members, or keep their current statuses.
5. Click **Submit**, and then check your email for a confirmation message.
6. In Salesforce Classic, use the Add to Campaign button to complete the operation. Review the

confirmation screen, and then click **Done**.

Be aware of these considerations when adding campaign members from a report:

- To add members to campaigns from custom reports, the report's primary object must be a lead, contact, or person account.
- To add members to campaigns from reports in Lightning Experience, the custom report type must include the Full Name field.
- If you interrupt the add campaign members process, some members can still be added to the campaign. That's because members are added in batches.
- If you edit a record during the adding process, it isn't added to the campaign.
- You can add active leads to campaigns—not converted leads. If converted leads appear on your report, don't worry, only the active leads are added to the campaign.
- The Add to Campaign button appears only in saved reports. The button doesn't appear when you edit or preview a report.

Import Campaign Members

Add contacts, leads, and person accounts to campaigns via the Data Import Wizard.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

With the Data Import Wizard, a designated marketing user can use a CSV (comma-separated values) file to import contacts, leads, or person accounts and track their responses at each stage of a campaign.

For example, you can mark each contact, lead, or person account as "Planned" at the beginning of the campaign. Then mark them as "Responded" after they respond. These responses are referred to as the member statuses.

Add Existing Contacts to a Campaign with the Data Import Wizard

To add multiple contacts as members of a campaign, launch the Data Import Wizard from the campaign detail page.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To add contacts that you own to a campaign via the Data Import Wizard:

Marketing User selected in User Detail

AND

Create on accounts

AND

Read on contacts

AND

Edit on accounts and campaigns

AND

Import Personal Contacts

To add contacts owned by others to a campaign via the Data Import Wizard:

Marketing User selected in User Detail

AND

Create on accounts

AND

Read on contacts

AND

Edit on accounts, contacts, and campaigns

AND

Modify All Data

Before you begin, make sure that your import file is in CSV format and contains values for these fields.

- Account: Salesforce ID
- Contact: Salesforce ID

 **Tip** To obtain Salesforce IDs or other values from your org, run reports and then export the report data.

These steps describe one recommended method of importing data. You can import data into Salesforce fields that aren't listed here. You can also customize your import by using other options that appear in

the Data Import Wizard.

1. If you're using Lightning Experience, from the campaign members related list, select **Import Leads and Contacts**. If you're using Salesforce Classic, from the campaign detail page, select **Manage Members | Add Members - Import File**.
The Data Import Wizard appears.
2. Select **Accounts and Contacts**, then select **Update existing records**.
3. Set **Match Contact by** to **Salesforce.com ID**.
4. Set **Match Account by** to **Salesforce.com ID**.
5. Select the CSV file that contains your import data, and click **Next**.
6. Map column headers from your CSV file to the Account: Salesforce ID and Contact: Salesforce ID fields.
7. Click **Next**.
8. Review the import settings, and then click **Start Import**.

When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred. A separate email notifies you of campaign member job results.

Add Existing Leads to a Campaign with the Data Import Wizard

To add multiple leads as members of a campaign, launch the Data Import Wizard from the campaign detail page.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To add existing leads to a campaign via the Data Import Wizard:

Marketing User selected in User Detail

AND

Edit on campaigns

AND

Import Leads

Before you begin, make sure that your import file is in CSV format and contains values for these fields.

- Salesforce ID of the lead
- Last Name of the lead

 **Tip** To obtain Salesforce IDs or other values from your org, run reports and then export the report data.

These steps describe one recommended method of importing data. You can import data into Salesforce fields that aren't listed here. You can also customize your import by using other options that appear in the Data Import Wizard.

1. From the campaign detail page, select **Manage Members | Add Members - Import File**.
The Data Import Wizard appears.
2. Select **Leads**, then select **Update existing records**.
3. Set **Match Lead by to Salesforce.com ID**.
4. Select **Assign leads to campaigns**.
5. Select the CSV file that contains your import data, and click **Next**.
6. Select **Assign contacts to campaigns**.
7. Map column headers from your CSV file to these fields.
 - Salesforce ID of the lead
 - Last Name of the lead
8. Click **Next**.
9. Review the import settings, and then click **Start Import**.

When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred.

Add Existing Person Accounts to a Campaign with the Data Import Wizard

To add multiple person accounts as members of a campaign, launch the Data Import Wizard from the campaign detail page.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To add person accounts that you own to a campaign via the Data Import Wizard:

Create on accounts

AND

Edit on accounts

AND

Import Personal Contacts

USER PERMISSIONS NEEDED

To add person accounts owned by others to a campaign via the Data Import Wizard:

Create on accounts

AND

Edit on accounts and contacts

AND

Modify All Data

Before you begin, make sure that your import file is in CSV format and contains values for these fields.

- Salesforce ID of the contact associated with the person account
- Email

 **Tip** To obtain Salesforce IDs or other values from your org, run reports and then export the report data.

These steps describe one recommended method of importing data. You can import data into Salesforce fields that aren't listed here. You can also customize your import by using other options that appear in the Data Import Wizard.

1. From the campaign detail page, select **Manage Members | Add Members - Import File**.
The Data Import Wizard appears.
2. Select **Person Accounts**, then select **Update existing records**.
3. For Match Lead by, select **Salesforce.com ID**.
4. Select **Assign person accounts to campaigns**.
5. Select the CSV file that contains your import data, and click **Next**.
6. Map column headers from your CSV file to these fields.
 - Salesforce ID of the contact associated with the person account
 - Email
7. Click **Next**.
8. Review the import settings, and then click **Start Import**.

When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred.

Create Contacts and Add Them to a Campaign with the Data Import Wizard

With a single import file, you can create multiple contacts at once and make them members of a campaign.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To create contacts that you own and add them to a campaign via the Data Import Wizard:

Marketing User selected in User Detail

AND

Create on accounts

AND

Read on contacts

AND

Edit on accounts and campaigns

AND

Import Personal Contacts

To create contacts owned by others and add them to a campaign via the Data Import Wizard:

Marketing User selected in User Detail

AND

Create on accounts

AND

Read on contacts

AND

Edit on accounts, contacts, and campaigns

AND

Modify All Data

Before you begin, make sure that your import file is in CSV format and contains values for these fields.

- Account: Account Name
- Contact: Email
- Contact: Last Name

- Contact: First Name
- Campaign Member: Campaign ID
- Campaign Member: Status

 **Tip** To obtain values that are already in your org, run reports and then export the report data.

These steps describe one recommended method of importing data. You can import data into Salesforce fields that aren't listed here. You can also customize your import by using other options that appear in the Data Import Wizard.

1. From the campaign detail page, select **Manage Members | Add Members - Import File**.
The Data Import Wizard appears.
2. Select **Accounts and Contacts**, then select **Add new and update existing records**.
3. Set **Match Contact by** to **Email**.
4. Set **Match Account by** to **Account Name and Account Site**.
5. Select **Assign contacts to campaigns**.
6. Select the CSV file that contains your import data, and click **Next**.
7. Map column headers from your CSV file to these fields.
 - Account: Account Name
 - Contact: Email
 - Contact: Last Name
 - Contact: First Name
 - Campaign Member: Campaign ID
 - Campaign Member: Status
8. Click **Next**.
9. Review the import settings, and then click **Start Import**.

When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred. A separate email notifies you of campaign member job results.

Create Leads and Add Them to a Campaign with the Data Import Wizard

To add multiple leads as members of a campaign, launch the Data Import Wizard from the campaign detail page.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To create leads and add them to a campaign via
the Data Import Wizard:

Marketing User selected in User Detail

USER PERMISSIONS NEEDED

AND

Edit on campaigns

AND

Import Leads

Before you begin, make sure that your import file is in CSV format and contains values for these fields.

- Campaign Member: Campaign ID
- Campaign Member: Status
- Email
- Company
- Last Name
- First Name (optional but recommended)

 **Tip** To obtain values that are already in your org, run reports and then export the report data.

These steps describe one recommended method of importing data. You can import data into Salesforce fields that aren't listed here. You can also customize your import by using other options that appear in the Data Import Wizard.

1. From the campaign detail page, select **Manage Members | Add Members - Import File**.
The Data Import Wizard appears.
2. Select **Leads**, then select **Add new and update existing records**.
3. Set **Match Lead by** to **Email**.
4. Select **Assign leads to campaigns**.
5. Select the CSV file that contains your import data, and click **Next**.
6. Map column headers from your CSV file to these fields.
 - Campaign Member: Campaign ID
 - Campaign Member: Status
 - Email
 - Company
 - Last Name
 - First Name (optional but recommended)
7. Click **Next**.
8. Review the import settings, and then click **Start Import**.

When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred.

Accounts as Campaign Members

To support your account-based marketing efforts, you can add an account or a person account to a campaign as a campaign member. Add accounts anywhere you normally add a campaign member, such as reports and related lists.

REQUIRED EDITIONS

Available in: Salesforce **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

[Considerations for Using Accounts as Campaign Members](#)

Before you start using Accounts as Campaign Members, review these considerations.

[Enable Accounts as Campaign Members](#)

To let users include accounts in campaign member lists and reports, turn on the feature and update page layouts.

[Adding Accounts as Campaign Members](#)

You can view and manage accounts, including person accounts, as campaign members in a few locations.

Considerations for Using Accounts as Campaign Members

Before you start using Accounts as Campaign Members, review these considerations.

REQUIRED EDITIONS

Available in: Salesforce **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

- Accounts as Campaign Member supports accounts and person accounts. When you add a person account as a campaign member, the record is added as a contact.
- Campaign member reports and metrics can vary between Sales Cloud and Account Engagement, because Account Engagement doesn't include accounts in its campaign member totals.
- When you set sharing rules on an object, the Controlled by Campaign Member option inherits sharing settings from leads, contacts, accounts, and person accounts.

Enable Accounts as Campaign Members

To let users include accounts in campaign member lists and reports, turn on the feature and update page layouts.

REQUIRED EDITIONS

Available in: Salesforce **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

USER PERMISSIONS NEEDED

To enable Accounts as Campaign Members:

Modify All Data

AND

View Setup and Configuration

To add or edit accounts as campaign members:

Marketing User selected in User Detail

AND

Edit and Read on campaign

AND

Read on account

-
1. From Setup, in the Quick Find box, enter *Accounts*, and then select **Accounts as Campaign Members**.
 2. Enable the feature and save your change.
 3. Add the Campaign History related list to Account page layouts.
 4. To view accounts as campaign members in a custom report type, select the Campaign object as primary and the Account object as secondary.

When you enable Accounts as Campaign Members, a new standard report, Campaigns with Accounts, becomes available. The Add to Campaign button also appears on any report that uses Account as the primary object.

Adding Accounts as Campaign Members

You can view and manage accounts, including person accounts, as campaign members in a few locations.

REQUIRED EDITIONS

Available in: Salesforce **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

Work with accounts as campaign members in the locations outlined in the table.

- To add an account as a campaign member from an account record, find the Campaign History related list, and then select **Add to Campaign**.
- To start from a campaign record, find the Campaign Members related list, select **Add Account**, and then select members from a list of all available accounts.
- To bulk import accounts as campaign members, open the Data Import Wizard, select the **Campaign Members**, and follow the prompts.

Record	Location	What's Shown
Account	Campaigns related list	Campaigns associated with any of the account's contacts.
Account	Campaign History related list	Campaigns that include the account as a campaign member.
Campaign	Campaign Members related list	Accounts that are campaign members.
Standard Report	Campaigns and Campaign Members report	Account records with a member type of Account. The column formerly called Lead/Contact ID is labeled Related Record ID.
Standard Report	Campaigns with Accounts report	Relationships between campaigns and accounts. This report becomes available after you enable Accounts as Campaign Members.
Custom Reports	Object Types	Account as a secondary object (when you select Campaign as the primary object)

 **Note** In Salesforce Classic, the bulk add action isn't available on the Campaign Member related list.

Work with Campaign Members

Update campaign members to accurately track your prospects.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Displaying and Editing a Campaign Member

From the campaign member detail page, you can edit, delete, or clone a campaign member record.

Additionally, if the campaign member is based on a lead, you can convert the lead; if the campaign member is based on a contact, you can create an opportunity.

Campaign Member Task Overview

Use the Manage Members page to search for, add, or edit multiple leads and contacts. To add members one at a time, go to a member's contact or lead detail page. With the Data Import Wizard, you can add up to 50,000 leads, contacts, or person accounts at a time to a campaign. You can also use the Data Import Wizard to update the statuses of up to 50,000 campaign members at a time.

Manage Members with the Campaign Members Related List

Manage campaign members directly from a campaign detail page.

Edit Multiple Campaign Members

Follow these steps to update the campaign member status, edit campaign member details, and remove campaign members from the Manage Members page.

Add or Update Campaign Members with the Data Import Wizard

To add or update many campaign members at one time, open the Data Import Wizard from the campaign detail page.

Delete Individual Members from Campaigns

Remove individual campaign members from campaigns.

Delete Multiple Contacts and Leads from Campaigns

Save time by removing lots of campaign members from campaigns at a time while in accessibility mode.

Displaying and Editing a Campaign Member

From the campaign member detail page, you can edit, delete, or clone a campaign member record. Additionally, if the campaign member is based on a lead, you can convert the lead; if the campaign member is based on a contact, you can create an opportunity.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To view, edit, or remove campaign members:

Read on campaigns

AND

Read on leads

AND

USER PERMISSIONS NEEDED

Read on contacts

AND

Marketing User selected in User Detail

To add campaign members:

Read on campaigns

AND

Edit on leads

AND

Edit on contacts

AND

Marketing User selected in User Detail

To view the campaign member detail page, click the campaign member's name in the Name, First Name, or Last Name columns on the Campaign Members related list on a campaign detail page or on the Existing Members tab.



Note To view a campaign member, you must have permissions on the campaign and the lead or contact. For example, to view a campaign member created from a lead, you must be able to view both the campaign and the lead.

To edit the campaign member detail page layout, from the object management settings for campaign members, go to Page Layouts, and then click **Edit** next to the page layout name.

Action	Description
Editing a Campaign Member	To edit a campaign member, click Edit on the campaign member detail page, change the fields you want to update, then click Save . Fields derived from the contact or lead can only be edited from the lead or contact detail pages. If your administrator has enabled inline editing for your organization, you cannot use inline editing on the Status drop-down list on the campaign member detail page. Instead, click Edit on the campaign detail page to edit the Status drop-down list.
Cloning a Campaign Member	To clone a campaign member, click Clone on the campaign member detail page, then select a campaign and a contact or lead. Change the fields you want to clone for the new campaign member, then click Save .

Action	Description
Deleting a Campaign Member	To delete a campaign member, click Delete on the campaign member detail page. Deleting a campaign member record is permanent; the record is not recoverable from the recycle bin. However, the original lead or contact record is not deleted.
Converting a Lead	If the campaign member was created from a lead, you can click Convert Lead on the campaign member detail page to convert the lead. When you convert a lead, the campaign member is still a part of the campaign, but its type changes from lead to contact.
Creating an Opportunity	If the campaign member was created from a contact, you can click Create Opportunity on the campaign member detail page to create an opportunity. When you create an opportunity, the campaign member is still a part of the campaign.

Campaign Member Task Overview

Use the Manage Members page to search for, add, or edit multiple leads and contacts. To add members one at a time, go to a member's contact or lead detail page. With the Data Import Wizard, you can add up to 50,000 leads, contacts, or person accounts at a time to a campaign. You can also use the Data Import Wizard to update the statuses of up to 50,000 campaign members at a time.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Adding Campaign Members

You can [add new members to a campaign](#):

- Individually from the Campaign History related list on a contact, lead, or person account detail page
- By searching for contacts and leads from the [Manage Members page](#)
- From a campaign, contact, person account, or lead report
- From a list view of existing contacts or leads
- From a CSV import file of existing leads
- From a CSV import file of existing contacts
- From a CSV import file of existing person accounts
- From a CSV import file of new leads
- From a CSV import file of new contacts

Editing Campaign Members

You can edit the details of existing campaign members:

- Campaign History related list on a contact, lead, or person account detail page
- From the [Campaign Members related list](#) on a campaign detail page
- From the [Manage Members](#) page

Updating the Status of Existing Campaign Members

You can update the status of existing campaign members:

- From the Campaign History related list on a contact, lead, or person account detail page
- From the [Manage Members](#) page
- From a campaign, contact, person account, or lead report
- From a CSV import file of existing members

Removing Campaign Members

You can remove members of a campaign:

- From the Campaign History related list on a contact, lead, or person account detail page
- From the [Campaign Members related list](#) on a campaign detail page
- From the [Manage Members](#) page

Example Uses

- Create follow-up campaigns—Search for a custom list view of contacts or leads that is restricted to an earlier campaign and a certain member status, such as “Attended”. Then add items from the generated list to a follow-up campaign. See [Add Multiple Members to a Campaign from a List View](#).
- Leverage reporting functionality—Customize a standard report or build a new custom report that returns a list of contacts, person account, or leads that you want to target. With the click of a button, you can add the entire list to a campaign. See [Add Campaign Members from Standard and Custom Reports](#).

Manage Members with the Campaign Members Related List

Manage campaign members directly from a campaign detail page.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To add or clone a campaign member:

Read on campaigns

AND

Edit on leads and contacts

AND

Marketing User selected in User Detail

To view and edit the campaign members related list:

Read on campaigns

AND

Read on leads or contacts

AND

Marketing User selected in User Detail

Use the Campaign Members related list to:

- Add individual members by searching
- Add multiple members from an import file
- Edit members
- Update or remove existing members
- Update member statuses from an import file
- Send Sales List Emails to selected or filtered campaign members

In Lightning Experience, the Campaign Members related list includes a chart showing the number of campaign members with each campaign member status. The chart doesn't appear for campaigns with more than 10,000 members when sharing for campaign members is set to Controlled by Lead or Contact, and sharing for leads and contacts is set to private.

Edit Multiple Campaign Members

Follow these steps to update the campaign member status, edit campaign member details, and remove campaign members from the Manage Members page.

REQUIRED EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS NEEDED

To view the Existing Members tab:

Edit on campaigns

AND

Read on leads or contacts

AND

Marketing User selected in User Detail

To update and remove campaign members:

Edit on campaigns

AND

Edit on leads and contacts

AND

Marketing User selected in User Detail

 **Note** Before using the Manage Members page, verify that you're using a supported browser.

1. On a campaign detail page or the Campaign Members related list, click **Manage Members** and select **Add Members - Search**.
2. On the Existing Members subtab, optionally enter filter criteria to find existing members and click **Go!**.

 **Note** For campaigns with campaign members created from both leads and contacts, you must have “Read” permission on leads and contacts to see all members. If you only have “Read” on leads, you see only campaign members created from leads. If you only have “Read” on contacts, you only see campaign members created from contacts.

3. Select the checkboxes next to the records that you want to edit. To select all records on the current page, select the checkbox in the header row.
4. Optionally perform these actions.
 - To change the campaign member status, select a status from the **Update Status** dropdown list.
 - To remove a member from a campaign, click **Remove**.
 - To edit the details of a campaign member, click **Edit**.
 - To [view, edit, delete, clone, a campaign member](#), click the campaign member's name in the Name column.

The latest Manage Members page isn't available in accessibility mode. In accessibility mode, you can still [add contacts or leads to a campaign](#), [update campaign members](#), and [remove campaign members](#) using the campaign member wizards.

To update large numbers of campaign members, you can use the Data Loader application to export and then reimport campaign member data. Before uploading a CSV file with Data Loader, be sure to sort the

file by Campaign ID. If you have problems reimporting your data, try splitting up the CSV file into a few smaller files and uploading them separately.

Add or Update Campaign Members with the Data Import Wizard

To add or update many campaign members at one time, open the Data Import Wizard from the campaign detail page.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To add or update campaign members via the Data Import Wizard:

Marketing User selected in your user information

AND

Read on contacts OR Import Leads

AND

Edit on campaigns

 **Tip** To obtain Salesforce IDs or other values from your org, run a report and then export the report data.

Before you begin, make sure that your import file is in CSV format and contains values for these fields. To import multiple contacts or leads to a single campaign, include a separate row for each in the CSV.

- Salesforce ID of the contact or lead. For person accounts, use the contact ID associated with the person account as the Salesforce ID.
- Status of the campaign member. If you leave the campaign member status blank, the status is automatically set to Sent.
- Campaign ID (if you're on a non-campaign page and want to import records)
- Campaign member currency, if the org uses multiple currencies.

1. From the campaign detail page:
 - To update campaign members, select **Manage Members | Update Members - Import File**.
 - To update campaign members, select **Campaign Members**, then select **Update existing records**. The Data Import Wizard appears. You can also access the Data Import Wizard from Salesforce Setup.
2. Select the CSV file that contains your import data, and click **Next**.
3. Map column headers from your CSV file to the Salesforce ID of the campaign member, the status of the campaign member, and the campaign ID.

4. Click **Next**.
5. Review the import settings, and then click **Start Import**.

When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred.

Delete Individual Members from Campaigns

Remove individual campaign members from campaigns.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To delete an individual campaign member:

Read on campaigns

AND

Read on leads and contacts

AND

Marketing User selected in User Detail

1. From a campaign detail page, go to the Campaign Members related list.
2. Find the campaign member you want to delete.
3. In Lightning Experience, click **Delete** from the drop-down menu on the member's row. In Salesforce Classic, click Remove.

Delete Multiple Contacts and Leads from Campaigns

Save time by removing lots of campaign members from campaigns at a time while in accessibility mode.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To delete multiple existing contacts and leads from campaigns:

Marketing User selected in User Detail

AND

Edit on campaigns and leads

AND

Read on contacts

1. From a campaign, click **Manage Members**.
2. Click either **Remove Members - Existing Contacts** or **Remove Members - Existing Leads**.
3. Choose the campaign members that you want to remove from the campaign.
4. When you are finished removing members from your campaign, click **Done** to exit the wizard.

Campaign Influence

Understand how your campaigns are affecting your opportunity pipeline.

REQUIRED EDITIONS

Campaign Influence 1.0

Available in: Salesforce Classic

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

Customizable Campaign Influence (v2)

Available in: Lightning Experience

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

Customizable Campaign Influence and the legacy Campaign Influence 1.0 are available to Lightning Experience customers. Campaign Influence 1.0 is supported only in Salesforce Classic. We recommend using Customizable Campaign Influence, which offers more flexibility and control.

To use Campaign Influence 1.0, an admin must disable Customizable Campaign Influence in Setup. However, if you revert to version 1.0, your existing campaign influence records are deleted, which can impact workflows and Apex rules.

Customizable Campaign Influence

Campaign Influence is a tool that helps you attribute a percentage of success to influential campaigns. Two versions are available: Campaign Influence 1.0 for Salesforce Classic and Customizable Campaign Influence for Classic and Lightning Experience. The customizable version offers more flexibility in how you assign influence to your marketing activities.

Campaign Influence 1.0

Campaign Influence 1.0 helps identify the return on your campaign investments. It uses the Campaign Influence object to make connections across contacts, campaigns, and opportunities. Campaign Influence 1.0 isn't supported in Lightning Experience. To track influential campaigns in Lightning Experience, switch to Customizable Campaign Influence.

Customizable Campaign Influence

Campaign Influence is a tool that helps you attribute a percentage of success to influential campaigns. Two versions are available: Campaign Influence 1.0 for Salesforce Classic and Customizable Campaign Influence for Classic and Lightning Experience. The customizable version offers more flexibility in how you assign influence to your marketing activities.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Download the PDF Implementation Guide: [Campaign Influence Implementation Guide](#)

How Customizable Campaign Influence Works

Customizable Campaign Influence identifies revenue share with standard and custom attribution models that you can update manually or via automated processes. Add Customizable Campaign Influence data in related lists and reports so that your reps can understand which campaigns impact their opportunity pipeline.

Switching to Customizable Campaign Influence

Look at the differences between the two Campaign Influence features and consider what steps are necessary to prepare for transition.

Set Up Customizable Campaign Influence

Review prerequisites for Customizable Campaign Influence. Give users access, and create page layouts and reports to set up your reps for success.

Use Customizable Campaign Influence

Customizable Campaign Influence is a flexible tool that combines sales and marketing data. Choose a predefined model or enter custom influence percentages. To see how marketing efforts impact your pipeline, build reports and dashboards based on active models.

How Customizable Campaign Influence Works

Customizable Campaign Influence identifies revenue share with standard and custom attribution models that you can update manually or via automated processes. Add Customizable Campaign Influence data in related lists and reports so that your reps can understand which campaigns impact their opportunity pipeline.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Influence models scan active campaigns to identify members who are also assigned a contact role on an open opportunity. A model creates a campaign influence record based on that relationship. Influence can be assigned manually on an opportunity record or automatically via Apex triggers or the API. After an opportunity's stage is closed (won or lost), influence records are no longer created.

Campaign Influence considers every campaign member, regardless of their member status.

The Customizable Campaign Influence models rely on the Campaign object, the Opportunity object, and a Campaign Influence junction object. When you enable Customizable Campaign Influence, the standard objects CampaignInfluence and CampaignInfluenceModel are added to your org.

You can build a report or dashboard for any active influence model.

Access to Campaign Influence Records

Campaign influence records are exposed to users through related lists and reports. A related list shows data from one model at a time. Choose which model you want to use, and set it as the default.

To allow users to add or edit campaign influence records from opportunity records, the default model must be custom and unlocked.

 **Note** In Salesforce Classic, the Influenced Opportunities related list displays an opportunity only if the influence is more than 0%. In Lightning Experience, opportunity records display regardless of influence percentage.

Standard vs. Custom Models

The Primary Campaign Source model is the default model that comes with Customizable Campaign Influence. It assigns 100% influence to the campaign noted in the Primary Campaign Source field on an opportunity. It uses auto-association, which means users can't add campaign influence records to the model manually.

Influence records created by the Primary Campaign Source model are recalculated when one of these events occurs.

- Any Customizable Campaign Influence setting is changed
- An opportunity's Close Date is changed
- A member is added or removed from a campaign
- An account or opportunity is deleted or undeleted

If the Primary Campaign Source model doesn't meet your business needs, you can create custom models. With a custom model, users manually add or edit an influence percentage in the Campaign Influence related list on an opportunity record. Custom model settings are unlocked by default, so that users can update records themselves. When a custom model is locked, it accepts updates via API only.

-  **Note** Opportunities added by the primary source campaign field appear in Campaign Statistics only when the Primary Source Campaign model is set as the default. If you're using another model, the value shows opportunities added by auto-association only.

The number of custom models you can create varies by your edition.

- Account Engagement **Plus, Advanced, and Premium** Editions: 5
- Account Engagement **Growth** Edition: 3
- Salesforce Performance and Unlimited Edition: 5
- Salesforce Professional and Enterprise Edition: 3
- Salesforce Developer Edition: 1

To preserve opportunity data, we don't delete custom campaign influence records when you delete an associated campaign. You can delete campaign influence records from the Opportunity related list or via the API.

Auto-Association Settings

Standard campaign influence models use auto-association to create campaign influence records based on the criteria you set. Criteria can include time frame and campaign types, and you can add other filters using standard or custom fields. You can set an [auto-association time frame](#) in Setup to limit when a member-contact relationship is considered influential.

Auto-association rules work only with standard campaign influence models and don't apply to custom models.

More Campaign Influence Models for Marketers

For users of both Sales Cloud and Account Engagement, choose whether to enable the Additional Campaign Influence Models: first touch, last touch, and even distribution. When you enable one of these models, auto-association rules support standard fields only.

If you can't or don't enable these models, your access is limited to the Primary Campaign Source model and custom models only.

- **First-Touch**—Assigns 100% of influence and revenue earned to the first campaign a prospect touches. Even if a prospect interacts with other marketing assets or activities, this model attributes all of the influence to the first touch. This model relies on the campaign member's Created Date and is for Account Engagement users only.
- **Even-Distribution**—Assigns an equal percentage of influence and revenue earned to every campaign a prospect touches. This model is for Account Engagement users only.

- Last-Touch—Assigns 100% of influence and revenue earned to the last campaign a prospect touches before a deal is closed. No matter what other campaigns the prospect has interacted with, this model attributes all influence to the final touchpoint. This model relies on the Last Modified Date of the campaign member and is for Account Engagement users only.

See Also

[Create a Custom Campaign Influence Model](#)

[Add Influential Campaigns to an Opportunity](#)

Switching to Customizable Campaign Influence

Look at the differences between the two Campaign Influence features and consider what steps are necessary to prepare for transition.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Feature Differences

Customizable Campaign Influence offers a few capabilities that aren't found in the original version of Campaign Influence 1.0.

Feature	Campaign Influence	Customizable Campaign Influence
Available in Salesforce Classic	✓	✓
Available in Lightning Experience		✓
Primary Campaign Source model	✓	✓
Primary Campaign Source field appears on related list (Opportunity records)	✓	
Auto-association with opportunities	✓	✓
Multiple Attribution Models		✓
Flexible Influence Attribution		✓
Locked Models		✓
API Access		✓

Prepare to Switch

In addition, there are differences in how the feature looks and its expected behavior.

- User Permissions—Consider whether a user needs access to edit a campaign or opportunity to create campaign influence records. Identify users with View permissions and verify their needs.
- Report Filters—The new Customizable Campaign Influence models aren't compatible with Campaign Influence 1.0 reports. Create reports that use the new objects and fields.
- Related Lists—The new Customizable Campaign Influence related lists are different from the lists used with Campaign Influence 1.0. Revisit your page layouts and make sure that the correct related lists are added.
- Data Discrepancy—Previously, campaign influence records were created each time a primary campaign source or contact role was identified, even if the same record existed. Customizable Campaign Influence enforces unique relationships in a way that CI 1.0 didn't, so some values can differ from your previous experience.

See Also

[Knowledge Article: Import records from Campaign Influence 1.0 into Customizable Campaign Influence](#)

Set Up Customizable Campaign Influence

Review prerequisites for Customizable Campaign Influence. Give users access, and create page layouts and reports to set up your reps for success.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

[Enable Customizable Campaign Influence](#)

When you're ready to set up Customizable Campaign Influence, turn on the feature in Setup. Then select or create the model you want to use.

[Add Customizable Campaign Influence Related Lists](#)

To view Customizable Campaign Influence records, add related lists to campaign, opportunity, and account page layouts. Data in related lists is limited to the model marked as the default model in Setup.

[Create a Custom Campaign Influence Model](#)

A custom influence model allows users to manually identify how much a campaign influences an opportunity. You can also set up triggers and processes that create campaign influence records.

Enable Customizable Campaign Influence

When you're ready to set up Customizable Campaign Influence, turn on the feature in Setup. Then select

or create the model you want to use.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To enable Campaign Influence:

Sales Cloud User, Service Cloud User, or CRM User permission set license

AND

Customize Application

To view Campaign Influence records:

Campaign Influence permission set

AND

Read on campaigns and opportunities

AND

Marketing User selected in User Detail

For Account Engagement users, we recommend turning on Connected Campaigns before you set up Customizable Campaign Influence. Connecting your campaigns shares Account Engagement marketing data with Salesforce to give you a bigger picture of performance.

1. From Setup, enter *Influence* in the Quick Find box, and then select **Campaign Influence Settings**.
2. Under Campaign Influence, select **Enabled**.
3. If you use Account Engagement, choose whether to enable Additional Campaign Influence Models. These models don't support custom fields in auto-association rule criteria.
4. Under Campaign Influence in Setup, select **Auto-Association Settings**. Then enter the criteria that you want to use to limit associations by time frame or field values.
For best results, use the lookup icon to add multiple criteria in the Value fields.

Campaign Influence Eligibility Limits
Limit whether a campaign is influential by specifying the maximum number of days between a contact's association with the campaign and the opportunity's creation date.
Campaign Influence Time Frame days

Auto-Association Rules
Association rules specify additional criteria for automatic association.

Field	Operator	Value	
Expected Revenue in Campaign	greater than	1,000	AND
Type	equals	Advertisement, Banner	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

[Add Filter Logic](#)

5. To review a model's details, click **Model Settings** and edit a model from the list.
6. To show data in related lists, edit a model and select **Default Model**.

See Also

[Connect Account Engagement and Salesforce Campaigns](#)

Add Customizable Campaign Influence Related Lists

To view Customizable Campaign Influence records, add related lists to campaign, opportunity, and account page layouts. Data in related lists is limited to the model marked as the default model in Setup.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

To view and edit Campaign Influence related lists, users need the Campaign Influence permission and a Sales User, Service User, or CRM User permission set license.

Related List	Page Layout	Description
Campaign Influence	Opportunity	Shows campaigns that have touched the opportunity. Users can create Campaign Influence records from here.
Influenced Opportunities	Campaign	Shows opportunities influenced by the campaign. Users can edit Campaign Influence records from here.
Campaign Influence	Account	Two charts show revenue share grouped by individual campaigns and by campaign type. Expand the list to see

Related List	Page Layout	Description
		<p>opportunities associated with the account alongside related campaign amount, revenue share, and contact name.</p> <p>In the Salesforce mobile app, this related list doesn't include charts.</p>

Note

- To add additional fields to a related list, such as Lead ID, edit the related list in Page Layouts and select from the Available Fields. [Customizing Related Lists](#)
- Some fields from Campaign Influence version 1.0 related lists aren't available in Customizable Campaign Influence related lists. [Switching to Customizable Campaign Influence](#)

Create a Custom Campaign Influence Model

A custom influence model allows users to manually identify how much a campaign influences an opportunity. You can also set up triggers and processes that create campaign influence records.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To create a custom model:

Customize Application

AND

Read on campaigns and opportunities

AND

Marketing User selected in User Detail

-
1. From Setup, enter *Influence* in the Quick Find box, and then click **Model Settings**.
 2. Click **New Attribution Model**.
 3. Enter a name, unique name, and model description.
 4. To show the model's data in related lists, select **Default Model**.

5. To prevent users from creating or editing influence records, select **Locked**.
6. In the Record Preference dropdown, select All Records.
7. Save your work.

Now that the model has been created, you can set up Apex triggers or create influence records via the API.

If your custom model is set as default, users can create influence records manually from an opportunity's Campaign Influence related list.

See Also

[Add Influential Campaigns to an Opportunity](#)

Use Customizable Campaign Influence

Customizable Campaign Influence is a flexible tool that combines sales and marketing data. Choose a predefined model or enter custom influence percentages. To see how marketing efforts impact your pipeline, build reports and dashboards based on active models.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

[Add Influential Campaigns to an Opportunity](#)

When you're using a custom model with Customizable Campaign Influence and the model set as the default, you manually create campaign influence records. Each time a campaign makes an impact on an opportunity, create a record that identifies the influential campaign, and enter an attribution percentage.

[Find Campaign Influence Results](#)

Customizable Campaign Influence offers a few ways to explore these influential relationships, from the record-level to a more aggregate view.

Add Influential Campaigns to an Opportunity

When you're using a custom model with Customizable Campaign Influence and the model set as the default, you manually create campaign influence records. Each time a campaign makes an impact on an opportunity, create a record that identifies the influential campaign, and enter an attribution percentage.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To view, add, or update campaign influence records:

Read and Edit on campaigns and opportunities

AND

Marketing User selected in User Detail

! **Important** The Primary Campaign Source model uses an Opportunity field to assign influence. To assign 100% of revenue share, enter a campaign in the Primary Campaign Source field instead of creating a campaign influence record.

1. On an opportunity record, find the Campaign Influence related list.
2. Click **New**.
3. Enter a campaign name or search for one.
4. Enter an attribution percentage in the **Influence (%)** field.

New Campaign Influence

Detail Information

Campaign Influence Model
Custom Model

* Opportunity
AbataOppty

* Campaign
Origin camp

Contact
Search Contacts...

Influence (%)
30.00%

Cancel Save

5. Click **Save**.

See Also

[Add Customizable Campaign Influence Related Lists](#)

Find Campaign Influence Results

Customizable Campaign Influence offers a few ways to explore these influential relationships, from the record-level to a more aggregate view.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

To get granular data about specific records, check out the related lists on opportunities, campaigns, and accounts.

- For opportunities and accounts, review the Campaign Influence related list.
- For campaigns, review the Influenced Opportunities related list.

To get a broader view of your opportunity pipeline, generate the Campaigns with Influenced Opportunities (Customizable Campaign Influence) standard report. This report provides opportunity data, such as amount, stage, and revenue share, alongside helpful campaign details. The Contact column includes primary campaign members only. The Opportunity Contact Role object and cross-filtering aren't available in this report. After you generate a source report, you can create a dashboard.

For more control, build custom reports that show relationships such as these examples.

- Campaigns with Influenced Opportunities
- Opportunities with Campaign Influence
- Contacts with Campaign Influence
- Accounts with Campaign Influence

Campaign Influence 1.0

Campaign Influence 1.0 helps identify the return on your campaign investments. It uses the Campaign Influence object to make connections across contacts, campaigns, and opportunities. Campaign Influence 1.0 isn't supported in Lightning Experience. To track influential campaigns in Lightning Experience, switch to Customizable Campaign Influence.

REQUIRED EDITIONS

Available in: Salesforce Classic

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

! **Important** For new users, Customizable Campaign Influence is enabled by default. Not sure which version of Campaign Influence you have? Search Setup for *campaign influence*, and check the available pages. If the Model Settings page appears, you're using [Customizable Campaign Influence](#).

Primary Campaign Source

Only one campaign in a related list can be marked as the primary campaign source, because it allocates 100% of the attribution to the selected campaign. When you mark a campaign as primary, it's added to

the Primary Campaign Source field on the opportunity. For more flexibility, check out Customizable Campaign Influence.

Opportunity statistics, such as Opportunities in Campaign and Won or Closed values, appear only on the campaign marked as the primary source. Opportunity statistics don't appear on other influential campaign records.

Before you select a primary source campaign, consider workflows or Apex rules that are triggered by changes to an opportunity record.

Auto-Association Settings

With Campaign Influence 1.0, you can choose whether to enable auto-association. When it's turned on, influential campaigns are automatically added to an open opportunity record when a campaign's related contact is assigned an opportunity contact role. You can also apply rules that specify which types of campaigns are considered influential.

- In the Campaign Influence Eligibility Limits section, the time frame field specifies a time period during which a campaign is considered influential. The time frame is the number of days between the date that a contact is added to a campaign and when a related opportunity is created.
- Eligibility limits work only when a contact is related to a campaign first and then assigned an opportunity contact role. Auto-association ignores contacts who are added to campaigns after the related opportunity is created.



Example Admin Kim enables auto-association and enters a Campaign Influence time frame of 10 days. Customer Gerrie engages with an email and their contact record is added to the New Services campaign on June 15. The next day, Gerrie talks to Parul in Sales, and Parul adds them to an opportunity and assigns an opportunity contact role. The New Services campaign is automatically added to the Campaign Influence related list.

Auto-Association

Use auto-association rules to automatically create campaign influence records.

Auto-Association

Enabled

Automatically adds Campaign Influence to an opportunity. For the campaign to auto associate, the contact on the opportunity must be assigned a contact role prior to the opportunity close date and also be a Campaign Member on the campaign.

Disabled

Deactivate auto-association. If auto-association was previously enabled, disabling will remove influence records that were created manually as well as by auto-association.

Campaign Influence Eligibility Limits

Limit whether a campaign is influential by specifying the maximum number of days between a contact's association with the campaign and the opportunity's creation date.

Campaign Influence Time Frame days

Auto-Association Rules

Association rules specify additional criteria for automatic association.

Field	Operator	Value	Logic
Type	equals	Webinar, Email	AND
--None--	--None--		

[Add Filter Logic...](#)

Save **Cancel**

If Parul doesn't assign an opportunity contact role to Gerrie, the campaign isn't added to the related list by auto-association. If Gerrie waits until June 26 to contact Sales, the campaign isn't considered influential, so it isn't added to the related list.

Configure Campaign Influence

To enable Campaign Influence 1.0, add the Campaign Influence related list to Opportunity page layouts and decide whether to configure the optional auto-association settings.

Add Campaign Influence Manually

You can track campaign influence manually by adding it to the Campaign Influence related list. When you add to a campaign manually, you don't select a specific contact, so names and campaign member statuses aren't shown.

Configure Campaign Influence

To enable Campaign Influence 1.0, add the Campaign Influence related list to Opportunity page layouts and decide whether to configure the optional auto-association settings.

REQUIRED EDITIONS

Available in: Salesforce Classic

Available in: Salesforce Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS NEEDED

To set up Campaign Influence:

Customize Application

Note This information applies only to Campaign Influence 1.0 and not to [Customizable Campaign Influence](#).

1. From Setup, in the Quick Find box, enter *Opportunities*, and select **Page Layouts**.
2. Select a page layout to work with.
3. Drag in the Campaign Influence related list.
4. To turn on auto-association, enter *Influence* in the Quick Find box, open **Auto-Association Settings**, and then select **Enabled**.
5. To customize auto-association, enter a time frame or other rules to limit when a campaign is auto-associated.

Auto-Association

Help for this Page

Use auto-association rules to automatically create campaign influence records.

Auto-Association

Enabled
Automatically adds Campaign Influence to an opportunity. For the campaign to auto associate, the contact on the opportunity must be assigned a contact role prior to the opportunity close date and also be a Campaign Member on the campaign.

Disabled
Deactivate auto-association. If auto-association was previously enabled, disabling will remove influence records that were created manually as well as by auto-association.

Campaign Influence Eligibility Limits

Limit whether a campaign is influential by specifying the maximum number of days between a contact's association with the campaign and the opportunity's creation date.

Campaign Influence Time Frame days

Auto-Association Rules

Association rules specify additional criteria for automatic association.

Field	Operator	Value	Logic
Type	equals	Webinar, Email	AND
--None--	--None--		

[Add Filter Logic...](#)

Save **Cancel**

6. Save your work.

When auto-association is enabled and the campaign meets the criteria that you specified, it's added automatically to the related list on an open opportunity. The entry includes the contact's name, contact role, and campaign member status.

If you don't enable auto-association, users manually add campaigns to the related list.

Add Campaign Influence Manually

You can track campaign influence manually by adding it to the Campaign Influence related list. When

you add to a campaign manually, you don't select a specific contact, so names and campaign member statuses aren't shown.

REQUIRED EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS NEEDED

To view the Campaign Influence related list:

Read on campaigns

AND

Read on opportunities

To manually add influential campaigns:

Read on campaigns

AND

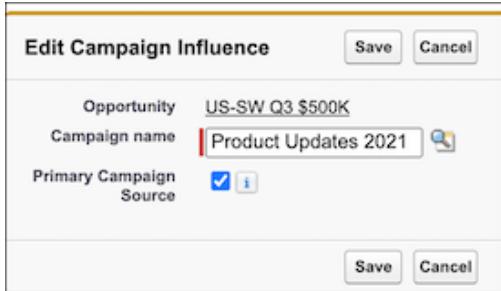
Read and Edit on opportunities

AND

Marketing User selected in User Detail

 **Note** This information applies only to Campaign Influence 1.0 and not to [Customizable Campaign Influence](#).

1. Open an opportunity record.
2. Find the Campaign Influence related list, and click **Add to Campaign**.
3. Enter a campaign name or use the lookup.



4. To allocate 100% of the influence to a campaign, select **Primary Campaign Source**. You can select only one campaign as the primary campaign source. To change the selection, deselect the checkbox on one campaign so that you can add it to another.

Connect Account Engagement and Salesforce Campaigns

If you're new to Salesforce and Account Engagement, the Connected Campaigns feature is already partially enabled. Connect campaigns to save time, reduce clutter, and access valuable cross-product features. For example, work with Campaign Influence attribution models, Engagement History, and Einstein Campaign Insights for a complete view of your business. Plus, you can work with prospects and engagement data without leaving Salesforce.

REQUIRED EDITIONS

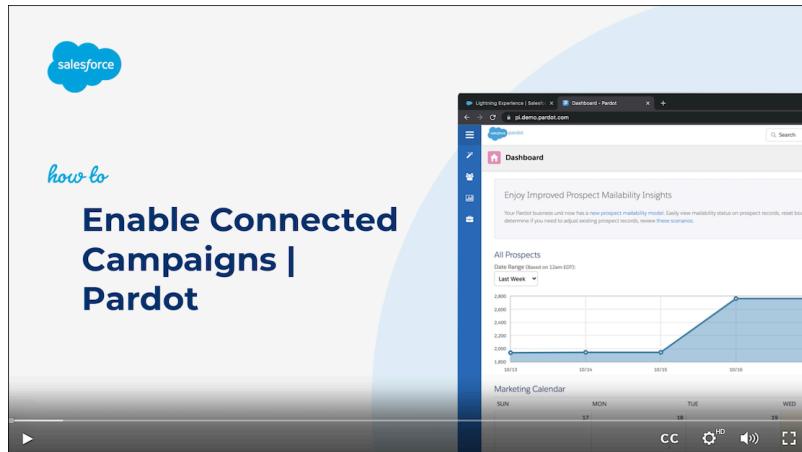
Available in: Salesforce Classic and Lightning Experience

Available in: All Account Engagement Editions with Salesforce **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

To streamline the way that you provide multifaceted campaign data to sales and marketing teams, connect your Salesforce and Account Engagement campaigns. As a prospect interacts with the marketing assets on a Account Engagement campaign, metrics are pushed to its equivalent Salesforce record. From there, marketers can track influence, and sales users can clearly see the prospect's journey to becoming an opportunity.

-  **Note** If you purchased Account Engagement after March 22, 2019, Connected Campaigns is partially enabled by default. You can create campaigns in Salesforce only and have access to Engagement History features.

Play a Demo:  [Enable Connected Campaigns \(English Only\)](#)



Get Started with Connected Campaigns

If you purchased Account Engagement after March 22, 2019, Connected Campaigns is partially enabled by default. To configure campaigns to work best for your business, complete a few tasks.

Considerations for Connecting Campaigns

If you're setting up Connected Campaigns in a business unit with existing campaigns, keep these considerations in mind.

Migrate to Connected Campaigns

Use Salesforce campaigns to align with revenue teams and get access to Salesforce reporting and other platform functionality. To activate these benefits, users who have Account Engagement campaigns must enable Connected Campaigns and map their records.

Campaign Member Sync

As you connect your campaigns, decide whether to sync prospects into those campaigns. When you turn on Member Sync for connected campaigns, prospects appear in Salesforce as campaign members.

See Also

[Show Engagement History on Records](#)

[Connect Multiple Campaigns at Once](#)

Get Started with Connected Campaigns

If you purchased Account Engagement after March 22, 2019, Connected Campaigns is partially enabled by default. To configure campaigns to work best for your business, complete a few tasks.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: All Account Engagement Editions with Salesforce **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS NEEDED

To connect campaigns: Account Engagement Administrator role

-  **Note** Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

To work with Account Engagement Campaigns in Account Engagement Lightning App, add the Account Engagement Campaigns tab to the navigation.

1. Open the Connected Campaigns page.
 - In Account Engagement, open **Settings** and click **Edit**. Scroll to Connected Campaigns.
 - In the Lightning app, select **Account Engagement Settings** and then **Connectors**. Click the gear icon to edit the Salesforce connector, and select the **Campaigns** tab.
2. In the campaign record types section, deselect Master Record Type.
3. Create a Account Engagement record type to use for syncing Salesforce campaigns.
 - a. From the Campaigns tab, click  and select **Edit Object**.
 - b. Click **Record Types**, and then **New**.
 - c. Create and save one or more record types to use with Account Engagement campaigns.
4. Create Salesforce campaigns for default Account Engagement campaigns.

- a. From the Campaigns tab, click **New**.
 - b. Create three campaigns: Website Tracking, Email Plug-In, and Salesforce Sync.
5. From the Account Engagement Campaigns tab, map default Account Engagement campaigns.
- a. For the Email Plug-In campaign, click the action menu and select **Connect to CRM Campaign**.
 - b. Select the Email Plug-In Salesforce campaign that you created in Step 4.
 - c. Repeat these steps for the Website Tracking and Salesforce Sync campaigns.
- If you have any other existing Account Engagement campaigns, repeat steps 4 and 5 for them so that every campaign has a counterpart. For a large number of existing campaigns, you can [connect them in bulk](#).
6. Return to the Salesforce Connector setup page in Account Engagement Settings, and then enter a default campaign.
- a. Open the **Connector Settings** tab, and select **Automatically create prospects in Pardot if they are created as a Lead or Contact in Salesforce**.
 - b. In the dropdown, select the Salesforce Sync campaign that you created in Step 4.
7. Return to Connected Campaigns settings and turn over campaign management to Salesforce.
- a. From the Salesforce Connector setup page, click **Campaigns**.
 - b. In the campaign record types section, select the Account Engagement record type that you created in Step 3.
 - c. Select **Use Salesforce to manage all campaigns**.

Now you're ready to start creating Salesforce campaigns. Each time you create a campaign in Salesforce, an equivalent campaign is created in Account Engagement. That Account Engagement campaign generates new prospects and tracks marketing engagement, which appears as Engagement History on your campaign records.

To automatically create lead records from new prospects, add an assignment completion action to your marketing forms.

To automatically add prospects as members to a campaign, create an automation.

Considerations for Connecting Campaigns

If you're setting up Connected Campaigns in a business unit with existing campaigns, keep these considerations in mind.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: All Account Engagement Editions with Salesforce **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Before You Start

- Create an equivalent Salesforce campaign for each Account Engagement campaign, including the

- default Account Engagement campaigns Website Tracking, Email Plug-In, and Salesforce Sync.
- Organize and dedupe existing Account Engagement campaigns.
- Create the Salesforce record types that you plan to use when syncing campaigns.

Requirements

- Connected Campaigns requires a verified Salesforce connector, a Salesforce login, and an admin to enable the feature.
- For the best experience, don't turn off Connected Campaigns after you turn it on.

About Record Types

Important Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

- To limit which counterpart campaigns are created in Account Engagement, use record types with Connected Campaigns. In the Connected Campaigns settings, you can deselect record types, if they aren't needed.
- For best performance, use record types to sync only the campaigns that you expect to connect frequently. It takes time to load all the campaigns in the menu that you use to connect Salesforce campaigns—the fewer campaigns to choose from, the better.
- The Master record type is the default record type for new records. To avoid syncing unnecessary Salesforce campaigns, we recommend that you don't choose this record type. Work with your Salesforce admin to create alternate record types.
- To connect more than one Account Engagement business unit to a single Salesforce org, create different campaign record types for each business unit.

After You Connect Campaigns

- Salesforce copies marketing forms, marketing links, and list emails from Account Engagement campaigns to their connected Salesforce campaigns. This data counts against your company's data storage limits.
- The Account Engagement campaign record becomes read-only, so always create campaigns from the Campaigns tab in Salesforce.
- When campaigns are connected, Salesforce replaces the values of these Account Engagement campaign fields, which can't be undone.
 - Name
 - Archive Date (maps to End Date on Salesforce campaigns)
 - Cost
 - Created By
 - Updated By
 - Updated At
- Some actions associated with Account Engagement campaigns are removed. The Add Campaign and Connect to CRM Campaign actions no longer appear on the Account Engagement Campaigns tab,

- and the Account Engagement Campaigns recycling bin is no longer available.
- You can use only active campaigns in automations and completion actions.

 **Note** To support Account Engagement features available within Sales Cloud, Salesforce added a user called B2BMA Integration User to all Salesforce customers who also have Account Engagement. This new user is read-only, doesn't affect your Salesforce license usage, and can't access or update data by default. If you choose to opt in to the new Account Engagement features available in Sales Cloud, this user enables campaign and engagement data to be shared and copied between the two systems.

See Also

[Account Engagement Integration User](#)

Migrate to Connected Campaigns

Use Salesforce campaigns to align with revenue teams and get access to Salesforce reporting and other platform functionality. To activate these benefits, users who have Account Engagement campaigns must enable Connected Campaigns and map their records.

 **Note** If you purchased Account Engagement after March 22, 2019, Connected Campaigns is partially enabled by default. Review [Get Started with Connected Campaigns](#) to find mapping and configuration instructions.

[Enable Connected Campaigns](#)

When you enable Connected Campaigns, decide which record types you want to connect and create.

[Connect Individual Campaigns Between Account Engagement and Salesforce](#)

You can map an Account Engagement campaign to a Salesforce campaign to track campaign activities.

[Connect Multiple Campaigns at Once](#)

The easiest way to audit and organize your campaigns in bulk is to download our mapping workbook. It contains your campaign names and IDs in three worksheets. Copy and paste values from the workbook tabs to align the campaigns in the Connect tab. Then, upload the completed file.

[Connect Existing Campaigns with Salesforce Data Loader](#)

Connect multiple existing Account Engagement campaigns to new Salesforce campaigns in bulk using Salesforce Data Loader.

See Also

[Salesforce Support Video: Enable Connected Campaigns | Account Engagement \(Pardot\)](#)

Enable Connected Campaigns

When you enable Connected Campaigns, decide which record types you want to connect and create.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: All Account Engagement Editions with Salesforce **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS NEEDED

To connect campaigns: Account Engagement Administrator role

 **Note** Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

Before you enable the feature or begin connecting campaigns, we recommend that you outline how your campaigns relate to each other. Consider the following tasks. For best results, make sure that every campaign you want to use has a counterpart.

- Identify the Account Engagement campaigns that you want to keep. Do their equivalent Salesforce campaigns exist?
- Identify the Salesforce campaigns that you want to keep. Do their equivalent Account Engagement campaigns exist?
- Identify which Account Engagement campaigns, if any, must stay in Account Engagement only.
- Create record types or assignments to organize your campaigns.

When the preparation is complete, head over to Account Engagement Settings and get started with Connected Campaigns.

 **Note**

- The B2BMA Integration user doesn't need the Account Engagement Marketing User role to enable and work with Connected Campaigns.
- Make sure that you create counterpart campaigns in Salesforce for Account Engagement default and required campaigns, including Website Tracking and Salesforce Sync. If you aren't using the Email Plug-in campaign, delete it before you connect.
- A Account Engagement campaign is updated or created each time the Salesforce campaign is edited by a person or process. To limit the number of campaigns created in Account Engagement, identify a cut-off date for replication.

1. Open the Connected Campaigns page.
 - In Account Engagement, open **Settings** and click **Edit**. Scroll to Connected Campaigns.
 - In the Lightning app, select **Account Engagement Settings** and then **Connectors**. Click the gear icon to edit the Salesforce connector, and select the **Campaigns** tab.
2. Select **Enable Connected Campaigns and Engagement History**.
3. Select the Salesforce campaign record types that can be connected.

4. Save your work.

The previous steps prepare your org for the alignment stage of setup. Unconnected campaigns continue to show in both places. Now, your marketing team can connect campaigns individually or in bulk.

After they're done, complete the setup process by giving Salesforce access to manage the campaigns.

- On the same connector settings page, select **Use Salesforce to manage all campaigns**.
- To reduce the number of campaigns that are replicated over time, enter a date under Limit Campaign Creation by Date.
- To let Account Engagement users continue to see the remaining unconnected campaigns, select **Show Unconnected Campaigns**.

Users now manage campaigns only in Salesforce.

See Also

[Salesforce Support Video: Enable Connected Campaigns | Account Engagement \(Pardot\)](#)

[Knowledge Article: Configuring Connected Campaigns: Recommended Order of Operations](#)

[Knowledge Article: Account Engagement - Connected Campaigns Setting are Not Getting Enabled](#)

Connect Individual Campaigns Between Account Engagement and Salesforce

You can map an Account Engagement campaign to a Salesforce campaign to track campaign activities.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: All Account Engagement Editions with Salesforce **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS NEEDED

To connect individual campaigns:	Account Engagement Marketing role
----------------------------------	-----------------------------------

1. Under Connected Campaigns settings, deselect **Use Salesforce to manage all campaigns**.
2. Open the Account Engagement Campaigns page.
 - In Account Engagement, select **Marketing** and then **Campaigns**.
 - In the Lightning app, select **Account Engagement Campaigns**. This tab isn't visible by default—an admin must add it.
3. Select the **Unconnected Campaigns** view.
4. For the Account Engagement campaign that you want to connect, click **Connect to CRM Campaign** and then select the associated Salesforce campaign.

See Also

[Account Engagement Integration User](#)

Connect Multiple Campaigns at Once

The easiest way to audit and organize your campaigns in bulk is to download our mapping workbook. It contains your campaign names and IDs in three worksheets. Copy and paste values from the workbook tabs to align the campaigns in the Connect tab. Then, upload the completed file.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: All Account Engagement Editions with Salesforce **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS NEEDED

To bulk connect campaigns: Account Engagement Administrator role

 **Note** Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

If you have more than 500 campaigns, it can take some time to download the workbook. We send an email to notify you when the file is available.

Here are a few tools the workbook offers to help you avoid data-entry errors.

- When a campaign has the same name in both apps and you add it to the Connect tab, the worksheet auto-fills the matching campaign.
- When a row is complete, it turns green.
- When a campaign is added to the Connect tab, its corresponding row is highlighted in its original tab, to indicate it's already been mapped.
- The Salesforce record type isn't required to map campaigns, but it's provided for your reference.
- Sometimes, associated campaigns are aligned automatically, so you can skip over them.
- You can upload only 3,000 rows on the Connect tab at one time. Split your import into multiple batches, if needed.

1. Open the Account Engagement Campaigns page.
 - In Account Engagement, select **Marketing** and then **Campaigns**.
 - In the Lightning app, select **Account Engagement Campaigns**. This tab isn't visible by default—an admin must add it.
2. Click **Connect Campaigns with Excel** and download the workbook.
3. In the Pardot tab of the workbook, copy a value from the Name column. Then, paste it into the Pardot Name column of the Connect tab.
4. In the Salesforce tab, copy the associated Salesforce campaign name. Back in the Connect tab, paste the name into the corresponding Salesforce Name field.
5. Delete unused rows from the worksheet.

- When you're finished aligning all the campaigns you want, upload the file.

See Also

[Connect Account Engagement and Salesforce Campaigns](#)

Connect Existing Campaigns with Salesforce Data Loader

Connect multiple existing Account Engagement campaigns to new Salesforce campaigns in bulk using Salesforce Data Loader.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: All Account Engagement Editions with Salesforce **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS NEEDED

To connect campaigns with Salesforce Data Loader: Account Engagement Administrator role

 **Note** Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

- Open the Account Engagement Campaigns page.
 - In Account Engagement, select **Marketing** and then **Campaigns**.
 - In the Lightning app, select **Account Engagement Campaigns**. This tab isn't visible by default—an admin must add it.
- Click **Bulk Connect Pardot Campaigns to New Salesforce Campaigns**.
Salesforce exports the file `NewConnectedCampaigns.csv`, which contains a list of your unconnected campaigns.
- If your org has required custom fields for campaigns, add a column for each custom field name to the CSV file.
- Log in with your Salesforce account credentials so you can [insert, update, or delete data using Data Loader](#).
- Select **Data**.
- Select **Show all Salesforce objects**, and select **Campaign**.
- Click **Browse**, and open the `NewConnectedCampaigns.csv` file.
- Click **Next** and after the object and CSV file are initialized, click **OK**.
- Salesforce Data Loader prompts you to map Salesforce campaign fields to the Account Engagement campaign fields in the CSV file. Accept the default mappings. If you added custom field columns to the CSV file, find the field on the left and select its corresponding CSV column.
- Click **Create or Edit a Map**, select **Auto-Match Fields to Columns**, and then click **OK**.

A confirmation page shows the field mappings and the number of new Salesforce campaign records to

be created.

11. Click **Next**, choose the folder to save the campaigns in, and select **Finish**.

Salesforce Data Loader reports the number of campaigns created and any failures. If a campaign fails to create, the reason is listed in the ERROR column. After a short wait, the newly connected campaigns appear in the Connected Campaigns view on the Account Engagement Campaigns page.

When you use Salesforce Data Loader to map campaigns, the Pardot Campaign ID field is added to your records for organization purposes. This field isn't shown on campaigns mapped via other methods, so we recommend that you don't use the field in reports or page layouts.

Campaign Member Sync

As you connect your campaigns, decide whether to sync prospects into those campaigns. When you turn on Member Sync for connected campaigns, prospects appear in Salesforce as campaign members.

REQUIRED EDITIONS

Available in: **Professional, Enterprise, Performance, and Unlimited** Editions and All Account Engagement Editions

Considerations for Member Sync

When using Member Sync, keep these considerations in mind.

Sync Campaign Members

To sync campaign members between Account Engagement and Salesforce, turn on Member Sync.

Considerations for Member Sync

When using Member Sync, keep these considerations in mind.

REQUIRED EDITIONS

Available in: Salesforce **Professional, Enterprise, Performance, and Unlimited** Editions with any Account Engagement Edition

How It Works



Warning After you turn on Campaign Member Sync, we recommend that you keep it enabled at all times. The configuration affects other processes and can cause data discrepancies if it's disabled later. If Campaign Member Sync is disabled for more than 48 hours and re-enabled, complete a full sync to make sure all pending Campaign members are synced.

Campaign Member Sync shows your prospects in Salesforce as campaign members. The sync works only

from Account Engagement to Salesforce, so campaign member changes aren't reflected in associated Account Engagement campaigns.

Before you can use member sync, Connected Campaigns must be enabled. To sync a prospect, assign it to an Account Engagement user and associate it with an Account Engagement campaign.

To indicate that a first touch came from an Account Engagement campaign, synced campaign members show a status of Connected. If a campaign member is missing or doesn't show a Connected status, verify that the prerequisites for syncing have been met.

- The connector user or integration user has Edit permission on Campaigns.
- Marketing User is selected on its Salesforce user record.

To add campaign members after the first touch, create a completion action. For more recent marketing engagement activity, view the prospect record.

Other Considerations

- If the prospect shares an email address with another Salesforce contact, the record is synced as a contact. Otherwise, the prospect syncs as a lead.
- When you enable Campaign Member Sync, prospects sync retroactively for campaigns that are already connected.
- Campaign Member Sync doesn't archive or delete lead or contact records from Salesforce. Remove associated records from Salesforce manually.
- The campaign member created date in Salesforce refers to when the prospect was synced, not the creation date in Account Engagement.
- Campaign Member Sync works alongside other prospect syncing jobs.
- Expect slower sync times when a connected campaign has more than 10,000 prospects.

Sync Campaign Members

To sync campaign members between Account Engagement and Salesforce, turn on Member Sync.

REQUIRED EDITIONS

Available in: **Salesforce Professional, Enterprise, Performance, and Unlimited Editions** with any Account Engagement Edition

USER PERMISSIONS NEEDED

To turn on Member Sync: Account Engagement Administrator role

Before you turn on Member Sync, make sure that the prospects you want to sync are assigned to users. Next, turn on Connected Campaigns, and then return to Account Engagement Settings to enable Member Sync.

 **Warning** Enabling Campaign Member Sync is a permanent change and can't be undone.

1. Open the Connected Campaigns page.
 - In Account Engagement, open **Settings** and click **Edit**. Scroll to Connected Campaigns.
 - In the Lightning app, select **Account Engagement Settings** and then **Connectors**. Click the **Settings** icon to edit the Salesforce connector, and select the **Campaigns** tab.
2. Select **Enable Campaign Member Sync**.
3. Save your work.

Allow some time for campaign members to show up in Salesforce campaigns.

Leads

Track prospects apart from your contacts and opportunities with Salesforce lead records. After you've qualified your lead records, convert them to contacts and create accounts for them (if you don't already have the accounts in Salesforce). And hopefully, create opportunities to bolster your pipeline.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer** Editions with Sales Cloud

Regardless of whether you're working in Lightning Experience or Salesforce Classic, you work with a list of leads. From the list, you quickly create, locate, and work with the leads you're focusing on at the moment.

Associate relevant events and tasks with those leads. And convert your qualified leads to contacts that have opportunities associated to them. For any lead records that you mark Unqualified, plan to revisit them later to see whether those prospects' needs for your products and services changed.

[Planning Your Leads Implementation](#)

Before you set up lead management, answer these questions to make sure that you have the information that you need to set up and use leads.

[Set Up Leads](#)

Configure leads to make them work for your sales department.

[Manage Leads](#)

View, update, and convert leads as you build your pipeline.

[Things to Know About Leads](#)

Review considerations, guidelines, and tips for leads.

See Also

[View and Convert Leads on an Account](#)

Planning Your Leads Implementation

Before you set up lead management, answer these questions to make sure that you have the information that you need to set up and use leads.

REQUIRED EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer** Editions with Sales Cloud

- Do you need to customize fields to meet your business needs?
- What information should be available on leads?
- Do you want to create email templates for lead assignment rules or auto-response rules, or to send to prospects who are interested in your company?
- How do you want to route incoming leads?
- Where are you planning to capture leads?
- Who should have access to leads?
- Do you have leads to import into Salesforce?

 **Note** If you have Enterprise, Unlimited, or Performance Edition, you can create a complete single copy of your organization in a separate environment, called a sandbox, to test your changes before implementing them in your Salesforce organization. See [Create a Sandbox](#).

Do you need to customize fields to meet your business needs?

Leads in Salesforce have default fields such as **Lead Source** and **Lead Status** but you can [customize](#) them to help you track your leads better. Also, you can [create custom fields](#) to meet your specific business needs.

Consider these suggestions for planning custom fields:

- Customize the **Lead Source** field. This field indicates the marketing channel used to get the lead. By default, the **Lead Source** field includes sources like Web, advertisement, and trade show. Your company may generate leads based on other sources, which you can add to the **Lead Source** field. For example:
 - Email
 - Events
 - Purchased lists of leads
 - Leads captured from your website
- Customize the **Lead Status** field. This field indicates the state of the lead in the pre-sales process of turning a lead into an opportunity. Some default values for the **Lead Status** field include Open, Contacted, and Qualified. These values may not match your pre-sales process, so you may want to add other values.

- [Create custom fields](#). Salesforce provides standard lead fields, but you'll likely want to track additional information specific to your business. Create a list of all the attributes you want to track. Then, prepare a list of all the custom fields you need to create for each attribute.
- [Map custom fields](#). Salesforce automatically maps standard lead fields to standard account, contact, and opportunity fields when you convert a lead into an account, contact, and opportunity. Custom lead fields can be mapped to custom account, contact, or opportunity fields. Before converting a lead, create the appropriate custom account, contact, or opportunity fields. Then, set the appropriate mapping for the custom lead fields.

What information should be available on leads?

If you want to make some fields read only or required and hide other fields completely, [customize your lead page layout](#).

Before customizing your lead page layout, think about how you plan to use it. Here are some things to consider:

- Fields that should be visible
- Fields that should be editable
- Fields that should be required
- Related lists that you want on the lead page layout
- Custom links that you want on the lead page layout

Do you want to create email templates for lead assignment rules or auto-response rules, or to send to prospects who are interested in your company?

To get started quickly, [create text email templates](#) using Salesforce merge fields. Merge fields are placeholders for variable text that you want replaced with data from your records.

Determine how many email templates you need. For example, you may need email templates for:

- Reps to use as introductions, company overviews, invitations to events, seminar invitations, or thank you notes
- Capturing leads online by sending email to people who submit forms on your website
- Sending your users a notification when they are assigned a new lead



Note You may want to create folders to organize your email templates and ensure that they are available to the appropriate users.

How do you want to route incoming leads?

When incoming leads are imported or generated through your website, Salesforce automatically assigns them to users or queues. You can [define assignment rules](#) to ensure the leads go to the right owner.

Consider the following when planning assignment rules:

- How leads will be assigned, for example, based on territory, product interest, or on a lead assignment hierarchy
- If leads will be assigned to users or queues, which allow members of the queue to take ownership of the leads
- The lead attributes that determine how a lead is routed, for example, by geography

Where are you planning to capture leads?

If you already have a product inquiry page on your website where customers can enter contact information, you can easily customize the HTML and redirect the information to Salesforce using [web-to-lead](#). Or connect [LinkedIn Lead Gen](#) advertisements to Salesforce. When prospective customers fill out a form with their information, we convert the data directly to new leads in Salesforce.

Consider the following when planning your web-to-lead or LinkedIn ad implementation:

- Design a default email template that reflects your company brand and messaging to send to people who submit inquiries through your website or an ad.
- Set up auto-response rules that determine when to send custom lead-specific email templates.
- Consider custom lead fields that you want captured.

Who should have access to leads?

It may be important to your company to limit the visibility of leads. [Select the sharing model](#) that fits the level of visibility you want.

- Public Read/Write/Transfer: Users can view, edit, and transfer ownership of any record, regardless of owner
- Public Read/Write: Users can view and edit any record regardless of owner, but cannot change the record owner
- Public Read Only: Users can view any record but only edit ones they own
- Private: Only lead owners, their managers, and Salesforce admins have access to view and edit their leads

Do you have leads to import into Salesforce?

If you have leads that aren't yet in Salesforce, you can import them so that all your leads are in one place. [Importing your lead data into Salesforce](#) is easy, regardless of what application you use.

Before you import your data from another source:

- Determine if you need to create custom fields to accommodate imported data that isn't tracked in standard fields.
- Decide if you want to use [assignment rules](#), for example, to auto-assign leads when you import them.

Set Up Leads

Configure leads to make them work for your sales department.

Configure Lead Management

Help your sales team track prospects and build a strong pipeline of opportunities. Your sales teams use Salesforce leads to work and qualify their prospects with the goal of creating opportunities.

Define Default Settings for Lead Creation

Optimize lead management features for your sales teams so they can nurture leads efficiently.

Generate Leads from Your Website with Web-to-Lead

Automatically generate up to 500 leads per day with the prospecting data from your company's website visitors. When you set up Web-to-Lead, Salesforce captures prospects who provide contact information. You can also redirect prospects to other web pages that are critical to campaign success.

Generate Leads with Buyer Assistant

Buyer Assistant bots include CRM-powered dialogs and automation flows that notify relevant team members when a customer is chatting, intelligently route leads to your sales team, and schedule customer meetings for your sales team. After creating a buyer assistant, you can personalize the conversation experience and adjust the built-in flows to meet your business needs. Use the guided onboarding experience to get your buyer assistant up and running quickly.

Generate Leads from LinkedIn Lead Gen Ads

Add another source of leads for your sales team by connecting LinkedIn Lead Gen advertisements to Salesforce. When prospective customers fill out a form on your LinkedIn ad, we convert the data directly to new leads in Salesforce.

Let Users View and Edit Converted Leads

Assign the View and Edit Converted Leads permission to marketing and sales operations who need access to view and edit converted leads.

Map Custom Lead Fields for Lead Conversion

Get the most out of records created from converted leads when you map custom lead fields to fields on the records they're converted to. Using custom fields can provide more context about the opportunity, and provide ways to highlight records for use in flows and other means.

Enable Lead Conversion in the Salesforce Mobile App

In Salesforce for Android and iOS, users can convert leads in much the same way as the full Salesforce site. Make this option available to sales reps in a few steps.

Configure Lead Management

Help your sales team track prospects and build a strong pipeline of opportunities. Your sales teams use Salesforce leads to work and qualify their prospects with the goal of creating opportunities.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer** Editions with Sales Cloud

USER PERMISSIONS NEEDED

To set up leads:	Modify Application
To map lead fields:	Customize Application

Using leads can give your sales staff access to the latest prospects and ensures that no leads are dropped. Successful lead management helps sales and marketing manage the inbound lead process, track lead sources, and analyze return on their marketing investment.

From Setup, get started using lead management.

1. Turn on Lead Intelligence View (Lightning Experience only).
 - a. Enter *Lead Intelligence View* in the **Quick Find** box, then select **Lead Intelligence View Setup**.
 - b. Turn on Lead Intelligence View and add the Intelligence View button to your lead page layouts.
 - c. To get the most out of Lead Intelligence View, turn on Einstein Activity Capture.
2. Go to the object management settings for leads.
 - a. From the fields section, create custom lead fields that track information specific to your company.
 - b. Map your custom lead fields to account, contact, and opportunity fields so that the data gets converted when users convert leads.
 - c. To choose the default status for new and converted leads, edit the **Lead Status** picklist.
3. Specify your default lead settings.
 - a. Enter *Lead Settings* in the **Quick Find** box, then select **Lead Settings**
 - b. Users who convert leads become the new lead owner. To prevent the Lead Status value from changing to the new owner's default value, turn on **Preserve Lead Status**.
4. To set up lead assignment rules that automatically assign leads, enter *Assignment Rules* in the **Quick Find** box, then select **Lead Assignment Rules**.
5. (Optional) To automatically capture leads from your website, enter *Web-to-Lead* in the **Quick Find** box, then select **Web-to-Lead**.
6. (Optional) If your business uses LinkedIn Lead Gen ads, enter *LinkedIn Lead Gen* in the **Quick Find** box, then click **LinkedIn Accounts**.
7. To let your marketing and sales operations teams edit converted leads, assign those users the "View and Edit Converted Leads" permission.
8. To create sales queues for leads or custom objects, from Setup, enter *Queues* in the **Quick Find** box, then select **Queues**.

See Also

- [Generate Leads from Your Website with Web-to-Lead](#)
- [Let Users View and Edit Converted Leads](#)
- [Map Custom Lead Fields for Lead Conversion](#)
- [Create Queues](#)
- [Generate Leads from LinkedIn Lead Gen Ads](#)

Define Default Settings for Lead Creation

Optimize lead management features for your sales teams so they can nurture leads efficiently.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer** Editions with Sales Cloud

USER PERMISSIONS NEEDED

To change lead settings: Customize Application

1. From Setup, enter *Lead Settings* in the **Quick Find** box, then select **Lead Settings**, and then click **Edit**.
2. Define the default lead owner and lead conversion settings.
3. Save your settings.

Generate Leads from Your Website with Web-to-Lead

Automatically generate up to 500 leads per day with the prospecting data from your company's website visitors. When you set up Web-to-Lead, Salesforce captures prospects who provide contact information. You can also redirect prospects to other web pages that are critical to campaign success.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To set up Web-to-Lead: Customize Application

To act as the default lead creator for Web-to-Lead:
Modify All Data

AND

Send Email

AND

Access Activities

To use spam filtering, you must have a reCAPTCHA key pair. Keep in mind that enabling reCAPTCHA is optional.

-  **Important** reCAPTCHA is a Google service. Make sure that reCAPTCHA is supported in your geography.

1. From Setup, enter *Web-to-Lead* in the Quick Find box, then select **Web-to-Lead**.
2. To turn on or change Web-to-Lead settings, click **Edit**.
3. Optionally, select **Require reCAPTCHA Verification** to reduce spam and reject leads without verification.

In orgs created after Winter '19, this setting is enabled by default.

4. Specify a Default Lead Creator. This user is listed as Creator when a lead is created online. The default lead creator must have the Modify All Data, Send Email, and Access Activities permissions, granted via a permission set or a user profile. Don't use a combination of a permission set and a user profile to grant these permissions to this user.
 5. To automate email replies to prospects, specify a Default Response Template. You can set up response rules to use different email templates based on the information prospects provide. The default response template is used when no auto-response rules apply. Templates must be marked Available for Use.
 6. Click **Save**.
 7. To create a form that captures prospect details on your website, click **Create Web-to-Lead Form**, and then select fields you want to include.
 8. Select fields to include on your Web-to-Lead form. Use the Add and Remove arrows to move fields between the Available Fields list and the Selected Fields list. Use the Up and Down arrows to change the order of the fields on your form.
 - a. Select the **Campaign** field.
 - b. If your company uses multiple currencies, add the **Lead Currency** field if you add currency amount fields. Without a Lead Currency, all amounts are captured in your corporate currency.
 - c. Use a custom multi-select picklist to allow potential customers to express interest in several products.
 - d. For organizations that use lead record types, select the **Lead Record Type** field if you want users to select a record type for web-generated leads.
 9. If your organization uses the Translation Workbench or has renamed tabs, select the language for the form labels shown on your Web-to-Lead form. The source of your Web-to-Lead form is always in your personal language.
 10. Specify the complete URL to direct users to after they submit their information and then click **Generate**. For example, you can use your company's home page for a thank you page.
 11. To add a reCAPTCHA widget to the lead submission form, select **Include reCAPTCHA in HTML**.
 - This setting is automatically selected and is read-only when **Require reCAPTCHA Verification** is enabled.
-  **Note** If **Include reCAPTCHA in HTML** is selected but **Require reCAPTCHA Verification** isn't, existing forms without reCAPTCHA keep working and continue to generate leads. We recommend that you enable **Require reCAPTCHA Verification** and then ensure that your HTML

on your website includes the reCAPTCHA validation code.

- Specify the reCAPTCHA API Key Pair using the lookup.
 - If you want to allow all traffic in the case that the Google reCAPTCHA servers aren't available, select **Enable server fallback**.
12. Copy the generated HTML code and provide it to your company's webmaster so they can incorporate it into your website.
13. Click **Finished**.

To test the Web-to-Lead form, uncomment these three lines in your code by removing the <!-- and --> from the beginning and end of each line.

```
<!-- <input type="hidden" name="debug" value=1> -->
<!-- <input type="hidden" name="debugEmail" -->
<!-- value="<<add emailId here>>"> -->
```

Replace **<<add emailId here>>** with your email address. When you submit the form, an email with debugging information is sent to that address.

Remove these three lines or recomment them before releasing the Web-to-Lead page to your website.

Leads generated from your website are initially marked with the default status specified by the Lead Status picklist.

For web leads generated as part of a campaign, the member status of the new leads is set to the Member Status value specified in the form. If the Member Status field isn't included in the form, the member status is set to the value you specify as the default. If you include the Campaign ID field on your form, Salesforce automatically inserts the lead as a campaign member. If you do, don't create any triggers or processes that insert campaign members from the generated leads.

In addition, new leads are marked as Unread, and are changed to Read when viewed or edited by the lead owner. To quickly locate their new leads, users can select the My Unread Leads list view.

See Also

- [Guidelines for Setting Up Web-to-Lead](#)
- [Validation Rules](#)
- [Define Validation Rules](#)
- [Capture Leads in Essentials with Web to Lead](#)

Generate Leads with Buyer Assistant

Buyer Assistant bots include CRM-powered dialogs and automation flows that notify relevant team members when a customer is chatting, intelligently route leads to your sales team, and schedule customer meetings for your sales team. After creating a buyer assistant, you can personalize the conversation experience and adjust the built-in flows to meet your business needs. Use the guided onboarding experience to get your buyer assistant up and running quickly.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in **Performance** and **Unlimited** Editions

Available with Sales Engagement, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Professional** and **Enterprise** Editions

USER PERMISSIONS NEEDED

To build and manage Buyer Assistant bots:

View Setup OR Lightning User Experience

AND

Customize Application OR Modify Metadata OR
Manage Bots

1. From Setup, in the Quick Find box, enter *Buyer*, and then select **Buyer Assistant (Beta)**.
2. To create a buyer assistant for web, click **Create**.
3. Follow the guided onboarding experience. After you create your assistant, assign the Messaging for In-App and Web User permission set to your sales team and sales leaders who supervise your team.
4. To continue setting your buyer assistant, see [Setting Up a Buyer Assistant](#).

Generate Leads from LinkedIn Lead Gen Ads

Add another source of leads for your sales team by connecting LinkedIn Lead Gen advertisements to Salesforce. When prospective customers fill out a form on your LinkedIn ad, we convert the data directly to new leads in Salesforce.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: all editions with Sales Cloud

USER PERMISSIONS NEEDED

To set up LinkedIn Lead Gen: Modify All Data

To act as the default lead creator for LinkedIn Lead Gen: Modify All Data

AND

Send Email

USER PERMISSIONS NEEDED

AND

Access Activities

Assign the new leads to the user you choose.

1. On the Lead Settings page in Setup, enable **Use LinkedIn Lead Sync APIs with Lead Forms** if it isn't already enabled.

2. From Setup, enter *LinkedIn Lead Gen* in the Quick Find box. Then click **LinkedIn Accounts**.

3. Connect a LinkedIn account to your Salesforce org.

Salesforce connects the ad accounts associated with this member account to your org. All forms associated with these ad accounts generate leads in Salesforce. We recommend associating this member account with all your LinkedIn ad accounts and company pages.

Leads submitted to LinkedIn before you connect an account don't sync to Salesforce automatically.

[Manually import](#) these leads.

4. Set up default values for leads from LinkedIn. From Setup, enter *LinkedIn Lead Gen* in the Quick Find box. Then click **Lead Gen Fields**.

5. Under Set Lead Defaults, enter values for the Default Lead Creator, Record Type, and Lead Source for leads generated from LinkedIn.

The default lead creator must have the Modify All Data, Send Email, and Access Activities permissions, granted via a permission set or a user profile. Don't use a combination of a permission set and a user profile to grant these permissions to this user.

6. Under Map Form Data, choose lead fields to receive the data from LinkedIn about the form each lead comes from.

Standard fields must use the string, picklist, text area, phone, date, email, datetime, or boolean data type. Custom fields must use the text or text area data type.

7. Under Map Lead Fields, choose lead fields to receive the data from LinkedIn about each lead.

Standard fields must use the string, picklist, text area, phone, date, email, datetime, or boolean data type. Custom fields must use the text or text area data type.

8. Under Map LinkedIn Questions to Custom fields, choose custom lead fields to capture data from your LinkedIn custom form questions.

LinkedIn Lead Gen forms let you ask up to 3 custom questions of your leads. For example, you can ask what their occupation is. When LinkedIn sends leads to Salesforce, it includes the text of each question and answer. Use a lead field to store each question and another for the answer provided by the lead. This way you can report on questions and answers by filtering leads by questions asked, using the fields you choose for the questions.

9. Under Consent Fields, choose the custom lead fields to capture data from your LinkedIn form consent fields.

LinkedIn consent fields let you track leads' preferences about communication and privacy. For example, you can have a consent called "Send me email" with a checkbox. In Setup, map one field to hold the name of the consent, "Send me email". Map another field to hold the response provided by the lead, either yes or no.

10. Under Hidden Fields, choose the custom lead fields to capture data from your LinkedIn form hidden

fields.

To capture campaign-specific data for each lead, use LinkedIn hidden fields. Salesforce sorts LinkedIn hidden fields into alphabetical order by field name before writing the values to the mapped fields. The first field in alphabetical order is always written to the first mapped field, and so on. Map the LinkedIn hidden fields to your Salesforce fields in alphabetical order.

See Also

[Generate Leads from Your Website with Web-to-Lead](#)

[External Link: View and download leads, metrics, and analytics for Lead Gen Form campaigns](#)

Let Users View and Edit Converted Leads

Assign the View and Edit Converted Leads permission to marketing and sales operations who need access to view and edit converted leads.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer** Editions with Sales Cloud

USER PERMISSIONS NEEDED

To assign a permission set to users:	Assign Permission Sets
--------------------------------------	--

Salesforce periodically indexes your unconverted leads to make them searchable. After lead conversion, Salesforce doesn't index the lead again. If a lead conversion takes place before it's indexed, or a user updates a lead after conversion, it isn't searchable.

1. From Setup, enter *Permission Sets* and select **Permission Sets**.
2. Click New.
3. Enter a name for the permission set and save.
4. Click **App Permissions** and then click Edit.
5. Under Sales, select the View and Edit Converted Leads permission.
6. Save the permission set.
7. From Setup, enter *Users* and select **Users**.
8. Select the user that you want to assign the new permission set to.
9. Scroll to the Permission Sets related list and then click **Edit Assignments**.
10. Assign the permission set to the user and save your changes.

The location where a converted lead appears depends on the interface that you use.

Where To see converted leads?	Lightning Experience	Salesforce Classic	The Salesforce Mobile App
Recent Items list	No	Yes	No
Recent Records list in the Global Navigation tab	Yes	No	No
Global Search Results	Yes	Yes	No
Global Search Most Recently Used list	Yes	No	No
Recently Viewed list views	Yes	Yes	Yes
Campaign Member related list (only leads added after conversion)	Yes	Yes	No
Custom Lead lookup fields	Yes	Yes	Yes
Lead reports	Yes	Yes	Yes
Recent Records on Home page	Yes	No	No

Users can't reverse a lead conversion.

Map Custom Lead Fields for Lead Conversion

Get the most out of records created from converted leads when you map custom lead fields to fields on the records they're converted to. Using custom fields can provide more context about the opportunity, and provide ways to highlight records for use in flows and other means.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer** Editions with Sales Cloud

USER PERMISSIONS NEEDED

To map lead fields:	Customize Application
---------------------	-----------------------

When sales reps convert qualified leads, the information from the standard lead fields appears in standard fields for contact, account, and opportunity records. If you set up custom lead fields, you specify how that custom information converts to custom fields in accounts, contacts, and opportunities.

1. From the object management settings for leads, go to the fields section, then click **Map Lead Fields**.
2. For each custom lead field, select a custom account, contact, or opportunity field into which you want the information inserted when you convert a lead. In Lightning Experience, a custom lead field can map to account, contact, and opportunity fields at the same time.

3. Save your work.

-  **Example** For example, you want to indicate that an opportunity was created from a lead. To do that, create a custom checkbox on the Lead object, defaulting it to selected. Create a custom checkbox on the Opportunity object called Created from Lead. Optionally, you can make these fields read only. Map the custom lead field to the custom opportunity field. When a lead is converted to an opportunity, the Created from Lead custom field will be checked. From here, you can use the Created from Lead field value to trigger a flow to update default opportunity values, such as Stage Name, Description, or Next steps.
-  **Note** In Lightning Experience and Salesforce Classic, custom field mapping for lead conversion is available in orgs that use Apex Lead Convert. Custom field mapping for lead convert isn't available in orgs that use the older PLSQL (Procedural Language for SQL) Lead Convert. If you have more than 2000 lead, account, contact, or opportunity fields in total, the lead field mapping page can become unresponsive. To improve performance, delete fields that aren't in use. You can also use Metadata API, Salesforce CLI, or VS Code Extensions to manage your lead mappings.

See Also

[Knowledge Article: Enable 'Use Apex Lead Convert'](#)

[Knowledge Article: Configure the Lead conversion process to specify default Opportunity field values](#)

Enable Lead Conversion in the Salesforce Mobile App

In Salesforce for Android and iOS, users can convert leads in much the same way as the full Salesforce site. Make this option available to sales reps in a few steps.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer** Editions with Sales Cloud

USER PERMISSIONS NEEDED

To enable lead conversion in the Salesforce Mobile Customize Application app:

1. From Lightning Experience Setup, enter *Lead Settings* in the Quick Find Box. Then click **Lead Settings**.
2. Click **Edit**.
3. Select **Enable Conversions for Salesforce Mobile**.
4. Save your changes.

See Also

[Leads: What's Different or Not Available in the Salesforce Mobile App](#)

Manage Leads

View, update, and convert leads as you build your pipeline.

[Lead Intelligence View](#)

View lead activity and engagement metrics, see insights, take action, and update records all in one place in the Lead Intelligence View.

[Leads List View Home](#)

Click the Leads tab to show the Leads List View or the Lead Intelligence View. Use the Leads List View to see a basic list of leads without advanced filtering or insights. For an enhanced view into leads, use the Lead Intelligence View.

[Display and Edit Leads](#)

Display, edit details, and share leads.

[Converting Leads](#)

After you qualify your leads, convert them to contacts, accounts, and opportunities.

[Merge Duplicate Leads](#)

Keep your records clean and free of duplicates so you can reach more customers and maintain better relationships with them.

[Reassign Leads from a Queue](#)

Accepting leads from a queue is an easy way to reassign leads to yourself.

Lead Intelligence View

View lead activity and engagement metrics, see insights, take action, and update records all in one place in the Lead Intelligence View.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer** Editions with Sales Cloud

USER PERMISSIONS NEEDED

To view Leads tab: Read on leads

To view leads: Read on leads

To create leads: Create on leads

To see the Intelligence View, go to the Lead home page and click **Intelligence View**. To return to the original list view, click **List View**.

In the Intelligence View, you can quickly filter your leads, see aggregate activity statistics for the resulting

records, and take action to reach out, right from the Leads tab.

To see detailed activity for individual records, click the side panel icon next to the record name. The side panel also includes email insights and Einstein Conversation Insights.

Lead activity metrics include:

- Total Leads: The total number of leads that meet your filter criteria.
- No Activity: Leads with no completed activities.
- Idle: Leads with past activity, but no completed activities in the last 30 days.
- No Upcoming: Leads with recently completed activity but no future activities scheduled.
- Overdue: Leads with activities that are overdue.
- Due Today: Leads with activities due today.
- Upcoming: Leads with activities due in the next 30 days.

Activity metrics include events as well as tasks.

Engagement metrics include:

- Leads not contacted
- Contact attempted
- Engaged
- Meeting scheduled
- Meeting declined
- Disqualified

To see the Lead Intelligence View, your Salesforce administrator must turn it on in Setup and add the Intelligence View button to the Lead List View button layout.

Leads List View Home

Click the Leads tab to show the Leads List View or the Lead Intelligence View. Use the Leads List View to see a basic list of leads without advanced filtering or insights. For an enhanced view into leads, use the Lead Intelligence View.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer** Editions with Sales Cloud

USER PERMISSIONS NEEDED

To view the Leads tab: Read on leads

To view leads: Read on leads

USER PERMISSIONS NEEDED

To create leads: Create on leads

Note these things about navigating and using the Leads List View in Lightning Experience. To go to the list view home from the Intelligence View, click **List View**.

- Select a view to broaden or narrow what's shown on the page. The page layout and your field-level security settings determine the fields that you see in the list view.
 - All Open Leads. All your open, assigned leads that you can see in your user hierarchy.
 - My Unread Leads. Your assigned leads that you haven't viewed or edited. This list only includes records that you own.
 - Recently Viewed Leads. The leads that you've viewed, with the most recently viewed lead listed first. This list includes records that you own and that other users in your user hierarchy own.
 - Today's Leads. The leads created today.
- To view the leads in a queue, select that queue list from the dropdown list. For each queue your Salesforce admin creates, Salesforce adds a corresponding queue list view. The org-wide sharing model for an object determines the access that users have to that object's records in queues.
 - Public Read/Write/Transfer: Users can view and take ownership of records from any queue.
 - Public Read/Write or Public Read Only: Users can view any queue but only take ownership of records from queues of which they're a member or, depending on sharing settings, if they're higher in the role or territory hierarchy than a queue member.
 - Private: Users can only view and accept records from queues of which they're a member or, depending on sharing settings, if they're higher in the role or territory hierarchy than a queue member.

Regardless of the sharing model, users must have the "Edit" permission to take ownership of records in queues of which they're a member. Salesforce admins, users with the "Modify All Records" object-level permission for Cases or Leads, and users with the "Modify All Data" permission, can view and take records from any Case or Lead queue regardless of their membership in the queue.

- To define your own list view, select New from the List View Controls menu (the small gear icon on the page).
- To manage leads, use inline editing capabilities and individual actions to update single leads. Or, select multiple leads to update statuses and to perform other quick actions.

What's Different in Salesforce Classic

The list view in Salesforce Classic is arranged differently and offers some different options.

- If your Salesforce admin has enabled Quick Create, you can add a lead using the Quick Create area in the sidebar on the leads home page. You can also click New next to the Recent Leads section to create a lead.
- Leads about reports are available in the Reports section. To generate a summary list of your leads, complete the information in the Summary Section and run the summary report.
- To manage your leads, select any of the options in the Tools section.
- If leads are shared with external contacts via Salesforce to Salesforce, choose one of the list views under **Leads from Connections** to view leads that your business partners have shared with you.

Display and Edit Leads

Display, edit details, and share leads.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer** Editions with Sales Cloud

USER PERMISSIONS NEEDED

To view leads: Read on leads

To change leads: Edit on leads

- **Display leads:** After you have located a lead, click the lead name to display detailed information. If hover details are enabled, hover over any lookup field on the detail page to view key information about a record before clicking into that record's detail page. If your admin sets up field validation rules for leads, Salesforce checks the lead field values whenever a lead owner views an unread lead. If any of the fields contain invalid information, an error is shown. You can correct the error by adding valid information to the field.
- **Edit lead details:** To update a lead, from the lead record, click **Edit**, and then change the fields you want to update. Optionally, select the **Assign using active assignment rule** checkbox below the lead detail to automatically reassign it using the active lead assignment rule. If the **Assign using active assignment rule** checkbox is selected and no assignment rule criteria is met, the lead is assigned to the Default Lead Owner. When you have finished, save your changes. Open activities associated with a lead aren't reassigned using the active lead assignment rule. To reassign a lead and its open activities, assign the lead to a new owner.
- **Edit leads in list views:** To update more than one lead from a list view in Salesforce Classic, select the leads you want to edit and then double-click the field value you want to change. To update more than one lead status in Lightning Experience, select the leads you want to edit and then choose **Change Status** from the Action menu. When updating Lead Statuses from a list view, all Lead Status values are available, even if your admin has created a Lead-based process that limits the available statuses. To limit the available statuses to those supported by your lead process, update the Lead Status from the lead details page.
- **View lead updates and comments (Chatter):** Display a feed of updates, comments, and posts about the lead.
- **View lead related lists:** View information related to the lead, including activities, notes, attachments, and any campaigns associated with the lead. Your personal customization, and any customization your admin has made to page layouts or your permissions to view related data determine the related lists that you see for leads.



Note Hover over the links at the top of a detail page to display the corresponding related list and

its records. If Chatter is enabled, hover links display below the feed. An interactive overlay allows you to quickly view and manage the related list items. Click a hover link to jump to the content of the related list. If hover links are not enabled, contact your Salesforce administrator.

- Share leads: Your admin defines the sharing model for your company. If it's private or Public Read Only, you can use lead sharing to increase access to your leads. In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, share a lead with other users, groups, or roles by selecting **Sharing** from the Action menu.
- Print leads: To open a printable version of the record details, select **Printable View** from the Action menu.

Converting Leads

After you qualify your leads, convert them to contacts, accounts, and opportunities.

Convert Qualified Leads

Keep the sales process moving when you qualify a lead and then convert it to a contact. Relate that contact to either an existing account in Salesforce, or an account that you create. And if the lead you're converting results in a deal that looks promising, create an opportunity record at the same time.

Troubleshoot Lead Conversion

If a lead doesn't convert, try these tips to correct the issue.

Convert Qualified Leads

Keep the sales process moving when you qualify a lead and then convert it to a contact. Relate that contact to either an existing account in Salesforce, or an account that you create. And if the lead you're converting results in a deal that looks promising, create an opportunity record at the same time.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer** Editions with Sales Cloud

USER PERMISSIONS NEEDED

To convert a lead:

Create and Edit on leads, accounts, contacts

AND

Convert Leads

To relate the converted lead to a new opportunity: Create on opportunities

To relate the converted lead to an existing Edit on opportunities

USER PERMISSIONS NEEDED

opportunity:

To avoid creating duplicate records when converting leads:

Require Validation for Converted Leads



When you convert leads to contacts or accounts, the process sometimes creates duplicate records. If so, we show you a warning. Custom warnings set up by your administrator don't appear during lead conversion. When you begin to convert a lead, possible matches appear based on matching rules using standard fields. When you click **Convert**, additional matches can appear based on matching rules using custom fields. How these duplicate records are handled depends on how your Salesforce admin has set up Apex Lead Convert and Duplicate Management. For example, your administrator can require that you resolve the duplicates before you finish converting. If your admin has created any cross-object duplicate rules, they aren't triggered during lead conversion.

You can't reverse a lead conversion. After the conversion, the lead record is no longer searchable, unless your admin assigned you the View and Edit Converted Leads permission. The new account, contact, or opportunity record created from the converted lead is searchable. In Lightning Experience, if your admin assigns you the View and Edit Converted leads permission, both the converted lead record and the new record created from the conversion are searchable. However, you can't view or edit the converted lead record from the search results page.

When converting a lead, attached files and notes are attached to the contact, account, and opportunity records you associate with the converted lead. If you use Sales Engagement, the lead's completed cadence tasks don't appear on the Activity Timeline of the new contact, account, or opportunity.

1. In a lead record, select to convert the lead.
2. Enter a name for an account that you're creating, or select an existing account.
3. Salesforce Classic only: If you update a person account, select the option to overwrite the lead source in the person account with the value from the lead.
4. Select a contact, or enter a name for a contact that you're creating.
5. Enter a name for an opportunity that you're creating, or, in Lightning Experience, select an existing opportunity. Up to 20 matching opportunities appear in the list.
6. Convert the lead.
7. Optionally, create a follow-up task.

Note Some long-time Salesforce customers still use an older lead convert process built with PLSQL (Procedural Language for SQL) instead of Apex. If your org uses Lightning Experience and the old lead convert process, the convert window contains fewer options. To use the newest lead conversion window, your org must have enabled Apex Lead Convert. With its increased capability, flexibility, and efficiency, the newest lead convert window is a great reason to make the switch to Apex Lead Convert. To use Apex Lead Convert, [review this knowledge article](#), and then contact Salesforce Customer Support.

See Also

- [Considerations for Converting Leads](#)
- [Troubleshoot Lead Conversion](#)

Troubleshoot Lead Conversion

If a lead doesn't convert, try these tips to correct the issue.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer** Editions with Sales Cloud

USER PERMISSIONS NEEDED

To convert leads:

Create and Edit on leads, accounts, contacts, and opportunities

AND

Convert Leads

To avoid creating duplicate records when converting leads:

Require Validation for Converted Leads

Duplicate Account Warnings That You Can't Dismiss

When converting a lead to an existing account, you can encounter a duplicate account warning that you can't dismiss.

This warning occurs when all the following conditions exist.

- Accounts has an active duplicate rule with matching rule criteria that refer to account fields that are mapped for lead conversion.
- Any of the mapped fields referenced by the duplicate rule are blank on the existing account.
- The lead field values that populate the blank account fields match another account record.

When fields are mapped from leads to accounts for lead conversion, blank fields on the account that you are converting to are updated with the values from the lead. However, in this situation, you can't ignore the duplicate warning and convert to the existing account. Salesforce asks you to choose one of the accounts identified as a duplicate or to convert to a new account.

To resolve this issue and convert to your chosen existing account, choose one of these options.

- Cancel the lead conversion, and populate the blank mapped fields on the account before restarting

- the conversion.
- Remove the values from the lead for the mapped fields that are blank on the account.

If you aren't sure which fields are mapped for lead conversion, consult your admin.

See Also

- [Convert Qualified Leads](#)
[Considerations for Converting Leads](#)

Merge Duplicate Leads

Keep your records clean and free of duplicates so you can reach more customers and maintain better relationships with them.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer** Editions with Sales Cloud

[Things to Know About Merging Duplicate Leads](#)

Keep these considerations in mind when you merge duplicate lead records.

[Merge Duplicate Leads in Lightning Experience](#)

Work only the prospects that matter. Merge duplicate leads using Lightning Experience.

[Merge Duplicate Leads in Salesforce Classic](#)

Work only the prospects that matter. Merge duplicate leads using Salesforce Classic.

Things to Know About Merging Duplicate Leads

Keep these considerations in mind when you merge duplicate lead records.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer** Editions with the Sales Cloud

Campaigns

When duplicate leads that are members of different campaigns are merged, Salesforce retains the campaign Member Status Updated date for each campaign the merged lead is a member of.

Sharing Rules

In Professional, Enterprise, Unlimited, Performance, or Developer edition orgs, any sharing rules are applied to the merged lead. Also, any manual sharing from the principal record is applied to the merged lead.

Related Items, Chatter Feeds, and Attachments

When duplicate records are related to items such as campaigns or activities, Salesforce relates the items to the merged record, with some exceptions. Chatter feeds are retained from the principal record only. Salesforce Files attached in the Chatter feed or Files related list will be retained in the merged record.

Hidden and Read-Only Fields

Salesforce retains any data in hidden or read-only fields, such as sharing settings, from the principal record. Hidden fields aren't shown while you merge. A merged record retains the Created By user and Created Date from the oldest record merged, regardless of which record is the principal. The record shows the merge date as the Last Modified By date.

Non-Principal Leads

The non-principal leads are moved to the Recycle Bin.

Converted Leads

In Salesforce Classic, you can't merge a converted lead with other converted leads. You can merge a converted lead with a non-converted lead, as long as the non-converted lead is selected as the principal record. To merge converted leads, use Lightning Experience instead.

Merge Duplicate Leads in Lightning Experience

Work only the prospects that matter. Merge duplicate leads using Lightning Experience.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer** Editions with the Sales Cloud

 **Note** If duplicate leads aren't getting flagged, see "Standard Contact Matching Rule and Standard Lead Matching Rule" in Salesforce Help to learn how Salesforce identifies duplicate records. Work with your Salesforce admin to fine-tune your matching rules if necessary.

USER PERMISSIONS NEEDED

To view leads:	Read on leads
To merge leads:	Delete on leads

1. Choose a lead record. A message tells you if duplicates exist for that record. To see them, click **View Duplicates**.
2. Choose up to three lead records to merge. Click **Next**.
3. Choose one lead record as the principal, and choose the field values that you want to keep. Click **Next**.

Potential Duplicate Records

Compare leads

When you merge, the principal record is updated with the values you choose, and relationships to other items are shifted to the principal record.

PRINCIPAL RECORD	Sarah Loehr
LEAD STATUS	<input checked="" type="radio"/> New
NAME	<input type="radio"/> Sara Loehr
PHONE	<input checked="" type="radio"/> (650) 555-1011
COMPANY	<input type="radio"/> MediLife
TITLE	<input type="radio"/> System Admin
CREATED DATE	9/30/2024, 2:16 PM
LAST MODIFIED DATE	9/30/2024, 2:23 PM
SARAH LOEHR	<input checked="" type="radio"/> Sarah Loehr
LEAD STATUS	<input type="radio"/> Contacted
NAME	<input checked="" type="radio"/> Sarah Loehr
PHONE	<input type="radio"/> (650) 555-1212
COMPANY	<input checked="" type="radio"/> MediLife, Inc.
TITLE	<input checked="" type="radio"/> System Administrator
CREATED DATE	9/23/2024, 3:32 PM
LAST MODIFIED DATE	9/30/2024, 2:19 PM

Showing fields with different values. [Show All Fields](#)

Back
Next

4. Confirm your choices and merge.

See Also

- [Standard Contact and Lead Matching Rule](#)
- [Things to Know About Matching Rules](#)
- [Retain Recently Updated Data Privacy Records for Merged Leads and Contacts](#)

Merge Duplicate Leads in Salesforce Classic

Work only the prospects that matter. Merge duplicate leads using Salesforce Classic.

REQUIRED EDITIONS

Available in: Salesforce Classic

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To view leads:	Read on leads
To merge leads:	Delete on leads

1. Select a lead record.
2. Click **Find Duplicates**.
3. Select up to three leads in the matching leads list that you want to merge.

You can't merge a converted lead with other converted leads. At least one of the records must be a lead that hasn't been converted.

If you want, enter a new lead name or company and click **Search** to find another lead to merge.

Salesforce performs a phrase search for matches in the **Name** and **Company** fields. It also considers an implied wildcard after any entry. Search results include matches for any fields you enter. For example, you enter *Bob Jones* who works at *Acme*. Search results include anyone named *Bob Jones* at any company and any lead with *Acme* as a company.

4. Click **Merge Leads**.
5. Select one lead record as the principal. Salesforce retains any data from hidden or read-only fields in the principal record. If you have the **Edit Read Only Fields** permission, you can select which read-only fields to retain. Hidden fields don't appear during the merge process.
If you're merging a converted lead, the principal record must be a lead that hasn't been converted.
6. Select the fields that you want to retain from each record.
7. Click **Merge**.
8. Click **OK**.

See Also

[Standard Contact and Lead Matching Rule](#)

[Things to Know About Matching Rules](#)

[Retain Recently Updated Data Privacy Records for Merged Leads and Contacts](#)

Reassign Leads from a Queue

Accepting leads from a queue is an easy way to reassign leads to yourself.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer** Editions with Sales Cloud

USER PERMISSIONS NEEDED

To change or accept ownership of leads from a queue: [Edit on leads](#)

1. Go to a list view that shows a lead queue. If you don't see a lead queue, ask your admin to add you as queue member.
2. Select the leads you want to own.
3. Click **Accept**.

To reassign a single lead from a queue, go to the record detail page and change the record owner.

Things to Know About Leads

Review considerations, guidelines, and tips for leads.

Guidelines for Creating Leads

Get some guidance when you manually create leads to track your prospects.

Considerations for Generating Leads

Before generating leads with Web-to-Lead or LinkedIn Lead Gen, review a few key points.

Considerations for Converting Leads

Learn what happens to qualified leads when you convert them to accounts, contacts, and opportunities.

Considerations for Deleting Leads

Understand what happens to the records associated with the leads you delete individually or in bulk.

Identify who can delete converted leads.

Lead Fields

Understand what each field in a lead represents. Depending on your page layout and field-level security settings, some fields aren't visible or editable.

Lead Conversion Field Mapping

Learn how lead fields convert to contact, account, person account, and opportunity fields when you convert a lead.

Guidelines for Mapping Custom Lead Fields for Lead Conversion

Learn the best practices for mapping custom lead fields to custom fields in contacts, accounts, and opportunities. Mapping custom fields helps your sales reps retain that important information when they convert qualified leads to track new potential deals.

Guidelines for Setting Up Web-to-Lead

Get Salesforce ready to gather information from your company's website and automatically generate up to 500 new leads a day.

Leads: What's Different or Not Available in the Salesforce Mobile App

Not every Lightning Experience feature is in the Salesforce mobile app. Find out what's different.

Leads FAQs

Find answers to common questions about leads.

Guidelines for Creating Leads

Get some guidance when you manually create leads to track your prospects.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer Editions** with Sales Cloud

- You can automatically assign the lead using the active lead assignment rule. To do so, select **Assign using active assignment rule** (Salesforce Classic only).
If the active assignment rule assigns the lead to a queue, you must be a member of the queue or have View All Records permission for leads. If you don't assign the lead using an assignment rule, the lead belongs to you. If you automatically assign the new lead, the record type of the lead can change, depending on the behavior your admin specified for assignment rules.
- If you're using the Apply Lead Assignment Rules invocable action on a record-triggered flow for a lead, and the flow is set to run immediately, select **Assign using active assignment rules** when creating or editing a lead (Salesforce Classic only).
- If your sales team uses divisions (Salesforce Classic only), the division of a new lead is automatically set to your default division, unless you manually select a different one.
- Your admin determines the default lead status for new leads.
- When you create a lead in Lightning Experience, the lead is:
 - Marked Read and doesn't appear in the My Unread Leads list view. In Salesforce Classic, if you click **Save & New**, the lead is marked Unread.
 - Automatically updated, causing flows and Apex triggers that are configured to run when a lead is updated to fire.
- You can create a lead from the Potential Connections section of the Email Message home page.

Considerations for Generating Leads

Before generating leads with Web-to-Lead or LinkedIn Lead Gen, review a few key points.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Web-to-Lead

- Date and currency fields captured online are formatted based on your Default Locale and Currency Locale settings.
- The limit for Web-to-Lead requests is 500 requests per day. If the number exceeds the limit, the Default Lead Creator specified in Setup receives an email informing them the daily limit has been exceeded.
- If a new lead can't be generated due to errors in your Web-to-Lead setup, Salesforce Customer Support is notified so we can help you correct it.
- Salesforce provides the standard Web-to-Lead form but doesn't support viewing or editing forms. To modify a Web-to-Lead form, update the HTML code on your website directly or create another form.

- Salesforce runs field validation rules before creating records via Web-to-Lead. If any field values aren't valid, no lead record is created.
- All universally required fields must have a value before Salesforce can create a record via Web-to-Lead.
- Salesforce doesn't support Rich Text Area (RTA) fields on Web-to-Lead forms. If you use RTA fields on your forms, any information you enter in them is saved as plain text when the lead is created.
- Salesforce retains the original format of email addresses for web-generated leads. For example, JohnDoe@gmail.com is saved as is, not as johndoe@gmail.com.
- Web-to-Lead forms don't validate the email address field. To validate email addresses of web-generated leads, create a validation rule for the Email field on leads.

LinkedIn Lead Gen

- Before you turn on LinkedIn Lead Gen, turn on Web-to-Lead. Turn off reCAPTCHA for Web-to-Lead.
- To make sure that leads are created in Salesforce from LinkedIn, assign a Default Lead Creator in Setup.
- The limit for leads added from LinkedIn is 500 leads per day. If the number exceeds the limit, the Default Lead Creator specified in Setup receives an email with the additional leads.
- Changing the field type of fields you map for LinkedIn Lead Gen can cause the mapping to fail.
- Salesforce retains the original format of email addresses for LinkedIn-generated leads. For example, JohnDoe@gmail.com is saved as is, not as johndoe@gmail.com.

Considerations for Converting Leads

Learn what happens to qualified leads when you convert them to accounts, contacts, and opportunities.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer** Editions with Sales Cloud

When you convert qualified leads, Salesforce moves any campaign members to the new contacts. The leads become read-only records, unless your administrator gives you permission to edit them.

Salesforce attaches all activities from the converted lead to the resulting account, contact, and opportunity, except activities initiated from a Sales Engagement cadence. If you delete one of these activities from any of the resulting records, Salesforce also removes it from the other records. To restore an activity to all resulting records, remove it from the recycle bin. You can assign the owners of these new records, and schedule follow-up tasks. When you assign new owners, only the open activities are assigned to the new owner. If you have custom lead fields, that information can be inserted into custom account, contact, or opportunity fields. Your admin can also set up your custom lead fields to populate custom account, contact, and opportunity fields automatically. You can't view converted leads, unless your admin has assigned you the View and Edit Converted Leads permission. However, converted leads do appear in lead reports. Salesforce updates the **Last Modified Date** and **Last Modified By** system fields

on converted leads when picklist values included on converted leads are changed.

Apex Triggers	<p>During lead conversion, triggers fire. Universally required custom fields and validation rules are enforced.</p> <p>When updating a lead, triggers that cause the lead to convert can cause a warning. The warning indicates that the lead is no longer accessible to the user because it's been converted to a contact. Refer to the new contact instead.</p> <p>If the Require Validation for Converted Leads checkbox on the Lead Settings page is deselected, Salesforce ignores lookup filters when converting leads.</p> <p>Converting leads with many associated events and tasks, or converting leads to accounts or contacts, can result in Apex governor limit errors, especially if there are triggers on the objects. See Apex Governor Limits.</p>
Campaigns	<p>A lead can match an existing contact. If both records are linked to the same campaign, the campaign member status is determined by whichever is further along in the campaign lifecycle. For example, if the lead member status is “sent” and the contact member status is “responded”, the responded value is applied to the contact.</p> <p>Related campaign information is always associated with the new contact record, regardless of the user's sharing access to the campaign.</p> <p>When more than one campaign is associated with a lead, the most recently associated campaign is applied to the Primary Campaign Source field for the opportunity, regardless of the user's sharing access to the campaign.</p>
Chatter	<p>When you convert a lead to an existing account, you don't automatically follow that account. However, when you convert the lead to a new account, you automatically follow the new account, unless you disabled feed tracking for accounts in your Chatter settings.</p>
Contacts to Multiple Accounts	<p>If your organization uses Contacts to Multiple Accounts, when you convert a lead to an existing contact, Salesforce creates a relationship record that connects the contact to the lead's account.</p>
Divisions	<p>The new account, contact, and opportunity are assigned to the same division as the lead. If you update an existing account during lead conversion, the account's division isn't changed, and the new contact and opportunity inherit the account's division.</p>
Duplicate Management	<p>When you convert leads to contacts or accounts, the process sometimes creates duplicate records. If so, we show you a warning. Custom warnings set up by your administrator don't appear during lead conversion. When you begin to convert a lead, possible matches appear based on matching rules using standard fields. When you click Convert, additional matches can appear based on matching rules using custom fields. How these duplicate records are</p>

	handled depends on how your Salesforce admin has set up Apex Lead Convert and Duplicate Management. For example, your administrator can require that you resolve the duplicates before you finish converting. If your admin has created any cross-object duplicate rules, they aren't triggered during lead conversion.
Enterprise Territory Management	Filter-based opportunity territory assignment isn't triggered when an opportunity is created through lead conversion.
Existing Accounts and Contacts	<p>When updating existing accounts or contacts during lead conversion, the values of mapped lead fields don't overwrite the values of the mapped account and contact fields.</p> <p>If existing accounts and contacts share the names specified on the leads, you can choose to update the existing accounts and contacts. Salesforce adds information from the lead into empty fields on the contact and account. Salesforce doesn't overwrite existing account and contact data with any lead data.</p> <p>For the composite address field, which is made up of several individual fields, Salesforce only adds information to empty individual fields on the contact and account.</p> <p>When the State and Country/Territory picklists are enabled, the State/Province and Country fields on the lead only transfer to the existing contact when both the State/Province and Country fields on the contact aren't set.</p> <p>Be sure to verify the resulting data on the contact and account after lead conversion.</p>
Health Cloud	The fields Specialty and Birth Date are available for use only in Health Cloud. They don't map to any fields when you convert a lead because they don't have equivalents on an account, contact, or opportunity.
List Emails	When a lead converts, list email activities associated with the lead become associated with the contact but aren't associated with the resulting opportunity.
Local Lead Names	Company Name (Local) on the lead automatically maps to Account Name (Local), along with their associated standard name fields.
New Accounts and Contacts	When new accounts or contacts are created during lead conversion, the values of mapped lead fields overwrite the default values of the mapped account and contact fields.
Opportunity Contact	If there are required custom fields added to the Opportunity Contact Role object, users can't create opportunities during lead conversion. Because there's no field mapping between leads and opportunity contact roles, the required custom field can't be populated.

Roles	
Person Accounts	<p>With person accounts enabled, you can convert leads to either person accounts or business accounts. In Lightning Experience, leads that don't have a value in the Company field are converted to person accounts. Leads that do have a value in the Company field are converted to business accounts. In Salesforce Classic and the Salesforce mobile app, leads without company information can still be converted to an existing business account.</p> <p>To differentiate leads that convert to person accounts from leads that convert to business accounts, use different lead record types and page layouts. Specifically, remove the Company field from the page layouts for leads that convert to person accounts. Then, make the Company field required on the page layouts for leads that convert to business accounts.</p> <p>In the Salesforce mobile app, you can't convert a lead to a person account if the person account name already exists.</p>
Record Types	<p>If the lead has a record type, the default record type of the user converting the lead is assigned to records created during lead conversion.</p> <p>The default record type of the user converting the lead determines the lead source values available during conversion. If the desired lead source values aren't available, add the values to the default record type of the user converting the lead.</p> <p>For accounts, users can set an overall default record type as well as subdefault record types for business accounts and person accounts. When converting leads, the overall default record type is used. Lead conversion doesn't use subdefault record types.</p>
Salesforce to Salesforce	When you convert a lead, Salesforce to Salesforce inactivates the shared record and updates the External Sharing related list in your connection's lead record with an Inactive (converted) status. Due to inactivation of the shared record, changes to the Lead Status during conversion aren't reflected in your connection's lead record.
Search	<p>Whether a converted lead is searchable differs for Salesforce Classic and Lightning Experience.</p> <p>Salesforce Classic: After converting a lead, it's no longer searchable. However, the new account, contact, or opportunity record created from the converted lead is searchable.</p> <p>Lightning Experience: The converted lead record and the newly created account, contact, or opportunity record are searchable. However, you can't access the converted lead record from the search results page to view or edit it. As you type the lead name in the search box, you might see search suggestions for leads that you already merged as duplicates. A delay in removing these converted leads from the search index causes this issue.</p>
Standard	The system automatically maps standard lead fields to standard account, contact, and

Custom Lead Fields	<p>opportunity fields.</p> <p>For custom lead fields, your administrator can specify how they map to custom account, contact, and opportunity fields.</p> <p>The system assigns the default picklist values for the account, contact, and opportunity when mapping standard lead picklist fields that are blank. If your organization uses record types, blank values are replaced with the default picklist values of the new record owner.</p> <p>Converting a lead sets the Unread field to false.</p> <p>The lead's ConvertedDate field contains the date the lead was converted based on the current date in Greenwich Mean Time (GMT). This field appears in some reports and shows the GMT date not adjusted to the user's local time zone. The value stored in the lead's CreatedDate field includes both the date and time and is converted to the user's time zone.</p>
Workflow	<p>You can't convert a lead that's associated with an active approval process or has pending workflow actions.</p> <p>Converting a lead to a person account doesn't trigger workflow rules.</p> <p>When a lead is converted by someone who isn't the lead owner, all workflow tasks associated with the lead that are assigned to that user, except email alerts, are reassigned to the lead owner. Workflow tasks assigned to users other than the lead owner and lead converter aren't changed.</p> <p>If validation and triggers for lead conversion are enabled, then converting a lead can trigger a workflow action on a lead. For example, if an active workflow rule updates a lead field or transfers the owner of a lead, that rule can trigger when the lead is converted. However, because of the conversion, the lead isn't visible on the Leads tab. Allow the workflow process to finish before updating lead fields, otherwise save or lead convert fails. A workflow rule can create a task because of a lead conversion. In that case, Salesforce assigns the task to the new contact and relates it to the associated account or opportunity.</p>

When you convert a lead, files and related records attached to the lead are attached to the resulting contact, account, and opportunity records. Items from the following related lists on leads are carried over to the new or existing contact, account, and opportunity during lead conversion.

Lead Related List	Contact	Account	Person Account	Opportunity
Open Activities	Yes	Yes	Yes	Yes
Activity History	Yes	Yes	Yes	Yes
Campaign History	Yes	No	Yes	No
HTML Email Status	Yes	No	Yes	No

Lead Related List	Contact	Account	Person Account	Opportunity
Notes and Attachments	Yes	No	Yes	No
Files	Yes	Yes	Yes	Yes
Notes (new)	Yes	Yes	Yes	No
Content Deliveries	Yes	No	No	No
Social Posts	Yes. When Social Customer Service is turned on.	No	Yes. When Social Customer Service is turned on.	No
Social Personas	Yes. When Social Customer Service is turned on.	No	Yes. When Social Customer Service is turned on.	No
Marketing Actions	Yes	No	Yes	No

Other related records from custom objects aren't attached to the resulting contact, account, and opportunity records.

See Also

- [Convert Qualified Leads](#)
- [Troubleshoot Lead Conversion](#)

Considerations for Deleting Leads

Understand what happens to the records associated with the leads you delete individually or in bulk. Identify who can delete converted leads.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer** Editions with Sales Cloud

- When you delete a lead, the lead record moves to the Recycle Bin. Associated notes, attachments, and activities are deleted along with the lead. If you restore the lead, any associated notes, attachments, and activities are also restored.
- Users without the View Converted Leads permission can delete converted leads via the public API or tools that use the public API.

See Also

- [Delete Multiple Records and Reports](#)

[Insert, Update, or Delete Data Using Data Loader](#)

Lead Fields

Understand what each field in a lead represents. Depending on your page layout and field-level security settings, some fields aren't visible or editable.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer** Editions with Sales Cloud

Field	Description
Address	Street address for the lead, for example, 475 Boardwalk Ave. Up to 255 characters are allowed in this field.
Annual Revenue	Amount of annual revenue at lead's company.
Campaign	Name of the campaign responsible for generating the lead. Displays only when creating a lead. Data entered in this field is stored in the Campaign History related list on the lead.
City	City portion of the lead's address, for example, San Francisco. Up to 40 characters are allowed in this field.
Company	Name of company with which lead is affiliated. Up to 255 characters are allowed in this field.
Company Name (Local)	Name of the company in the local language.
Country	Country portion of user's address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.
Created By	User who created the lead, including creation date and time. (Read only)
Description	Description of the lead. Up to 32 KB of data is allowed in this field. Only the first 255 characters appear in reports.
Do Not Call	Whether the contact wants to be contacted by phone.
Email	Email address of lead. Must be a valid email address in the form: jsmith@acme.com. Up to 80 characters are allowed in this field. Click the email address in this field to send an email using your

Field	Description
	personal email application. If the Gmail Buttons and Links feature is enabled, you can click the Gmail link next to the field to send an email from your Gmail account. See Gmail™ in Salesforce for more information.
Email Opt Out	Whether the lead wants to receive email (<code>false</code>) or not (<code>true</code>).
Engagement History	A chart showing the lead's inbound and outbound engagements for the last 30 days. Available with Sales Engagement.
Fax	Lead's fax number. Up to 40 characters are allowed in this field.
Fax Opt Out	Lead hasn't requested to be included in broadcast faxes.
First Name	First name of the lead, as displayed on the lead edit page. Up to 40 characters are allowed in this field.
First Name (Local)	First name of the lead translated into the local language.
Gender Identity	The lead's personal and self-identified experience of their gender, which do or don't correspond to the lead's designated sex at birth.
Industry	Primary business of lead's company. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.
Last Name	Last name of the lead, as displayed on the lead edit page. Up to 80 characters are allowed in this field.
Last Name (Local)	Last name of the lead translated into the local language.
Last Transfer Date	The date and time the lead owner was last changed.
Lead Currency	The default currency for all currency amount fields in the lead. Amounts display in the lead currency and are also converted to the user's personal currency. Available only for organizations that use multiple currencies.
Lead Division	Division to which the lead belongs. Available only in organizations that use divisions to segment their data.
Lead Owner	Assigned owner of the lead.
Lead Record Type	Name of the field that determines what picklist values are available for the record. The record type can be associated with a lead process. Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.
Lead Source	Source of lead, for example, Advertisement, Partner, or Web. Entry is

Field	Description
	selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 255 characters.
Lead Status	Status of the lead, for example, Open, Contacted, Qualified. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.
Middle Name	<p>Middle name of the lead, as displayed on the lead edit page. Up to 40 characters are allowed for this field.</p> <p>To enable this field, contact Salesforce Customer Support. Next, from Setup, enter <i>User Interface</i> in the Quick Find box, then select User Interface. Then select Enable Name Suffixes for Person Names.</p>
Middle Name (Local)	<p>Middle name of the lead translated into the local language.</p> <p>To enable this field, contact Salesforce Customer Support. Next, from Setup, enter <i>User Interface</i> in the Quick Find box, then select User Interface. Then select Enable Name Suffixes for Person Names.</p>
Mobile	Cellular or mobile phone number. Up to 40 characters are allowed in this field.
Modified By	User who last changed the lead fields, including modification date and time. Modified By doesn't track changes made to any of the related list items on the lead. (Read only)
Name	Combined first name, middle name (beta), last name, and suffix (beta) of lead, as displayed on lead detail page.
No. of Employees	Number of employees at the lead's company.
Partner Account	Read-only field that indicates the lead is owned by a partner user.
Phone	Lead's primary phone number. Up to 40 characters are allowed in this field.
Pronouns	The lead's personal pronouns, reflecting their gender identity. The entry is selected from a picklist of available values, which the administrator sets. Maximum 40 characters.
Rating	Indicates value or prospect of the lead, for example, Hot, Warm, Cold. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.
Read	Flag indicating that the lead has been viewed or edited by the lead owner. The flag isn't shown on lead edit or detail pages. Leads marked

Field	Description
	as “Read” don’t contain a check mark in the Unread column on leads list views.
Salutation	Title for addressing the lead, for example, Mr., Ms., Dr., or Prof. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.
State/Province	State or province portion of user’s address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.
Suffix	Name suffix of the lead, as displayed on the lead edit page. Up to 40 characters are allowed for this field. To enable this field, contact Salesforce Customer Support. Next, from Setup, enter <i>User Interface</i> in the Quick Find box, then select User Interface . Then select Enable Name Suffixes for Person Names .
Title	Position of lead within his or her company. Up to 128 characters are allowed in this field. When converting a lead to a person account, the conversion fails if the lead Title field contains more than 80 characters.
Total Cadences	The number of Sales Engagement cadences the lead is assigned to. This field is only available in list views.
Unread	Flag indicating that the lead hasn’t been viewed or edited by the lead owner. The flag isn’t shown on lead edit or detail pages. Leads marked as “Unread” contain a check mark in the Unread column on leads list views. The Unread field is set to false when the lead is converted.
Custom Links	Listing of custom links for leads as set up by your administrator.
Website	URL of company’s website, for example, www.acme.com. Up to 255 characters are allowed in this field; only the first 50 are displayed.
ZIP	ZIP code or postal code portion of the lead’s address. Up to 20 characters are allowed in this field.

Lead Conversion Field Mapping

Learn how lead fields convert to contact, account, person account, and opportunity fields when you convert a lead.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer** Editions with Sales Cloud

When you convert lead records, standard lead fields map to contact, account, person account, and opportunity fields. If you use custom fields, your admin specifies the fields that they map to in your newly created records.

Lead Field	Maps to this field
Address	Account: Billing Address Person Account: Mailing Address and Billing Address Contact: Mailing Address
Annual Revenue	Account: Annual Revenue Person Account: Annual Revenue
Campaign	Opportunity: Primary Campaign Source This field shows the campaign associated with a lead before conversion. The campaign provides 100% of the amount revenue credit to the specified campaign. For leads associated with multiple campaigns, Salesforce adds the most recently associated campaign to the opportunity, even if the sales rep can't access that campaign.
City	Account: Billing City Person Account: Mailing City and Billing City
Company	Account: Account Name Contact: Account Opportunity: Opportunity Name and Account Name
Company Name (Local)	Account: Account Name (Local)
Country	Account: Billing Country Person Account: Mailing Country and Billing Country

Lead Field	Maps to this field
Country Code	<p>Account: Billing Country Code</p> <p>Person Account: Mailing Country Code and Billing Country Code</p>
Description	Contact: Description
Do Not Call	<p>Contact: Do Not Call</p> <p>This field isn't updated for leads converted to existing contacts.</p> <p>Person Account: Do Not Call</p>
Email	<p>Contact: Email</p> <p>Person Account: Email</p>
Email Opt Out	<p>Contact: Email Opt Out</p> <p>This field isn't updated for leads converted to existing contacts.</p> <p>Person Account: Email Opt Out</p>
Fax	<p>Account: Fax</p> <p>Person Account: Fax</p> <p>Contact: Fax</p>
Fax Opt Out	<p>Contact: Fax Opt Out</p> <p>Person Account: Fax Opt Out</p>
First Name	<p>Contact: First Name</p> <p>Person Account: First Name</p>
First Name (Local)	<p>Contact: First Name (Local)</p> <p>Person Account: First Name (Local)</p>
Industry	<p>Account: Industry</p> <p>Person Account: Industry</p>

Lead Field	Maps to this field
Informal Name	Person Account: Informal Name
Last Name	Contact: Last Name Person Account: Last Name
Last Name (Local)	Contact: Last Name (Local) Person Account: Last Name (Local)
Latitude	Account: Billing Latitude Person Account: Mailing Latitude and Billing Latitude
Lead Owner	Account: Owner Contact: Owner Opportunity: Owner
Lead Source	Account: Account Source Contact: Lead Source Opportunity: Lead Source Person Account: Lead Source
Longitude	Account: Billing Longitude Person Account: Mailing Longitude and Billing Longitude
Middle Name	Person Account: Middle Name
Mobile	Contact: Mobile Person Account: Mobile
No. of Employees	Account: Employees Person Account: Employees
Partner Account	Opportunity: Partner Account

Lead Field	Maps to this field
	This field isn't updated for leads converted to existing opportunities. This field isn't updated on new opportunities if Allow editing of the Partner Account field on opportunities and leads is turned on in Digital Experiences setup.
Phone	Account: Phone Person Account: Phone Contact: Phone
Postal Code	Account: Billing Postal Code Person Account: Mailing Postal Code and Billing Postal Code
Rating	Account: Rating Person Account: Rating
Salutation	Person Account: Salutation
State	Account: Billing State Person Account: Mailing State and Billing State
State Code	Account: Billing State Code Person Account: Mailing State Code and Billing State Code
Street	Account: Billing Street Person Account: Mailing Street
Suffix	Person Account: Suffix
Title	Contact: Title Person Account: Title
Website	Account: Website Person Account: Website

Opportunity Close Dates

During the lead conversion process, Salesforce automatically assigns close dates for the opportunities you create depending on the fiscal year settings in Salesforce.

If the fiscal year in Salesforce is	Salesforce assigns close dates for opportunities to
Standard	The last day of the current fiscal quarter.
Custom	The last day of the current fiscal period. If a fiscal year hasn't been defined for the current date, the close date is the end of the current calendar quarter.

See Also

[Define Your Fiscal Year](#)

Guidelines for Mapping Custom Lead Fields for Lead Conversion

Learn the best practices for mapping custom lead fields to custom fields in contacts, accounts, and opportunities. Mapping custom fields helps your sales reps retain that important information when they convert qualified leads to track new potential deals.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer** Editions with Sales Cloud

- The following Lead custom field types can only be mapped to custom fields of the same data type.
 - Checkbox
 - Currency
 - Date
 - Date/Time
 - Email
 - Geolocation
 - Encrypted (Classic)
 - Number
 - Percent
 - Phone
 - Multi-select Picklist
 - Long Text
 - Rich Text
 - URL
- Each target field can have only one source field mapped to it.

- You can map auto-number fields to field types text or text area.
- You can map text and text area fields to custom field types of text, text area, long text, and picklist. If you map to a picklist field, the picklist must be unrestricted.
- You can map custom picklist fields to custom field types of text, text area, and picklist (unrestricted), but not long text.
- When mapping between picklist and text fields, your data truncates if the source field value is longer than the target field allows.
- Custom lookup fields can be mapped to a lookup field pointing to the same object. For example, a lead custom lookup field pointing to the Account object can be mapped to a contact custom lookup field that also points to the Account object.
- When mapping custom lead fields, the selected account, contact, or opportunity field must be of equal or greater length.
- You can't delete lead, account, contact, or opportunity fields included in Lead Custom Field Mapping. To delete a field, first remove its mapping.
- You can't change the field type of a field that's included in Lead Custom Field Mapping. To change a field's type, remove its mapping first.
- When you uninstall a package that references fields included in Lead Custom Field Mapping, those custom field mappings are deleted automatically.
- When mapping lead custom number, currency, or percent fields, the target field must have the same length and number of decimal places.
- If you have more than 2000 lead, account, contact, or opportunity fields in total, the lead field mapping page can become unresponsive. To improve performance, delete fields that aren't in use. You can also use Metadata API, Salesforce CLI, or VS Code Extensions to manage your lead mappings.
- Dependent picklist fields on leads can't have a default value assigned. These fields are driven from the value selected in the controlling picklist field. Field mappings defined between a controlling and dependent picklist are validated during lead conversion. These mappings don't allow any values other than the current value of the controlling picklist to be assigned to the dependent picklist.
- In Lightning Experience and Salesforce Classic, custom field mapping for lead conversion is available in orgs that use APEX Lead Convert. Custom field mapping for lead convert is not available in orgs that use the older PLSQL Lead Convert.
- In orgs that use APEX Lead Convert, contact, account, and opportunity fields with field-level security settings are populated from mapped lead fields.



Note Don't map custom formula fields to other formula fields or any other type of field.

Guidelines for Setting Up Web-to-Lead

Get Salesforce ready to gather information from your company's website and automatically generate up to 500 new leads a day.

REQUIRED EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS NEEDED

To set up Web-to-Lead: Customize Application

If you want to	Make sure to
Track special lead information that standard fields for Salesforce leads don't accommodate	Create custom lead fields and specify how you want them to map to custom fields for accounts, contacts, and opportunities during lead conversion.
Validate email addresses for web-generated leads	Create a validation rule for the Email field on leads.
Automatically send prospects email after they've submitted information through your website	Create public email templates. You can set up email response rules to use different email templates depending on the information submitted. If you do, make sure to create one default template to send when none of your response rules apply.
Set the default status for new and converted leads	Use the Lead Status picklist to do so.
Assign leads to sales reps and queues	<ul style="list-style-type: none"> • Create lead queues if you want to assign leads to queues instead of individual sales reps. • Choose a default owner of leads that fail to meet the criteria in your assignment rule using Lead Settings. • Determine how web-generated leads get assigned to users or queues by creating a lead assignment rule and activating it. If the rule is inactive, all web-generated leads get assigned to the default owner you specify in Lead Settings.

See Also

[Generate Leads from Your Website with Web-to-Lead](#)

[Validation Rules](#)

[Define Validation Rules](#)

Leads: What's Different or Not Available in the Salesforce Mobile App

Not every Lightning Experience feature is in the Salesforce mobile app. Find out what's different.

- Lead conversion:
 - You can create opportunities, but you can't select existing ones.
 - You can't select lead sources across duplicate records. The lead source defaults to the duplicate contact.

- You can't create related tasks during the conversion, but you can create tasks from the contact record.
 - You can't automatically notify owners of converted leads.
 - Account details aren't auto-populated when creating an account.
 - You can choose an existing account or create one. To create an account, tap the Account field on the record and select **New**.
 - You can view Converted Leads only from the Recent Leads list view. Converted Leads don't appear in any other list views in Salesforce for Android and iOS.
 - You can convert leads without company information to existing business accounts even if person accounts are enabled. In Lightning Experience, leads without company information must be converted to person accounts.
- The **Find Duplicates** and **Unlock Record** buttons aren't available.
 - You can't merge leads.
 - The Lead History related list isn't available.
 - When you add a lead, the Campaign field isn't available. You can add a value to this field in the desktop Salesforce site.

Leads FAQs

Find answers to common questions about leads.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Starter, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Pro Suite, and Developer** Editions with Sales Cloud

What Is a Lead?

Leads are people who are interested in your product and service. Converting leads to loyal customers provide success within a business. By managing your leads in a systematic and structured way, you can increase both the numbers of leads you generate and how many leads you convert.

What are the advantages of using leads?

Using leads allows your company to maintain two separate lists - one for prospective customers and one for existing customers. You can store your prospects as leads, and then when a lead becomes qualified, you can convert it to an account, contact, and, optionally, an opportunity.

Can I automatically email leads that come from my website?

Yes. You can create auto-response rules to email these prospects using templates that vary based on criteria that you set up.

Can I capture leads from multiple web pages?

Yes. Insert the generated HTML code into the web pages from which you want to capture leads. Whenever someone submits information on any of those web pages, a lead is created.

Can I convert existing accounts or contacts into leads?

No. As an alternative, create an opportunity for the account or contact. If you prefer to use a lead,

create a report containing the accounts or contacts you want to convert into leads, export them, and then import them as leads.

How are lead fields mapped to other fields during conversion?

When you convert a lead, data in standard lead fields is transferred into standard account, contact, and opportunity fields. For custom lead fields, the data is mapped to custom account, contact, and opportunity fields as specified by your admin.

How can I be sure that leads aren't lost?

The daily limit for Web-to-Lead requests is 500. If your organization exceeds its daily Web-to-Lead limit, the Default Lead Creator (specified in the Web-to-Lead setup page) receives an email containing the additional lead information.

How can I tell which of my leads are new?

When a lead is assigned to you, either manually transferred, imported, or generated from the web, the lead is marked as "Unread," that is, it has a check mark in the Unread column on leads list views.

How can our webmaster test the Web-to-Lead page?

Add the following line to your Web-to-Lead page code if you want to see a debugging page when you submit the form. Don't forget to remove this line before releasing the Web-to-Lead page on your website.

How many leads can we capture from our website?

In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, you can capture up to 500 leads in a 24-hour period.

What happens when I convert leads?

When you convert a lead, Salesforce creates an account, contact, and optionally an opportunity, using information from the lead you're converting.

What if my company reaches the limit for web-generated leads?

The daily limit for Web-to-Lead requests is 500. If your company generates more leads than the maximum allowed, the Default Lead Creator (specified in the Web-to-Lead setup page) receives an email containing the captured information. Contact Customer Support if your company wants to generate over 500 Web-to-Lead requests per day.

What status is assigned to web-generated leads?

All new web leads are marked with a status equal to the "default status" that your administrator selects when editing the Lead Status picklist values.

Who owns new web-generated leads?

Your administrator can create a lead assignment rule to determine how web leads are automatically assigned to different users or queues.

What Is a Lead?

Leads are people who are interested in your product and service. Converting leads to loyal customers provide success within a business. By managing your leads in a systematic and structured way, you can increase both the numbers of leads you generate and how many leads you convert.

What are the advantages of using leads?

Using leads allows your company to maintain two separate lists - one for prospective customers and one for existing customers. You can store your prospects as leads, and then when a lead becomes qualified, you can convert it to an account, contact, and, optionally, an opportunity.

Leads are especially useful if your company has two separate teams - one that handles lead generation and mass marketing and one that handles sales. The lead generation team can concentrate their work on the Leads tab, and the opportunity team can use the Account, Contact, and Opportunity tabs.

Can I automatically email leads that come from my website?

Yes. You can create auto-response rules to email these prospects using templates that vary based on criteria that you set up.

Can I capture leads from multiple web pages?

Yes. Insert the generated HTML code into the web pages from which you want to capture leads. Whenever someone submits information on any of those web pages, a lead is created.

Can I convert existing accounts or contacts into leads?

No. As an alternative, create an opportunity for the account or contact. If you prefer to use a lead, create a report containing the accounts or contacts you want to convert into leads, export them, and then import them as leads.

How are lead fields mapped to other fields during conversion?

When you convert a lead, data in standard lead fields is transferred into standard account, contact, and opportunity fields. For custom lead fields, the data is mapped to custom account, contact, and opportunity fields as specified by your admin.

Any standard lead picklist fields that are blank inherit the default picklist value for accounts, contacts, and opportunities. If you use record types, all records created during lead conversion adopt the default record type for the owner of the newly created account, contact, and opportunity.

How can I be sure that leads aren't lost?

The daily limit for Web-to-Lead requests is 500. If your organization exceeds its daily Web-to-Lead limit, the Default Lead Creator (specified in the Web-to-Lead setup page) receives an email containing the additional lead information.

If a new lead cannot be generated due to errors in your Web-to-Lead setup, Customer Support is notified so that we can assist you in correcting it.

Salesforce ensures that your leads aren't lost if they are submitted during a scheduled Salesforce downtime.

How can I tell which of my leads are new?

When a lead is assigned to you, either manually transferred, imported, or generated from the web, the lead is marked as "Unread," that is, it has a check mark in the Unread column on leads list views.

To view your new leads, select the My Unread Leads list view on the Leads tab. When you view or edit an "Unread" lead, it is automatically marked as "Read."

How can our webmaster test the Web-to-Lead page?

Add the following line to your Web-to-Lead page code if you want to see a debugging page when you submit the form. Don't forget to remove this line before releasing the Web-to-Lead page on your website.

```
<input type="hidden" name="debug" value="1">
```

How many leads can we capture from our website?

In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, you can capture up to 500 leads in a 24-hour period.

If your organization exceeds its daily Web-to-Lead limit, the Default Lead Creator (specified in the Web-to-Lead setup page) receives an email informing them the daily limit has been exceeded. If your company regularly exceeds the Web-to-Lead limit, click **Help & Training** at the top of any page and select the My Cases tab to submit a request for a higher limit directly to Salesforce.

When your organization reaches the 24-hour limit, Salesforce stores additional requests in a pending request queue that contains both Web-to-Case and Web-to-Lead requests. The requests are submitted when the limit refreshes. The pending request queue has a limit of 50,000 combined requests. If your organization reaches the pending request limit, additional requests are rejected and not queued. Your administrator receives email notifications for the first five rejected submissions. Contact Salesforce Customer Support to change your organization's pending request limit.

What happens when I convert leads?

When you convert a lead, Salesforce creates an account, contact, and optionally an opportunity, using information from the lead you're converting.

If the lead was also a campaign member, Salesforce associates the campaign member record with the new contact. The converted lead becomes a read-only record. If existing accounts and contacts share the names specified on the leads, you can choose to update the existing accounts and contacts. Salesforce adds information from the lead into empty contact fields; Salesforce doesn't overwrite existing account and contact data.

When you convert a lead to a new or existing contact, Salesforce adds the **contactCreatedByLead** or **contactUpdatedByLead** system field to the contact. You can see these fields in the History related list for the contact. The value of these fields is null; their presence on a contact indicates that the contact was created or updated from a lead.

Salesforce attaches all activities from the converted lead to the resulting account, contact, and opportunity, except activities initiated from a Sales Engagement cadence. If you delete one of these activities from any of the resulting records, Salesforce also removes it from the other records. To restore an activity to all resulting records, remove it from the recycle bin. You can assign the owners of these new records, and schedule follow-up tasks. When you assign new owners, only the open activities are assigned to the new owner. If you have custom lead fields, that information can be inserted into custom account, contact, or opportunity fields. Your admin can also set up your custom lead fields to populate custom account, contact, and opportunity fields automatically. You can't view converted leads, unless your admin has assigned you the View and Edit Converted Leads permission. However, converted leads do appear in lead reports. Salesforce updates the **Last Modified Date** and **Last Modified By** system fields on converted leads when picklist values included on converted leads are changed.

After it's converted, a lead record is no longer searchable, unless your admin assigned you the View and Edit Converted Leads permission. The new account, contact, or opportunity record created from the converted lead is searchable.

What if my company reaches the limit for web-generated leads?

The daily limit for Web-to-Lead requests is 500. If your company generates more leads than the maximum allowed, the Default Lead Creator (specified in the Web-to-Lead setup page) receives an email containing the captured information. Contact Customer Support if your company wants to generate over 500 Web-to-Lead requests per day.

What status is assigned to web-generated leads?

All new web leads are marked with a status equal to the “default status” that your administrator selects when editing the Lead Status picklist values

In addition, web-generated leads are marked with the “Unread” flag; they have a check mark in the Unread column on the lead list views. When a user views or edits a new web lead, the lead is automatically set to “Read.” This way you can easily locate all new leads using the My Unread Leads list view.

Who owns new web-generated leads?

Your administrator can create a lead assignment rule to determine how web leads are automatically assigned to different users or queues.

In addition, your administrator must customize the Lead Settings to specify a Default Lead Owner. If the assignment rule fails to locate an owner, web leads are assigned to the default lead owner. If you do not use assignment rules, all web leads are assigned to the default lead owner.

Turn Opportunities into Deals

Move opportunities through the sales process, and track exactly what you're selling and for how much.

Products and Price Books

Products are a base catalog of all the items and services you sell and their standard prices. Price Books let you create a custom collection of products with associated list prices for specific uses.

Opportunities

Track and manage your potential deals and any deals that are in progress with Salesforce opportunities. Opportunity records contain the details about all your deals, including which accounts they're related to, who the key players are, and the amount of potential revenue. If your Salesforce admin has set up leads, an opportunity is created when a lead is converted. Opportunities can also be created directly for the accounts that you're working.

Quotes

Quotes in Salesforce represent the proposed prices of your company's products and services. You create a quote from an opportunity and its products. Each opportunity can have multiple associated quotes, and any one of them can be synced with the opportunity. When a quote and an opportunity are synced, any change to line items in the quote syncs with products on the opportunity, and vice versa. Get an overview of all your quotes on the Quotes tab. And if you're using Lightning Experience, track sales activity in Path and stages in Kanban.

Contracts

A contract is a written agreement between parties. Many companies use contracts to define the terms for doing business with other companies. Use Salesforce to establish and document the contracts that you have with your accounts and opportunities. Track the contract through your approval process. And use workflow alerts to remind yourself of contract renewals.

Orders

Use orders to track your customers' requests for products and services.

Products and Price Books

Products are a base catalog of all the items and services you sell and their standard prices. Price Books let you create a custom collection of products with associated list prices for specific uses.

Set Up Products

Customize products to make them work better for your sales reps.

Manage Products

Create and update the products your company sells and their standard prices.

Product Schedules

Use product schedules to determine the payment and delivery cycles for products that are paid or delivered over time. In Lightning Experience, customize schedules with custom fields, custom buttons, customized layout, validation rules, and Apex triggers.

Manage Price Books

Price books track the prices of products and services that your company offers to customers.

Things to Know About Products and Price Books

Review these considerations before you delete products or pricebooks. Learn more about product, price book, price book entry, and product schedule fields.

Set Up Products

Customize products to make them work better for your sales reps.

Activate and Deactivate Product Prices with Their Products Simultaneously

Set up Salesforce so that when you activate or deactivate a product, all related prices for that product are activated or deactivated at the same time.

Organize Products with Product Families

Use the **Product Family** picklist to categorize your products. For example, if your company sells both hardware and software, you can create two product families: Hardware and Software.

Activate and Deactivate Product Prices with Their Products Simultaneously

Set up Salesforce so that when you activate or deactivate a product, all related prices for that product are activated or deactivated at the same time.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To auto-activate or auto-deactivate product prices: Customize Application

1. From Setup, enter *Product Settings* in the Quick Find box, and then select **Product Settings**.
2. Select **When changing active flag on a product record, automatically update active flag on related prices**.
3. Save your changes.

Organize Products with Product Families

Use the **Product Family** picklist to categorize your products. For example, if your company sells both hardware and software, you can create two product families: Hardware and Software.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

USER PERMISSIONS NEEDED

To edit product families: Customize Application

If your organization uses forecasting, your users can have a different quota for hardware sales and software sales. Users can also view forecasts for opportunities with hardware products separate from opportunities that include software products.

- Customize the **Product Family** picklist to include the different categories of products you sell.
- For each product in your price books, edit the product and select the appropriate **Product Family** value.
- If your organization uses forecasting, set a different quota for each product family for your users.

Manage Products

Create and update the products your company sells and their standard prices.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Products Concepts

Before you use products in Salesforce, make sure that you understand the basics.

Guidelines for Creating Products

If you're an admin or sales operations manager, you create products in Salesforce to track the products and services that your company sells. After you create a product, your sales reps can add it to their quotes, opportunities, and orders. Before you get started, review a few key guidelines.

Considerations for Cloning Products

If you're an admin or a sales operations manager, you can clone a product to quickly create another product with the same information and price book entries. Consider key points before you clone a product.

Set and Edit Product Prices

Set and edit prices for each of your company's products and services.

Considerations for Setting Prices

If you're an admin or a sales operations manager, consider key points before you set prices for your products in Salesforce.

Products Concepts

Before you use products in Salesforce, make sure that you understand the basics.

REQUIRED EDITIONS

Products, product schedules, price books, and quotes available in: both Salesforce Classic and Lightning Experience	Orders available in Salesforce Classic
Products, product schedules, price books, and orders available in: Professional, Enterprise, Performance, Unlimited, and Developer Editions	Quotes available in: Performance and Developer Editions and in Professional, Enterprise, and Unlimited Editions with the Sales Cloud

Products are the items and services that you sell to customers. Each product can exist in multiple price books with different prices.

When you view the detail page of an opportunity, quote, order, or service contract, the Products related list or the Quote Line Items related list shows the associated products for that record. Use these related lists to choose a price book for the record, add or edit products, and, for opportunities, establish or edit product schedules. For example, on a quote detail page, click **Add Line Item** on the Quote Line Items related list to select a product to list on the quote.

If products are shared with external contacts via Salesforce to Salesforce, choose one of the list views under Products from Connections to view products that your business partners have shared with you.

Guidelines for Creating Products

If you're an admin or sales operations manager, you create products in Salesforce to track the products and services that your company sells. After you create a product, your sales reps can add it to their quotes, opportunities, and orders. Before you get started, review a few key guidelines.

REQUIRED EDITIONS

Products, product schedules, price books, and quotes available in: both Salesforce Classic and Lightning Experience	Orders available in Salesforce Classic
Products, product schedules, price books, and orders available in: Professional, Enterprise, Performance, Unlimited, and Developer Editions	Quotes available in: Performance and Developer Editions and in Professional, Enterprise, and Unlimited Editions with the Sales Cloud

- To view and create products, you need the Read and Create permissions on products.
- To get started creating products, click **New** on the Products home page.
- You can create a product by cloning an existing product. See [Considerations for Cloning Products](#).
- To ensure fast system performance with price books, keep the number of products below 2,000,000.
- In Salesforce Classic, inactive products are excluded from search results for users who don't have the System Administrator profile and have read-only access to products.
- Products need a [standard active price](#) before you can add them to a price book.
- To define a payment and delivery cycle via a [product schedule](#), click **Edit** above the product detail.

- For descriptions of product fields, see [Product, Price Book, Price Book Entry, and Product Schedule Fields](#).

Considerations for Cloning Products

If you're an admin or a sales operations manager, you can clone a product to quickly create another product with the same information and price book entries. Consider key points before you clone a product.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

When you clone a product:

- Price book entries in price books that you don't have sharing access to aren't created.
- If you have read-only access to a field, the value of that field isn't carried over to the cloned record.

Set and Edit Product Prices

Set and edit prices for each of your company's products and services.

REQUIRED EDITIONS

Products, product schedules, price books, and quotes available in: both Salesforce Classic and Lightning Experience

Orders available in Salesforce Classic

Products, product schedules, price books, and orders available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Quotes available in: **Performance and Developer** Editions and in **Professional, Enterprise, and Unlimited** Editions with the Sales Cloud

[Set and Edit Product Prices in Salesforce Classic](#)

Track different types of prices for each of your products to fit the way you sell to different market segments and customers.

[Set Product Prices in Lightning Experience](#)

Track different types of prices for each of your products to fit the way you sell to different market segments and customers.

Set and Edit Product Prices in Salesforce Classic

Track different types of prices for each of your products to fit the way you sell to different market segments and customers.

REQUIRED EDITIONS

Products, product schedules, price books, and quotes available in: both Salesforce Classic and Lightning Experience	Orders available in Salesforce Classic
Products, product schedules, price books, and orders available in: Professional, Enterprise, Performance, Unlimited , and Developer Editions	Quotes available in: Performance and Developer Editions and in Professional, Enterprise, and Unlimited Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To set prices on products:	Edit on products
	AND
	Read on Price Books

Set Standard Prices

1. Select a product.
2. On the product detail page, click **Add** from the Standard Price related list. If you've already added a standard price, click **Edit** to change it or **Edit All** to edit all standard prices in other currencies.
3. Enter the standard price.
4. Select **Active** to make this price available to products on opportunities, quotes, or other custom price books.
5. Save your changes.
The standard price is automatically associated with the product in your standard price book.

Set List Prices

1. Select a product.
2. On the product detail page, click **Edit** from the Price Books related list next to the custom price book that will contain the list price. If you haven't already added the product to a custom price book, click **Add to Price Book** from the Price Books related list.
3. Enter the list price. Alternatively, if both prices are the same, select **Use Standard Price**.
4. Select **Active** to make this price available to products on opportunities or quotes.
5. Save your changes.

Edit a Price

Click **Edit** next to a price book entry record in any of these locations.

- The price book detail page, in the Products related list
- The product detail page, in the Standard Price related list

- The product detail page, in the Price Books related list
- The price book list view

For information about fields, see [Product, Price Book, Price Book Entry, and Product Schedule Fields](#).

Set Product Prices in Lightning Experience

Track different types of prices for each of your products to fit the way you sell to different market segments and customers.

REQUIRED EDITIONS

Products, product schedules, price books, and quotes available in: both Salesforce Classic and Lightning Experience	Orders available in Salesforce Classic
Products, product schedules, price books, and orders available in: Professional, Enterprise, Performance, Unlimited , and Developer Editions	Quotes available in: Performance and Developer Editions and in Professional, Enterprise, and Unlimited Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To set prices on products:	Edit on products
	AND

Edit on Price Books

Set Standard Prices in the Standard Price Book

1. Select a product.
2. On the product page, in the Price Books related list, click **Add Standard Price**. If you've already added a standard price, change it by clicking **Edit** in the Show More menu.
3. Enter the new standard price in the List Price field.
4. To make this price available to products on opportunities, quotes, or other custom price books, select **Active**.
5. Save your changes.

The standard price is automatically associated with the product in your standard price book.

Set List Prices in Custom Price Books

1. Select a product.
2. On the product page, in the Price Books related list, click **Add to Price Book**.
3. Choose the price book and currency for the new list price, and then click **Next**.
4. Enter the list price. Or, to make the price in the selected price book match the standard price, select

Use Standard Price.

5. To make this price available when users add the product to opportunities or quotes, select **Active**.
6. Save your changes.

Edit a PriceBook Entry

Click **Edit** next to a price book record in any of these locations.

- The price book detail page, in the Products related list
- The product detail page, in the Price Books related list

For information about fields, see [Product, Price Book, Price Book Entry, and Product Schedule Fields](#).

Considerations for Setting Prices

If you're an admin or a sales operations manager, consider key points before you set prices for your products in Salesforce.

REQUIRED EDITIONS

Products, product schedules, price books, and quotes available in: both Salesforce Classic and Lightning Experience	Orders available in Salesforce Classic
Products, product schedules, price books, and orders available in: Professional, Enterprise, Performance, Unlimited, and Developer Editions	Quotes available in: Performance and Developer Editions and in Professional, Enterprise, and Unlimited Editions with the Sales Cloud

- The following price types are available.
 - A *standard price* is the default price that you associate with a product. It's automatically included in your standard price book.
 - A *list price* is the custom price that you associate with a product in a custom price book. For example, you can maintain one set of prices for domestic orders and another for international orders.
 - *Sales prices* are the actual prices that sales reps specify for the products that they add to opportunities and quotes. Sales prices can be the same as the list prices from the price book that's used for the opportunity or quote, or they can include discounts or other modifications.
- Before you can add a new product to an opportunity, quote, or custom price book, add a standard price to the product, and mark it as active. This pricing is the default pricing of the product.
- Before you can assign list prices for products, create custom price books. List prices are available to use when you add products to an opportunity or quote from a custom price book.
- To represent the price, for example, \$100.00, enter *100* or *100.00*, with or without the \$ symbol.
- You can expand the format of your price fields to up to eight decimal places. To change your decimal place settings, contact Salesforce.

Considerations When Using the Salesforce Classic User Interface

- You can add standard or list prices only through the multiline add pages (the Add Standard Price page and the Add List Price page). These pages don't support custom fields. To add standard or list prices and populate custom fields, add the price book entry via the multiline add pages, navigate to the Price Book Entry Edit page for the added record, and then update the custom fields.
-  **Note** This consideration doesn't affect price book entries that were created or edited by using Data Loader or the API.
- If the price book entry contains required custom fields, you can't create price book entries in the user interface. You can create these price book entries only by using Data Loader or the API.
 - You can edit prices in either of the following locations.
 - The multiline edit pages (the Edit Standard Price page and the Edit List Price page)
 - The Price Book Entry Edit page

Product Schedules

Use product schedules to determine the payment and delivery cycles for products that are paid or delivered over time. In Lightning Experience, customize schedules with custom fields, custom buttons, customized layout, validation rules, and Apex triggers.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

- A *quantity schedule* determines when a product is delivered.
- A *revenue schedule* determines when a product is paid for.
- A *default schedule* is associated with a specific product in a specific price book. Every time the product is added to an opportunity, the default schedule is used. You can override the default schedules on any opportunity.

You determine which types of schedules your reps can use and which types of schedules can be established for each individual product.

- A quantity schedule is suitable if your customers pay once but receive the product in increments, for example, as with an annual magazine subscription for a monthly magazine. A quantity schedule defines the dates, number of units, and number of installments for payments, shipping, or other use as determined by your company.
- A revenue schedule is suitable if your customers make regular payments but receive the product once, for example, if you sell customized products that are charged in installments but delivered once. A revenue schedule defines the dates, revenue amounts, and number of installments for payments, recognizing revenue, or other use.
- A revenue and quantity schedule is suitable if your customers receive their orders on a delivery schedule and pay for the products using a payment schedule, for example, a monthly product

- subscription that's paid for monthly.
- A default schedule is suitable if all your customers make product payments on the same timetable or you deliver products on a regular schedule. If you typically customize schedules, there's no advantage to creating default schedules.

When you enable customizable product schedules, the Salesforce Classic actions on product schedules are disabled, and Line Item Schedule is added to the object manager. In Salesforce Classic, product schedules become read-only.

Enable Product Schedules in Salesforce Classic

Create default revenue and quantity schedules for products that are delivered or paid for over time. Let users create schedules for individual products on opportunities.

Considerations for Using Product Schedules

Consider key points and review examples before you add product schedules, establish schedules on opportunity products, or enable customizable product schedules.

Add and Edit Product Schedules

Add product schedules to define the payment and delivery cycles of your products.

Establish Schedules for Products on Opportunities

After you add product schedules, use them to set up payments for product sales and realized revenue on opportunities.

Enable Product Schedules in Salesforce Classic

Create default revenue and quantity schedules for products that are delivered or paid for over time. Let users create schedules for individual products on opportunities.

REQUIRED EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS NEEDED

To enable product schedules: Customize Application

To customize page layouts: Customize Application

To define or change validation rules: View Setup and Configuration

To define Apex triggers: Author Apex

See Also

[Products Concepts](#)

[Customize Fields](#)

[Define Apex Triggers](#)

Turn On Product Schedules



Warning Enabling or disabling product schedules doesn't affect archived products. If you disable a scheduling type, all schedule information for that type is deleted from active products. Disabling product schedules deactivates and deletes any schedule date forecast types and deletes the related forecasting data.

1. From Setup, in the Quick Find box, enter *Product Schedules*, and select it.
2. Select **Enable quantity scheduling**, **Enable revenue scheduling**, or both.
3. To enable a product scheduling type for every product in your price books, select **Enable for all products**.
4. Save your changes.

The Enable for all products option acts like a one-time switch. When it's selected, the selected product scheduling type becomes available for all preexisting products. New products must have product scheduling enabled again, either at the time the product record is created, or later, via Setup.

Add Product Schedule Fields to Page Layouts

1. From Setup, in the Quick Find box, enter *Products*, and select **Page Layouts**.
2. Click **Edit** next to the layout to customize.
3. Depending on which product scheduling types you've enabled, drag these fields to the layout.
 - Quantity Scheduling Enabled
 - Quantity Schedule Type
 - Quantity Unit of Measure
 - Quantity Installment Period
 - Number of Quantity Installments
 - Revenue Scheduling Enabled
 - Revenue Schedule Type
 - Revenue Installment Period
 - Number of Revenue Installments
4. Click **Save**.

Allow Admin Users to Enable Product Schedules on New Products

To allow admin users to enable product schedules on new products, set field visibility on System Administrator profiles.

1. From Setup, in the Quick Find box, enter *Security Controls*, and select **Field Accessibility**.
2. Select **Product**.
3. Select **View by Profiles**.
4. Select the profile for **System Administrator**.
5. If you've enabled Revenue Scheduling:
 - a. Find **Revenue Scheduling Enabled** and click the corresponding value under the Field Access column.

- b. Select **Visible**.
 - c. Click **Save**.
6. If you've enabled Quantity Scheduling:
- a. Find **Quantity Scheduling Enabled** and click the corresponding value under the Field Access column.
 - b. Select **Visible**.
 - c. Click **Save**.
- Repeat these steps for all profiles that must have permission to enable product schedules.

Considerations for Using Product Schedules

Consider key points and review examples before you add product schedules, establish schedules on opportunity products, or enable customizable product schedules.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Considerations for Enabling and Disabling Customizable Product Schedules

- Insert or delete Apex triggers that you've applied to schedules are invoked immediately.
- Line Item Schedule is unavailable in Process Builder and Workflow.
- You can use custom fields and customize the layout in default product schedules, but if you've applied validation rules or Apex triggers, they're bypassed when they're first inserted.

In addition, the layout of the OpportunityLineItemSchedule related list on the OpportunityLineItem page is customizable in Lightning Experience regardless of whether you've enabled customizable product schedules.

If schedules are referenced in Apex, only one of the schedule types (quantity or revenue) can be disabled. For example, if Apex references the schedule object (represented as **OpportunityLineItemSchedule** in the code), one of the schedule types can be disabled, but not both.

Considerations for Using Default Product Schedules

- If you add or change a product schedule, opportunities with that product aren't updated. If a product has a default quantity schedule and a default revenue schedule, the quantity schedule is calculated first to determine the total product revenue. Then the revenue schedule is applied to that amount.
- If you have a quote line item with a discount, and the corresponding product record has a default schedule, you can't edit the Discount field.
- If a product has default schedules established on the product record, the schedules are automatically created when you add the product to the opportunity. The dates of the installments begin with the date that you specified when adding the product. If you didn't specify a product date, the installment

dates begin with the opportunity Close Date.

- On default product schedules, we don't support the type **Repeat Amount for each installment** for both quantity and revenue schedule types. You can set up repeat schedules for both quantity and revenue schedule types from the Schedules related list on an opportunity product record.
- In Lightning Experience, the Schedules related list on an opportunity product shows the default revenue schedule and the default quantity schedule as two separate items. In Salesforce Classic, the related list combines the schedules in a single item.
- When customizable product schedules are enabled, default field values and formulas aren't supported by default product schedules.
- If amounts can't be evenly divided when quantity or revenue schedules are enabled, the remaining amounts are placed into the final schedule period.

Examples of Using Default Product Schedules

- Default Revenue Schedule Only: Your ASP company sells yearly contracts of product licenses at \$1,200 per license. When a customer buys licenses, the licenses are all "delivered" at one time, but you recognize the revenue monthly. In this case, set a revenue schedule of Schedule Type=Divide, Installment Period=Monthly, and Number of Installments=12.

With this default revenue schedule, a salesperson sells 200 licenses at a unit price of \$1,200 per license per year on an opportunity on March 15. The 200 licenses are all "delivered" on March 15. The total revenue for this product is the quantity of 200 multiplied by the unit price of \$1,200 per year, for a total yearly revenue of \$240,000. The revenue schedule divides the total revenue into monthly installments of \$20,000 on the 15th of every month for the next year.

- Default Quantity Schedule Only: Your medical supplies company sells a box of tongue depressors for \$10 per box. You normally have yearly contracts with hospitals to deliver boxes monthly. In this case, set a quantity schedule of Schedule Type=Repeat, Installment Period=Monthly, and Number of Installments=12.

With this default quantity schedule, a salesperson sells 1,000 boxes on an opportunity on January 1. The quantity schedule creates 12 monthly installments of 1,000 boxes each, for a total quantity of 12,000 boxes. The total revenue from this opportunity is calculated using the unit price and the total quantity, so \$120,000 is booked on January 1.

- Default Quantity and Revenue Schedules: Your manufacturing company sells widgets for \$10 each. You normally have yearly contracts to deliver widgets weekly, but your customers pay quarterly. In this case, set a quantity schedule of Schedule Type=Repeat, Installment Period=Weekly, and Number of Installments=52. Set a revenue schedule of Schedule Type=Divide, Installment Period=Quarterly, and Number of Installments=4.

With these default schedules, a salesperson sells 2,000 widgets on an opportunity on January 1. The quantity schedule is applied first, and it schedules 2,000 widgets to be delivered every week for a year, for a total quantity of 104,000. The total revenue is calculated using the unit price and the total quantity. The total revenue of \$1,040,000 is then divided into quarterly installments of \$260,000.

Add and Edit Product Schedules

Add product schedules to define the payment and delivery cycles of your products.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To add or edit product schedules: Edit on products

1. Review [considerations and examples](#).
 2. Enable the appropriate [schedule types](#).
 3. Enable customization of product schedules. Create custom fields and buttons, validation rules, and Apex triggers as needed to support your business process.
-  **Note** Default product schedules aren't customizable.
4. Select a product from the Products home page.
 5. Click **Edit**.
 6. Select the type of schedule to create: quantity, revenue, or both. Your choices are limited by your Salesforce org's schedule settings and the schedule types that are enabled for the product.
 7. Set the schedule details.
 8. Save your changes.
 9. To establish a schedule on an opportunity product, see [Establish Schedules for Products on Opportunities](#).
 10. To edit a product schedule, click **Edit** on the product detail page.

Establish Schedules for Products on Opportunities

After you add product schedules, use them to set up payments for product sales and realized revenue on opportunities.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To add or edit product schedules: Edit on opportunities

1. Review [considerations and examples](#).
2. Make sure that [product schedules have been added](#).
3. Click a product name in the Products related list of an opportunity.
4. Click **Establish** to create a schedule, or click **Reestablish** to delete the old schedule and create another one.
5. Select the type of schedule to create: quantity, revenue, or both. Your choices are limited by the

schedule types and other settings enabled by your Salesforce admin.

6. Set the schedule details.

See [Product, Price Book, Price Book Entry, and Product Schedule Fields](#) for a description of scheduling fields.

7. Save your changes.

Salesforce displays the schedule installments. Your Salesforce admin can customize the columns and other schedule features to support your company's business process.

8. To edit the installments, click **Edit**.

See Also

[Opportunities: What's Different or Not Available in the Salesforce Mobile App](#)

Manage Price Books

Price books track the prices of products and services that your company offers to customers.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

A *price book* is a list of products and their prices.

- The *standard price book* is the master list of all your products and their default *standard prices*. Salesforce creates the standard price book when you start creating product records. It includes all your products and their standard prices regardless of any custom price books that include those products.
- A *custom price book* is a separate list of products with custom prices, called *list prices*. Custom price books are ideal for offering products at different prices to different market segments, regions, or other subsets of your customers. Create a separate price book for each set of customers that you want to address. For example, if you have one set of prices for domestic customers and another for international customers, create a domestic price book and an international one.

A *price book entry* is a product with its price as listed in a price book. Each price book entry specifies a currency for the price.

- *Standard price book entries* are the default (standard) prices for the products and services in the standard price book. When you create a product record, Salesforce creates a standard price book entry. You can mark the standard price book entry as active or inactive, depending, for example, on whether you intend to start selling the product right away.
- *Custom price book entries* are the custom (list) prices for the products and services in your custom price books. Custom price book entries can be created only for products with active standard price book entries.
- In Lightning Experience, Product detail pages display the Standard Price related list and the Price Books related list as a single Price Books related list.
- If you customize the Price Book Entry detail page layout, no field dependencies exist for price book

entry fields in the user interface. If the **Use Standard Price** checkbox is removed from the page layout, and this checkbox is selected for a price book entry, you can't edit the list price. The **List Price** field is disabled and can't be enabled on this page.

Create Custom Price Books

Create custom price books for each market segment that your sales reps sell to. Then add products to each price book with the prices that you offer each market segment. For example, if you sell to domestic and international customers at different prices, you can create two custom price books: a domestic one and an international one.

Considerations for Creating and Maintaining Price Books

Before you create a price book, consider a few key points.

Guidelines for Sharing Price Books

Extend access to price books to more of your sales team members through sharing in Salesforce Classic.

Considerations for Removing Price Books

To remove price books from related lists, you can archive, deactivate, or delete the price books. Each removal option has a different result. Before you remove a price book from your related lists, determine which option best fits your business needs.

Considerations for Removing a Product from a Price Book

Before you remove a product from a price book, consider a few key points.

Create Custom Price Books

Create custom price books for each market segment that your sales reps sell to. Then add products to each price book with the prices that you offer each market segment. For example, if you sell to domestic and international customers at different prices, you can create two custom price books: a domestic one and an international one.

REQUIRED EDITIONS

Products, product schedules, price books, and quotes available in: both Salesforce Classic and Lightning Experience	Orders available in Salesforce Classic
Products, product schedules, price books, and orders available in: Professional, Enterprise, Performance, Unlimited , and Developer Editions	Quotes available in: Performance and Developer Editions and in Professional, Enterprise, and Unlimited Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To create or clone price books:	Create on price books
To view price books:	Read on products

USER PERMISSIONS NEEDED

AND

Read in price books

1. Review [considerations](#).
2. On the Price Books page, click **New**.
3. Enter a name for your price book.
4. If your Salesforce org uses descriptions, enter one for your price book.
5. Select **Active** to allow sales reps to begin adding the price book or its entries to opportunities or quotes.
6. If you created the custom price book from scratch, leave it empty, populate it with price book entries from another price book, or add new entries.

For information about price book fields, see [Product, Price Book, Price Book Entry, and Product Schedule Fields](#).

Considerations for Creating and Maintaining Price Books

Before you create a price book, consider a few key points.

REQUIRED EDITIONS

Products, product schedules, price books, and quotes available in: both Salesforce Classic and Lightning Experience	Orders available in Salesforce Classic
Products, product schedules, price books, and orders available in: Professional, Enterprise, Performance, Unlimited , and Developer Editions	Quotes available in: Performance and Developer Editions and in Professional, Enterprise, and Unlimited Editions with the Sales Cloud

- To create a custom price book by cloning an existing price book, click **Clone** on the price book detail page.
- You can delete products from custom price books without affecting the original product listing or its entries in other price books. When you delete a product from the standard price book, the product is still available and active, but its standard price is deleted and removed from all custom price books. If you delete the product from the standard price book, and it's still associated with any custom price books, click **OK** to remove it from all custom price books.
- You can add products, quote line items, or order products from a single price book only.
- To include a product on an opportunity, quote, or order, choose a price book that contains the product. The last price book that you used on an opportunity or quote is selected by default. To select a different price book, click **Choose Price Book** in the Products related list on an opportunity or the Quote Line Items related list on a quote. Choose Price Book appears when you have access to more than one price book. If you have access to more than one price book and the option isn't visible, ask

- your administrator to add it to your page layout.
- If you change the price book for an opportunity that has products, all products are deleted from the Products related list, but the value in the opportunity's Amount field remains.

Guidelines for Sharing Price Books

Extend access to price books to more of your sales team members through sharing in Salesforce Classic.

REQUIRED EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS NEEDED

To share price books: Edit on price books

If you're an admin or a user with the "Edit" permission on price books, you can extend sharing of a price book to more users. However, you can't change the sharing model to make it more restrictive than the default.

To view and manage sharing details, click **Sharing** on the price book detail page. The sharing detail page lists the users, groups, roles, and territories that have sharing access to the price book. On this page, you can do any of the following.

- 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 that you created, select it from the **View** drop-down list, and then click **Edit**.
- To grant access to the record for other users, groups, roles, or territories, click **Add**.
- For manual sharing rules that you created, click **Edit** or **Del** next to an item in the list to edit or delete the access level.

Does your sales team want to see prices on the product detail page? If your organization-wide default for price books is "No Access," you can give your entire organization "View Only" access to your standard price book.

Considerations for Removing Price Books

To remove price books from related lists, you can archive, deactivate, or delete the price books. Each removal option has a different result. Before you remove a price book from your related lists, determine which option best fits your business needs.

REQUIRED EDITIONS

Products, product schedules, price books, and

Orders available in Salesforce Classic

quotes available in: both Salesforce Classic and Lightning Experience

Products, product schedules, price books, and orders available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

Quotes available in: **Performance and Developer Editions** and in **Professional, Enterprise, and Unlimited Editions** with the Sales Cloud

- Deleting, deactivating, or archiving a custom price book doesn't affect other price books or your product lists. However, these actions can affect your opportunities and quotes. Changing associations with opportunities or quotes is sometimes required before you can remove an associated price book.
- You can deactivate the standard price book, but you can't delete or archive it.

Considerations for Deleting Price Books

- You can't delete a price book while it's in use on opportunities or quotes. If you try to, the system creates a list of the opportunities or quotes that the price book is used on.
- When you delete a price book, you delete all entries in the price book. The deleted price book and its entries are moved to the Recycle Bin. You can restore them for up to 15 days.

Considerations for Deactivating Price Books

- You can activate, deactivate, or reactivate price books at any time by changing the price book's properties.
- You can deactivate a price book even if it's used on an opportunity or quote.
- You can continue to manage entries in your price book while it's deactivated.

Considerations for Archiving Price Books

- You can archive a price book even if it's in use on an opportunity or quote.
- An archived price book is visible, but not accessible, in all associated records.
- Entries in archived price books don't appear in search results.
- You can't recover or delete an archived price book.

Considerations for Removing a Product from a Price Book

Before you remove a product from a price book, consider a few key points.

REQUIRED EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience

Quotes available in Salesforce Classic

Products and price books available in: **Professional, Enterprise, Performance,**

Quotes available in: **Performance and Developer Editions** and in **Professional, Enterprise, and Unlimited Editions** with the Sales Cloud

Unlimited, and Developer Editions	Unlimited Editions with the Sales Cloud
<ul style="list-style-type: none"> If you remove a product from a price book, all related price book entries are removed. If you restore the product from the Recycle Bin, any related price book entries are restored with it. If opportunities, quotes, service contracts, or contract line items are associated with a product, you can't remove the product. You can't remove a product that's used on an opportunity or quote. If you try to remove it, Salesforce displays a list of the opportunities and quotes. That way, you can remove the product from those opportunities and quotes and try again. If you don't want to remove the product from all opportunities and quotes, you can deactivate (recommended) or archive the product. See Considerations for Removing Products and Price Books. 	

Things to Know About Products and Price Books

Review these considerations before you delete products or pricebooks. Learn more about product, price book, price book entry, and product schedule fields.

[Product, Price Book, Price Book Entry, and Product Schedule Fields](#)

Products, price books, and product schedules have the following fields. The availability of fields depends on how Salesforce is set up.

[Considerations for Removing Products and Price Books](#)

Review considerations before removing a product or a price book.

Product, Price Book, Price Book Entry, and Product Schedule Fields

Products, price books, and product schedules have the following fields. The availability of fields depends on how Salesforce is set up.

REQUIRED EDITIONS

Products, product schedules, price books, and quotes available in: both Salesforce Classic and Lightning Experience	Orders available in Salesforce Classic
Products, product schedules, price books, and orders available in: Professional, Enterprise, Performance, Unlimited, and Developer Editions	Quotes available in: Performance and Developer Editions and in Professional, Enterprise, and Unlimited Editions with the Sales Cloud

Product Fields

Field	Description
Active	Indication that the product is ready for use in a price book, opportunity, or quote, and whether

Field	Description
	you can see the product in views. In Salesforce Classic, if your profile allows only Read access to products and you're not a Salesforce admin, search results don't show inactive products.
Created By	The name of the user who created the product record, with the date and time of creation.
Custom Links	A list of custom links for products from Salesforce.
Display URL	URL leading to a specific version of a record in the linked external data source.
External Data Source	The related external data source.
External ID	The unique identifier of a record in the linked external data source. For example, <i>ID</i> #123.
Last Modified By	The name of the user who last saved the record, including the date and time of the most recent save to the record.
Product Code	The internal code or product number that you use to identify the product.
Product Currency	In an org with multiple currencies enabled, the currency that you use for the product. If the product currency differs from the user currency, currency-related fields for opportunities, quotes, and quote line items appear in both currencies. The product's currency is converted to the user's currency, and the converted amount appears in parentheses.
Product Description	The text that distinguishes this product from other products.
Product Family	The category that you specify for the product.
Product Name	The product's name.
Product SKU	The product's SKU, which can be used with or in place of the Product Code field. For example, you can use the Product Code field to track the manufacturer's identifying code, and assign the product a SKU when you resell it.
Quantity Scheduling Enabled	Whether the product can have a quantity schedule.

Field	Description
Quantity Unit Of Measure	Unit of the product—for example, kilograms, liters, or cases. This field comes with only one default value, Each. You can create your own. The Quantity Unit of Measure field on product items inherits this field's values.
Revenue Scheduling Enabled	Whether the product can have a revenue schedule.

Price Book Fields

Field	Description
Active	Whether you can add the price book to an opportunity or quote.
Created By	The name of the user who created the price book, including the date and time of creation.
Description	The text that distinguishes this price book from others.
Is Standard Price Book	Whether the price book is the standard price book. A read-only checkbox.
Last Modified By	The name of the user who last saved the record, including the date and time when the record was most recently saved.
Price Book Name	The price book's title.

Price Book Entry Fields

Field	Description
Active	Whether the price book entry (product and list price) is active and can be added to an opportunity or quote.
Created By	The name of the user who created the price book entry, including the date and time of creation.
Currency	This field is available only when multiple currencies are enabled. It represents the currency to use for the price book entry (product and list price).

Field	Description
Last Modified By	The name of the user who last saved the price book entry record.
List Price	The price of the product within the price book, including currency.
Price Book	The price book that contains the price for this entry.
Product	The product's name.
Product Code	The internal code or product number used to identify the product.
Standard Price	The standard price for the product. This field is derived and doesn't exist on the underlying PricebookEntry standard object.
Use Standard Price	Whether the price book entry inherits its price from the standard price book.

Schedule Fields

Field	Description
Schedule Type	Whether the product revenue or quantity is divided into multiple installments or repeated for each installment.
Installment Period	The interval for installments; for example, Weekly or Monthly.
Number of Installments	The number of installments in the schedule.

Considerations for Removing Products and Price Books

Review considerations before removing a product or a price book.

REQUIRED EDITIONS

Products, product schedules, price books, and quotes available in: both Salesforce Classic and Lightning Experience	Orders available in Salesforce Classic
Products, product schedules, price books, and orders available in: Professional, Enterprise,	Quotes available in: Performance and Developer Editions and in Professional, Enterprise, and

Performance, Unlimited, and Developer Editions Unlimited Editions with the Sales Cloud

- You can use the Salesforce mobile app to relate a price book with an opportunity that doesn't have one. To change an opportunity's price book, use the desktop Salesforce site.
 - When you remove a product or price book, all related price book entries are removed. However, if several price books contain the same product, removing the product from one price book doesn't affect the other price books. Similarly, if you remove a price book, the products that it contained aren't removed from any other price book.
 - To remove a product completely, remove it from the standard price book.
 - If opportunities, quotes, service contracts, or contract line items are associated with a product, you can't remove the product.
 - You can't remove a product or price book that's associated with an approval process or has a pending workflow action.
 - If your product or price book is used on an opportunity, quote, or order, you have three options.
 - Deactivate it by editing it and then deselecting the Active field. We recommend deactivating a product or price book that's on an opportunity or quote because it will no longer be available to users. You can reactivate it later. Deactivation doesn't affect the history of an opportunity line item.
 - Remove the related product or price book from all opportunities and quotes. When you try to remove a product or price book that's used on an opportunity or quote, Salesforce displays a list of the opportunities or quotes that use it.
 - If you remove a price book, remove it from each opportunity and quote that's listed.
 - If you remove a product, remove it from each opportunity and quote that uses it.
 - Then remove the price book or product.
 - Archive the product or price book and each related price book entry. Use this option with caution. Archived products and price books can't be recovered because they're not stored in the Recycle Bin. Archived products and price books still appear on any opportunities or quotes that contained them before they were archived.
- If you archive a price book, it's still visible in the related records but not accessible or retrievable.

Opportunities

Track and manage your potential deals and any deals that are in progress with Salesforce opportunities. Opportunity records contain the details about all your deals, including which accounts they're related to, who the key players are, and the amount of potential revenue. If your Salesforce admin has set up leads, an opportunity is created when a lead is converted. Opportunities can also be created directly for the accounts that you're working.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: all editions for orgs created before Summer '09

Available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer**

Editions for orgs created in Summer '09 and later

-  **Tip** To learn more about using opportunities and leads, complete the [Leads & Opportunities](#) Trailhead module.

As your deals progress through the sales cycle, use the opportunity record to capture all the details about the deal.

- Add products and attach files, such as contracts or data sheets.
- Log the calls you make so there's visibility into the conversations about the deal.
- Use Notes to jot down things during customer meetings.
- Create tasks for key activities and calendar events for client meetings.
- Send email to the opportunity contact or other key decision-makers.

As you negotiate and work the deal, share sales strategies with colleagues or ask your manager for targeted guidance about the deal, and update the stage to indicate where the deal is in the process.

[Set Up Opportunities and Opportunity Products](#)

Help your sales reps close deals faster by customizing options for opportunities and the products you sell.

[Manage Your Opportunities](#)

Create, share, clone, and move your opportunities through your sales process.

[Manage the Products on Your Opportunities](#)

To help manage your deals effectively, add products to opportunities.

[Track Your Competitors](#)

Track competitors in a pending sale by listing the competitors' names in the opportunity. You can enter the names of new competitors, or choose from a list of competitors defined by your administrator. To access this information, go to the Competitors related list of the opportunity.

[Opportunity Fields and Opportunity Product Fields](#)

Review details about opportunity fields and opportunity product fields.

[Opportunities: What's Different or Not Available in the Salesforce Mobile App](#)

Not every Lightning Experience feature is in the Salesforce mobile app. Find out what's different.

Set Up Opportunities and Opportunity Products

Help your sales reps close deals faster by customizing options for opportunities and the products you sell.

[Enable and Configure Similar Opportunities](#)

Allow users to find Closed - Won opportunities that match the attributes of an opportunity they're currently working on, so they can quickly access information that can help them close their deals.

[Enable Opportunity Update Reminders](#)

Updated and accurate opportunities drive precise forecasts. Enable update reminders to let managers

automatically send a report of the team's open opportunities to their direct reports in the role hierarchy.

Set Up Big Deal Alerts for Opportunities

Automatically email your users whenever an opportunity reaches a threshold of amount and probability. For example, set the threshold to trigger an alert when opportunities of \$500,000 or more reach a probability of 90%. The alert is a plain-text email rendered in the corporate language and using the corporate currency setting.

Manage Settings to Show Changed Deals

Help your sales team prioritize work by highlighting recent changes in deal size and close date. For example, calling out recent changes to deals can help sales managers with their weekly coaching sessions. This feature is turned on by default, but you can turn it off (and back on).

Set a Default Product Quantity of 1 on Opportunities

Help your sales reps keep data and forecasts current and complete. If the opportunity product quantity is always 1 or isn't known until later in the sales cycle, set a default quantity of 1.

Automatically Enter the List Price as the Sales Price on Opportunities

Ensure that the price from the associated price book is applied to opportunity products by removing the Sales Price field from the opportunity product layout.

Enable and Configure Similar Opportunities

Allow users to find Closed - Won opportunities that match the attributes of an opportunity they're currently working on, so they can quickly access information that can help them close their deals.

REQUIRED EDITIONS

Available in: Salesforce Classic

Available in: All Editions in orgs activated before Summer '09

Available in: Enterprise, Performance, Unlimited, and Developer Editions in orgs activated after Summer '09

USER PERMISSIONS NEEDED

To enable and configure similar opportunities: Customize Application

Note

- Searches are constructed as *OR* statements. Therefore, Closed/Won opportunities must match only one criterion to be considered similar. For best search results, include multiple search terms.
- When deciding which opportunity fields to display in the Similar Opportunities related list, be aware that users see all the fields, regardless of sharing rules or permissions.

1. From Setup, enter *Similar Opportunities* in the **Quick Find** box, then select **Similar Opportunities**.
2. Click **Edit**.
3. Select **Enable Similar Opportunities**.
4. Select the fields or related lists that you want Similar Opportunities searches to match against, and then click **Add**.
5. Select the fields to display in the Similar Opportunities related list.
6. Click **Save**.
7. Make sure that the Similar Opportunities related list is included in the opportunity page layout.

Enable Opportunity Update Reminders

Updated and accurate opportunities drive precise forecasts. Enable update reminders to let managers automatically send a report of the team's open opportunities to their direct reports in the role hierarchy.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

USER PERMISSIONS NEEDED

To enable opportunity update reminders: Customize Application OR Manage Users

To activate or deactivate opportunity update reminders: Manage Users

1. In Setup, use the Quick Find box to find **Update Reminders**.
2. Click **Edit**.
3. Select **Enable Update Reminders for My Organization**.
4. If you want to schedule opportunity update reminders for all users who have direct reports in the role hierarchy, select **Automatically Activate Reminders for Users with Direct Reports**.
5. Click **Save**.
6. If you didn't select **Automatically Activate Reminders for Users with Direct Reports**, select which users can schedule opportunity update reminders. Any user with direct reports in the role hierarchy can be selected.
7. Click **Activate**.
8. Let the users you selected know that they can [start scheduling update reminders for their direct reports](#).

See Also

[Considerations for Scheduling Opportunity Update Reminders](#)

Set Up Big Deal Alerts for Opportunities

Automatically email your users whenever an opportunity reaches a threshold of amount and probability. For example, set the threshold to trigger an alert when opportunities of \$500,000 or more reach a probability of 90%. The alert is a plain-text email rendered in the corporate language and using the corporate currency setting.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

USER PERMISSIONS NEEDED

To activate big deal alerts:

Customize Application

AND

View All Data

1. In Setup, use the Quick Find box to find **Big Deal Alert**.
 2. Name the alert.
 3. To activate the alert when you save it, select **Active** or leave the option deselected and activate the alert later.
When you activate the alert, emails are immediately triggered for all open opportunities that meet the threshold.
 4. Enter a threshold: a trigger amount in the corporate currency, and a trigger probability.
-  **Note** Opportunities trigger alerts regardless of currency. When an opportunity is updated, if the amount isn't in the corporate currency, it's converted and compared to the trigger amount. If you're using advanced currency management, dated exchange rates are used.
5. Enter Sender settings.
 - a. Enter the name and email address you want to show in the From field of the email.
The email address must be your own Salesforce email address (as shown in your Salesforce profile) or a verified org-wide email address.
 - b. In the User field, select yourself.
 6. Enter the email addresses of recipients, separated by commas.
If you've enabled compliance BCC emails, the BCC: field isn't available.
 7. To send alerts to opportunity owners, select **Notify Opportunity Owner**.
 8. Click **Save**.

An opportunity triggers an alert when it reaches the threshold. If the amount or probability change, the opportunity triggers no additional alerts unless those values fall below the threshold and then reach the threshold again.

When a sales rep working in Connect Offline makes changes that push an opportunity to the threshold, the alert is sent when the data is updated.

See Also

- [Opportunity Fields](#)
- [Set Up Organization-Wide Email Addresses](#)
- [About Advanced Currency Management](#)

Manage Settings to Show Changed Deals

Help your sales team prioritize work by highlighting recent changes in deal size and close date. For example, calling out recent changes to deals can help sales managers with their weekly coaching sessions. This feature is turned on by default, but you can turn it off (and back on).

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Performance** and **Unlimited** Editions

USER PERMISSIONS NEEDED

To manage settings to show changed deals:

Customize Application

AND

View All Data

In the opportunities list view and Kanban view, green text and arrows indicate amounts that increased and close dates that were pulled in during the previous week. Red text and arrows indicate amounts that decreased and close dates that were pushed out. Users can hover over a highlighted opportunity to see what changed, who changed it, and when.

1. From Setup, in the Quick Find box, enter *Opportunity Settings*, and then select **Opportunity Settings**.
2. Under Manage Settings to Show Deals That Changed in the Last Week, select or deselect **Show amounts that changed** and **Show close dates that changed** as needed.
3. Save your changes.

Set a Default Product Quantity of 1 on Opportunities

Help your sales reps keep data and forecasts current and complete. If the opportunity product quantity is always 1 or isn't known until later in the sales cycle, set a default quantity of 1.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

USER PERMISSIONS NEEDED

To edit opportunity settings:

Customize Application

1. In Setup, use the Quick Find box to find **Opportunity Settings**.
2. Select **Prompt users to add products to opportunities**. Save your change.
When reps create an opportunity, the button changes to **Save & Add Product** instead of **Save**.

 **Tip** If there's no need for sales reps to edit the quantity, reduce clutter: Remove the Quantity field from the opportunity products page layout and the multiline editor layout.

Automatically Enter the List Price as the Sales Price on Opportunities

Ensure that the price from the associated price book is applied to opportunity products by removing the Sales Price field from the opportunity product layout.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

USER PERMISSIONS NEEDED

To restrict price and unit editing:

Customize Application

1. In the Object Manager, use the Quick Find box to find **Opportunity Product**.
2. In the opportunity product layout, remove the Sales Price field. Save your change.

Manage Your Opportunities

Create, share, clone, and move your opportunities through your sales process.

 **Note** Chatter Only users don't have access to opportunities.

Considerations for Creating and Updating Opportunities

Review considerations for creating and updating opportunities.

Considerations for Cloning Opportunities

Review considerations for cloning an opportunity with or without its related contact roles, products,

and product (line item) schedules.

Things to Know About Sharing Opportunities

Review considerations for sharing opportunities. By sharing your opportunities, you can give visibility into your pipeline to others who can provide important information to help you close deals.

Move an Opportunity to the Next Stage

Update your deal as it moves closer to closing. Accurate stage information is important for forecasting, reporting, and ultimately meeting your quota.

Opportunity History

Two related lists show changes to the fields on an opportunity record: One tracks field history, and the other tracks changes to the opportunity stage.

Things to Know About Deleting Opportunities

Review considerations for deleting opportunities.

Schedule Reminders to Update Opportunities

To ensure that your team is keeping their opportunities up to date, create an email containing a report of your team's open opportunities. Schedule automatic reminder emails to your direct reports.

Considerations for Scheduling Opportunity Update Reminders

Review considerations for scheduling opportunity update reminders.

Guidelines for Finding Similar Opportunities

Close your deals faster by taking advantage of the rich information contained in successfully closed deals that are similar to yours. Here are some guidelines to help you find the opportunities that help you close your deals.

Considerations for Creating and Updating Opportunities

Review considerations for creating and updating opportunities.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: all editions for orgs created before Summer '09

Available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions for orgs created in Summer '09 and later

Contacts and Contact Roles

- To relate an opportunity to an account or contact, you must have at least Read access to the account or contact.

Divisions

- If your admin has enabled divisions, the division of a new opportunity is automatically set to the division of the related account.

Forecasts

- In Professional, Enterprise, Unlimited, Performance, and Developer Editions, when you create an opportunity, by default the forecast category is applied that corresponds to the opportunity stage you assigned. Your Salesforce admin correlates opportunity stages and forecast categories when editing the Stage picklist values.
- If an opportunity is set to close in a given period, as determined by the Close Date, the opportunity is added to the forecast for that period, unless the forecast category is set to Omitted or you forecast by schedule or product date.

Mobile Device Support

- In the Salesforce mobile app, you can edit one opportunity at a time. There's no multiline editor.

Multiple Currencies

- If your admin has enabled multiple currencies, your opportunity amounts are initially shown in your personal currency. To track the sales revenue in another currency, change the Opportunity Currency picklist.

Opportunity Splits

- When team selling and splits that total 100% are enabled, as the opportunity owner, you're automatically added to the opportunity team and assigned 100% of the split.

Considerations for Cloning Opportunities

Review considerations for cloning an opportunity with or without its related contact roles, products, and product (line item) schedules.

REQUIRED EDITIONS

Clone action available in Lightning Experience, Salesforce Classic, and the Salesforce mobile app in:
Professional, Enterprise, Performance, Unlimited, and Developer Editions

Clone with Related action available in Lightning Experience in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

Fields You Can't Access

- If the record you're cloning or a related record contains a field you don't have access to, the field in the new record is blank.

Fields with Read-Only Access

- If the record you're cloning contains a field you have read-only access to, the field in the new record is blank. However, if a related record contains a field you have read-only access to, the field value is copied into the new record.

Custom Fields with Unique Values

- If a related record includes a custom field configured to contain a unique value, you must delete the value before cloning the opportunity.

Related Records Limit

- Related contact role, product, and product (line item) schedule records can't total more than 999.

Validation Rules, Apex Triggers, and Workflow

- Related records are cloned in batches of up to 200. For example, if you clone an opportunity with 500 related records, it's cloned in three batches. Validation rules, Apex triggers, and workflow are applied separately to each batch.

Things to Know About Sharing Opportunities

Review considerations for sharing opportunities. By sharing your opportunities, you can give visibility into your pipeline to others who can provide important information to help you close deals.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: all editions for orgs created before Summer '09

Available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions for orgs created in Summer '09 and later

Overall Sharing Model

- Your Salesforce admin determines the default access levels across your Salesforce org, including the default opportunity access levels for territories.

Sharing Your Own Opportunities

- Although you can increase access to your opportunities, you can't restrict access further than the default access levels determined by your Salesforce admin.
- To share an opportunity with another user, that user must have read access to opportunities.

Sharing Info for Opportunities

- The sharing detail page lists the users, groups, roles, and territories that have sharing access to an opportunity.

Move an Opportunity to the Next Stage

Update your deal as it moves closer to closing. Accurate stage information is important for forecasting, reporting, and ultimately meeting your quota.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: all editions for orgs created before Summer '09

Available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions for orgs created in Summer '09 and later

User Permissions Needed	
To create opportunities:	Create on Opportunities
To view opportunities:	View on Opportunities

In Lightning Experience, move an opportunity to the next stage by taking any of these actions.

- From an open opportunity, select the new stage on the Sales Path and then click **Mark as Current**, or click **Mark Stage as Complete**
- From the Opportunity Kanban view, find the opportunity whose stage you want to update and drag its card to the next stage column.

In Salesforce Classic, edit the opportunity and select the new stage in the Stage field.

See Also

[Manage Opportunity Stage to Forecast Category Mappings for Pipeline Forecasts](#)

Opportunity History

Two related lists show changes to the fields on an opportunity record: One tracks field history, and the other tracks changes to the opportunity stage.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: all editions for orgs created before Summer '09

Available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions for orgs created in Summer '09 and later

User Permissions Needed

To view opportunities:	Read on opportunities
------------------------	-----------------------

Opportunity Field History

- Anytime a user modifies tracked standard or custom opportunity fields, a new entry is added to the Opportunity Field History related list. All entries include details of the change and who made it. Your Salesforce admin selects which fields to track.

Stage History

- Anytime a user changes the Amount, Probability, Stage, or Close Date fields on an opportunity, a new entry is added to the Stage History related list. All entries include details of the change and who made it. Your admin can't select which fields to track.
- Unlike field history data for other objects, which is retained for a limited time, opportunity stage history data isn't automatically deleted.

Changes to the Amount and Quantity fields are tracked even when the change is the result of a change to an opportunity's products or schedules.

See Also

[Manage Settings to Show Changed Deals](#)

[Field History Tracking](#)

Things to Know About Deleting Opportunities

Review considerations for deleting opportunities.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: all editions for orgs created before Summer '09

Available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions for orgs created in Summer '09 and later

Who Can Delete Opportunities

- You can delete an opportunity if you're a Salesforce admin, the opportunity owner, or a user above the opportunity owner in the organization role hierarchy. You must also have the Delete permission on opportunities.

What Gets Deleted with an Opportunity

- When you delete an opportunity, these related records are also deleted: all notes, attachments, quotes, quote line items, quote PDF files, events and tasks, partner relationships, competitor strengths and weaknesses, contact roles, splits, and stage history.
- Related contacts and accounts aren't deleted with the opportunity.

Recycle Bin

- A deleted opportunity is moved to the Recycle Bin and can be restored. If you restore the opportunity, related items are also restored.

Schedule Reminders to Update Opportunities

To ensure that your team is keeping their opportunities up to date, create an email containing a report of your team's open opportunities. Schedule automatic reminder emails to your direct reports.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

For example, schedule a weekly report of all the opportunities for the current fiscal quarter owned by

anyone on the team. Have the report distributed to everyone on the team.

1. Make sure that opportunity update reminders are enabled in Setup.
2. In your personal settings, use the Quick Find box to find **My Update Reminder**.
3. To start sending reminders after you save the settings, check **Active**.
4. Enter a sender name and address.
5. Choose recipients.
6. Enter any other recipients in the CC field. Separate email addresses with commas, semicolons, spaces, or new lines.
7. Enter a subject and message for the reminders.
8. Schedule the frequency.
9. Select To include all open opportunities that have a closing date within 90 days before the specified close date, select **Include Past Due Opportunities**.
For example, suppose that in your org you use a normal fiscal year, and the current quarter started on April 1, 2012. You configure reminders for opportunities closing in the current quarter and then select **Include Past Due Opportunities**. When the reminder is sent on June 15, it includes all opportunities with a close date between April 1 and June 15. It also includes open opportunities with a close date between January 2 and April 1 (there are 91 days in Q1).
10. Include opportunities with dates within that range by selecting a close date.
11. Select fields to include in the reminders.

Field	Description
Last Login Date	Most recent login date of the opportunity owner
# of Open Opportunities	Total number of opportunities in the report.
# Not Updated in Last 30 Days	Total number of opportunities that haven't been updated in 30 days.
Open Opportunity Amount	Total of all opportunity amounts in report.
Total Closed Amount	Total closed amount for all opportunities in report. If you use multiple currencies in your org, this amount is converted to the user's currency. If you use advanced currency management in your org, the conversion is done using dated exchange rates.
Last Update Date	Most recent date the opportunity owner updated a forecast. If you use multiple currencies in your org, this amount is converted to the user's currency. If you use advanced currency management in your org,

Field	Description
	the conversion is done using dated exchange rates.

12. Click **Save**.

When there are no records to include in a reminder, Salesforce doesn't send an email. If no email is sent for three consecutive reminders, the scheduled reminder is deactivated. Reminders generally arrive early on the scheduled date. However, depending on your org's time zone and location, a reminder can arrive 24 hours earlier or later.

See Also

[Considerations for Scheduling Opportunity Update Reminders](#)

Considerations for Scheduling Opportunity Update Reminders

Review considerations for scheduling opportunity update reminders.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

- In the update reminder email, the View Details button links to Report Home, where users can create a report of their teams' opportunities.
- Users at the top of the portal role hierarchy receive reminders even when they don't have access to an opportunity. The top role in a portal hierarchy depends on how many users you set up in the hierarchy. With three roles, the top role is Partner Executive, and with two roles, the top role is Partner Manager. To prevent sending reminders to users in the Partner Executive or Partner Manager roles, remove them from the highest portal role.
- When you have only one role in your portal hierarchy, you can't remove a user from the role. To stop sending reminders to an executive or other user, in your personal settings, go to My Update Reminder and change the Recipients setting to Myself only.
- So that your users can control which individuals receive opportunity update reminders, create at least two portal roles.

Guidelines for Finding Similar Opportunities

Close your deals faster by taking advantage of the rich information contained in successfully closed deals that are similar to yours. Here are some guidelines to help you find the opportunities that help you close your deals.

REQUIRED EDITIONS

Available in: Salesforce Classic

Available in: all editions in orgs activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions in orgs activated after Summer '09

- To find Closed/Won opportunities with common information, use the Similar Opportunities related list on the opportunity's detail page.
- Your Salesforce admin determines the criteria used to find similar opportunities. The search finds a maximum of 10,000 opportunities with close dates in a three-month period and displays up to 300 of the records that best match the search criteria. The results are ranked by the number of matching fields.
- Results can be filtered by Close date or by matching fields.
- To see how a record in the search results is similar to your current deal, hover over the opportunity name. The matching fields are highlighted in the Match Criteria sidebar.

Manage the Products on Your Opportunities

To help manage your deals effectively, add products to opportunities.

Add Products to Opportunities

Track what's selling and in what quantity by adding products to opportunities. Then maintain accurate records by updating the quantities and prices of the products.

Things to Know About Adding Products to Opportunities

Review considerations for adding products to opportunities.

Add Products to Opportunities

Track what's selling and in what quantity by adding products to opportunities. Then maintain accurate records by updating the quantities and prices of the products.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

USER PERMISSIONS NEEDED

To add or edit opportunity products:

Edit on opportunities

USER PERMISSIONS NEEDED

AND

Read on products and price books

1. Navigate to the opportunity that you want to edit.
2. In the Products related list, select **Add Products**, or select **Edit** next to a product in the list. If you're adding the first product, choose a price book for the opportunity.
3. Find the products you want to add to this opportunity.
 - a. In Lightning Experience, enter keywords in the search bar. Then open the Quick Filter panel by clicking . Filter by product fields and click **Apply**, and then click **Next**.
You can filter only by product fields that your Salesforce admin has included in the layout.
 - b. In Salesforce Classic, enter keywords in the search bar. Then add filters. Click **Search**.
You can filter by all standard and custom fields on products and price books.
4. In the Quantity field, enter the number of products at this price.
5. Enter the sales price for the product. The sales price defaults to the list price specified in the price book related to the opportunity.
6. If the product has a discount, type the discount as a number with or without the percent sign (%) in the Discount field. If the Discount field isn't available, check with your Salesforce admin.
7. Save your changes.
8. To determine the order of products on an opportunity, in the Products related list, select **Sort Products**. Drag products into the order you want and save. If an opportunity and a quote are linked and the sort order of either record is changed, the sort order is updated during syncing.

See Also

[Things to Know About Adding Products to Opportunities](#)

[Sync Quotes and Opportunities](#)

Things to Know About Adding Products to Opportunities

Review considerations for adding products to opportunities.

Available in: Lightning Experience and Salesforce Classic

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

Sorting

- In the opportunity products related list, you can't sort columns by list price.
- In the Add Products window, you can't sort by list price after refining your list of products using the search box.

Opportunity Amount

The opportunity amount is the sum of the products added to the opportunity. You can't edit the amount without deleting the products from the opportunity.

Total Price

The total price is the quantity multiplied by the sales price.

Multiple Currencies

If your Salesforce admin has enabled multiple currencies, the opportunity currency dictates the currency of the associated price book entries. You can't edit the currency unless you delete the products from the opportunity.

Product Status

You can add to an opportunity any product with an active price book entry, since product status doesn't determine a product's eligibility to be used in a deal. If a product's status is inactive, but it has an active price book entry, you can still add the inactive product to an opportunity.

See Also

[Add Products to Opportunities](#)

Track Your Competitors

Track competitors in a pending sale by listing the competitors' names in the opportunity. You can enter the names of new competitors, or choose from a list of competitors defined by your administrator. To access this information, go to the Competitors related list of the opportunity.

REQUIRED EDITIONS

Available in: Salesforce Classic

Available in: all editions in orgs activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions in orgs activated after Summer '09

To add, edit, or delete competitors on an opportunity, you must have Edit access on the opportunity.

[Define Competitors](#)

Create a picklist of competitors that your users can attach to opportunities.

Competitor Fields

The fields for competitors help you track your competition as you work to close deals.

See Also

[Define Competitors](#)
[Competitor Fields](#)

Define Competitors

Create a picklist of competitors that your users can attach to opportunities.

REQUIRED EDITIONS

Available in: Salesforce Classic

Available in: all editions in orgs activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions in orgs activated after Summer '09

USER PERMISSIONS NEEDED

To define competitors: Customize Application

1. From Setup, enter *Competitors* in the **Quick Find** box, then select **Competitors**.
2. Click **New** to add competitor names to the list.
3. Enter the name of the competitor.
4. Optionally, check the default option to select this value on any new record when another value is not selected.
5. Click **Save**.

See Also

[Track Your Competitors](#)

Competitor Fields

The fields for competitors help you track your competition as you work to close deals.

REQUIRED EDITIONS

Available in: Salesforce Classic

Available in: all editions in orgs activated before Summer '09

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

activated after Summer '09

A competitor has the following fields, listed in alphabetical order.

Field	Description
Competitor Name	Name of competitor. You can enter any name, or select from the list of all competitors defined by your administrator.
Strengths	Description of competitor's key selling points and advantages.
Weaknesses	Description of competitor's key disadvantages.

See Also

[Track Your Competitors](#)

Opportunity Fields and Opportunity Product Fields

Review details about opportunity fields and opportunity product fields.

Opportunity Fields

The fields for opportunities contain a range of information to help you track your pending and potential sales. Depending on your page layout and field-level security settings, some fields aren't visible or editable.

Opportunity Product Fields

The fields for opportunity products contain information to help you track what's selling. Depending on your page layout and field-level security settings, some fields aren't visible or editable.

Opportunity Fields

The fields for opportunities contain a range of information to help you track your pending and potential sales. Depending on your page layout and field-level security settings, some fields aren't visible or editable.

Available in: Lightning Experience and Salesforce Classic

The available fields vary according to your Salesforce edition.

Field	Description
Account Name	Name of the account that the opportunity is linked to. You can enter the account name or select the account by using the lookup icon. If you

Field	Description
	change the account for an opportunity that has partners, all partners are deleted from the Partners related list.
Amount	<p>Estimated total sale amount. If multiple currencies are enabled, the amount is shown in your personal currency by default. Change the Opportunity Currency picklist to track the amount in another currency.</p> <p>For opportunities with products, the amount is the sum of the related products. You can't directly edit the amount unless the opportunity has no products. To change the amount for an opportunity that contains products, edit the sales price or quantity of the related products.</p> <p>If you change the price book for an opportunity that has products, all products are deleted from the Products related list, but the value in the opportunity's Amount field remains. After the products are removed, you can edit the amount value.</p>
Close Date	<p>Date when you plan to close the opportunity. You can enter a date or select a date from the calendar that shows when you put your cursor in the field.</p> <p>Opportunities with a Close Date in a given period tally in the forecast for that period, unless you assign them to the Omitted category or you forecast by schedule or product date.</p> <p>When you set an open opportunity's stage to a type of Closed/Won, if the original date was in the future, the Close Date is set to the current date in Coordinated Universal Time (UTC). At certain times of day, UTC differs by one day from your time zone. If the close date is in the past when the opportunity is closed, the date doesn't change.</p>
Contract	The contract that the opportunity is linked to.
Created By	The user who created the opportunity, with the

Field	Description
	creation date and time. (Read only)
Custom Links	Listing of custom links for opportunities that your Salesforce admin has set up. Available only in Salesforce Classic.
Description	Description of the opportunity. Up to 32 KB of data is allowed. In reports, only the first 255 characters are displayed.
Expected Revenue	Calculated revenue based on the Amount and Probability fields.
Forecast Category	Forecast category name shown in reports, opportunity detail and edit pages, opportunity searches, opportunity list views, and the forecasts page. The setting for an opportunity is tied to its stage. You can rename the default forecast categories. However, you can't delete or deactivate them.
Last Amount Changed History	This read-only field references the OpportunityHistory record that contains information about when the Amount field was last updated in Winter '21 or later. Information includes the date and time of the change and the user who made the change.
Last Close Date Changed History	This read-only field references the OpportunityHistory record that contains information about when the Close Date field was last updated in Winter '21 or later. Information includes the date and time of the change and the user who made the change.
Last Modified By	User who last changed the opportunity fields, including modification date and time. This field doesn't track changes made to related list items on the opportunity. (Read only)
Lead Source	Source of the opportunity, such as an advertisement, a partner, or the web. Entry is selected from a picklist of available values, which an admin sets. Each picklist value can have up to 40 characters.
Next Step	Description of next task in closing opportunity. Up

Field	Description
	to 255 characters are allowed in this field.
Opportunity Currency	<p>The default currency for all currency amount fields in the opportunity. Amounts are shown in the opportunity currency, and are also converted to the user's personal currency. Available only when multiple currencies are enabled.</p> <p>For opportunities with products, the currency is tied to the currency of the associated price book. You can't directly edit this field unless you first delete the products.</p>
Opportunity Division	<p>Division to which the opportunity belongs. This value is automatically inherited from the related account.</p> <p>Available only when divisions are used to segment data.</p>
Opportunity Name	Name of the opportunity, for example, Acme.com - Office Equipment Order. Up to 120 characters are allowed in this field.
Opportunity Owner	Assigned owner of opportunity. Not available in Personal Edition.
Opportunity Record Type	<p>Name of the field that determines what picklist values are available for the record. The record type is sometimes associated with a sales process.</p> <p>Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.</p>
Partner Account	Read-only field that indicates that a partner user owns the opportunity.
Primary Campaign Source	<p>Name of the campaign responsible for generating the opportunity.</p> <p>For opportunities created during lead conversion, this field is automatically filled in with the campaign name from the lead. If the lead has multiple associated campaigns, the campaign with the most recently updated member status is</p>

Field	Description
	<p>inserted into the opportunity.</p> <p>For opportunities with multiple influential campaigns, click Edit next to the primary campaign in the Campaign Influence related list on the opportunity detail page and select the Primary Campaign Source checkbox. The campaign is shown in the Primary Campaign Source field on the opportunity.</p>
Private	<p>Indicates that the opportunity is private. Only the record owner, users above that role in the hierarchy, and admins can view, edit, or report on private opportunities. Not available in Group or Personal Editions. Private opportunities don't trigger Big Deal alerts, workflow rules, or after-save record-triggered flows. Private opportunities count toward your forecasts only if Salesforce Forecasting is enabled. Users with the View All Forecasts permission can see private opportunities within the Forecasts tab.</p> <p>When you mark opportunities <i>Private</i>, opportunity teams, opportunity splits, and sharing are removed. (The owner of a private opportunity receives 100% of split types that total that amount.)</p>
Probability	<p>Likelihood that the opportunity will close, stated as a percentage.</p> <p>The probability value is always updated by a change in the stage value, even if the Probability field is marked as read only on your page layout. Users with edit access to this field can override the value.</p>
Quantity	<p>Total of all Quantity field values for all products in the Products related list if the opportunity has products. General use field if the opportunity has no products.</p>

Field	Description
Stage	<p>Current stage of opportunity based on selections you make from a predefined list, such as Prospect or Proposal. Entry is selected from a picklist of up to 100 available values, which are set by an admin. Each picklist value can have up to 40 characters.</p> <p>Your admin correlates the values in this picklist with Forecast Category values that determine how the opportunity contributes to your forecast.</p> <p>When you set an open opportunity's stage to a type of Closed/Won, the Close Date is set to the current date in Coordinated Universal Time (UTC) if the original date was in the future. At certain times of day, UTC differs by one day from your time zone. If the close date was in the past when the opportunity is closed, the date doesn't change.</p>
Synced Quote	Quote synced to the opportunity. Only one quote can sync to the opportunity at a time.
Territory	Territory with which the opportunity is associated. Available only if territory management is enabled.
Type	Type of opportunity, such as Existing Business or New Business. Entry is selected from a picklist of available values, which are set by an admin. Each picklist value can have up to 40 characters.

Opportunity Product Fields

The fields for opportunity products contain information to help you track what's selling. Depending on your page layout and field-level security settings, some fields aren't visible or editable.

Available in: Lightning Experience, Salesforce Classic, and the Salesforce mobile app

The available fields vary according to your Salesforce Edition

Field	Description
Active	Whether the price book entry (product and list price) is active and can be added to an opportunity or quote.
Created By	User who created the product.

Field	Description
Date	Close date of a particular opportunity product.
Discount	Discount for the product as a percentage.
Last Modified By	User who last changed the opportunity product fields. Read-only.
Line Description	Text to distinguish this opportunity product from another.
List Price	The price of the product within the price book, including currency. Read-only.
Opportunity	Name of the opportunity for this opportunity product.
Product	Item listed in the Products related list on an opportunity.
Quantity	Number of units for the opportunity product.
Sales Price	Price for the products in the opportunity product. On an opportunity product without a related schedule, the sales price is editable. When a schedule is related to an opportunity product, the sales price becomes read-only.
Subtotal	Difference between standard and discounted pricing. Converted currency amounts when the opportunity's currency is different from the user's currency. The Subtotal field on an opportunity product isn't available in the Salesforce mobile app.
Total Price	Sum of all the product amounts for an opportunity product.

Opportunities: What's Different or Not Available in the Salesforce Mobile App

Not every Lightning Experience feature is in the Salesforce mobile app. Find out what's different.

- The Subtotal field on an opportunity product isn't available in the Salesforce mobile app.
- The **Team Member Access** action isn't available in the Salesforce mobile app.
- The Split Amount field isn't available, and other opportunity splits fields are read-only.
- You can use the Salesforce mobile app to relate a price book with an opportunity that doesn't have one. To change an opportunity's price book, use the desktop Salesforce site.
- In the Salesforce mobile app, you can edit one opportunity at a time. No multiline editor is available.
- Clone with Related isn't available in the Salesforce mobile app.
- Creating product schedules on opportunities isn't available. Users can edit or delete product schedules in the Salesforce mobile app that were created on the desktop site.

Quotes

Quotes in Salesforce represent the proposed prices of your company's products and services. You create a quote from an opportunity and its products. Each opportunity can have multiple associated quotes,

and any one of them can be synced with the opportunity. When a quote and an opportunity are synced, any change to line items in the quote syncs with products on the opportunity, and vice versa. Get an overview of all your quotes on the Quotes tab. And if you're using Lightning Experience, track sales activity in Path and stages in Kanban.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

USER PERMISSIONS NEEDED

To view quotes: Read on Quotes

To create quotes: Create on Quotes

To add quote line items:
Edit on Quotes

AND

Read on Products and Price Books

Set Up Quotes

Make it easy for your sales reps to show your customers the prices of the products and services that your company offers.

Enable Quote Creation Without a Related Opportunity

Sales reps can now fast-track deals by creating quotes without first creating an opportunity, speeding up delivering quotes to their customers for review. This feature allows sales departments who don't use opportunities to use quoting.

Set Up Quote Templates

Quote templates let you customize the way your sales reps quote your company's products and services. Sales reps can select standard or customized quote templates from their quote records, generate quote PDFs, and email them to customers.

Manage Your Quotes

Show your customers the prices of the products and services that you offer. Sync quotes and opportunities so your information stays up to date.

Create and Email Quote PDFs

Provide quotes to your customers the easy way: via PDF. Create quote PDFs from a standard template or from your company's design. Email quotes to your customers. Then delete quotes that you no longer need.

Things to Know About Quote Templates

Review considerations and guidelines for working with quote templates.

Things to Know About Quotes

Review considerations for working with quotes.

Set Up Quotes

Make it easy for your sales reps to show your customers the prices of the products and services that your company offers.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

USER PERMISSIONS NEEDED

To enable or disable quotes:	Customize Application
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1. From Setup, enter *Quote* in the **Quick Find** box, then select **Quote Settings** (Lightning Experience) or **Quotes Settings** (Salesforce Classic).
2. Select the option for enabling quotes.
3. Optionally, select the **Create Quotes Without a Related Opportunity** checkbox, and then click **Save** to enable that feature.
4. To display the Quotes related list on the standard opportunity page layout, select **Opportunity Layout**.
5. To add the Quotes related list to all opportunity page layouts that users have customized, select **Append to users' personal related list customization**.
6. Save your changes.

 **Note** You can't disable the Quotes feature if:

- Your records have any references to quotes, quote line items, or quote PDFs from any application customizations, including formula fields, triggers, workflow rules, and approval processes. Remove these references before you try to disable the feature.
- Any quote is synced with an opportunity. On each synced quote's detail page, choose to stop syncing before you try to disable the feature.

See Also

[Quotes](#)

Enable Quote Creation Without a Related Opportunity

Sales reps can now fast-track deals by creating quotes without first creating an opportunity, speeding up delivering quotes to their customers for review. This feature allows sales departments who don't use opportunities to use quoting.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Professional, Enterprise, Unlimited, and Developer** Editions with a Sales Cloud license.

Applies to: [Aura, LWR, and Visualforce sites](#) accessed through Lightning Experience in the same editions.

USER PERMISSIONS NEEDED

To create quotes with or without opportunities: Sales Cloud license and access to quotes

1. From Setup, enter *quote* in the Quick Find box, and then select **Quote Settings**.
2. Select **Create Quotes Without a Related Opportunity**, and then click **Save**.
3. Select a page layout if you're enabling quotes for the first time, and then save your changes.
The quote page layout can't contain formulas or lookups to formulas that refer to the fields on the Opportunities object.
4. In Setup, search for *sharing* to find the Sharing Settings page.
 - a. Find the Quote object, select **Edit**, and then set the Default Internal Access from Controlled by Parent to Private. Click **Save**.
 - b. Find the Quote Sharing Rules section by scrolling down the page, and then click **New**. Create a quote sharing rule for quote objects. You must set up a rule because no parent record exists for the quote to inherit sharing settings.
5. To create a quote, select the Quotes tab on the page header, and then click **+New Quote**.
 - Creating or selecting an opportunity for your new quote is optional.
 - Choose a different opportunity at a later time.
 - You can change the quote owner during quote creation.
 - Associate your new quote to an account. This association is optional, but recommended because an account is required to convert the quote to an order.
 - A new QuoteAccount field has been added to the page layout for you to specify an account on the quote. The Account field from the opportunity lookup isn't filled in. Instead, the QuoteAccount field is used to see an account in the view.

Set Up Quote Templates

Quote templates let you customize the way your sales reps quote your company's products and services. Sales reps can select standard or customized quote templates from their quote records, generate quote PDFs, and email them to customers.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance and Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

Create, Preview, and Activate Quote Templates

Define the look of your company's quote PDFs by creating templates that your sales reps can choose when they create quote PDFs.

Add Rich Text to a Quote Template

Include text that you can format, such as your company's address or terms and conditions, in your quote template's body, header, or footer.

Add a List to a Quote Template

Arrange and display fields from a quote line item or any other standard or custom object that has a lookup relationship to the quote object. The added list looks like a table, with field names appearing as columns.

Add an Image to a Quote Template

Show an image, such as your company logo, in your quote template's body, header, or footer.

Add a Totals Section to a Quote Template

Include subtotal and grand total amounts for your quote.

Add a Signature Block to a Quote Template

Create signature and date lines so that customers can easily sign off on their quotes.

Create, Preview, and Activate Quote Templates

Define the look of your company's quote PDFs by creating templates that your sales reps can choose when they create quote PDFs.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

USER PERMISSIONS NEEDED

To create quote templates: Customize Application

To view quote templates: View Setup and Configuration

Watch a Demo:  [Creating Quote Templates \(Salesforce Classic\) \(English only\)](#)

1. From Setup, enter *Templates* in the **Quick Find** box, then select **Quote Templates** (Lightning Experience) or **Templates** under Quotes (Salesforce Classic).
2. Click **New**, and then select a template, such as *Standard Template*, on which to base your new template.
3. Give your new template a name, and then click **Save**.

4. In the template editor, drag the elements that you want to the template, and then complete the details.
 - To add one or more Quote fields or fields from related objects, use a section and add fields to it.
 - To add text that you can edit and format, such as terms and conditions, use **Text/Image Field**.
 - To add an image, such as your company logo, use **Text/Image Field**.
 - To add a table of Quote fields or fields from a different object, such as Quote Line Item, use a list.
5. Click **Quick Save** to save your changes and continue working on the template.
6. Click **Save and Preview** to make sure that the quote PDFs that users create look the way you want them to.

Preview shows templates in system administrator profile view. The preview and the template show the rich text and images that you've added. Other data is simulated.

 **Important** **Save and Preview** saves changes to your template, so after you preview, you can't undo them.

7. Click **Save** when you're finished.
8. Return to the Quote Templates page, and then click **Activate**.

See Also

[Quote Template Fields](#)

Add Rich Text to a Quote Template

Include text that you can format, such as your company's address or terms and conditions, in your quote template's body, header, or footer.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

USER PERMISSIONS NEEDED

To create quote templates: Customize Application

1. Drag **Text/Image Field** into place in the header, the footer, or any section in the body.
2. Type or paste your text into the field.
3. Format the text as needed.
4. Click **OK**.

See Also

[Guidelines for Using the Quote Templates Editor](#)

[Add an Image to a Quote Template](#)

Add a List to a Quote Template

Arrange and display fields from a quote line item or any other standard or custom object that has a lookup relationship to the quote object. The added list looks like a table, with field names appearing as columns.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

USER PERMISSIONS NEEDED

To create quote templates: Customize Application

To view quote templates: View Setup and Configuration

A list can include up to 10 fields.

 **Note** You can't add lists to the header or footer of your quote template.

1. Drag a list from the palette to the template.
2. Enter a title for the list. To suppress the title from appearing on the template or PDF, select **Hide Title**.
3. In the **Object** field, select the object whose fields you want to appear in the list.
4. Use the **Add** and **Remove** arrows to move columns from the Available Fields list to the Selected Fields list. Use the **Up** and **Down** arrows to change the order of the columns.
5. Click **OK**.

See Also

[Guidelines for Using the Quote Templates Editor](#)

Add an Image to a Quote Template

Show an image, such as your company logo, in your quote template's body, header, or footer.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

USER PERMISSIONS NEEDED

To create quote templates: Customize Application

To view quote templates: View Setup and Configuration

Before you begin, review key [considerations](#).

Insert an Uploaded Image

1. To use an image that's stored in Salesforce CRM Content, locate the image, and then download it to your local file directory.
2. Drag **Text/Image Field** into place in the header, the footer, or any section in the body.
3. Click the image icon, click **Choose File**, and then select the image in your file directory.
4. Click **Open** and then **Insert**.
The image appears in the field. To resize it, drag the sizing handles, which show the image's height and width in pixels.
5. Click **OK**.
6. To see how the image looks in PDFs that are created from the template, click **Save and Preview**.
7. To suppress the title from appearing on the template or PDF, select **Hide Title** in Section Properties.

Insert an Image from a Salesforce Web Address

1. If you need to, upload the image to the Documents tab, or define a static resource.
2. Drag **Text/Image Field** into place in the header, the footer, or any section in the body.
3. To suppress the title from appearing on the template or PDF, select **Hide Title**.
4. Click **OK**.
5. On the Documents tab or the Static Resources page, open the image's detail page, click **View File**, and then copy its URL.
6. In the quote template editor, click  in the title bar of **Text/Image Field**.
7. Click the image icon, and then click the Web Address tab.
8. Paste the URL into the URL field, and then click **Insert**.
9. Click **OK**.
10. To see how the image looks in PDFs that are created from the template, click **Save and Preview**.

! **Important** If the image is removed from the Documents tab or Static Resources page where it's stored, the template displays a message that the image isn't available. Restore the image, open the template, delete the error message image, and then paste the URL again.

Add a Totals Section to a Quote Template

Include subtotal and grand total amounts for your quote.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

USER PERMISSIONS NEEDED

To create quote templates: Customize Application

To view quote templates: View Setup and Configuration

1. Do either of the following.

- a. Select *Standard Template* when you create a template, and then modify the totals section as needed.
 - b. Drag a section onto the layout of any template, and then drag total-related fields (such as **Subtotal** and **Grand Total**) to the right half of the section. If you're placing the section directly below a list, hide the title.
2. Click , and then select right field alignment.
3. Save your changes.

See Also

[Guidelines for Using the Quote Templates Editor](#)

Add a Signature Block to a Quote Template

Create signature and date lines so that customers can easily sign off on their quotes.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

USER PERMISSIONS NEEDED

To create quote templates: Customize Application

To view quote templates: View Setup and Configuration

1. Drag **Text/Image Field** into the footer of your template. To right-align your signature block, or to create two signature blocks, use two columns.
2. Enter a label for each line that you want to create. For example, enter *Signature*, *Name*, *Title*, or *Date*.

3. To create a line where the customer can sign or write other information, press and hold the underscore key.
4. Click **OK**.
5. Save your changes.

See Also

[Guidelines for Using the Quote Templates Editor](#)

Manage Your Quotes

Show your customers the prices of the products and services that you offer. Sync quotes and opportunities so your information stays up to date.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

[Create and Manage Quotes](#)

Create quotes to show your customers the prices of the products and services that you offer. Create a set of quotes to show different combinations of products, discounts, and quantities so customers can compare prices. Then add and sort products as needed to keep your quotes up to date.

[How Quote Syncing Works](#)

Quote syncing lets you link a quote to the opportunity that it was created from and synchronize all updates between the two records. An opportunity can have multiple quotes, but it can sync with only one quote at a time.

[Sync Quotes and Opportunities](#)

Link a quote to the opportunity that it was created from. That way, updates to one record are always reflected in the other.

Create and Manage Quotes

Create quotes to show your customers the prices of the products and services that you offer. Create a set of quotes to show different combinations of products, discounts, and quantities so customers can compare prices. Then add and sort products as needed to keep your quotes up to date.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

USER PERMISSIONS NEEDED

To view quotes: Read on Quotes

To create quotes: Create on Quotes

To add quote line items:
Edit on Quotes

AND

Read on Products and Price Books

See Also

[Considerations for Creating and Managing Quotes and Quote Line Items](#)

[Create and Email Quote PDFs](#)

Create a Quote

1. Click **New Quote** on the Quotes related list on an opportunity. The **Subtotal**, **Discount**, **Total Price**, and **Grand Total** fields show values from the opportunity. If your Salesforce admin has enabled Create Quotes Without a Related Opportunity in Quote Settings, you can click **+New Quote** on the Quotes page.
2. Complete the fields.
3. Save your changes.
 - A unique quote number is added.
 - Products on the opportunity are copied to the quote as line items.
 - The grand total is recalculated based on the taxes and shipping information that you entered.

Add a Line Item to a Quote

1. Click **Add Products** in Lightning Experience or **Add Line Item** in Salesforce Classic in the Quote Line Items related list.
2. If no price book was selected on the opportunity, select a price book for the quote. Otherwise, the quote uses the opportunity's price book.
3. To locate a line item, enter search criteria in the lookup.
4. Select the products that you want to add, and then click **Next** in Lightning Experience or **Select** in Salesforce Classic.
5. Complete the fields. The sales price defaults to the product's list price as recorded in the price book. Depending on your permissions, you can edit the sales price.
6. Save your changes.

The line items are added to the Quote Line Items related list. The grand total in the detail section is the sum of the related line items. The discount is the average discount for the line items.

Sort Line Items in a Quote

1. Click **Sort** in the Quote Line Items related list.
2. In Salesforce Classic, use the arrows to sort line items. In Lightning Experience, drag line items into the order you want.
3. Save your changes.

The sort order updates after you sync related opportunities. The PDF quote also includes the sort order.

How Quote Syncing Works

Quote syncing lets you link a quote to the opportunity that it was created from and synchronize all updates between the two records. An opportunity can have multiple quotes, but it can sync with only one quote at a time.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

While a quote and an opportunity are synced, any addition or change to the list of products in one record syncs with the list of products in the other one. Adding or removing a line item from a quote updates the synced opportunity's Products related list. Adding or removing a product from the opportunity updates the synced quote's Quote Line Items related list. Product sorting also syncs between the two records. The quote and opportunity continue to sync each way until you stop syncing or delete one of the records.

You can sync quotes and opportunities that don't have any products. When you add a product to either record, it's automatically added to the record that it's synced to.

If an opportunity and a quote are synced, the opportunity identifies the synced quote in the following places.

- The Synced Quote field on the Opportunity detail page
- The Syncing checkbox in the Quotes related list

You can't edit the opportunity's Amount field, even if you stop syncing.

If you replace the synced quote with another synced quote, the existing opportunity line items are replaced by the newly synced quote records.

If you stop the sync between a quote and an opportunity, the link is broken and the records are no longer automatically updated with each other's changes.

See Also

[Sync Quotes and Opportunities](#)
[Troubleshooting Quote Syncing](#)

Sync Quotes and Opportunities

Link a quote to the opportunity that it was created from. That way, updates to one record are always reflected in the other.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

USER PERMISSIONS NEEDED

To sync quotes:	Create on quotes
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1. Open the quote that you want to sync, and then click **Start Sync**.
2. Follow the prompts until the quote and opportunity are synced.
The opportunity's **Synced Quote** field and quotes related list identify the quote that's synced.
3. To stop syncing between a quote and an opportunity, open the synced quote, and then click **Stop Sync**.
Updates are no longer synced between the records.
4. To sync a different quote with an opportunity, follow the steps for syncing a quote.
The previously synced quote stops syncing, and the new quote starts.

When you sync a Quote to an Opportunity, the system matches these fields.

Opportunity	Quote
<i>SyncedQuote</i>	<i>IsSyncing</i>
<i>Pricebook2</i>	<i>Pricebook2</i>
<i>Amount</i>	<i>TotalPrice</i>
	<i>Subtotal</i>
<i>TotalOpportunityQuantity</i>	<i>LineItemCount</i>

 **Note** The Amount field on the Opportunity syncs with the TotalPrice field on the Quote, which is calculated as the subtotal of all line items.

When you sync a QuoteLineItem to an OpportunityLineItem, the system matches these fields.

OpportunityLineitem	Quotelineitem
<i>Quantity</i>	<i>Quantity</i>
<i>UnitPrice</i>	<i>UnitPrice</i>
<i>ServiceDate</i>	<i>ServiceDate</i>
<i>Discount</i>	<i>Discount</i>

When you sync a QuoteLineItem to an OpportunityLineItem in Revenue Cloud, the system matches these additional fields.

OpportunityLineitem	Quotelineitem
<i>HasRevenueSchedule</i>	<i>HasRevenueSchedule</i>
<i>HasQuantitySchedule</i>	<i>HasQuantitySchedule</i>

See Also

- [How Quote Syncing Works](#)
- [Troubleshooting Quote Syncing](#)

Create and Email Quote PDFs

Provide quotes to your customers the easy way: via PDF. Create quote PDFs from a standard template or from your company's design. Email quotes to your customers. Then delete quotes that you no longer need.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

USER PERMISSIONS NEEDED

To create or email quote PDFs: Edit on quotes

[Create a Quote PDF from the Standard Template](#)

Quickly create quote PDFs from the standard templates.

[Create a Quote PDF by Selecting a Template](#)

Select from the available templates to create a PDF.

[Email Quote PDFs](#)

Email quotes to your customers.

See Also

[Considerations for Creating Quote PDFs](#)

Create a Quote PDF from the Standard Template

Quickly create quote PDFs from the standard templates.

REQUIRED EDITIONS

If you haven't created custom templates or generated PDFs, start from the standard template.

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

1. On the quote detail page, generate a preview by clicking **Create PDF**.
2. Save the PDF to the Quote PDFs related list by clicking **Save to Quote**. The PDF name is the quote name plus a version number, such as *AcmeQuote_V1*.

Create a Quote PDF by Selecting a Template

Select from the available templates to create a PDF.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

1. Choose one of these options.
 - If you're using Lightning Experience, click **Create PDF**, and then choose a template from the dropdown list.
 - If you're using Salesforce Classic, click the **Create PDF** dropdown list, and then select a template from the Recent Templates list, or click *Choose Template* and search for the template that you want to use.
2. Generate a preview by clicking **Create PDF**.
3. Save the PDF to the Quote PDFs related list by clicking **Save to Quote**. The PDF name is the quote name plus a version number, such as *AcmeQuote_V1*.

To enable accessibility in PDFs, contact Salesforce Customer Support.

Email Quote PDFs

Email quotes to your customers.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

[Email Quote PDFs and Other Documents in Lightning Experience](#)

Make it easy for your customers to compare. Email one or more quote PDFs and other documents at the same time in Lightning Experience.

[Email a Quote PDF in Salesforce Classic](#)

Email a quote for your customer's approval in Salesforce Classic.

Email Quote PDFs and Other Documents in Lightning Experience

Make it easy for your customers to compare. Email one or more quote PDFs and other documents at the same time in Lightning Experience.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

1. Click **Email Quote** on a quote's activity timeline to open an email task with the last uploaded document attached. Or, click **Email PDF** on the Quote PDFs related list to open an email task with the quote document attached.
2. Enter the customer's email address, a subject, and body text.
3. Click **Attach file**, add quotes and other documents one at a time, and then send.

Email a Quote PDF in Salesforce Classic

Email a quote for your customer's approval in Salesforce Classic.

REQUIRED EDITIONS

Available in: Salesforce Classic

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

1. Click the email option on the PDF preview, on the quote detail page, or next to the PDF in the Quote PDFs related list. An email task opens with the current quote PDF attached.
2. Enter the customer's email address, a subject, and body text, and then send.

Things to Know About Quote Templates

Review considerations and guidelines for working with quote templates.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

[Considerations for Creating Quote Templates](#)

Before you create a quote template, consider a few key points.

[Guidelines for Using the Quote Templates Editor](#)

While you're creating and editing quote templates, refer to key guidelines for additional information.

[Considerations for Adding Images to Quote Templates](#)

Before you add images to quote templates, consider a few key points.

[Quote Template Fields](#)

If you're working with quote templates, review details about quote template fields.

[Quote Template and PDF Limitations](#)

Limitations for quote templates and PDFs.

Considerations for Creating Quote Templates

Before you create a quote template, consider a few key points.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

- Quote PDFs don't support right-to-left languages. The text aligns to the left side of the page.
- Text formatting isn't available in the **Text/Image Field** for Unicode languages such as Arabic and Japanese. To make these languages visible in plain text, contact Salesforce and ask to enable the feature for foreign character support for rich text area fields in Quote PDFs.

- Advanced Currency Management isn't available with quotes.
- The maximum number of characters that you can use in the quotes template **Text/Image Field** is 32,000. This number includes the hidden HTML characters that are used to format text.
- Sometimes a field doesn't appear on the quote templates palette or on a PDF that's created from a template.
 - If the default value for the field exceeds 255 characters, quote templates can't include text areas or text fields.
 - If a user can't view or update a field because of field-level security settings, that field doesn't appear on PDFs that are created from a template, even if the template includes that field. Read-only fields appear on PDFs.
 - Fields that appear on a quote page layout but don't contain data for a given quote appear on the quote templates palette but not when a PDF is created.
 - Quote line item fields that don't contain data don't appear as columns in a list when a PDF is created, even if the template includes that field. For example, if no quote line items offer a discount, the **Discount** column doesn't appear, even if the list includes the **Discount** field.
 - If a related list isn't included on a quote page layout, it doesn't appear on the template palette or any PDFs for quotes that use that page layout.
 - If the currency of a product on an opportunity differs from the user's currency in a multicurrency org, currency fields for quotes and quote line items appear in both currencies. The product's currency is converted to the user's currency, and the converted amount appears in parentheses. Fields in quote custom reports appear in the report's currency. Currency fields include **Subtotal**, **Tax**, and **Grand Total**.
 - If you create a Developer or Developer Pro sandbox, templates that contain **Text/Image** fields can't be opened for editing within the sandbox.
- Fields within sections have different alignment than columns within lists, so if you place a totals section below a list, its field values won't align directly below the right-hand list values. For example, say your template includes a list of quote line items, including a Total Price column at the far right that shows the total for each line item. If you add a totals section beneath the list, and you include **Subtotal**, **Total Price**, and **Grand Total** fields, their values will show the total of all line items, but the amounts won't align directly below the list's Total Price column.
- Quote PDFs appear in both the Quote PDFs related list and the Notes & Attachments related list.

See Also

[Create, Preview, and Activate Quote Templates](#)

Guidelines for Using the Quote Templates Editor

While you're creating and editing quote templates, refer to key guidelines for additional information.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

General Guidelines

- Click  beneath the palette at the top to expand or collapse it.
- In the left column, select an object to display its fields on the palette.
- Use **Quick Find** to easily locate items on the palette.
- To add an element to the template, drag it from the palette to the layout.
- To remove an element from the layout, drag it back to the palette, or hover over its title bar and click .
- For any section (including a header or footer), double-click its title bar or click  to:
 - Hide the section title.
 - Hide field labels. (Field names appear in gray in the quote template editor, but they don't appear on quote PDFs.)
 - Change the number of columns (one or two).
 - Adjust field alignment.
- To rename the template, click **Quote Template Properties**.
- To show field content without labels in quote template sections, headers, and footers, click , and then select the **Hide** checkbox.
- Use the Blank Space field to add vertical space anywhere on the template. Each Blank Space field adds five pixels of vertical space to the quote PDF.

 **Note** The space in the quote template preview doesn't look the same as the space in the quote PDF.

Guidelines for Using Headers and Footers

A header or footer is essentially a section. You can add fields to it and show or hide its title. You can't remove a header or footer or add more sections to it.

- In the quote template editor, select an object, and then drag the fields that you want to the header or footer.
- To use an image, such as your company logo, or include extended information, such as terms and conditions, use **Text/Image Field**.
- To change the number of columns in your header or footer, click , and then select the number (one or two) that you want.
 - To display an image that spans the width of a page, use a one-column header or footer.
 - For terms and conditions text, use a one-column footer.
- To change field alignment within a column, click , and then select left or right alignment.
- To hide field labels, click , and then select the **Hide** checkbox.

Considerations for Adding Images to Quote Templates

Before you add images to quote templates, consider a few key points.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

- You can store images for uploading in your file system or in Salesforce CRM Content.
- If you store images on the Documents tab or the Static Resources page, you get a web address that you can use to insert the image.
- If you insert an image that's too large, it's cropped when users create quote PDFs from the template. To prevent cropping, click **Save and Preview** after you insert an image, and then resize the image as needed.
- To insert an image from a *public* web address outside Salesforce (such as your company's website), contact Salesforce and ask to have the public URL allowlisted for your Salesforce org.

See Also

[Add an Image to a Quote Template](#)

Quote Template Fields

If you're working with quote templates, review details about quote template fields.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

-  **Note** To help you understand the information that you get when you select fields for your template, the Template Field Name column in the following table provides additional information that doesn't appear on PDFs that are created from the template.

Object	Object Field	Template Field Name	PDF Field Name
User	First Name, Last Name	Prepared By (Name)	Prepared By
User	Email	Prepared By (Email)	E-mail
User	Phone	Prepared By (Phone)	Phone
User	Fax	Prepared By (Fax)	Fax
Company Information	Address	Organization (Address)	Company Address
Quote Documents	Hidden. The date when	Quote PDF (Created)	Created Date

Object	Object Field	Template Field Name	PDF Field Name
	the PDF was generated and saved in the quote documents object.	Date)	

See Also

[Create, Preview, and Activate Quote Templates](#)

Quote Template and PDF Limitations

Limitations for quote templates and PDFs.

Quote Template Limitations

Sometimes , a field may not appear on the quote templates palette or on a PDF created from a template.

- Text fields can't be used on quote templates if the default value for the field exceeds 255 characters.
- If a user is unable to view or update a field because of field-level security settings, that field won't appear on PDFs created from a template, even if the template includes that field. Read-only fields will appear on PDFs.
- A field that appears on a quote page layout but does not have a value for a given quote will appear on the quote templates palette, but won't appear on PDFs created from that quote.
- Quote line item fields that don't contain data won't appear as columns in a list when a PDF is created, even if the template includes that field. For example, if no quote line items offer a discount, the **Discount** column won't appear, even if the list includes the **Discount** field.
- If a related list is not included on a quote page layout, it won't appear on the template palette or any PDFs for quotes that use that page layout.

Quote PDF Limitations

- Text fields displayed in a related list in a quote PDF are truncated to fewer than 256 characters . This limitation occurs on rich text area fields, other types of text fields, standard fields, and custom fields.
- Quote PDFs do not support right-to-left languages. The text aligns to the left side of the page instead of the right.
- Quote PDFs do not show formatting from RTA fields.

Things to Know About Quotes

Review considerations for working with quotes.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

Considerations for Deleting Quotes

Before you delete a quote, it's a good idea to understand how deleting a quote affects quote-related PDFs and syncing with opportunities.

Considerations for Creating and Managing Quotes and Quote Line Items

Before you create a quote or work with quote line items, review a few key points.

Considerations for Creating Quote PDFs

Before you create quote PDFs, consider a few key points.

Quotes Fields

If you're troubleshooting quotes or working with custom fields, review the details about quote fields.

Troubleshooting Quote Syncing

Errors can occur when you try to sync quotes under certain conditions. Review common error messages, and learn how to resolve them. If you don't have the appropriate permissions, contact your Salesforce admin.

Quotes: What's Different or Not Available in the Salesforce Mobile App

Not every Lightning Experience feature is in the Salesforce mobile app. Find out what's different.

Considerations for Deleting Quotes

Before you delete a quote, it's a good idea to understand how deleting a quote affects quote-related PDFs and syncing with opportunities.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

- If you have the appropriate permissions, and you're an admin, the quote owner, or someone above the quote owner in the organization role hierarchy, you can delete quotes.
- When you delete a quote, here's what happens. All related PDFs, notes, and attachments are deleted. If the quote is synced with an opportunity, the record is removed from the opportunity's Quotes related list. The deleted quote is moved to the Recycle Bin.
- If you restore a previously synced quote, it's no longer synced with the opportunity.

Considerations for Creating and Managing Quotes and Quote Line Items

Before you create a quote or work with quote line items, review a few key points.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

 **Note** Your user permissions determine which tasks you can perform. See your Salesforce admin for help with any tasks that you can't perform on your own.

- Relevant price books, products, and [list prices](#) must be active in an opportunity before you can create a quote for the opportunity.
- Professional, Enterprise, Performance, Unlimited, and Developer Edition orgs can activate record types and ask you to choose a **Record Type** when creating a quote. Record types determine the picklist values and business processes that are available when you create or edit a record.
- If you use divisions (Salesforce Classic only), the division of a new quote is automatically set to the division of the related opportunity.
- Quotes don't support division filters.
- You can sort up to 200 quote lines. If your quote has more than 200 line items, sorting is done via the API.
- When you sort quote line items, the sort order updates in PDF quotes and in synced opportunities.
- When a quote is synced with an opportunity then you add a line item to the quote, the new line item is copied to the opportunity as a product in the Products related list.
- If an opportunity is syncing with a quote, deleting the quote line item deletes the corresponding product from the opportunity's Products related list.
- Opportunity Name isn't a required field on the quote record page layout.
- Custom field syncing isn't supported. When a quote is created from the API, the quote line items aren't created based on the opportunity line items. New opportunity line items are created based on the quote line items.
- If a product has default schedules, the schedules aren't created when you add a line item to a quote. If the line item is copied from the opportunity, you can view the schedule from the opportunity. To change the schedule, edit the product record directly.
- If you have a quote line item with a discount, and the product has a default schedule on the product record or an individual schedule on the opportunity product record, you can't edit the **Discount** field of the line item.
- Creating a quote via New Quote on the Quote related list copies the opportunity products to the quote line items. Custom buttons or quick actions don't automatically create quote line items.
- Quote line items are not supported for dynamic related lists.

Considerations for Creating Quote PDFs

Before you create quote PDFs, consider a few key points.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

- Quote PDFs don't support right-to-left languages. The text aligns to the left side of the page instead of the right.
- Text fields in a related list in a quote PDF are truncated to fewer than 256 characters. This limit occurs on rich text area fields, other types of text fields, standard fields, and custom fields.
- Your Salesforce admin determines which status is the default for new quotes and which statuses allow you to email a quote PDF. For example, your admin can prevent you from emailing a quote whose status is *In Review*.
- In Lightning Experience, the Save and Email Quote button shows on quote PDFs only if the Email Quote button is already on the quote page layout.

Quotes Fields

If you're troubleshooting quotes or working with custom fields, review the details about quote fields.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

These tables list the fields that make up a quote. Your page layout, field-level security settings, and Salesforce edition determine what fields are visible and editable. (Field-level security is available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.)

-  **Note** If the currency of a product on an opportunity differs from the user's currency in a multicurrency org, currency fields for quotes and quote line items appear in both currencies. The product's currency is converted to the user's currency, and the converted amount appears in parentheses. Fields in quote custom reports appear in the report's currency. Currency fields include **Subtotal**, **Tax**, and **Grand Total**.

Field	Description
Account Name	The name of the account that the quote's opportunity is linked to. (Read only.)
Additional To	Another address field. By default not displayed on the page layout.

Field	Description
Additional To Name	The name of the person or company that's associated with the additional address.
Bill To	The billing address for the account that's associated with the quote.
Bill To Name	The name of the person or company that the quote is billed to.
Contact Name	The name of the contact that's associated with the quote. By default, this contact is the primary contact on the opportunity.
Contract	The contract that's associated with the quote.
Created By	The user who created the quote, including the creation date and time. (Read only.)
Description	The description of the quote, or notes to help you differentiate between quote versions.
Discount	The weighted average of all line item discounts on the quote. Can be any positive number up to 100. (Read only.)
Email	The email address of the contact who's associated with the quote. If available, automatically completed when you add a contact.
Expiration Date	The date when this quote is no longer valid.
Fax	The fax number for the contact who's associated with the quote. If available, automatically completed when you add a contact.
Grand Total	The total price of the quote plus shipping and taxes. (Read only.)
Last Modified By	The user who most recently changed the quote, including the modify date and time.(Read only.)
Line Items	The number of line items on the quote.
Opportunity Name	The name of the opportunity that's associated with the quote. (Read only.)
Owner	The owner of this quote. Quotes can have a different owner than their parent opportunity. (Read only.)
Phone	The phone number of the contact who's associated with the quote. If available, automatically completed when you add a contact.

Field	Description
Quote Currency	The currency of the quote that is taken from the currency of the associated opportunity. Available only for organizations with the multicurrency feature enabled. Currency fields for quotes and quote line items default to the user's currency. If the opportunity currency differs from the user's currency, the quote currency must match the currency of its parent opportunity. Users can't change the quote currency to be different than the opportunity currency.
Quote Name	The quote's name.
Quote Number	A system-generated number that identifies the quote. (Read only.)
Quote To	The address to send the quote to for approval, such as the address of a third-party agency that represents a buyer. By default not displayed on the page layout.
Quote To Name	The name of the entity (such as a person or business) that the quote is sent to for approval.
Record Type	The name of the field that determines what picklist values are available for the record. The record type can be associated with a sales process. Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.
Shipping and Handling	The total shipping and handling costs for the quote.
Ship To	The shipping address for the account that's associated with the quote.
Ship To Name	The name of the entity (such as a person or company) that the quote line items are shipped to.
Status	The status of the quote. The standard options are: <ul style="list-style-type: none"> • –None– • Draft • Needs Review • In Review • Approved • Rejected • Presented • Accepted

Field	Description
	<ul style="list-style-type: none"> Denied <p>Your admin determines which status is the default for new quotes and which statuses allow you to email a quote PDF.</p>
Subtotal	The total of the quote line items before discounts, taxes, and shipping are applied. (Read only.)
Syncing	Whether the quote syncs with its associated opportunity. (Read only.)
Tax	The total taxes for the quote.
Total Price	The total of the quote line items after discounts and before taxes and shipping. (Read only.)

Quote Line Item Fields

Field	Description
Created By	The user who created the line item, including creation date and time. (Read only.)
Date	The service date, effective date, or other date for the product.
Discount	The discount that you apply to the line item. You can enter a number with or without the percent symbol. You can use up to two decimal places.
Last Modified By	The user who most recently changed the line item, including the modify date and time. (Read only.)
Line Description	The description of the product in the line item.
Line Item Number	A system-generated number that identifies the line item. (Read only.)
List Price	The price of the product within the price book, including currency. (Read only.)
Product	The name of the line item product as listed in the price book. (Read only.)
Product Code	The internal code or product number used to identify the product.
Quantity	The number of units of this line item's product included in the quote. The value must be one or greater. If a quote is synced

Field	Description
	with an opportunity, this field is updated from the quote line item to the opportunity product.
Quote Name	The name of the quote that the line item is for.
Sales Price	The price that you want to use for the product. Initially, the sales price for a product on an opportunity or quote is the product's list price from the price book, but you can change it here. If a quote is synced with an opportunity, this field is updated from the quote line item to the opportunity product.
Schedule	Whether the line item uses schedules in the opportunity. Default schedules aren't carried over from the opportunity when opportunity products are copied to a quote.
Subtotal	The line item's sales price multiplied by the quantity.
Total Price	The line item's sales price multiplied by the quantity and minus the discount.

Troubleshooting Quote Syncing

Errors can occur when you try to sync quotes under certain conditions. Review common error messages, and learn how to resolve them. If you don't have the appropriate permissions, contact your Salesforce admin.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

Quote Sync Error	Resolution
This quote can't be synced because it has inactive or archived products.	<ul style="list-style-type: none"> If the product isn't active, edit the product and select the Active checkbox. If the product has been archived and the opportunity isn't closed, delete the product.
This quote can't be synced because it has an inactive or archived price book.	<ul style="list-style-type: none"> If the price book isn't active, edit the price book and select the Active checkbox.

Quote Sync Error	Resolution
	<ul style="list-style-type: none"> If the price book has been archived and the opportunity isn't closed, delete the price book.
This quote can't be synced because it has inactive or archived list prices.	<ul style="list-style-type: none"> If the list price isn't active, edit the list price and select the Active checkbox for the list price. If the list price has been archived and the opportunity isn't closed, delete the list price.
This quote can't be synced because it has an inactive currency.	Activate the currency from Setup by entering <i>Manage Currencies</i> in the Quick Find box, then selecting Manage Currencies .
This quote can't be synced because one or more of the schedules for the opportunity products have changed since the quote was created.	Create a different quote and sync it, or open the product, delete the schedule, and then re-create the schedule.
This quote can't be synced because another quote that's being synced for this opportunity is locked due to a workflow approval process. Opportunities can only sync with one quote at a time.	To unlock the other quote, finish the approval process or recall the request for approval.
The SyncedQuote field is read only within a trigger.	Determine whether your Salesforce org is using an Apex trigger that's attempting to modify the SyncedQuote field. The SyncedQuote field is read only and can't be modified with a trigger. An admin can modify the trigger.

Quotes: What's Different or Not Available in the Salesforce Mobile App

Not every Lightning Experience feature is in the Salesforce mobile app. Find out what's different.

- Quote PDFs appear in the related list but aren't viewable.
- You can't add or edit multiple quote line items at the same time.
- You can't perform these actions.
 - Email quotes
 - Create or delete PDFs
 - Start sync or stop sync
 - Create quotes from the Quotes home page. You create quotes from opportunities.

Contracts

A contract is a written agreement between parties. Many companies use contracts to define the terms for doing business with other companies. Use Salesforce to establish and document the contracts that you have with your accounts and opportunities. Track the contract through your approval process. And use workflow alerts to remind yourself of contract renewals.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions with the Sales Cloud

[Set Up Contracts](#)

Customize Salesforce to handle your internal contract management process.

[Manage Your Contracts](#)

Establish and document the contracts that you have with your accounts and opportunities. Track the contract through your approval process. And use workflow alerts to remind yourself of contract renewals.

[Things to Know About Contracts](#)

When you create a contract, consider the type of information that's needed to maximize the quality of your data.

Set Up Contracts

Customize Salesforce to handle your internal contract management process.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Contracts are available in: **Performance** and **Developer** Editions

Contracts are available in: **Professional**, **Enterprise**, and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To change contract settings:	Customize Application
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To access the Contract Settings page, from Setup, enter *Contract Settings* in the Quick Find box, then select **Contract Settings**.

See Also

[Contracts](#)[Set Up Orders](#)[Find Object Management Settings](#)

Enable Contract Expiration Notices

Send email notifications to account and contract owners when a contract expires.

1. Select **Send Contract Expiration Notice Emails to Account and Contract Owners**, and then save your changes.
2. To stop sending expiration notices, deselect this option, and then save your changes.

Enable Auto-Calculation of Contract End Dates

1. Select **Auto-calculate Contract End Date**.
2. Save your changes.

- If Salesforce automatically calculates a contract end date, it doesn't appear on the contract's edit page.
- If Auto-calculate Contract End Date is enabled, and Contract Start Date or Contract Term is blank, Contract End Date is blank.

Disable Auto-Calculation of Contract End Dates

If your contracts don't have end dates, or if you prefer to let your sales team enter them manually, disable auto-calculation of contract end dates.

1. Deselect **Auto-calculate Contract End Date**, and then save your changes.
2. View your page layout and field-level security settings for Contract End Date, Contract Start Date, and Contract Term to verify that your sales team can read and edit them as needed.

Track History for All Statuses

The default is to track history for contracts with a status of In Approval Process or Activated. You can track history for contracts for all statuses instead.

1. Select **Track History for All Statuses**.
 2. Save your changes.
- If Salesforce automatically calculates a contract end date, it doesn't appear on the contract's edit page.
 - If Auto-calculate Contract End Date is enabled, and Contract Start Date or Contract Term is blank, Contract End Date is blank.

Show a Contract on Opportunity or Quote Details

To show a contract on the opportunity or quote details, use field-level security and field accessibility.

1. From Setup, at the top of the page, select **Object Manager**.
2. In the object management settings for opportunities or quotes, click **Contract** in the fields area.
3. Click **Set Field-Level Security**.
4. Select **Visible** for each profile that you want to see contracts on opportunity or quote details, and then save your changes.
5. Click **View Field Accessibility**.
6. If any profile is marked hidden, click **Hidden**, and then select **Visible** under Page Layout.
7. Save your changes. The profiles are marked editable.

To show an Opportunities or Quotes related list on contracts, use page layouts.

Enable a Contracts Chatter Feed

Add contract fields to be monitored via Chatter.

1. From Setup, enter *Feed Tracking* in the Quick Find box, then select **Feed Tracking**.
2. From the list of objects, select Contract.
3. Select the **Enable Feed Tracking** checkbox and then the checkboxes for the fields that you want to track.
4. Save your changes.

Manage Your Contracts

Establish and document the contracts that you have with your accounts and opportunities. Track the contract through your approval process. And use workflow alerts to remind yourself of contract renewals.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions with the Sales Cloud

[Activate Contracts](#)

Activate a contract to indicate that it's in effect. An activated contract is read-only.

[Contract History](#)

Curious about the changes made to a contract during its lifecycle? View the Contract History related list on a contract's detail page.

[Delete Contracts](#)

To keep your data up-to-date, delete contracts that are no longer valid.

Activate Contracts

Activate a contract to indicate that it's in effect. An activated contract is read-only.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To activate contracts:

Activate Contracts

AND

Read and Edit on contracts

Open a contract, and then click **Activate**.

See Also

[Contracts](#)

Contract History

Curious about the changes made to a contract during its lifecycle? View the Contract History related list on a contract's detail page.

REQUIRED EDITIONS

Available in: Salesforce Classic

Available in: **Performance** and **Developer** Editions

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions with the Sales Cloud

Here's how it works. When someone modifies a standard or custom field whose history is tracked on a contract, an entry is added to the Contract History related list. Entries show the date, time, nature of the change, and who made the change. (Changes to the contract's related lists aren't tracked here.)

The default is to track changes for contracts with a status of In Approval Process or Activated. To track changes for contracts with any status, ask your Salesforce admin to set up contracts.

To report on activated contracts whose fields are tracked, choose **Contract History** under Contracts and Orders in the Reports area.

If you're using Lightning Experience, switch to Salesforce Classic to see Contract History.

Delete Contracts

To keep your data up-to-date, delete contracts that are no longer valid.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To delete inactivated contracts:

Delete on contracts

AND

Read on accounts

To delete activated contracts (Salesforce admins only):

Delete Activated Contracts

AND

Read on accounts

You delete a contract on the contracts list view or a contract's detail page.

When you delete a contract:

- It's moved to the Recycle Bin.
- All related orders, notes, attachments, events, tasks, history, and approval requests are deleted. (Associated accounts aren't deleted.) If you restore the contract, the related items are restored.

Things to Know About Contracts

When you create a contract, consider the type of information that's needed to maximize the quality of your data.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions with the Sales Cloud

- The start date (required)
- How long the contract will be in effect: the term in months (required)
- The end date

Some admins configure Salesforce to calculate the contract end date based on the contract start date and contract term. If the contract end date is calculated, it doesn't appear on the contract's edit page.

If you use divisions (Salesforce Classic only), the division of a new contract is set to the division of the related account.

Contract Fields

Your page layout and field-level security settings determine which fields are visible and editable.

Contract Fields

Your page layout and field-level security settings determine which fields are visible and editable.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions with the Sales Cloud

A contract has the following fields, listed in alphabetical order.

Field	Description
Account Name	Name of the account associated with the contract.
Activated By	Name of the person who activated the contract.
Activated Date	Activation date of the contract.
Billing City	City portion of billing address. Up to 40 characters are allowed.
Billing Country	Country portion of billing address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Billing State/Province	State or province portion of billing address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Billing Street	Street address used for billing. Up to 255

Field	Description
	characters are allowed in this field.
Billing Zip/Postal Code	Zip or postal code portion of billing address. Up to 20 characters are allowed.
Company Signed By	User at your company who authorized the contract.
Company Signed Date	Date when the contract was authorized.
Contract Division	Division to which the contract belongs (Salesforce Classic only). This value is inherited from the related account. Available only in orgs that use divisions to segment data.
Contract End Date	Last day when the contract is in effect. Your admin can configure Salesforce to calculate the contract end date based on the contract start date and contract term. If this field is auto-calculated, it doesn't appear on the contract edit page.
Contract Name	Title for the contract that distinguishes it from other contracts.
Contract Number	Unique number assigned to the contract. Numbering for contracts starts at 100. (Read only.) Admins can modify the format and numbering for this auto-number field.
Contract Owner	User who owns the contract record.
Contract Start Date	First day when the contract is in effect.
Contract Term (months)	Number of months that the contract is in effect.
Created By	User who created the contract record.
Customer Signed By	Contact on the account that authorized the contract.
Customer Signed Date	Date when the contact signed the contract.
Customer Signed Title	Title of the contact who signed the contract.
Description	Statement describing the contract.
Last Modified By	User who most recently changed the contract record.
Owner Expiration Notice	Number of days before the contract end date when you want to send the notification, if the

Field	Description
	contract owner and account owner wants to be notified of an upcoming contract expiration.
Shipping City	City portion of primary mailing or shipping address. Up to 40 characters are allowed.
Shipping Country	Country portion of primary mailing or shipping address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Shipping State/Province	State or province portion of primary mailing or shipping address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Shipping Street	Primary mailing or shipping street address of account. Up to 255 characters are allowed.
Shipping Zip/Postal Code	Zip or postal code portion of primary mailing or shipping address. Up to 20 characters are allowed.
Special Terms	Any terms that you've agreed to and want to track in the contract.
Status	Stage that the contract has reached in the contract business process. Your admin can add values to this picklist within three system-defined contract status categories: Draft, In Approval Process, and Activated. You can use these status categories to track contracts within your business process using reports and views.
Custom Links	List of custom links for contracts set up by your admin.

See Also

[Things to Know About Contracts](#)

Orders

Use orders to track your customers' requests for products and services.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To view the Orders tab: Read on orders

To view orders: Read on orders

An *order* is an agreement between a company and a customer to provision services or deliver products with a known quantity, price, and date. Your Salesforce admin determines whether you add orders to contracts or accounts.

For example, an Internet service provider probably requires customers to commit to a year of service. That company requires contracts as a reference for every order. But a company that sells clothing probably sells products in a single transaction. That company associates each order with an account.

[Set Up Orders](#)

Customize Salesforce to handle your internal order management process.

[Manage Your Orders](#)

Share orders, add products to orders, and reduce orders as needed.

[Things to Know About Orders](#)

Review considerations, guidelines, and limitations for using orders.

See Also

[Reduction Orders](#)

[Gaps Between Salesforce Classic and Lightning Experience](#)

Set Up Orders

Customize Salesforce to handle your internal order management process.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To modify order settings: Customize Application

Specify the following order settings from the Order Settings page in Setup.

[Enable Orders](#)

To let your sales team track and manage customer requests for products or services, enable orders.

[Enable Negative Quantities for Order Products](#)

To let your sales team add order products with quantities of less than zero, enable negative quantities.

[Enable Reduction Orders](#)

To let your sales team process returns or reductions on activated orders (Salesforce Classic only), enable reduction orders in Salesforce.

[Enable Zero Quantity Orders](#)

To let your sales team add order products with quantities of zero, enable zero quantities.

[Enable Orders Without Price Books](#)

To let your sales teams use orders in Salesforce while managing products and price books in an external platform, enable orders without price books.

See Also

[Orders](#)

Enable Orders

To let your sales team track and manage customer requests for products or services, enable orders.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To modify order settings:	Customize Application
---------------------------	-----------------------

1. From Setup, enter *Order Settings* in the **Quick Find** box, then select **Order Settings**.
2. Make sure that **Enable Orders** is selected.
3. Save your changes.
4. Select which page layouts have an Orders related list, and then save your changes.
5. Use profiles or permission sets to assign user and object permissions to the appropriate users.
6. Create field sets (Salesforce Classic only) on orders and order products to control what fields appear on Visualforce pages.

If you disable orders, your order-related data is hidden. To access that data, re-enable orders.

See Also

[Permission Sets Overview](#)

[Working in the Enhanced Profile User Interface Overview Page](#)

[Set Up Orders](#)

[Enable Reduction Orders](#)

[Orders](#)

[About Field Sets](#)

Enable Negative Quantities for Order Products

To let your sales team add order products with quantities of less than zero, enable negative quantities.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To modify order settings: Customize Application

1. From Setup, enter *Order Settings* in the **Quick Find** box, then select **Order Settings**.
2. Make sure that **Enable Orders** is selected.
3. Select **Enable Negative Quantity**.
4. Save your changes.

If Enable Negative Quantity is disabled, your sales team can't add order products with negative quantities or activate orders that have order products with negative quantities. But your sales team can still view and edit order products that have negative quantities.

See Also

[Set Up Orders](#)

[Order Products](#)

Enable Reduction Orders

To let your sales team process returns or reductions on activated orders (Salesforce Classic only), enable reduction orders in Salesforce.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To modify order settings: Customize Application

1. From Setup, enter *Order Settings* in the **Quick Find** box, then select **Order Settings**.
2. Make sure that **Enable Orders** is selected.
3. Select **Enable Reduction Orders**.
4. Save your changes.
5. Using a profile or permission set, assign the necessary permissions to the appropriate sales team

members.

- To create reduction orders, team members need the “Create Reduction Orders” user permission.
- To add order products to reduction orders, team members need field-level access to these order product fields: **Start Date**, **End Date**, and **Original Order Product**.

6. Consider adding the Reduction Order Products related list to your page layouts for order products.



Note If Enable Reduction Orders is later disabled, the “Create Reduction Orders” permission is hidden from all profiles or permission sets, but no data is hidden. Your sales team can’t create or activate reduction orders, but they can view and edit existing ones. If you disable reduction orders, disable the record types and page layouts specific to reduction orders. If you aren’t using record types, remove fields specific to reduction orders from your page layouts. These include **Original Order** and **Reduction Order** on the Order object, **Original Order Product** and **Available Quantity** on the Order Product object, and any custom fields.

See Also

[Permission Sets Overview](#)

[Working in the Enhanced Profile User Interface Overview Page](#)

[Set Up Orders](#)

[Reduction Orders](#)

Enable Zero Quantity Orders

To let your sales team add order products with quantities of zero, enable zero quantities.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To modify order settings:	Customize Application
---------------------------	-----------------------

1. From Setup, enter *Order Settings* in the **Quick Find** box, then select **Order Settings**.
2. Make sure that **Enable Orders** is selected.
3. Select **Enable Zero Quantity Orders**.
4. Save your changes.



Note

- If Enable Zero Quantity is disabled, your sales team can’t add order products with zero quantities or activate orders that have order products with zero quantities. But your sales team can still view and edit order products that have zero quantities.
- When you contract a quote with a zero-quantity quote line, a subscription with zero quantity is

generated. If **Amend** is selected on the contract, the subscription appears on the Visualforce page, but no quote lines appear on the ensuing amendment opportunity. If **Renewal Quoted** is selected on the contract, a renewal opportunity and quote are created, but no quote lines appear.

Enable Orders Without Price Books

To let your sales teams use orders in Salesforce while managing products and price books in an external platform, enable orders without price books.

REQUIRED EDITIONS

Available in: Salesforce Lightning Experience

B2B Commerce, B2B Commerce Starter, B2B Commerce Growth, B2B Commerce Plus, Salesforce Order Management

USER PERMISSIONS NEEDED

To modify order settings:	Customize Application
---------------------------	-----------------------

To enable orders without price books, your org requires a B2B license or a Salesforce Order Management license.

When this setting is active, developers can create orders without a value for the Price Book field. The order accepts only order items without price book entries. The order's Add Products button and Edit Products button are hidden.

 **Important** When implementing Salesforce Order Management, decide whether to enable this feature before going live.

1. From Setup, in the Quick Find box, enter *Order Settings*, and then select **Order Settings**.
2. Select **Enable Optional Price Books for Orders** and save your changes.

Orders without price books follow several different guidelines compared to standard orders.

- Orders without price books don't support reduction orders.
- Order products without price book entries require list prices.
- Orders without price books support only order items without price book entries. Orders with price books support only order items with price book entries.

Manage Your Orders

Share orders, add products to orders, and reduce orders as needed.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Share Orders

Your Salesforce admin defines your company's default sharing model. You can change this model to extend sharing to more users than the default allows. You can't change the sharing model to make it more restrictive than the default.

Order History

Track changes to an order, such as when the status is modified, on its detail page by using the Order History related list.

Order Products

An *order product* is a product or service that's provided to a customer according to an associated order.

Add Products to an Order

Track what you're selling by adding products to your customers' order records.

Reduction Orders

Use reduction orders to track requests to reduce, return, deactivate, or disable a customer's products or services.

Reduce Orders

If your company accepts returns or reductions on activated orders, you can reduce the relevant orders to reflect those exchanges of goods and services.

Add Products to a Reduction Order

After creating a reduction order, indicate which products need to be reduced and the quantities to reduce those products.

Share Orders

Your Salesforce admin defines your company's default sharing model. You can change this model to extend sharing to more users than the default allows. You can't change the sharing model to make it more restrictive than the default.

REQUIRED EDITIONS

Available in: Salesforce Classic

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

1. To view and manage sharing details, click **Sharing** on the order detail page.

The Sharing Detail page lists the users, groups, roles, and territories that have sharing access to the order. The Sharing button isn't available when the organization-wide default for orders is controlled by the parent.

2. To grant access to the record for other users, groups, roles, or territories, click **Add**.



Note You can share orders only with people who have “Read” permission on orders.

Order History

Track changes to an order, such as when the status is modified, on its detail page by using the Order History related list.

REQUIRED EDITIONS

Available in: Salesforce Classic

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

When someone modifies a standard or custom field, an entry is added to the Order History related list (available in Salesforce Classic only), regardless of the order’s status. All entries include the date, the time, the nature of the change, and who made the change. Modifications to the related lists on the order aren’t tracked in the order history.

See Also

[Orders](#)

[Reduction Orders](#)

Order Products

An *order product* is a product or service that’s provided to a customer according to an associated order.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Orders are available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Reduction orders are available in: **Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS NEEDED

To create or update order products on an order: [Edit on orders](#)

To delete order products: [Edit on orders](#)

All order products in an order are associated with a price book. The Order Products related list on an order indicates in parentheses which price book the order is associated with. For example, if the Government price book is associated with your order products, the related list is titled Order Products (Government).

A *reduction order product* is a product or service to be returned, reduced, deprovisioned, or disabled according to an associated reduction order. Each reduction order product is directly associated with an order product.

See Also

[Add Products to a Reduction Order](#)

[Orders](#)

[Reduction Orders](#)

Add Products to an Order

Track what you're selling by adding products to your customers' order records.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To add products to an order:	Edit on orders
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- You can use only one price book per order.
- You can add order products to draft orders only.
- To show the Add Products button, make sure the order has a related price book and the first order product has a related price book entry. See [Enable Orders Without Price Books](#).

1. Open the order that you want to add products to.
2. In the Order Products related list, click **Add Products**.
3. If a price book isn't selected for this order, select the price book that you want to use, and then save your changes.
4. Select the products to add to your order.
5. Enter a quantity and unit price for each order product.
6. Add line descriptions if needed.
7. Save your changes.

See Also

[Editing and Deletion Limitations for Orders and Reduction Orders](#)

[Considerations for Activation Limitations](#)

[Order Products](#)

[Orders](#)

Reduction Orders

Use reduction orders to track requests to reduce, return, deactivate, or disable a customer's products or

services.

REQUIRED EDITIONS

Available in: Salesforce Classic

Orders are available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Reduction orders are available in: **Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS NEEDED

To reduce an order:

Create Reduction Orders

 **Note** If you're using Lightning Experience, you can't create reduction orders. Switch to Salesforce Classic.

A *reduction order* is an agreement between a company and a customer to process product returns, deprovision services, or reduce services that have been provisioned. For example, if a customer has purchased 30 items through an order and then requests to cancel that order, you can create a reduction order to track the request.

You can create multiple reduction orders for a single order, but you can't create a single reduction order for multiple orders. For example, to reduce order products that were purchased through three activated orders, you create three reduction orders—one for each original order—even if all those orders are for the same account.

See Also

[Considerations for Activation Limitations](#)

[Editing and Deletion Limitations for Orders and Reduction Orders](#)

[Order Fields](#)

Reduce Orders

If your company accepts returns or reductions on activated orders, you can reduce the relevant orders to reflect those exchanges of goods and services.

REQUIRED EDITIONS

Available in: Salesforce Classic

Orders are available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Reduction orders are available in: **Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS NEEDED

To reduce an order:

Create Reduction Orders

- If you're using Lightning Experience, you can't create reduction orders. Switch to Salesforce Classic.
- You can reduce activated orders only.
- You can apply a reduction order toward one order only. To reduce order products across multiple orders, create a reduction order for each original order.

1. Go to the detail page of the order that you're reducing.
2. Click **Reduce Order**.
3. Enter the details for the reduction order, and then save your changes.
4. Add products to indicate which order products on the original order need to be reduced.

See Also

- [Add Products to a Reduction Order](#)
[Considerations for Activation Limitations](#)
[Order Fields](#)
[Order Product Fields](#)

Add Products to a Reduction Order

After creating a reduction order, indicate which products need to be reduced and the quantities to reduce those products.

REQUIRED EDITIONS

Available in: Salesforce Classic

Orders are available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Reduction orders are available in: **Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS NEEDED

To add order products to a reduction order:

Edit on orders

- If you're using Lightning Experience, you can't create reduction orders. Switch to Salesforce Classic.
- An order product is reducible only if its Available Quantity is greater than zero. You can partially reduce a product, but you can't reduce it to less than zero.
- You can reduce up to 200 order products in one reduction order.

1. Open the reduction order that you want to add products to, or [reduce an existing order](#) to create a reduction order.
2. In the Order Products related list, click **Select Products to Reduce**.
3. In the Quantity to Reduce column, enter the number of units to reduce each order product's quantity.

- To fully reduce an order product, enter the same number in Quantity to Reduce as appears in Available Quantity.
- If you don't want to reduce an item, leave the Quantity to Reduce blank.

For example, if the original order included 3,000 coffee sleeves, and your customer needs only 2,000, enter *1000* in the Quantity to Reduce column.

4. Save your changes.

See Also

[Reduction Orders](#)

[Order Products](#)

[Editing and Deletion Considerations for Order Products](#)

Things to Know About Orders

Review considerations, guidelines, and limitations for using orders.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

[Guidelines for Creating Orders](#)

When you're creating orders, make sure that you follow key guidelines.

[Editing and Deletion Limitations for Orders and Reduction Orders](#)

Some fields aren't editable after an order is created. Others aren't editable after an order has been reduced.

[Considerations for Activation Limitations](#)

Protect the integrity of your order data with activation limitations for orders and reduction orders.

[Salesforce CPQ Reduction Orders Limitations](#)

When you work with reduction orders in Salesforce CPQ, some limitations apply. We recommend using Salesforce CPQ amendments instead.

[Editing and Deletion Considerations for Order Products](#)

Depending on whether the parent order has been activated or reduced, limitations on when you can edit or delete order products apply.

[Order Fields](#)

Your page layout and field-level security settings determine which fields are visible and editable.

[Order Product Fields](#)

Your page layout and field-level security settings determine which fields are visible and editable.

[New Order Save Behavior](#)

New Order Save Behavior allows Salesforce to run custom application logic whenever an order product update causes a change to the parent order. You can activate New Order Save Behavior in Salesforce settings.

Enable New Order Save Behavior

Enable New Order Save Behavior in Salesforce with a release update.

Guidelines for Creating Orders

When you're creating orders, make sure that you follow key guidelines.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To create an order from the Orders tab:	Create on orders
To create an order on a contract:	Create on orders AND Read on contracts
To create an order on an account:	Create on orders AND Read on accounts

- When you create an order, the order's start date must fall between the associated contract's start and end dates.
- Associate each order with an account and optionally with a contract, depending on your Salesforce admin's settings.
- You can create an order from the Orders tab and then manually add the associated account and contract. But if you create an order directly on an account or contract via its Orders related list, no extra step is required. The order is associated with that record.
- To create an order with the same details as another order, you can clone it. (If you're using Lightning Experience, when you clone an order with products, the products aren't cloned. Clone the order, and then add products as needed to the new order.)
- If you clone an order with products, you can't change the new order's currency or price book.

See Also

[Add Products to an Order](#)

[Orders](#)

Editing and Deletion Limitations for Orders and Reduction Orders

Some fields aren't editable after an order is created. Others aren't editable after an order has been reduced.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Orders are available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

Reduction orders are available in: **Enterprise, Performance, Unlimited, and Developer Editions**

USER PERMISSIONS NEEDED

To edit an order or reduction order:	Edit on orders
To edit an activated order or reduction order:	Edit Activated Orders
To delete an order or reduction order:	Delete on orders

- In Salesforce Classic, you can't edit the status category of an order or reduction order from Draft to Activated or vice versa. The status field is updated based on other processes. For example, when you click **Activate**, the status category is changed from Draft to Activated. The status picklist values sometimes differ depending on your Salesforce admin's settings.
- In Lightning Experience, Status picklist values aren't filtered based on an order's status, so all status values appear in the picklist.
- After an order is created, you can change its **Account** field only when the following conditions are true.
 - The order is in Draft status.
 - If the order has an associated contract, that contract is associated with the new account.
- After an order is created, you can change its **Contract** field only when the following conditions are true.
 - The order is in Draft status.
 - The account associated with the order is the same as the account associated with the new contract.
 - The currency associated with the order is the same as the currency associated with the new contract.
 - If the order has an associated price book, that price book is associated with the new contract.
- After a price book is assigned to an order, you can't change or remove the price book assignment.
- If an order has an associated reduction order, you can't edit the order's end date.
- Before you delete an activated order or reduction order, deactivate it. And before you deactivate the order, deactivate and delete any associated reduction orders.
- Only the order owners, account owners, contract owners, and Salesforce admins can delete related orders.

 **Note** When you delete a contract, all related orders, notes, attachments, events, tasks, history, and approval requests are deleted. Associated accounts aren't deleted with the contract. The deleted contract is moved to the Recycle Bin. If you restore the contract, its related items are also restored.

See Also

- [Reduction Orders](#)
- [Guidelines for Creating Orders](#)
- [Orders](#)

Considerations for Activation Limitations

Protect the integrity of your order data with activation limitations for orders and reduction orders.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Orders are available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Reduction orders are available in: **Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS NEEDED

To activate orders: Activate Orders

To deactivate orders and reduction orders: Edit Activated Orders

- You can activate orders for active contracts but not for inactive contracts.
- You can activate orders only if they include order products.
- You can activate reduction orders for order products only if they result in positive quantities.
- After you activate an order or reduction order, you can modify order products. You can't add or remove them.
- Before you can deactivate an order that has reduction orders, you must deactivate and delete its reduction orders.

See Also

[Orders](#)

[Reduction Orders](#)

Salesforce CPQ Reduction Orders Limitations

When you work with reduction orders in Salesforce CPQ, some limitations apply. We recommend using Salesforce CPQ amendments instead.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Orders are available in: **Professional, Enterprise, Unlimited, and Developer** Editions

Reduction orders are available in: **Enterprise, Unlimited, and Developer** Editions

USER PERMISSIONS NEEDED

To edit an order or reduction order: Edit on orders

USER PERMISSIONS NEEDED

To edit an activated order or reduction order: Edit Activated Orders

To delete an order or reduction order: Delete on orders

Salesforce Billing doesn't support reduction orders. Specifically, reduction orders in Salesforce CPQ can't be used to do the following.

- Include percent of total lines when you reduce a covered asset
- Include bundle components when you reduce the parent bundle
- Create price schedules
- Consider the price calculation status when you activate an order
- Create a contract, subscription, or asset

Editing and Deletion Considerations for Order Products

Depending on whether the parent order has been activated or reduced, limitations on when you can edit or delete order products apply.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Orders are available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Reduction orders are available only in Salesforce Classic: **Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS NEEDED

To edit an order product on a draft order or reduction order: Edit on Orders

To delete an order product on a draft order or reduction order: Edit on Orders

To edit order products on an activated order or reduction order: Edit Activated Orders

- When the Enhanced Commerce Orders setting is enabled, additional rules apply to editing orders after they are activated. For example, if an OrderItem has any other records (such as OrderSummary and ChangeOrder) or any price-impacting fields (such as Quantity and UnitPrice), the order can't be changed after it's activated even if you have the Edit Activated Order user permission.
- After an order or reduction order is activated, you can't delete its order products. But you can still edit an order product's fields.
- After an order product has been reduced, you can no longer edit or delete the order product in that order.

See Also

- [Add Products to an Order](#)
- [Add Products to a Reduction Order](#)
- [Order Products](#)
- [Reduction Orders](#)

Order Fields

Your page layout and field-level security settings determine which fields are visible and editable.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Orders are available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Reduction orders are available in: **Enterprise, Performance, Unlimited, and Developer** Editions

Orders and reduction orders have the following fields.

Field	Description
Account Name	Name of the account associated with the order. (Read-only for reduction orders.)
Account Number	Unique number automatically assigned to the account associated with the order. (Read-only for reduction orders.)
Activated By	Name of the user who activated the order. (Read-only.)
Activated Date	Date when the order was activated.
Billing City	City portion of billing address. Up to 40 characters are allowed.
Billing Country	Country portion of billing address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Billing State/Province	State or province portion of billing address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Billing Street	Street address used for billing. Up to 255

Field	Description
	characters are allowed.
Billing Zip/Postal Code	Zip or postal code portion of billing address. Up to 20 characters are allowed.
Bill To Contact	Contact to whom the order is billed.
Company Authorized By	User at your company who authorized the order.
Company Authorized Date	Date when the order was authorized.
Contract End Date	Last day when the contract is in effect. (Read-only.)
Contract Name	Title for the parent contract that distinguishes it from other contracts. (Read-only.)
Contract Number	Unique number automatically assigned to the contract. Numbering for contracts starts at 100. (Read-only for reduction orders.)
Created By	User who created the order record. (Read-only.)
Currency	Default currency for all currency amount fields in the order. (Read-only for reduction orders.)
Customer Authorized By	Contact on the order's account who authorized the order.
Customer Authorized Date	Date when the contact authorized the order.
Description	Description of the order.
Last Modified By	User who most recently changed the order record.
Opportunity	Opportunity that's associated with the order.
Order Amount	Total amount of the order.
Order End Date	Date when the order ends.
Order Name	Title for the order that distinguishes it from other orders.
Order Number	Unique number automatically assigned to the order. Numbering for orders starts at 100. (Read-only.)
Order Record Type	Record type assigned to this order.
Order Reference Number	Reference number assigned to this order.

Field	Description
Order Start Date	Date when the order becomes effective.
Order Type	Type of order. Entry is selected from a picklist of available values, which a Salesforce admin sets. Each picklist value can have up to 40 characters.
Original Order	For reduction orders only. Prepopulated with the ID of the parent order when you create a reduction order by clicking Reduce Order .
Owner	Owner of the order. Can be a user or queue. Order owners have full access to their orders regardless of their account access.
PO Date	Date when a purchase order was entered.
PO Number	Number of the purchase order.
Quote	Quote that's associated with the order.
Reduction Order	If selected, the order record represents a reduction order. Automatically selected when you create a reduction order by clicking Reduce Order . (Read-only.)
Shipping City	City portion of primary mailing or shipping address. Up to 40 characters are allowed.
Shipping Country	Country portion of primary mailing or shipping address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Shipping State/Province	State or province portion of primary mailing or shipping address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Shipping Street	Primary mailing or shipping street address of account. Up to 255 characters are allowed.
Shipping Zip/Postal Code	Zip or postal code portion of primary mailing or shipping address. Up to 20 characters are allowed.
Ship To Contact	Contact to whom the order is shipped.
Status	Indication of the stage that the order has reached

Field	Description
	<p>in the order business process.</p> <p>You can add values to this picklist within two system-defined order status categories: Draft and Activated. You can use these status categories to track orders within your business process using reports and views. Some user permissions apply specifically to draft statuses. Others apply specifically to activated statuses.</p> <p>The Superseded status category is applicable only for Revenue Cloud.</p>

See Also

- [Orders](#)
- [Reduction Orders](#)
- [Order Product Fields](#)

Order Product Fields

Your page layout and field-level security settings determine which fields are visible and editable.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Orders are available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Reduction orders available in: **Enterprise, Performance, Unlimited, and Developer** Editions

Order products and reduction order products have the following fields.

Field	Description
Available Quantity	<p>Number of units available to be reduced. When a reduction order is activated, an order product's available quantity is updated to reflect the quantity of relevant reduction order products.</p> <p>Value must be greater than or equal to 0. (Read-only.)</p>
Created By	<p>User who created the order product record. (Read-only.)</p>

Field	Description
End Date	End date for the order product.
Last Modified By	User who most recently changed the order record.
Line Description	Description for this order product record.
List Price	Default price set by the price book on the parent order. (Read-only.)
Order	Parent order for this order product.
Order Product Number	Automatically generated number that identifies the order product record. (Read-only.)
Original Order Product	Number that identifies the order product being reduced. Required if the order product is reducing another order product. (Read-only.)
Product	Name of the product used in this order product record. (Read-only.)
Product Code	Internal code or product number used to identify the product. (Read-only.)
Quantity	Quantity of units of the product.
Quote Line Item	Quote line item that's associated with the order product. The quote line item's quote must match the quote that's associated with the order product's parent order.
Start Date	Start date for the order product.
Total Price	Quantity of the order product multiplied by the unit price.
Unit Price	Unit price for the order product.

See Also

- [Order Products](#)
- [Order Fields](#)

New Order Save Behavior

New Order Save Behavior allows Salesforce to run custom application logic whenever an order product update causes a change to the parent order. You can activate New Order Save Behavior in Salesforce settings.

In Salesforce Summer '20 and earlier, Salesforce didn't run custom application logic when an order product update caused a change to the parent order. For example, a new order product causing a change to the order's total amount. Users who wanted to enforce custom applications in these scenarios required further customizations for a workaround.

When New Order Save Behavior is active, Salesforce evaluates and runs these customizations whenever an order product update changes the parent order.

- Order and order product validation rules
- Order and order product Apex triggers and classes
- Flows, including processes

We recommend that you activate New Order Save Behavior. If it isn't activated, order field tracking doesn't track changes on orders when order products are modified for order amounts.

When you activate New Order Save Behavior, we recommend you test your custom application logic to ensure that it still works as intended.

Important

- Packages don't support the New Order Save Behavior release update by default. Package providers can test and configure their packages to support the new behavior.
- If you use a package involving orders, wait for confirmation from your package provider before enabling the release update.
- You can install packages that support the Old Order Save Behavior on subscriber orgs that have enabled the New Order Save Behavior. However, we recommend you to verify that your package works with the new order save behavior.
- Starting Summer '21, Salesforce CPQ and Salesforce Billing support both [New Order Save Behavior](#) and [Old Order Save Behavior](#). Installations of Salesforce CPQ and Salesforce Billing Summer '21 work on subscriber orgs regardless of the subscriber org's order save behavior. If Salesforce CPQ and Billing is installed while the New Order Save Behavior release update is enabled, previous versions of Salesforce CPQ and Billing sometimes don't work correctly.
- Starting Winter '25, the New Order Save Behavior is enabled by default in all new customer orgs. However, you can choose to disable it.

Example Your order has an Apex Trigger rule that updates the custom field **NeedApproval__c** to True if the order amount is greater than \$10,000.

```
trigger OrderTrigger on Order (before update) {
    for(Order ord : Trigger.new) {
        if (ord.TotalAmount > 10000) {
            ord.NeedApproval__c = true;
        }
    }
}
```

If New Order Save Behavior is active, Salesforce runs the rule whenever you add or edit an order product on the order. If New Order Save Behavior is inactive, Salesforce runs the rule only when you insert or update the order.

See Also

[Second-Generation Managed Packaging Developer Guide: Test and Respond to the New Order Save Behavior](#)

Enable New Order Save Behavior

Enable New Order Save Behavior in Salesforce with a release update.

1. From Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**.
 2. On the Needs Action page, go to the Enable New Order Save Behavior box, and then click **View Updates**.
 3. Click **Enable Test Run**.
 4. After you enable the new behavior, select **Disable Test Run** to revert to the old order save behavior.
- Packages don't support the New Order Save Behavior release update by default. Package providers can test and configure their packages to support the new behavior.
 - If you use a package involving orders, wait for confirmation from your package provider before enabling the release update.
 - You can install packages that support the Old Order Save Behavior on subscriber orgs that have enabled the New Order Save Behavior. However, we recommend you to verify that your package works with the new order save behavior.
 - Starting Summer '21, Salesforce CPQ and Salesforce Billing support both [New Order Save Behavior](#) and [Old Order Save Behavior](#). Installations of Salesforce CPQ and Salesforce Billing Summer '21 work on subscriber orgs regardless of the subscriber org's order save behavior. If Salesforce CPQ and Billing is installed while the New Order Save Behavior release update is enabled, previous versions of Salesforce CPQ and Billing sometimes don't work correctly.
 - Starting Winter '25, the New Order Save Behavior is enabled by default in all new customer orgs. However, you can choose to disable it.

See Also

[Second-Generation Managed Packaging Developer Guide: Test and Respond to the New Order Save Behavior](#)

Manage Accounts and Contacts

Track the people and companies you do business with. Store information, collaborate on accounts, access the records you need.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

Accounts

Use accounts to store information about customers or individuals you do business with. There are two types of accounts. Business accounts store information about companies. Person accounts store information about individual people.

Contacts

Use contacts to store information about the people you do business with. Contacts are most often associated with an account, but can also be associated with other records such as opportunities. Contacts are even more useful when you enable Contacts to Multiple Accounts, add hierarchy information, and customize sharing settings.

Accounts

Use accounts to store information about customers or individuals you do business with. There are two types of accounts. Business accounts store information about companies. Person accounts store information about individual people.

REQUIRED EDITIONS

Business accounts available in: both Salesforce Classic and Lightning Experience

Business accounts available in: **All** Editions

Person accounts available in: Both Salesforce Classic and Lightning Experience

Person accounts available in **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

-  **Note** In Salesforce Help and other documentation, the word *account* by itself always refers to both business accounts and person accounts. We use the terms *business accounts* and *person accounts* when there are differences between the two types of accounts.

Manage Accounts

Get the most out of accounts by merging duplicates, sharing accounts with the right people, seeing the history of an account, and more. And, get vital account metrics using the Account Intelligence view.

Set Up Accounts

Accounts are great, but when you add other account features they're even better. Track companies and their subsidiaries with account hierarchies and set up flexible sharing models for business contacts so

your sales reps have the right information.

Person Accounts

Person accounts store information about individual people by combining certain account and contact fields into one record.

Collaborate on Accounts by Using Teams

When you collaborate on accounts with colleagues, use account teams to facilitate teamwork and track progress. Roles on a team can include an executive sponsor, a dedicated support agent, and a project manager, for example. Team members can be internal users or partner users.

Administer Account Teams

Help your account reps collaborate to improve customer relationships by enabling account teams and customizing the team layout.

Things to Know About Accounts

Review additional considerations for accounts.

Manage Accounts

Get the most out of accounts by merging duplicates, sharing accounts with the right people, seeing the history of an account, and more. And, get vital account metrics using the Account Intelligence view.

REQUIRED EDITIONS

Business accounts available in: both Salesforce Classic and Lightning Experience

Business accounts available in: All Editions

Person accounts available in: Both Salesforce Classic and Lightning Experience

Person accounts available in **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Account Intelligence View

To help you prioritize your records based on activity and opportunity data, the Account Intelligence view adds more capabilities to the standard list view. See account activity, scan vital opportunity metrics, review cases, and log activities, all in one dedicated workspace.

Considerations for the Account Intelligence View

Get the most out of the Account Intelligence view by first reviewing some important considerations.

Guidelines for the Account Intelligence View

Streamline your workflow by keeping a few guidelines about the Account Intelligence view in mind.

Turn On the Account Intelligence View

To view account activities, see vital account metrics, and access related records in one dedicated workspace, turn on the Account Intelligence view.

Share Accounts

Your administrator defines your organization's sharing model and your organization's default account access levels for territories. However, you can extend sharing privileges for your own data on an account-by-account basis.

Merge Duplicate Accounts

Keep your records clean and free of duplicates so you can reach more customers and maintain better relationships with them.

[View and Convert Leads on an Account](#)

Accounts show leads matched to a business account, with the best matches first. Convert leads without leaving the account.

Account History

Use the Account History related list on an account detail page to track the changes to the account.

See Also

[Guidelines for Creating Accounts](#)

[Create and Update Records](#)

[Export Data](#)

Account Intelligence View

To help you prioritize your records based on activity and opportunity data, the Account Intelligence view adds more capabilities to the standard list view. See account activity, scan vital opportunity metrics, review cases, and log activities, all in one dedicated workspace.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Professional, Enterprise, Performance, and Unlimited** Editions

The screenshot shows the Salesforce Account Intelligence View. At the top, there's a navigation bar with various tabs like Sales, Home, Analytics, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Dashboards, Reports, Chatter, Groups, Calendar, and More. Below the navigation is a search bar and a toolbar with icons for New, List View, and other actions.

The main content area displays account metrics: Total Accounts (12), With Opportunities (11), No Recent Activity (12), and With Upcoming Activity (3). A table lists accounts with their names, open opportunities, next close date, type, and last activity. The first account in the list is Yasha Cabute.

A side panel for 'Yasha Cabute' provides detailed information about her account. It shows she is a Competitor, last active on 10/17/2023. It also lists her Open Opportunities and Open Cases. Buttons for 'Send Email' and 'Show All Opportunities' or 'Show All Cases' are located at the bottom of the side panel.

You can quickly filter your accounts with one click (1), see opportunity metrics at a glance (2), and identify recently active accounts in one dedicated workspace. To see detailed activity and related records for individual accounts, click the side panel icon (3) next to the account name. Review related case and opportunity records (4), log tasks or send emails (5) right from the side panel.

Account metrics include these details.

- Total Accounts: The total number of accounts that meet your filter criteria.
- With Opportunities: The number of accounts with open opportunities.
- No Recent Activity: The number of accounts with no activities completed in the last 30 days.
- With Upcoming Activity: The number of accounts with activities scheduled in the next 30 days.

Personalize your list view by creating filters and selecting which fields to show. To ensure your filter criteria persist, set them in the filter panel with the Show Filters button.

See Also

[Considerations for the Account Intelligence View](#)

[Guidelines for the Account Intelligence View](#)

[Work with List Views in Lightning Experience](#)

Considerations for the Account Intelligence View

Get the most out of the Account Intelligence view by first reviewing some important considerations.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Professional, Enterprise, Performance, and Unlimited Editions**

- !** **Important** Starting in Summer '25, Activity 360 Reporting, Activity Metrics, and Activities Analytics Dashboard aren't available unless previously set up. Additionally, data from these reporting tools that appear in other features, including Close Plan, Pipeline Inspection, and Einstein Conversation Insights isn't available unless configured before Summer '25. If you're already using Activity 360 Reporting, Activity Metrics, Activities Analytics Dashboard, or related data, you can continue to do so until these tools are retired in Summer '26. To explore email data added by Einstein Activity Capture after Summer '25, make sure you [sync email as salesforce activity](#) and use Salesforce Activity reports. See [Considerations for Sync Email as Activity](#) and [Einstein Activity Capture Activity 360 Reporting, Activity Metrics, Activities Dashboard Upcoming Retirement \(Summer '26\)](#).

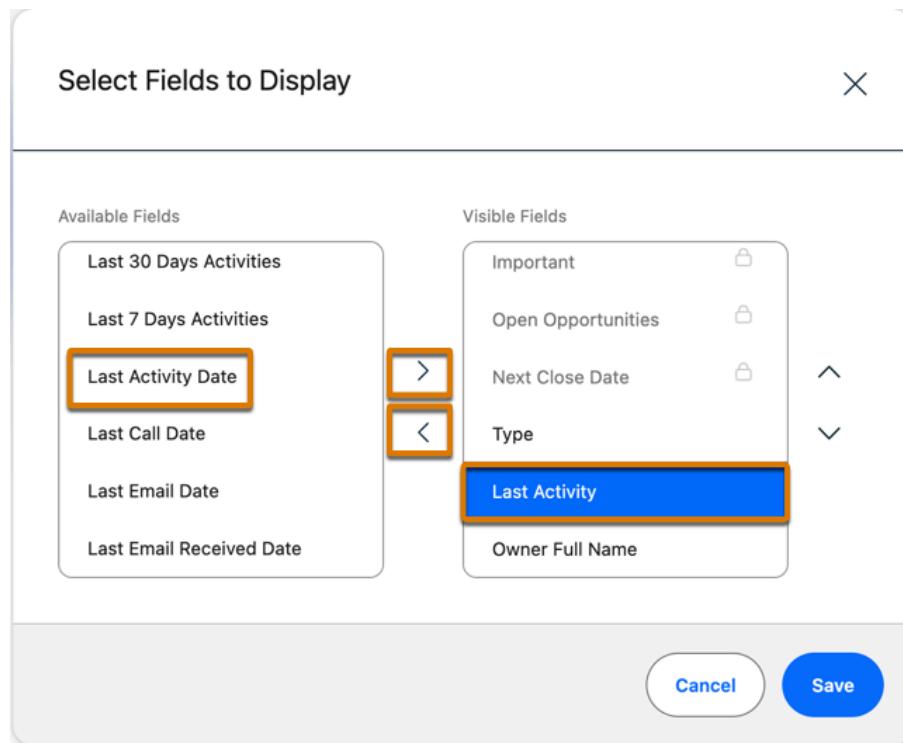
Einstein Features and Activity Metrics

- You can see manually logged activities in the side panel without using Einstein Activity Capture.
- To see the complete timeline of your interactions with each account and to ensure your metrics are fully logged, set up Einstein Activity Capture with Activity Metrics, Activity 360 Reporting, or both.
- To see counts of recent activities in the side panel, set up Einstein Activity Capture with Activity Metrics, Activity 360 Reporting, or both. If you enable both, the counts come from Activity 360 Reporting.
- If Sync Email as Salesforce Activity is enabled, Activity 360 Reporting and Activity Metrics aren't available.

Last Activity

The dates in the Last Activity field in the side panel and in the Last Activity or Last Activity Date column on the main Intelligence view depend on which features you enable.

- When both Einstein Activity Capture and Activity Metrics are enabled, dates come from Activity Metrics. The available Intelligence view columns are Last Activity Date and Next Activity Date.
- When Einstein Activity Capture isn't enabled, dates come from the standard Last Activity field on the Account object. The available Intelligence view column is Last Activity. Metrics for Next Activity aren't available.
- If Einstein Activity Capture is enabled but Activity Metrics is disabled, the Last Activity field in the side panel is hidden. Dates come from the standard Last Activity field on the Account object, and the available Intelligence view column is Last Activity. Metrics for Next Activity aren't available.
- If you turn on Einstein Activity Capture with Activity Metrics after creating Account Intelligence views, update the view columns to reflect the Einstein metrics. Manually replace the Last Activity column in the view with the Last Activity Date column, and optionally add the Next Activity Date field to the view. Any new views you create after enabling Activity Metrics automatically have the columns derived from Activity Metrics.



Person Accounts and Last Activity

- If you use Person Accounts, activities related to the current Person Account through Contacts are shown in the side panel. However, the Last Activity date is based only on activities that are related to the Person Account via the Account entity.

See Also

- [Set Up Einstein Activity Capture](#)
- [Turn On Activity Metrics](#)
- [Things to Know About Activities](#)
- [Get Started With Activity 360 Reports](#)

Guidelines for the Account Intelligence View

Streamline your workflow by keeping a few guidelines about the Account Intelligence view in mind.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Professional, Enterprise, Performance, and Unlimited** Editions

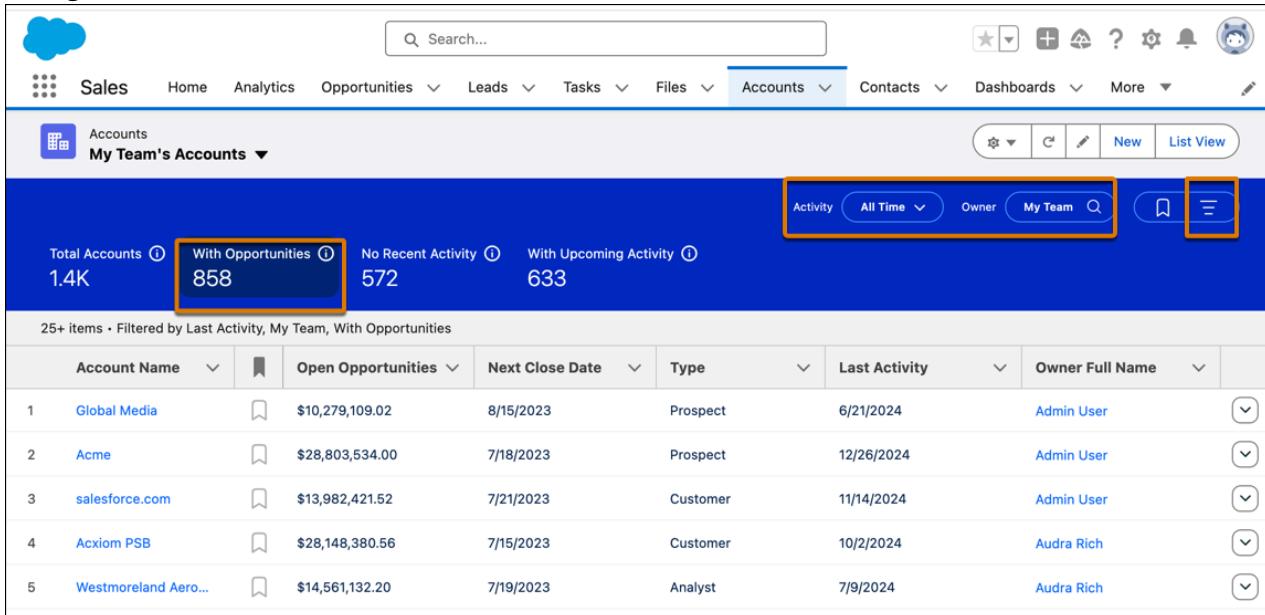
Account Intelligence Views

- The default Account Intelligence views are My Accounts and My Important Accounts.

- You can edit and rename default Account Intelligence views, but you can't share, clone, or delete them.
- To see a list of all accounts, switch to the Accounts list view.

Custom Filters

- Account Intelligence views and saved filters are unique to the Account Intelligence view. They aren't shared with the Account list view.
- To quickly change the list of Accounts, select a metric filter in the header row, such as With Opportunities or With Upcoming Activity. Or, use the Activity or Owner dropdown filters to temporarily change the list view.



The screenshot shows the Salesforce Account Intelligence view for 'My Team's Accounts'. At the top, there are several filters: 'With Opportunities' (highlighted with a yellow box), 'No Recent Activity', and 'With Upcoming Activity'. Below these, there are dropdowns for 'Activity' (set to 'All Time'), 'Owner' (set to 'My Team'), and a search bar. A 'List View' button is also visible. The main area displays a table of accounts with columns for Account Name, Open Opportunities, Next Close Date, Type, Last Activity, and Owner Full Name. The first account listed is 'Global Media'.

Account Name	Open Opportunities	Next Close Date	Type	Last Activity	Owner Full Name
1 Global Media	\$10,279,109.02	8/15/2023	Prospect	6/21/2024	Admin User
2 Acme	\$28,803,534.00	7/18/2023	Prospect	12/26/2024	Admin User
3 salesforce.com	\$13,982,421.52	7/21/2023	Customer	11/14/2024	Admin User
4 Acxiom PSB	\$28,148,380.56	7/15/2023	Customer	10/2/2024	Audra Rich
5 Westmoreland Aero...	\$14,561,132.20	7/19/2023	Analyst	7/9/2024	Audra Rich

- To persist your filters for a particular list in the Account Intelligence view, set them in the filter panel by selecting the Show Filters button .
- To further refine your list view, set additional filter criteria in the filter panel.

The screenshot shows the Salesforce Account Intelligence view. At the top, there's a navigation bar with tabs like Sales, Home, Analytics, Opportunities, Leads, Tasks, Files, Accounts (which is selected), Contacts, Dashboards, Reports, Chatter, Groups, Calendar, and More. Below the navigation bar, there's a search bar and a toolbar with buttons for New, List View, Cancel, and Save (the Save button is highlighted with a yellow box).

The main area displays a list of accounts. At the top of the list, there are filters: Total Accounts (4), With Opportunities (3), No Recent Activity (4), and With Upcoming Activity (0). Below these filters, the list shows four accounts:

	Account Name	Open Opportunities	Next Close Date	Type	Last Activity
1	Caryn Dawn Comacchio	\$6,521.31	7/31/2023	Prospect	10/6/2023
2	NewLink BancSystem	\$1,529,787.85	10/12/2023	Other	10/6/2023
3	Cyanotech Stratasy Inc.	\$1,685,763.00	10/8/2023	Customer	10/8/2023
4	Staples Repligen LLC	\$0.00		Prospect	10/22/2023

To the right of the list, there's a sidebar titled "Saved Filters" which contains two filter criteria: "Last Activity equals Last 180 Days" and "Owner equals My Team". Below this, it says "Matching all of these filters" and shows a single filter: "Type equals Customer, Prospect, Other". There are buttons for "Add Filter" and "Remove All". At the bottom of the sidebar, there's a section for "Filter Logic" with a button for "Add Filter Logic".

- The Activity filter shows you accounts with completed activity within the date range that you specify. To see accounts with no completed activity, select **Never**.

- Example** The Acme Global account has one upcoming task. This new account doesn't have any completed past activities. To see this account in the list of accounts in the Account Intelligence view, select **Never** in the Activity filter criteria

Accounts Marked as Important

- You can see and mark accounts as important in the Account Intelligence view only.
- Users can mark up to 200 accounts as important.
- The important designation is visible only to the user who marked the accounts as important. The list of important accounts can't be shared with other users.

Opportunity Metrics

- The Account Intelligence view supports standard and custom number and currency fields for summarizing opportunity metrics. The default field is Amount.
- You can choose which opportunity field to use for metrics summaries based on the fields a Salesforce admin has configured. Set or change the summary field in the Account Intelligence view by using the available fields in the List View Controls menu.
- When an admin changes the default opportunity summary field for the Account Intelligence view, that action changes the default Opportunity summary field for the Pipeline Inspection view.

Opportunities and Cases in the Side Panel

- The side panel shows up to five open opportunities and five open cases.
- To see a list of all related records, including closed records, click **All Opportunities** or **All Cases**.
- The sort order of the opportunities and cases related lists determines the sort order of the opportunities and cases shown in the side panel.

Activities in the Side Panel

- Which metrics you see depends on which features are enabled. To see the complete timeline of your interactions with each account, set up Einstein Activity Capture.
- In the Upcoming Activity section, only one open activity is shown, with a due date within 6 months from the current date. Open tasks that don't have a due date aren't included. Open tasks that are overdue are included.
- In the Recent Activities section, the selection in the Activity dropdown in the side panel determines the filter time frame, not the Activity dropdown in the main Account Intelligence view.

See Also

- [Set Up Einstein Activity Capture](#)
- [Things to Know About Activities](#)
- [Work with List Views in Lightning Experience](#)
- [Edit List View Filters in Lightning Experience](#)

Turn On the Account Intelligence View

To view account activities, see vital account metrics, and access related records in one dedicated workspace, turn on the Account Intelligence view.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

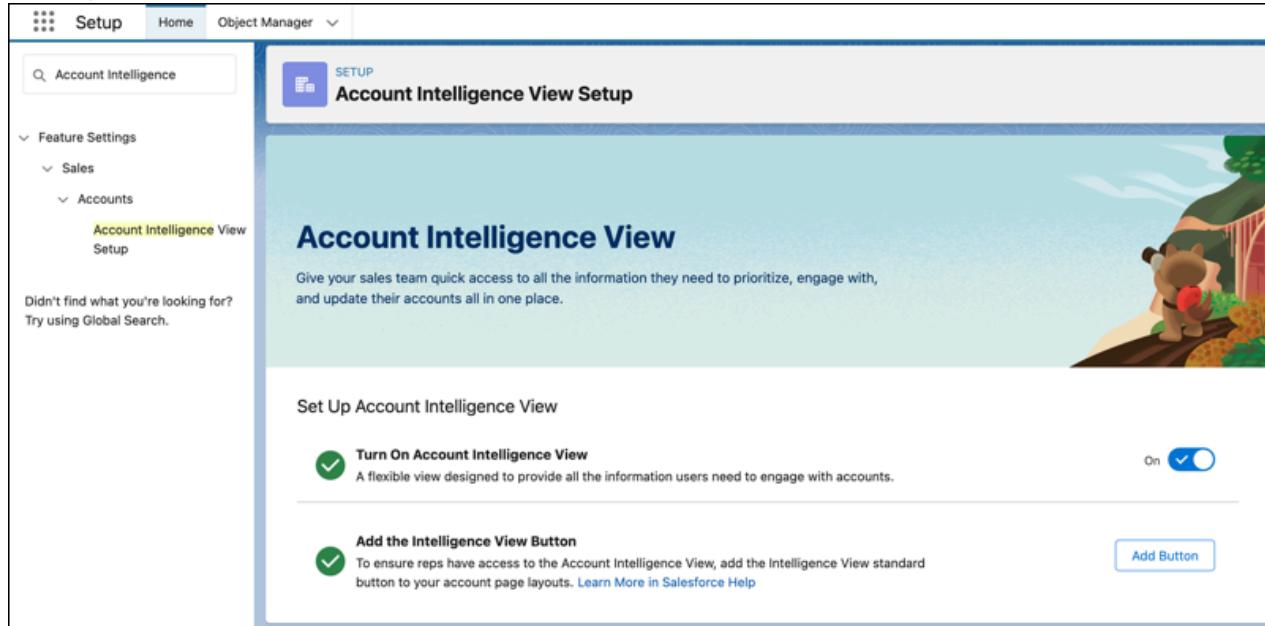
USER PERMISSIONS NEEDED

To set up accounts: [Modify Application](#)

 **Tip** Check out this feature in Salesforce Go! Find a guided setup experience, explore more content, discover related features, and monitor feature usage. See [Discover and Set Up Features With Salesforce Go](#).

The Account Intelligence view is the default view for most users. To see the Account Intelligence view, click **Intelligence View** from the Account list view page. To return to the Account list view, click **List View**. If you don't see the Account Intelligence view, your Salesforce admin can turn it on by using these steps.

- From Setup, in the **Quick Find** box, enter *Account Intelligence View*, and then select **Account Intelligence View Setup**.



- Turn on Account Intelligence View.
- Add the Intelligence View button to your Accounts List View button layout.
 - Click **Add Button**
 - Select **Intelligence View**
 - Save your changes

Optionally, select the opportunity fields users can apply when customizing their Account Intelligence metrics. The default value is Amount.

To get the most out of the Account Intelligence View, turn on Einstein Activity Capture.

See Also

- [Set Up Einstein Activity Capture](#)
- [Turn On Activity Metrics](#)
- [Get Started With Activity 360 Reports](#)

Share Accounts

Your administrator defines your organization's sharing model and your organization's default account access levels for territories. However, you can extend sharing privileges for your own data on an account-by-account basis.

REQUIRED EDITIONS

Available in: Salesforce Classic

Business accounts available in: **All Editions except Database.com**

Person accounts available in **Enterprise, Performance, Unlimited, and Developer** Editions

1. Click **Sharing** on the account detail page.
2. To share the account with users, groups, roles, or territories, click **Add**.

 **Note**

- You can't restrict access beyond your organization's default access levels. When you share an account, Salesforce prompts you to share any related contacts, opportunities, and cases that you have access to. Users must have at least "Read" permission to access the shared records.
- If you're using Enterprise Territory Management, you can select **Territories** or **Territories and Subordinates** when sharing an account.

See Also

[Considerations for Account Access via Teams](#)

Merge Duplicate Accounts

Keep your records clean and free of duplicates so you can reach more customers and maintain better relationships with them.

[Guidelines for Merging Duplicate Accounts](#)

Review guidelines for merging duplicate account records.

[Things to Know About Merging Duplicate Accounts Associated with Relationship Groups](#)

Keep these considerations in mind when merging accounts that are members of relationship groups.

[Merge Duplicate Accounts in Lightning Experience](#)

Merge duplicate accounts using Lightning Experience.

[Merge Duplicate Accounts in Salesforce Classic](#)

Merge duplicate accounts using Salesforce Classic.

Guidelines for Merging Duplicate Accounts

Review guidelines for merging duplicate account records.

Available in: Lightning Experience and Salesforce Classic

Business accounts available in: **All Editions except Database.com**

Person accounts available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

 [Merging Duplicate Accounts: Tips and Gotchas \(Salesforce Classic\)](#)

General

Sharing Rules	In Professional, Enterprise, Unlimited, Performance, or Developer Edition orgs, sharing rules are applied to the merged account. Also, manual sharing from the primary record is applied to the merged account.
Redundant Relationships	If you try to merge accounts that are indirectly related to the same contact, Salesforce displays a message suggesting that you remove the redundant relationships. On account records, indirect relationships are managed from the Related Contacts related list.
Related Items, Chatter Feeds, and Attachments	When duplicate records are related to items such as campaigns or activities, Salesforce relates the items to the merged record, with some exceptions. Chatter feeds are retained from the primary record only. Salesforce Files attached in the Chatter feed or Files related list are retained in the merged record.
Mobile Device Support	You can't use the Salesforce mobile app to merge duplicate accounts.
Hidden and Read-Only Fields	Salesforce retains any data in hidden or read-only fields, such as sharing settings, from the primary record. Hidden fields aren't shown while you merge. A merged record retains the Created By user and Created Date from the oldest record merged, regardless of which record is the primary. The record shows the merge date as the Last Modified By date.
Account Hierarchy	In Lightning Experience, you can choose the parent account to retain. In Salesforce Classic, the merged account retains the account hierarchy from the primary record.
Non-Master Accounts	The non-master accounts are moved to the Recycle Bin.
Divisions	If divisions are enabled, the merged account is assigned to the division from the primary record unless you select otherwise.
Relationship Groups	Lightning Experience doesn't support merging of accounts associated with relationship groups.

Team Members

Team Members from Non-Master Accounts	<p>The merged account retains all the team members from non-master accounts, even if the members are from different teams.</p> <p>You can only merge accounts when team members from non-master accounts have no values in unique custom fields. Before merging, either remove the unique flag from any custom fields, or clear any values from unique custom fields on the team member accounts.</p>
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Permission to Merge on Teams	To merge accounts to which a team member has greater record level access, you must have the Modify All Data permission on accounts. For example, suppose that you're the account owner but an account team member has more access on one or more child account records. To merge those accounts, you need the Modify All Data permission.
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Person Accounts

Portal Support	You can't merge person accounts that are enabled to use portal or Experience Cloud site users.
Person Accounts and Business Accounts in Salesforce Classic	In Salesforce Classic, if person accounts are enabled in your org, both business accounts and person accounts are returned when you search for duplicates. However, you can't merge a person account with a business account or the opposite. Person accounts display the person account icon ().
Redundant Relationships	In Salesforce Classic, if you try to merge person accounts that are indirectly related to the same contact or account, Salesforce displays a message suggesting you remove the redundant relationships. Indirect relationships with accounts and indirect relationships with contacts are evaluated separately. If you have conflicts with both, you must resolve them separately.
Customer-Enabled Person Accounts	When merging a customer-enabled person account with a person account that isn't customer-enabled, the customer-enabled account must be the primary record.
Contact Point Objects	Contact point objects don't support merging. Relationships between contact point objects and person accounts are lost after a merge.

Experience Cloud Sites

Permission	To merge accounts associated with sites, you must have the Manage External Users permission. You also need permissions to delete accounts and edit related records such as opportunities and contacts.
Including Site-Associated Contacts in Merged Record	To ensure that the merged account includes contacts associated with a site, select the account with site users as the primary record.
Experience Cloud Site Type	When you merge accounts that have contacts associated with a site, the contacts must belong to the same type of site.
Contacts Associated with Multiple Experience Cloud Sites	When you merge accounts that have contacts associated with multiple sites

	<p>of the same type, a contact's access to a specific site doesn't change. A site user's profile determines the site they can access.</p> <p>If two person accounts are merged and the profile for each account grants access to different sites, the resulting account can only access the primary account's site.</p>
Partner Accounts	<p>When you merge a non-partner account with a partner account, the partner account must be selected as the primary record.</p> <p>When you merge a partner account with a non-partner account, the owner can't be changed.</p>

Enterprise Territory Management

- If a territory was manually assigned to one of the merged accounts (for models in all states), the territory is manually added to the merged account.
- Account assignment rules run on the merged account for the active territory model only if you select *Default* for the **Evaluate this account against territory rules on save** checkbox on the applicable account page layout's layout properties.
- If the merged value of **Exclude from territory assignment rules** = **true**, then:
 - Territory assignment rules aren't evaluated even if the *Default* checkbox for the **Evaluate this account against territory rules on save** checkbox is selected on the applicable account page layout's layout properties.
 - Existing rule-based territory associations in the active model are removed from the merged account.
- For territory models in non-active states (**Planning** or **Archived**), rule-based associated territories don't change on the merged account even if the merged account field values don't match the rules.

See Also

[Merge Duplicate Accounts in Lightning Experience](#)

Things to Know About Merging Duplicate Accounts Associated with Relationship Groups

Keep these considerations in mind when merging accounts that are members of relationship groups.

REQUIRED EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

USER PERMISSIONS NEEDED

To merge business accounts:

Delete on accounts

USER PERMISSIONS NEEDED

To merge person accounts:

Delete on accounts, Read on contacts

One Account per Group

An account can't exist more than once in the same relationship group.

Which Record Gets Relationship Group Membership

The account you select as the master record retains its original relationship group memberships. For example, suppose that the master record "Joseph Blake" is a member of the "Blake Family" and "Blake Law Firm" relationship groups. "Joseph Blake" remains a member of those relationship groups.

The master record replaces the non-master records in all other relationship groups involved in the merge. For example, suppose that the non-master record "Joe Blake" is a member of "Blake Trust Beneficiaries." The master record is transferred to Joe Blake's membership in Blake Trust Beneficiaries.

If multiple non-master records belong to a relationship group that the master record doesn't belong to, the master record acquires membership as follows:

- In the relationship group of the non-master account with higher priority (primary versus secondary)
- In the relationship group whose member record was most recently modified in the group

For example, suppose that the non-master records "JR Blake" and "Joe Blake" both are members of "Acme LLP" and JR Blake is primary. The master record is transferred to JR Blake's membership in Acme LLP. Alternatively, suppose that JR Blake and Joe Blake aren't primary or secondary, but JR Blake's member record in the relationship group was modified more recently. The master record is transferred to JR Blake's membership in Acme LLP.

See Also

[Merge Duplicate Accounts in Lightning Experience](#)

Merge Duplicate Accounts in Lightning Experience

Merge duplicate accounts using Lightning Experience.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To view business or person accounts:

Read on business or person accounts

USER PERMISSIONS NEEDED

To merge business or person accounts:

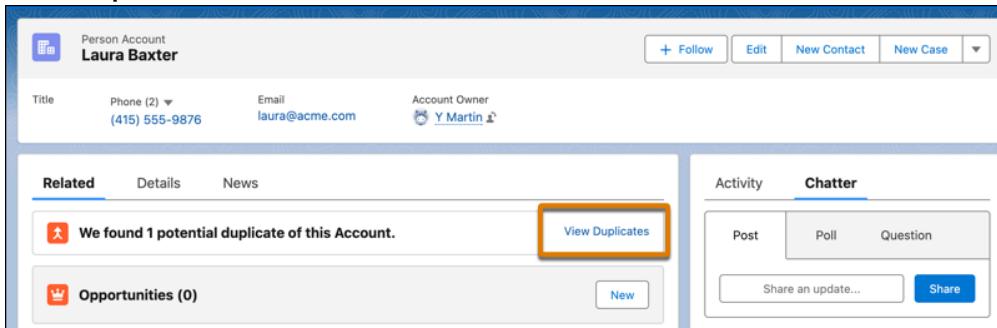
Delete on business or person accounts

AND

You must be a Salesforce admin, the account owner, or a user above the account owner in the role hierarchy

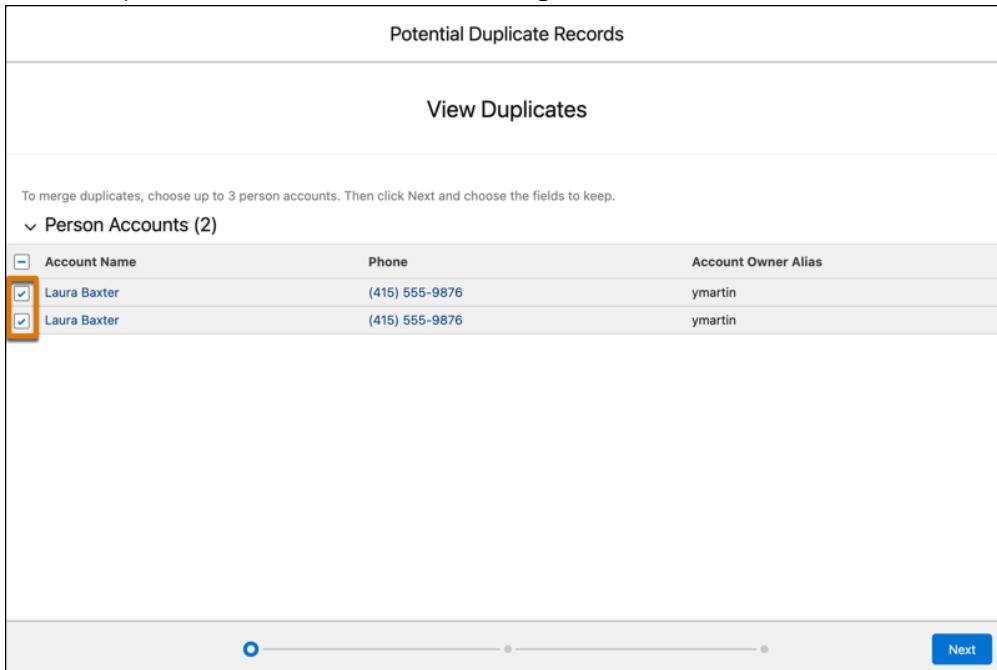
-  **Note** If duplicate accounts aren't getting flagged, see "Standard Account Matching Rule" in Salesforce Help to learn how Salesforce identifies duplicate records. Work with your Salesforce admin to fine-tune your matching rules if necessary.

1. Choose an account record. A message tells you if duplicates exist for that record. To see them, click **View Duplicates**.



The screenshot shows the Account detail page for 'Laura Baxter'. At the top, there's a message: 'We found 1 potential duplicate of this Account.' Below this, there's a 'View Duplicates' button highlighted with a red box. On the right side of the page, there's a Chatter feed section.

2. Choose up to three account records to merge. Click **Next**.



The screenshot shows the 'Potential Duplicate Records' step in the merge wizard. It displays a list of potential duplicates under the heading 'View Duplicates'. The list includes two entries for 'Laura Baxter' with different phone numbers. The first entry has a checked checkbox, indicating it is selected for merging. At the bottom right, there is a 'Next' button.

You can merge business accounts or person accounts. Business and person accounts can't be merged with each other.

3.  **Note** When accounts containing brands are merged, the brand associated with the master account will be retained. Brands associated with non-master accounts will be moved to the Recycle Bin, even if there is no brand associated with the master account.

Choose one account record as the principal, and choose the field values that you want to keep. Click **Next**.

Potential Duplicate Records

Compare accounts

When you merge, the master record is updated with the values you choose, and relationships to other items are shifted to the master record.

PRINCIPAL RECORD 	Laura Baxter Select All	Laura Baxter Select All
<input checked="" type="radio"/> Use as principal	<input type="radio"/> Use as principal	
EMAIL	<input checked="" type="radio"/> laura@acme.com	<input type="radio"/> lbaxter@globalmedia.com
TYPE	<input checked="" type="radio"/> Customer	<input type="radio"/> Prospect
INDUSTRY	<input type="radio"/> Biotechnology	<input checked="" type="radio"/> Technology
CREATED DATE 	9/11/2023, 9:25 PM	9/11/2023, 9:30 PM
LAST MODIFIED DATE	9/11/2023, 10:18 PM	9/11/2023, 9:58 PM

Showing fields with different values. [Show All Fields](#)

[Back](#)  [Next](#)

4. Confirm your choices and merge.

Potential Duplicate Records

Confirm merge

We're ready to merge these records

You're about to merge these person accounts. You can't undo merging.

[Back](#)  [Merge](#)

See Also

- [Standard Account Matching Rule](#)
- [Things to Know About Matching Rules](#)
- [Guidelines for Merging Duplicate Accounts](#)

Things to Know About Merging Duplicate Accounts Associated with Relationship Groups
[Manage Duplicate Records](#)

Merge Duplicate Accounts in Salesforce Classic

Merge duplicate accounts using Salesforce Classic.

REQUIRED EDITIONS

 **Important** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Available in: Salesforce Classic

Business accounts available in: **All Editions except Database.com**

Person accounts available in **Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS NEEDED

To view business or person accounts: Read on business or person accounts

To merge business or person accounts: Delete on business or person accounts

AND

You must be a Salesforce admin, the account owner, or a user above the account owner in the role hierarchy

Watch the 5-minute video to see how to merge accounts in Salesforce Classic.

Watch the video: <https://play.vidyard.com/QcK0SLnypaQZFEGn9wePnA>

1. From the Accounts tab, click **Merge Accounts** in the Tools section. If you don't see the merge option, ask your admin to check your user permissions.

The screenshot shows the Salesforce Accounts page. At the top, there's a navigation bar with tabs: Home, Chatter, Profile, Groups, Files, Leads, Accounts (which is highlighted with a blue box), Contacts, Opportunities, Reports, Dashboards, Products, Forecasts, and a plus sign. Below the navigation bar is a sidebar with sections for Recent Items (including InsightStar Account #v0XLC, A. Brian Arnell, Inria CyberOptics Inc., and OneEarth.Ess) and a Recycle Bin. The main content area has sections for Recent Accounts, Reports, and Tools. The Tools section is expanded, showing options like Import Person Accounts, Import Business Accounts & Business Contacts, Mass Delete Accounts, Transfer Accounts, Merge Accounts (which is highlighted with a red box), Mass Reassign Account Teams, Mass Email Contacts, Mass Mail Merge, Mass Add Contacts to Campaign, and Sales Methodologies.

2. To show a list of duplicate accounts, enter a search string, such as an account name or part of an account name, in the text box. Then click **Find Accounts**.
3. Select up to three accounts you want to merge. Then click **Next**.
4. Select one account as the master record.
5. Select the fields that you want to retain from each record. Fields with conflicting values are highlighted.
6. Click **Merge**.

 **Note** When accounts containing brands are merged, the brand associated with the master account is retained. Brands associated with accounts that aren't master are moved to the Recycle Bin, even if no brand is associated with the remaining master account.

See Also

- [Standard Account Matching Rule](#)
- [Things to Know About Matching Rules](#)
- [Guidelines for Merging Duplicate Accounts](#)

View and Convert Leads on an Account

Accounts show leads matched to a business account, with the best matches first. Convert leads without leaving the account.

REQUIRED EDITIONS

Available in: **Essentials, Professional, Enterprise, Performance, and Unlimited** Editions

USER PERMISSIONS NEEDED

To view leads:	View on Leads
To edit or convert leads:	Edit on Leads

A standard matching rule for leads on accounts populates the Matched Leads component.



Example

The screenshot shows the Account detail page for 'Acme'. At the top, there are tabs for RELATED, DETAILS, and NEWS. Under RELATED, it says 'We found no potential duplicates of this account.' Below this, there are sections for 'Contacts (3)' and 'Opportunities (3)'. In the 'Matched Leads' section, there are two entries: 'Sarah Loehr' and 'John Gardner'. Each entry includes fields for Title, Email, Phone, and Stage. A 'Convert' button is located next to each lead entry, and both of these buttons are circled in red.

See Also

[Standard Matching Rule for Leads on Accounts](#)

[Account Engagement Pricing](#)

Account History

Use the Account History related list on an account detail page to track the changes to the account.

REQUIRED EDITIONS

Available in: Salesforce Classic

Business accounts available in: **All Editions except Database.com**

Person accounts available in **Enterprise, Performance, Unlimited, and Developer Editions**

USER PERMISSIONS NEEDED

To view accounts:

Read on accounts

Any time a user modifies any of the standard or custom fields whose history is set to be tracked on the account, a new entry is added to the Account History related list. For person accounts, this addition includes any relevant contact fields that are set to be tracked. All entries include the date, time, nature of the change, and who made the change. Modifications to the related lists on the account are not tracked in the account history.

See Also

Field History Tracking

Set Up Accounts

Accounts are great, but when you add other account features they're even better. Track companies and their subsidiaries with account hierarchies and set up flexible sharing models for business contacts so your sales reps have the right information.

Display Account Hierarchies

Give sales reps a bird's-eye view of the relationships between parent accounts and their subsidiaries.

Business Contact Sharing for Orgs That Use Person Accounts

Orgs that use person accounts can modify the Organization-Wide Sharing Default for Contacts.

Modifying the Organizing Sharing Default provides flexibility in how you share business contacts, including the ability to define contact sharing rules and manually share business contacts.

Display Account Hierarchies

Give sales reps a bird's-eye view of the relationships between parent accounts and their subsidiaries.

Set Up Account Hierarchy in Salesforce Classic

Provide a link to the account hierarchy on account records so sales reps can view relationships between parent accounts and their subsidiaries.

Set Up Account Hierarchy in Lightning Experience

Show the relationships between parent accounts and their subsidiaries to sales reps using Lightning Experience. You can customize hierarchy columns to show the information that's most useful to your sales teams.

Set Up Account Hierarchy in Salesforce Classic

Provide a link to the account hierarchy on account records so sales reps can view relationships between parent accounts and their subsidiaries.

REQUIRED EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS NEEDED

To view account hierarchies: Read on accounts

To create account hierarchies: Edit on accounts

To add, edit or delete hierarchy columns: Modify All Data

Account hierarchies display accounts related via the Parent Account field. To maintain a complete account hierarchy, enter an account in the Parent Account field for every account except the one at the top of the hierarchy.

1. From Setup, in the Quick Find box, enter *Account Settings* and then click **Account Settings**.
2. Select **Show View Hierarchy link on account pages in Salesforce Classic**.

Whenever an account is related to another account via the Parent Account field, the account detail page includes a **View Hierarchy** link.

See Also

[Considerations for Using Account Hierarchy](#)

Set Up Account Hierarchy in Lightning Experience

Show the relationships between parent accounts and their subsidiaries to sales reps using Lightning Experience. You can customize hierarchy columns to show the information that's most useful to your sales teams.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To view account hierarchies:	Read on accounts
To create account hierarchies:	Edit on accounts
To add, edit or delete hierarchy columns:	Modify All Data

Account hierarchies display accounts related via the Parent Account field.

1. Give your sales reps access to account hierarchies from account pages. In Setup, in the Salesforce Mobile and Lightning Experience Actions section of your account page layout, add the View Account Hierarchy action.
The Actions menu includes the View Account Hierarchy action unless you customized the account page layout before Spring '17.

ACCOUNT DoubleTree (France)

Type Customer Phone +1-33-7659876 Website Account Owner Georges M... Industry Billing Address Paris France

RELATED DETAILS ACTIVITY CHAT

News New Task Log a Call

View Account Hierarchy

Sales reps can expand or collapse parts of a hierarchy as they navigate it. They can view up to 2,000 accounts from each point where they enter a hierarchy. To view accounts in a different part of the hierarchy, a sales rep can enter the hierarchy from a different account.

ACCOUNT NAME	ANNUAL REVENUE	BIRTHDATE	FIRST NAME
▼ Hilton Inc	\$125,876,987		
> Canopy	\$1,456,543		
> Conrad	\$4,765,789		
> Curio	\$4,766,123		
▼ DoubleTree	\$5,672,341		
> DoubleTree (Canada)	\$987,654		
> CURRENT DoubleTree (France)	\$109,876		
> DoubleTree (Germany)	\$564,123		
> DoubleTree (Italy)	\$1,765,432		

Hovering over an account name shows more details.

Conrad

DoubleTree (France)

Type	Customer	Phone	+1-33-7659876
Website		Account Owner	Georges Martin

Opportunities (0)

Cases (0)

2. You can edit the hierarchy columns to show the information that's most useful to your sales reps.
 - a. From Setup, at the top of the page, select **Object Manager**.

- b. In Account, click **Hierarchy Columns** and then edit the columns.

You can include up to 15 columns.

By default, account hierarchies display the same columns as the Recently Viewed Accounts standard list view. However, the list view columns don't change when you customize the hierarchy columns.

HIERARCHY VIEW NAME	COLUMNS DISPLAYED
Account Hierarchy View	Account Name, Account Owner Alias, Account Record Type, Annual Revenue, Assistant, Asst. Phone, Billing City, Billing Country

Choose Columns to Display

Available Fields
Columns Displayed

Account Owner Alias
 Account Record Type
 Account Source
 ActiveLiveAgentUser
 Assistant
 Asst. Phone

Account Name
 Annual Revenue
 Birthdate
 First Name
 Mailing City
 Mailing Street

Cancel
Save

-  **Note** After you customize hierarchy columns, the item Org_Account_Hierarchy is added to the Accounts list view menu. Deleting this item resets the columns to the defaults.

See Also

[Considerations for Using Account Hierarchy](#)

Business Contact Sharing for Orgs That Use Person Accounts

Orgs that use person accounts can modify the Organization-Wide Sharing Default for Contacts. Modifying the Organizing Sharing Default provides flexibility in how you share business contacts, including the ability to define contact sharing rules and manually share business contacts.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Manually sharing contacts applies only to the business accounts because person accounts don't have contacts. To share information about a person account, you must share the entire account.

To use this feature, edit your Sharing Settings.

1. From Setup, enter *Sharing Settings* in the Quick Find box.
2. For Account and Contract, select **Private**.
3. For Contact, select **Private**.



To disable business contact sharing, change the Contact sharing setting to **Controlled by Parent**.

See Also

[Person Accounts](#)

Person Accounts

Person accounts store information about individual people by combining certain account and contact fields into one record.

REQUIRED EDITIONS

Business accounts available in: both Salesforce Classic and Lightning Experience

Business accounts available in: **All** Editions

Person accounts available in: Both Salesforce Classic and Lightning Experience

Person accounts available in **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

 **Note** In Salesforce Help and other documentation, the word *account* by itself always refers to both business accounts and person accounts. We use the terms *business accounts* and *person accounts*

when there are differences between the two types of accounts.

Considerations for Using Person Accounts

Review how person accounts differ from business accounts and contacts.

Considerations for Using Merge Fields for Person Accounts

A merge field is a field you can put in an email, an email template, a mail merge template, a custom link, or a formula to incorporate values from a record. You can use merge fields in the subject and body of custom HTML templates. When using merge fields, it's a good idea to understand how they work and what to expect in your merged documents and emails.

Considerations for Using Merge Fields in Validation Rules for Person Accounts

A merge field incorporates values from a record. You can add merge fields to an email template, mail merge template, custom link, or formula. If your person account validation rules include merge fields, here are some things to keep in mind.

Enable Person Accounts

Person accounts store information about individual people by combining certain account and contact fields into one record.

See Also

[Merge Duplicate Accounts](#)

Considerations for Using Person Accounts

Review how person accounts differ from business accounts and contacts.

REQUIRED EDITIONS

Business accounts available in: Lightning Experience and Salesforce Classic

Business accounts available in: all editions

Person accounts available in: Lightning Experience and Salesforce Classic

Person accounts available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

Product or Feature	Consideration
Account Engagement	Person accounts are supported in Account Engagement and Sales Emails and Alerts, but the integration requires additional configuration. See Person Account Syncing with Salesforce .
Account merge	Person accounts can be merged only with other person accounts. You can't merge person accounts that are enabled as portal or Experience Cloud site users. See Merge Duplicate Accounts .
Account Quick Create	On the accounts page in Salesforce Classic, fields in the Quick Create area

Product or Feature	Consideration
	depend on whether the default record type is set to person account or business account.
Accounts	<p>Person accounts can't be included in account hierarchies. To allow users to include person accounts in contact hierarchies, turn on the Reports To field.</p> <p>Person accounts can't be parent accounts of other accounts or of contacts. However, you can use Contacts to Multiple Accounts to create indirect relationships between a person account and another person account, business account, or contact. And, you can use the Reports To field to create associations between person accounts and other person accounts and contacts in a reporting structure.</p> <p>In Lightning Experience orgs where Shared Activities isn't enabled, activity visibility differs for an activity associated with a person account through the Name field. In this case, the activity is visible in the person account's Activity Timeline only. It isn't visible in activity related lists: Open Activities and Activity History.</p>
Activities	<p>Person accounts can be associated with events or tasks by using the Name or the Related To field.</p> <p>Person accounts can be invited to events.</p> <p>For users to request a meeting with a person account, the Email field must be included in the person account page layout.</p>
Approval processes	When creating approval processes for person accounts, the Account Name field isn't accepted as a valid entry criteria. Use the First Name and Last Name fields instead.
Assets	On assets, person accounts can be entered in the Account field, the Contact field, or both.
Campaigns	<p>Person accounts can be added to campaigns and have a Campaign History related list.</p> <p>If an admin creates a Contact related list based on a custom lookup relationship, the Add to Campaign row-level action isn't displayed on person accounts. To see the full related list and access the Add to Campaign mass action, click View All. This procedure applies to Lightning Experience and the Salesforce mobile app. (The Add to Campaign action isn't available in Salesforce Classic.)</p>
Cases	On cases, person accounts can be entered in the Account Name field, the

Product or Feature	Consideration
	Contact Name field, or both.
Chatter feed tracking	When you follow person accounts, you follow the account fields, but not the contact fields.
Experience Cloud sites and portals	<p>Person accounts can be enabled as users for customer Experience Cloud sites and portals.</p> <p>Person accounts can't be enabled as users for partner Experience Cloud sites and portals because partners represent companies, not individuals. Similarly, person accounts can't be used with Lightning External Apps Plus licenses.</p> <p>Person account owner power users can be configured to allow your site to accommodate the number of users or roles that are needed.</p>
Contacts	<p>When you look up a Contact in Lightning Experience, Person Account records don't appear in the Instant Results list, and in Global Search results when scoped to Contact. To receive Person Account records, scope to the Account object.</p> <p>The Account Name field must be accessible on the Contact object to view person accounts related to contacts. If not, the contact record is accessible, but the related person account is not.</p>
Contacts to Multiple Accounts	With Contacts to Multiple Accounts, a person account can be either a related contact on a business account or a related account on a contact. A person account can also be related to another person account as either a related contact or related account. Person accounts are always indirectly related to other accounts or contacts.
Custom fields	Custom fields with the <code>__pc</code> suffix are Person Account custom fields on the Contact object. These fields aren't supported for Einstein predictions.
Custom objects	Custom objects with relationships to either accounts or contacts can be added as related lists on person accounts.
Duplicate management	Duplicate rules and the Potential Duplicates component support person accounts.
Email	<p>As with contacts, you can send individual emails and group emails to person accounts.</p> <p>In Lightning Experience, you can send list emails to person accounts from Contact list views but not Account list views.</p>

Product or Feature	Consideration
Email integration	<p>These Salesforce email integration features support person accounts.</p> <ul style="list-style-type: none"> • Gmail integration • Outlook integration • Lightning Sync • Salesforce Inbox • Salesforce for Outlook • Connect Offline
Encryption	<p>When person accounts are enabled, encrypting some account fields encrypts the equivalent contact fields, and vice versa.</p> <p>See the General Shield Platform Encryption Considerations.</p>
Field history	<p>Account and contact fields that appear on person account records can be tracked using the account field history settings. Person account field history is then captured in the Account History related list, the Account History report, and field audit trails.</p> <p>Field history for accounts tracks both business accounts and person accounts. For more information, see Track Field History for Standard Objects.</p>
Fields	<p>Most standard account and contact fields and all custom account and contact fields are available for person account page layouts.</p> <p>To set field-level security on a Person Account field, set security on the corresponding Contact field. The Person Account field inherits the same security setting from the Contact field. You can't specify a different security setting on a Person Account field compared to the corresponding Contact field.</p> <p>Person accounts don't support certain business account fields (such as Parent Account) and some contact fields. See Account Fields.</p> <p>If your org uses person accounts, the Account Fields page lists both person account and business account fields. Person accounts use a combination of account and contact fields. These contact fields are available for person accounts, but not for business accounts.</p> <ul style="list-style-type: none"> • Fields in the Account Standard Fields list that display with a person account icon. • Fields in the Contact Custom Fields & Relationships list.

Product or Feature	Consideration
Formula fields	Custom formula fields from contacts can't be referenced through person accounts. For more information, see Using custom formula fields with person accounts .
Geocodes	Geocodes for addresses can't be added to person accounts using data integration rules. You can use a third-party service, or, if you know the geocodes for your person account records, the API can be used to add them.
Icons	<p>In Salesforce Classic, person accounts have a person icon (), whereas business accounts have a folder icon ().</p> <p>In Lightning Experience, person accounts have a person with a building icon (), while business accounts have a building icon ().</p>
Lead conversion	<p>In Lightning Experience, leads that don't have a value in the Company field are converted to person accounts. Leads that do have a value in the Company field are converted to business accounts.</p> <p>In Salesforce Classic and the Salesforce mobile app, you can convert leads without company information to an existing business account even if person accounts are enabled.</p>
Lightning pages	<p>To display a custom Lightning page for person accounts, create a custom account record page, then assign it to the person account record type.</p> <p>Suppose that an admin creates a Lightning page for accounts and assigns it as the default for an org or an app. That page becomes the org or app default for both business accounts and person accounts.</p>
List views	<p>Person accounts appear in all but these account and contact list views.</p> <ul style="list-style-type: none"> • Recent Contacts on the Contacts home page in Salesforce Classic • Recent Contacts on the Contacts home page in Lightning Experience • Recently Viewed Contacts on the Contacts home page in Lightning Experience <p>An admin can show which records are person accounts by adding the Is Person Account field to the list of fields to display. To include or exclude person accounts from a list view, add the Is Person Account field to the filter criteria.</p>
Marketing Cloud	Person accounts aren't supported in Marketing Cloud. See Considerations for Managing Consent Data in Marketing Cloud .

Product or Feature	Consideration
Marketing Cloud Engagement	Person accounts are supported, but additional configuration is required. More information
News	Account news is available only for business accounts.
Opportunity Contact Roles	You can relate person accounts to opportunities using the Contact Roles related list.
Packages	<p>You can include person account components and attributes in managed and unmanaged packages.</p> <p>If you removed Middle Name, Suffix, or Informal Name from a person account object or any person object including Contact, Lead, or User, those fields are still always available in Apex when it runs in a managed package.</p>
Page layouts	<p>Person accounts have their own page layouts, which can include account and contact fields, account custom links, and account and contact related lists.</p> <p>Person accounts page layouts don't support the Parent Account field. See Account Fields.</p>
Partners	In Salesforce Classic, you can use the Partners related list to relate person accounts to each other. We recommend that you rename the Partners related list to reflect how your person accounts are connected.
Process Builder	Creating or editing a person account triggers Process Builder processes.
Quick actions	Custom actions can be defined for Person Accounts but with some exceptions. For details, see Action Limits and Limitations.
Record types	Admins can configure multiple record types for person accounts. You can change an account's record type from a business account to a business account or from a person account to a person account. However, changing an account's record type from a business account to a person account, or vice versa, requires using the API.
Renamed tabs and standard fields	<p>To customize the names of tabs and fields displayed on person account records, an admin must customize the account and contact tabs and fields.</p> <p>Renaming person accounts has differing effects on the entity history label between Salesforce Classic and Lightning Experience. In Lightning Experience, the person account history label is fixed as "Person Account History." In Salesforce Classic, the entity history label is renamed to "[new entity name] History."</p>

Product or Feature	Consideration
Reports To field	<p>The Reports To field on the Person Account object allows users to associate person accounts and contacts with other person accounts and contacts in a reporting structure. Enabling this field can affect integrations, workflows, or validations that use the Reports To field on Contact.</p> <p>Before separating a person account into a business account and a contact, ensure that the Reports To field is empty.</p> <p>Person accounts can't report to themselves or to contacts or person accounts lower in the hierarchy.</p>
Sales Dialer	Users can use Sales Dialer to make and receive calls for person accounts.
Sales Cloud Einstein	Einstein Activity Capture can automatically log emails and events for person accounts. Other Sales Cloud Einstein features, such as Account Insights and Automated Contacts, are currently only available with business accounts and contacts.
Salesforce to Salesforce	Person account records can be shared using Salesforce to Salesforce. For more information, see Best Practices for Mapping Fields in Salesforce to Salesforce.
Salutation field	Globally replacing salutation values on the Person Account object via the Object Manager replaces salutations on contact records, but not on person account records. To globally replace salutation values on all person account and contact records, update the Salutation field values via the API. You can also manually update salutation values on individual person account records via the UI.
Search	<p>In Lightning Experience and the Salesforce mobile app, person accounts appear in both account and contact search results. In Salesforce Classic, person accounts appear only in account search results.</p> <p>To help users differentiate person accounts from business accounts in search results, admins can add the Is Person Account field to the appropriate search layout.</p> <p>You can configure person accounts with an account configuration in Search Manager, but you can't configure fields that are specific to person accounts such as Email. Contact configurations don't affect person accounts.</p>
Self-registered users	When users self-register, admins can choose to save them as contacts under a business account or create a person account for each self-registered user.
Self-service portal	You can enable person accounts as users for a Self-Service portal.

Product or Feature	Consideration
Sharing settings	If person accounts are enabled, the organization-wide default sharing must be set in one of these two ways. <ul style="list-style-type: none"> • Contacts are set to Controlled by Parent • Accounts and contacts are both set to Private
Social accounts, contacts, and leads	As with contacts, you can link person accounts to social network profiles.
Storage	Person accounts count against both account and contact storage, because each person account consists of one account and one contact.
Workflow rules	Creating or editing a person account triggers account workflow rules.

See Also

[Person Accounts](#)

[Person Accounts Implementation Guide](#)

Considerations for Using Merge Fields for Person Accounts

A merge field is a field you can put in an email, an email template, a mail merge template, a custom link, or a formula to incorporate values from a record. You can use merge fields in the subject and body of custom HTML templates. When using merge fields, it's a good idea to understand how they work and what to expect in your merged documents and emails.

REQUIRED EDITIONS

Business accounts available in: both Salesforce Classic and Lightning Experience

Business accounts available in: **All Editions**

Person accounts available in: Both Salesforce Classic and Lightning Experience

Person accounts available in **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

- If your organization uses person accounts, business account and person account fields are available as account merge fields. Account fields exclusive to person accounts, such as **Birthdate**, **Email**, and **Title** have “Account.Person” in their merge field names. For example, **{!Account.PersonBirthdate}**.
- You can use the merge field **{!Account.IsPersonAccount}** to determine whether you are working with a person account or a business account.
- Account fields that previously had unique names and labels are no longer unique because some contact fields are displayed as part of the account object. Look for the person account icon () to

identify these fields. Ensure that all custom account fields have field names and labels unique to your organization so that the merge field references the correct field.

Important

- If two or more custom objects have matching names or labels, only one of the objects appears when you select from available merge fields. Make sure that all custom objects have unique names and labels so that you can select merge fields from any of the objects.

See Also

[Person Accounts](#)

[Considerations for Using Merge Fields in Validation Rules for Person Accounts](#)

[Account Fields](#)

Considerations for Using Merge Fields in Validation Rules for Person Accounts

A merge field incorporates values from a record. You can add merge fields to an email template, mail merge template, custom link, or formula. If your person account validation rules include merge fields, here are some things to keep in mind.

REQUIRED EDITIONS

Business accounts available in: both Salesforce Classic and Lightning Experience

Business accounts available in: **All** Editions

Person accounts available in: Both Salesforce Classic and Lightning Experience

Person accounts available in **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

- The list of available merge fields depends on the type of data that you're working with.
- To define a validation rule that applies only to person accounts, use the `IsPersonAccount` merge field. For example, `Account.City = "San Francisco"` verifies that a business or person account's city is San Francisco, while `IsPersonAccount (Account.City = "San Francisco")` verifies that a person account's city is San Francisco.
- Handle person account and business account names separately in account validation rules.
 - For business accounts, use the `Name` merge field.
 - For person accounts, use the `FirstName` and `LastName` merge fields.
- **Birthdate, Email**, and other fields that are only supported for person accounts are available as merge fields in account validation rules. When you use one of those merge fields, business account records are processed as if those fields have blank values.

See Also

[Person Accounts](#)[Considerations for Using Merge Fields in Validation Rules for Person Accounts](#)[Account Fields](#)

Enable Person Accounts

Person accounts store information about individual people by combining certain account and contact fields into one record.

REQUIRED EDITIONS

Business accounts available in: both Salesforce Classic and Lightning Experience

Business accounts available in: **All** Editions

Person accounts available in: Both Salesforce Classic and Lightning Experience

Person accounts available in **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS NEEDED

To enable person accounts:

Customize Application

AND

View All Profiles

 **Important** After Person Accounts is enabled, it can't be disabled. We recommend that you create a sandbox to preview how Person Accounts affect your Salesforce org.

1. From Setup, enter *Person Accounts* in the Quick Find box, and then select **Person Accounts**.
2. Go through the steps listed on the Setup page.
3. Turn on Person Accounts.
4. After Person Accounts is enabled, a Person Account object with a corresponding person account record type is created. You can create additional record types on Person Account as needed.
5. Assign the person account record type to user profiles.
6. To allow users to associate person accounts and contacts to other person accounts and contacts in a reporting structure, turn on the Reports To field and add it to your page layouts.

See Also

[Person Accounts](#)[Person Accounts Implementation Guide](#)[Assign Record Types](#)

Collaborate on Accounts by Using Teams

When you collaborate on accounts with colleagues, use account teams to facilitate teamwork and track progress. Roles on a team can include an executive sponsor, a dedicated support agent, and a project manager, for example. Team members can be internal users or partner users.

[Add Teams to Your Accounts](#)

If your Salesforce admin has enabled account teams, the Account Team related list appears on each account. You can add, edit, or remove team members.

[Set Up a Default Account Team](#)

Set up a default team of coworkers you typically work with on accounts, with a role for each member and special access to your accounts. If you don't see the Account Team related list, ask your Salesforce admin to enable account teams.

[Use Reports to Maintain Account Teams](#)

Keep team information current using the ID field on Account Team Member in reports. For example, run a report to identify all the account teams that a user is a member of. Then use the IDs and Data Loader to remove the team member from all account teams.

[Considerations for Account Access via Teams](#)

Review considerations for granting account access via account teams and adding portal users to teams.

See Also

[Collaborate on Deals with Opportunity Teams](#)

Add Teams to Your Accounts

If your Salesforce admin has enabled account teams, the Account Team related list appears on each account. You can add, edit, or remove team members.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

USER PERMISSIONS NEEDED

To add, edit, or remove account team members:

Read on users

AND

Edit on accounts

AND

USER PERMISSIONS NEEDED

Account owner or above the owner in the role hierarchy

To view accounts as a team member: Read on accounts

If you don't see the Account Team related list, ask your Salesforce admin to enable account teams.

-  **Note** Team members may be removed upon account ownership changes based on who added the account team members. If the account owner is changed, the team members added by users with group-based access are removed from the team, even if the **Keep account team** option is selected. To keep the team members related to the account, they should be added by a Salesforce admin, the account owner, or someone above the owner in the role hierarchy.

- Edit the account team.

Add, Edit, or Remove Team Members

In the Account Team related list on an account, click to add a team member or a default account team.

To remove team members in Lightning Experience and the Salesforce mobile app , use the **Remove All Members** action. In Salesforce Classic, use the **Delete All** button on the related list.

If you remove an account team member who receives opportunity splits, you can also remove the member from opportunity teams on open opportunities related to the account.

Give a Team Member Access to the Account

To see each team member's access, click the **Team Member Access** action. A member's access level can be read and write or read-only, but it's at least equal to the default account sharing access.

The **Team Member Access** action isn't available in the Salesforce mobile app.

Specify a Member's Role on the Account

For example, a member can be the account manager or an executive sponsor.

To edit information about a team member, go to the user's detail page.

Changes that you make to an account team don't affect your default account team or the teams on your other accounts.

- Add your default account team–users you normally work with on accounts.
Add your default team to all your accounts automatically or to one account at a time.
Account teams and opportunity teams share available team member roles.

See Also

[Set Up a Default Account Team](#)

Set Up a Default Account Team

Set up a default team of coworkers you typically work with on accounts, with a role for each member and special access to your accounts. If you don't see the Account Team related list, ask your Salesforce admin to enable account teams.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

USER PERMISSIONS NEEDED

To set up or edit a default account team:

Read on accounts

AND

Account owner or above the owner in the role hierarchy

To add the account owner's default account team to an account:

Read on accounts

AND

Account owner or above the owner in the role hierarchy

1. In your personal settings, go to Advanced User Details and find Default Account Team. Click **Add**.
2. Add coworkers, selecting each user's access to the account and to related opportunities and cases, and the user's role on the team.
3. If you want, select options for adding the team to accounts automatically.
To add your default team to accounts from now on, select **Automatically add my default account team to accounts that I create or accounts that are transferred to me**.
To add your default team to all your accounts immediately, select **Update account teams with these members**.
If you don't add your default team to accounts automatically, you can add it to individual records by clicking **Add Default Team** on the Account Team related list. **Add Default Team** adds the default team of the account owner, not of the user who clicks the button.
4. Click **Save**.

See Also

[Add Teams to Your Accounts](#)

[Considerations for Account Access via Teams](#)

Use Reports to Maintain Account Teams

Keep team information current using the ID field on Account Team Member in reports. For example, run a report to identify all the account teams that a user is a member of. Then use the IDs and Data Loader to remove the team member from all account teams.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

USER PERMISSIONS NEEDED

To create, edit, and delete reports in private folders:	Create and Customize Reports
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To create, edit, and delete reports in public and private folders:	Report Builder OR Report Builder (Lightning Experience)
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Let's say that the user Jessica Adams left your company, so you want to remove her from the account teams she's a member of.

1. Create a report of type Account with Account Teams. The report preview includes the Account Owner field.
2. Add the UserId field to the report preview.
3. Save and run the report. Find all the UserId values for the user you want to remove from teams. The report includes all users with a UserId value on the Account Team Member object. Each user has a UserId value for each team.
4. Export the report data. Configure Data Loader to update records on the basis of the UserId values you identified.

Considerations for Account Access via Teams

Review considerations for granting account access via account teams and adding portal users to teams.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

Access

Accounts and Related Records

- Your Salesforce admin sets default access to accounts and related records. To grant team members more access than the default, you must be the account owner or above in the role hierarchy. You can grant team members more access than the default, but not less.
- To add team members who don't have Read or Read/Write access to an account, you must be the owner or above in the role hierarchy.

Account Owner Changes and Group-Based Access

Suppose that a user with group-based access adds account team members. If the account owner is changed, the team members added by users with group-based access are removed from the team, even if the **Keep account team** option is selected.

To keep the team members related to the account, they should be added by a Salesforce admin, the account owner, or someone above the owner in the role hierarchy.

Child Records

You can't grant team members greater access to child records than you have yourself. For example, if you have Read access to child records on an account, you can't give a team member Read/Write access. Ask your Salesforce admin to grant the needed access.

Available Fields

The fields available when sales reps add a team member are based on the reps' level of access to the account.

Org-Wide Default Access to Accounts and Opportunities

Your Salesforce admin can set the default account and opportunity access to Private. In that case, if you give team members access to an individual opportunity, those users gain Read access to accounts on the opportunity. Conversely, if you remove a user's access to an individual account, the user is removed from opportunity teams related to the account.

Portal Users

High-volume portal users can't be added to teams.

See Also

[Add Teams to Your Accounts](#)

Administer Account Teams

Help your account reps collaborate to improve customer relationships by enabling account teams and

customizing the team layout.

Facilitate Collaboration by Enabling Account Teams

Enable account teams so that your reps can create and maintain teams for their accounts.

Customize Account Team Roles

Every account team member has a role on an account, such as account manager or sales rep. To track the roles that team members fill in your company, customize account team roles.

Maintain Your Users' Account Teams

Add, remove, or replace multiple account team members at a time. Update member roles and access.

Disable Account Teams

If your account reps aren't using account teams and you don't want to retain account team data, you can disable account teams.

Considerations for Customizing Account Teams

If you customize account teams, review considerations related to custom fields, team member information, and validation rule, flow, and Apex trigger support.

Account Team Fields

Account team member data is stored in standard fields. A user's page layout determines which fields are visible, and a user's access to the account determines which fields are editable.

Facilitate Collaboration by Enabling Account Teams

Enable account teams so that your reps can create and maintain teams for their accounts.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

USER PERMISSIONS NEEDED

To enable account teams: Customize Application

1. In Setup, use the Quick Find box to find Account Team Settings.
2. Click **Enable Account Teams**.
3. Select the account page layouts where you want to include the Account Team Member related list. You can also include the related list in page layouts that users have customized.
4. Save your settings.

See Also

[Collaborate on Accounts by Using Teams](#)

Customize Account Team Roles

Every account team member has a role on an account, such as account manager or sales rep. To track

the roles that team members fill in your company, customize account team roles.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

USER PERMISSIONS NEEDED

To set up team roles: Customize Application

 **Warning** Account teams share roles with opportunity teams. If you remove an account team role, that role is no longer listed as an opportunity team role.

1. In Setup, use the Quick Find box to find **Team Roles**.
2. Edit the picklist values for team roles to follow your business process.
3. Save your changes.
4. To update a changed picklist value globally, in Setup, use the Quick Find box to find **Replace Team Role**.

See Also

[Customize Opportunity Team Roles](#)

Maintain Your Users' Account Teams

Add, remove, or replace multiple account team members at a time. Update member roles and access.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

USER PERMISSIONS NEEDED

To edit multiple account team members, roles, and access in one operation: Use Team Reassignment Wizards

1. In Setup, use the Quick Find box to find **Mass Reassign Account Teams**.
2. Specify your changes by following the steps. Select the appropriate account, contact, case, and opportunity access for new or changed team members. Then complete any custom fields included in the account team page layout.
Suppose that you deactivate an account team user who has Read/Write access on accounts, contacts, opportunities, or cases, and then you reactivate the user. The user's access defaults to Read Only.
3. Review the number of changed records, and then click **Done**.

Disable Account Teams

If your account reps aren't using account teams and you don't want to retain account team data, you can disable account teams.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

USER PERMISSIONS NEEDED

To disable account teams: Customize Application

Before disabling account teams, do the following:

- Delete all custom fields, custom buttons and links, page layouts, validation rules, Apex triggers, and workflow rules that you've added to account teams.
- Delete all custom reports that include account team information.
- Uninstall Apex packages that use account teams.
- Remove account team members referenced in your Apex code.



Warning Disabling account teams is an irreversible process, permanently removing all teams from accounts, deleting all default account teams, and removing the Account Team related list from all page layouts.

1. In Setup, use the Quick Find box to find **Account Teams**.
2. Select **Disable Account Teams**.

See Also

[Customize Fields](#)

[Custom Buttons and Links](#)

[Build a Report in Lightning Experience](#)

[Validation Rules](#)

[Define Apex Triggers](#)

[Workflow Rules](#)

Considerations for Customizing Account Teams

If you customize account teams, review considerations related to custom fields, team member information, and validation rule, flow, and Apex trigger support.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

Custom Fields and Picklists

- Custom fields and picklists aren't visible in Salesforce Classic.
- You can create up to 100 custom fields for an account team.
- When editing team members, users see custom fields, even if you don't add the fields to the Add Account Team Members multiline page layout.
- If you delete a custom field, filters based on the custom field are also deleted. The results of assignment or escalation rules that rely on the custom field's data can change.
- If you include a default value for a custom field, the field appears blank to Lightning Experience users while they're adding account team members. If users don't enter a value, the default value appears on the record after they save.
- Mass Reassign Account Teams doesn't support custom picklists.

Team Member Information

- You can't create a lookup from an object, such as an account, to an account team member.
- The Account Team related list is sorted by Team Member Name. The sort order can't be customized, even if you specify the sort order in the Account Team Member page layout. A user can sort the related list by any other column, but when the page is refreshed, sorting reverts to the Team Member Name column.
- If you set the organization-wide default for contacts to Controlled by Parent, users can't see or edit the Contact Access field.
- Only users with the Modify All Data profile permission can grant account team members higher access levels than the access levels of the account owner. In Lightning Experience, the running user's permissions determine the available access level picklist values. In Salesforce Classic, an exception prevents users without the Modify All Data profile permission from saving higher access levels.
- When accounts are merged, account team members are deleted if they were added by a user who did not have sharing access on the account record.
- A deleted account team member record isn't moved to the Recycle Bin. It can't be recovered unless the record was cascade-deleted when deleting a related account. For more information, see [AccountTeamMember](#) in the Object Reference.
- Account team member records don't support [overriding the behavior of standard buttons](#)—like Edit or Delete—with Visualforce pages.

Validation Rules, Flows, and Apex Trigger Support

- Validation rules, flows, and Apex triggers are applied when Lightning Experience users add their default team to an account using the Add action on the related list. However, they're not applied when

- Lightning Experience users select the personal settings option to add their default team to accounts automatically.
- Validation rules and Apex triggers are bypassed when Salesforce Classic users add default account teams via any method.
 - When an account team member is removed during an account ownership change, Apex triggers are bypassed.

See Also

[Customize Account Team Roles](#)
[Account Team Fields](#)

Account Team Fields

Account team member data is stored in standard fields. A user's page layout determines which fields are visible, and a user's access to the account determines which fields are editable.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

Field	Description
Account Access	A team member's level of access to an account. The access level can be Read/Write or Read Only, but it can't be less than the default account sharing access.
Case Access	A team member's level of access to the cases associated with the account.
Contact Access	The level of access that a team member has to the contact on the account. The access level can be Read/Write or Read Only, but it can't be less than the default contact sharing access. The Contact Access field is unavailable when the organization-wide default for contacts is set to Controlled by Parent.
Opportunity Access	The level of access that a team member has to the opportunities associated with the account.
Team Member	A user listed as part of the team.
Team Role	The role that a team member plays for the

Field	Description
	account, such as account manager.

Things to Know About Accounts

Review additional considerations for accounts.

Guidelines for Creating Accounts

Review guidelines for creating accounts.

Guidelines for Deleting Accounts

Most accounts and their related records can be deleted in one click. Some accounts can't be deleted until related records have been removed.

Considerations for Using Account Hierarchy

All hierarchies display accounts related via the Parent Account field. Keep these considerations in mind when you create account hierarchies.

Account Fields

Accounts have business account fields and person account fields.

Guidelines for Creating Accounts

Review guidelines for creating accounts.

REQUIRED EDITIONS

Business accounts available in: Lightning Experience and Salesforce Classic

Business accounts available in: **All** Editions

Person accounts available in: Lightning Experience and Salesforce Classic

Person accounts available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS NEEDED

To create business accounts: Create on accounts

To create person accounts: Create on accounts

AND

Create on contacts

Support on Mobile Devices

You can view attachments in the Salesforce mobile app, but you can't edit them.

Record Types

If your Salesforce admin has set up record types, you're prompted to choose a record type when creating an account. Different record types can include different fields and picklist values to support your company's business processes.

Company Subsidiaries

To specify that a business account is a subsidiary of another business account, fill in the Parent Account field. You can then view an account hierarchy from the account detail page. In Lightning Experience, click **View Account Hierarchy**. In Salesforce Classic, click the **View Hierarchy** link. The Parent Account field isn't available for person accounts.

Company Locations

Use the Account Site field to designate different locations of the same company. For example, suppose that Acme.com has offices in Paris and London. Create two accounts, both called Acme.com, but with Account Site values of Paris and London, respectively.

Divisions

If your Salesforce admin has enabled divisions, the division of a new account is automatically set to your default division, unless you select a different one.

Territory Management

If your Salesforce admin has set up territory management, account assignment rules can automatically assign newly created accounts to territories.

See Also

[Create and Update Records](#)

[Who Has Access to Account Records?](#)

[Account Fields](#)

Guidelines for Deleting Accounts

Most accounts and their related records can be deleted in one click. Some accounts can't be deleted until related records have been removed.

REQUIRED EDITIONS

Business accounts available in: Lightning Experience and Salesforce Classic

Business accounts available in: All Editions

Person accounts available in: Lightning Experience and Salesforce Classic

Person accounts available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

USER PERMISSIONS NEEDED

To view accounts:	Read on accounts
To delete accounts:	Delete on accounts

! **Important** You see the Delete option only if you have permission to delete an account. The Delete option is available on the account's detail page and on the account list view in Lightning Experience and Salesforce Classic. If you don't see the Delete option, you don't have permission to delete the account. Ask your Salesforce admin for help.

Deleted accounts are moved to the Recycle Bin, along with these related items. If you restore an account from the Recycle Bin, related items are also restored, except the following.

- Contacts
- Opportunities
- Orders
- Contracts (if they're not activated)
- Activities
- Notes
- Attachments
- Portal roles and groups (if all portal users in the account are disabled)
- Partner relationships
- Relationship group members

- Relationship group members in certain cases
- Portal roles and groups
- Scorecard associations

If any of the following conditions apply, you can't delete an account.

- A case is related to the account
- You don't have the Delete permission on accounts
- You aren't the account's owner, above the account's owner in the role hierarchy, or a Salesforce admin
- When a contact on the account is related to an order via the Bill to Contact lookup field

If any of the following conditions apply, you can't delete a partner account. To delete an account with closed-won opportunities that you own, you have to delete the closed-won opportunities along with the account. To delete an account associated with a channel program membership, you have to delete the membership first.

- Child records, activated contracts, or related opportunities owned by other users are related to the account
- Related contacts enabled as customer or partner users are related to the account

- A channel program membership is related to the account

 **Note** You don't need the Delete permission on related records.

See Also

[Deleting Records](#)

[Merge Duplicate Accounts](#)

Considerations for Using Account Hierarchy

All hierarchies display accounts related via the Parent Account field. Keep these considerations in mind when you create account hierarchies.

REQUIRED EDITIONS

Available in: both Lightning Experience and Salesforce Classic

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions in Lightning experience. Available in all editions except **Database.com** in Salesforce Classic.

Lightning Experience

- The Account Hierarchy page displays up to 2,000 accounts in Lightning Experience, sorted by name. To view accounts in a different part of the hierarchy, enter the hierarchy from a different account. The hierarchy doesn't display accounts you don't have permission to view.
- If the current displayed record exists in the middle of the hierarchy (for example, the parent record has 500 children and the current record is child #250), the parent record isn't visible when the Account Hierarchy page first appears. To see results further up in the hierarchy, scroll up.
- For companies with multiple office locations, use the Account Site field to distinguish among the locations
- If divisions are enabled, you can use the Parent Account field to relate accounts in different divisions.
- Person accounts aren't supported for the Parent Account field or the View Account Hierarchy action.
- You can't view account hierarchies in the Salesforce mobile app.

Salesforce Classic

- An account hierarchy displays up to 500 child accounts in Salesforce Classic. The hierarchy doesn't display details of accounts you don't have permission to view.
- For companies with multiple office locations, you can also use the Account Site field to distinguish among the locations.
- If divisions are enabled, accounts that are related via the Parent Account field don't have to be in the same division.
- Person accounts aren't supported for the Parent Account field or the View Account Hierarchy action.
- To list an account as a subsidiary, edit the subsidiary account and type the name of an existing account in the Parent Account field. Alternatively, you can click the lookup icon to search for (or optionally,

create) a parent account.

See Also

- [Set Up Account Hierarchy in Lightning Experience](#)
- [Set Up Account Hierarchy in Salesforce Classic](#)

Account Fields

Accounts have business account fields and person account fields.

REQUIRED EDITIONS

Business Account Fields

Available in: Lightning Experience and Salesforce Classic

Business accounts available in: **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

Person accounts available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

A business account has these fields. Depending on your page layout and field-level security settings, some fields aren't visible or editable.

Field	Description
Account Currency	The default currency for all currency amount fields in the account. Amounts are displayed in the account currency and are also converted to the user's personal currency. Available only in orgs using multiple currencies.
Account Division	Division to which the account belongs. Records related to the account, such as contacts and opportunities, automatically inherit the account's division. Available only in orgs using divisions to segment data.
Account Name	Name of company. Up to 255 characters are allowed in this field.
Account Name (Local)	The name of the account translated into the local language.
Account Number	Tracking or reference number for account. Up to 40 characters are allowed in this field.

Field	Description
Account Owner	Assigned owner of account. Not available in Personal Edition.
Account Record Type	The name of the field that determines what picklist values are available for the record. Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.
Account Site	Information about the account's location, such as <i>single location, Headquarters, or Branch</i> . Up to 80 characters are allowed in this field.
Account Source	The source of the account record. For example, <i>Advertisement</i> or <i>Trade Show</i> . The source is selected from a picklist of available values, which a Salesforce admin sets. Each picklist value can have up to 40 characters.
Annual Revenue	Amount of annual reported revenue.
Billing City	City portion of billing address. Up to 40 characters are allowed.
Billing Country	Country portion of billing address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Billing State/Province	State or province portion of billing address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Billing Street	Street address used for billing. Up to 255 characters are allowed in this field.
Billing Zip/Postal Code	Zip or postal code portion of billing address. Up to 20 characters are allowed.
Created By	User who created the account, including creation date and time. (Read only)
Description	Description of account. Up to 32 KB of data is allowed in this field. Only the first 255 characters are shown in reports.
Employees	Number of people employed by the account.
Evaluate this account against territory rules on save	When checked, this field causes account

Field	Description
	assignment rules to run when the account is edited and saved. When customizing the page layout for accounts, an administrator can control whether this checkbox displays and whether it's checked by default.
Exclude from territory assignment rules	When checked, this field shields the account from being evaluated when account assignment rules are run, preventing it from being automatically assigned to territories. Also, if the account is already assigned to territories as a result of assignment rules, checking this box removes the account from those territories. This checkbox only affects rule-based account assignments and has no effect on manual account assignments.
Fax	Fax number. Up to 40 characters are allowed in this field.
Industry	Primary business of account. Entry is selected from a picklist of available values, which a Salesforce admin sets. Each picklist value can have up to 40 characters.
Modified By	User who last changed the account fields, including modification date and time. This field doesn't track changes made to any of the related list items on the account. (Read only)
Ownership	The ownership of the company, such as public or private. Entry is selected from a picklist of available values, which a Salesforce admin sets. Each picklist value can have up to 40 characters.
Parent Account	Parent company for companies that are subsidiaries of a larger company or organization. The parent account must be an existing account in Salesforce. You can enter the account name, or select (or optionally, create) the account using the lookup icon.
Partner Account	Read-only field that indicates whether an account is a partner account.
Phone	Primary phone number of account. Up to 40 characters are allowed in this field.

Field	Description
Rating	Categorization of how you rate this account, for example, Hot, Cold. Entry is selected from a picklist of available values, which a Salesforce admin sets. Each picklist value can have up to 40 characters.
Shipping City	City portion of primary mailing or shipping address. Up to 40 characters are allowed.
Shipping Country	Country portion of primary mailing or shipping address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Shipping State/Province	State or province portion of primary mailing or shipping address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Shipping Street	Primary mailing or shipping street address of account. Up to 255 characters are allowed.
Shipping Zip/Postal Code	Zip or postal code portion of primary mailing or shipping address. Up to 20 characters are allowed.
SIC Code	The standard Industrial Classification code of the account's main business categorization. Up to 10 characters are allowed in this field.
SIC Description	A brief description of an organization's line of business, based on its SIC code.
Ticker Symbol	The abbreviation used to identify publicly traded shares of a particular stock. Also known as the stock symbol. Up to 20 characters are allowed in this field.
Type	Type of account, for example, Customer, Competitor, or Partner. Entry is selected from a picklist of available values, which a Salesforce admin sets. Each picklist value can have up to 40 characters.
Custom Links	Listing of custom links for accounts that your Salesforce admin set up.
Website	URL of the account's website. Up to 255

Field	Description
	characters are allowed in this field, but only the first 50 characters are shown.

Person Account Fields

A person account has these fields. Depending on your page layout and field-level security settings, some fields aren't visible or editable. Fields with a prefix `Person` or suffix `_pc` are contact fields that are supported for person accounts but not business accounts.

This list doesn't include custom fields that your Salesforce admin has created. Both account and contact custom fields are available for person accounts.

-  **Note** To set field-level security on a Person Account field, set security on the corresponding Contact field. The Person Account field inherits the same security setting from the Contact field. You can't specify a different security setting on a Person Account field compared to the corresponding Contact field.

Field	Description	Is Contact Field
Account Currency	The default currency for all currency amount fields in the account. Amounts are displayed in the account currency and are also converted to the user's personal currency. Available only in orgs using multiple currencies.	
Account Division	Division to which the account belongs. Records related to the account, such as contacts and opportunities, automatically inherit the account's division. Available only in orgs using divisions to segment data.	
Account Name	The name of the individual. For person accounts, the account name can't be edited directly. Instead, Salesforce derives it by combining the First Name and Last Name fields in the appropriate order per the user's language setting. If Middle Name and Suffix fields have been	

Field	Description	Is Contact Field
	enabled for the org, those fields are also included in the account name.	
Account Name (Local)	The name of the account translated into the local language.	
Account Number	Tracking or reference number for account. Up to 40 characters are allowed in this field.	
Account Owner	Assigned owner of account. Not available in Personal Edition.	
Account Record Type	The name of the field that determines what picklist values are available for the record. Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.	
Account Site	Information about the account's location, such as <i>single location</i> , <i>Headquarters</i> , or <i>Branch</i> . Up to 80 characters are allowed in this field.	
Annual Revenue	Amount of annual reported revenue.	
Assistant	The contact's assistant. Maximum 40 characters.	✓
Asst. Phone	The assistant's phone number. Maximum 40 characters.	✓
Billing City	City portion of billing address. Up to 40 characters are allowed.	
Billing Country	Country portion of billing address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.	

Field	Description	Is Contact Field
Billing State/Province	State or province portion of billing address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.	
Billing Street	Street address used for billing. Up to 255 characters are allowed in this field.	
Billing Zip/Postal Code	Zip or postal code portion of billing address. Up to 20 characters are allowed.	
Birthdate	The contact's birthday. Click the field, and then choose a date from the calendar.	✓
Created By	User who created the account, including creation date and time. (Read only)	
Custom Links	Listing of custom links for accounts that your Salesforce admin set up.	
Department	The associated business or organizational unit. Maximum 80 characters.	✓
Description	Description of account. Up to 32 KB of data is allowed in this field. Only the first 255 characters are shown in reports.	
Do Not Call	Whether the contact allows phone calls.	✓
Email	The contact's email address. A valid email address is required. Maximum 80 characters.	✓
Email Opt Out	Whether the contact (person account) wants to receive email (<code>false</code>) or not (<code>true</code>).	✓
Employees	Number of people employed by	

Field	Description	Is Contact Field
	the account.	
Engagement History	A chart showing the person account's inbound and outbound engagements for the last 30 days. Available with Sales Engagement.	
Evaluate this account against territory rules on save	When checked, this field causes account assignment rules to run when the account is edited and saved. When customizing the page layout for accounts, an administrator can control whether this checkbox displays and whether it's checked by default.	
Exclude from territory assignment rules	When checked, this field shields the account from being evaluated when account assignment rules are run, preventing it from being automatically assigned to territories. Also, if the account is already assigned to territories as a result of assignment rules, checking this box removes the account from those territories. This checkbox only affects rule-based account assignments and has no effect on manual account assignments.	
Fax	Fax number. Up to 40 characters are allowed in this field.	
Fax Opt Out	Whether the contact wants to be included in broadcast faxes.	✓
First Name	The first or given name of the individual. Up to 40 characters are allowed in this field.	✓
Gender Identity	The contact's personal and self-identified experience of their	✓

Field	Description	Is Contact Field
	gender, which sometimes doesn't correspond to the contact's designated sex at birth.	
Home Phone	The contact's home phone number. Maximum 40 characters.	✓
Industry	Primary business of account. Entry is selected from a picklist of available values, which a Salesforce admin sets. Each picklist value can have up to 40 characters.	
Last Name	The surname or family name of the individual. Up to 80 characters are allowed in this field.	✓
Lead Source	The record source: for example, Advertisement, Partner, or Web. The entry is selected from a picklist of available values, which the administrator sets. Maximum 40 characters for each picklist value.	✓
Mailing City	The city in the mailing address. Maximum 40 characters.	✓
Mailing Country	The mailing country for the address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.	✓
Mailing State/Province	The mailing state or province for the address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.	✓
Mailing Street	The street in the mailing address. Maximum 255 characters.	✓

Field	Description	Is Contact Field
Mailing Zip/Postal Code	The zip or postal code in the mailing address. Maximum 20 characters.	✓
Middle Name	<p>Middle name of the individual. Up to 40 characters are allowed for this field.</p> <p>To enable this field, contact Salesforce Customer Support. Next, from Setup, enter <i>User Interface</i> in the Quick Find box, then select User Interface. Then select Enable Name Suffixes for Person Names.</p>	✓
Mobile	The contact's mobile phone number. Maximum 40 characters.	✓
Modified By	User who last changed the account fields, including modification date and time. This field doesn't track changes made to any of the related list items on the account. (Read only)	
Other City	The city in another address for the contact. Maximum 40 characters.	✓
Other Country	Another country for the address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.	✓
Other Phone	Another phone number for the contact. Maximum 40 characters.	✓
Other State/Province	Another state or province for the address. Entry is selected from a picklist of standard values, or entered as text. Up to 80	✓

Field	Description	Is Contact Field
	characters are allowed if the field is a text field.	
Other Street	The street address in another address for the contact. Maximum 255 characters.	✓
Other Zip/Postal Code	The zip or postal code in another address for the contact. Maximum 20 characters.	✓
Ownership	The ownership of the company, such as public or private. Entry is selected from a picklist of available values, which a Salesforce admin sets. Each picklist value can have up to 40 characters.	
Phone	Primary phone number of account. Up to 40 characters are allowed in this field.	
Pronouns	The contact's personal pronouns, reflecting their gender identity. The entry is selected from a picklist of available values, which the administrator sets. Maximum 40 characters.	✓
Rating	Categorization of how you rate this account, for example, Hot, Cold. Entry is selected from a picklist of available values, which a Salesforce admin sets. Each picklist value can have up to 40 characters.	
Reports To	The name of the person account's manager. Enter a person account or contact name, or select a person account or contact from the list.	✓
Salutation	The title for addressing the contact, for example, Mr., Ms., or Dr. The entry is selected from a	✓

Field	Description	Is Contact Field
	picklist of available values, which the administrator sets. Maximum 40 characters.	
Shipping City	City portion of primary mailing or shipping address. Up to 40 characters are allowed.	
Shipping Country	Country portion of primary mailing or shipping address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.	
Shipping State/Province	State or province portion of primary mailing or shipping address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.	
Shipping Street	Primary mailing or shipping street address of account. Up to 255 characters are allowed.	
Shipping Zip/Postal Code	Zip or postal code portion of primary mailing or shipping address. Up to 20 characters are allowed.	
SIC Code	The standard Industrial Classification code of the account's main business categorization. Up to 10 characters are allowed in this field.	
Suffix	<p>Name suffix of the individual. Up to 40 characters are allowed for this field.</p> <p>To enable this field, contact Salesforce Customer Support. Next, from Setup, enter <i>User</i></p>	✓

Field	Description	Is Contact Field
	<p><i>Interface</i> in the Quick Find box, then select User Interface. Then select Enable Name Suffixes for Person Names.</p>	
Title	<p>The contact's position within the organization. Maximum 80 characters. When converting a lead to a person account, the conversion fails if the lead Title field contains more than 80 characters.</p>	
Total Cadences	<p>The number of Sales Engagement cadences the person account is assigned to. This field is only available in list views.</p>	
Type	<p>Type of account, for example, Customer, Competitor, or Partner. Entry is selected from a picklist of available values, which a Salesforce admin sets. Each picklist value can have up to 40 characters.</p>	
Website	<p>URL of the account's website. Up to 255 characters are allowed in this field; only the first 50 are displayed.</p>	

See Also

[Accounts](#)

Contacts

Use contacts to store information about the people you do business with. Contacts are most often associated with an account, but can also be associated with other records such as opportunities. Contacts are even more useful when you enable Contacts to Multiple Accounts, add hierarchy information, and customize sharing settings.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: all editions

Manage Contacts

Understand the basics of contact records, including creating and deleting, merging duplicates, and sharing contacts with others.

Set Up Contacts

Contacts are great, but when you add basic contact features such as sharing rules and hierarchies they're even better.

Contacts to Multiple Accounts

People often work with more than one company. A business owner might own more than one company or a consultant might work on behalf of multiple organizations. Relate a single contact to multiple accounts so you can easily track the relationships between people and businesses without creating duplicate records.

Contact Roles

Contact roles specify the part that each contact plays in an account, case, contract, or opportunity. When you use contact roles, your sales team always knows who to contact and when.

Opportunity Contact Roles

Opportunity contact roles specify the part that each contact plays in a deal. When you use and customize opportunity contact roles, your sales team knows who to contact and when.

Things to Know About Contacts

Review additional considerations for contacts.

Manage Contacts

Understand the basics of contact records, including creating and deleting, merging duplicates, and sharing contacts with others.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: all editions

Considerations for Creating Contacts

Before you create contacts, consider a few key points.

Guidelines for Viewing and Managing Contacts

When viewing and managing your contacts, consider a few key points.

Contact Intelligence View

View contact activity and engagement metrics, see insights, take action, and update records all in one place in the Contact Intelligence View.

Considerations for Deleting Contacts

Most contacts can be deleted with one click. However, before you delete a contact, be aware of who can delete contacts and what happens to records that are associated with deleted contacts.

Merge Duplicate Contacts

Keep your records clean and free of duplicates so you can reach more customers and maintain better relationships with them.

Update Contacts with Third-Party Data

Your Salesforce admin can set up features for comparing your contacts to records from Lightning Data. Depending on the way your admin sets up these features, your contacts are updated when information changes, and you can also review and update contacts manually.

Share Contacts

Share contacts with other users to make it easier to collaborate within your sales team.

Import Contacts from Mobile Device Contact Lists into Salesforce

Sales reps can save time and eliminate typos by using the Salesforce mobile app to import contacts from mobile device contact lists into Salesforce. This feature is available only in Salesforce for Android and Salesforce for iOS.

Automatic Contact Creation

Create contacts automatically from your email and calendar interactions. You can also set thresholds to create or suggest contacts after a certain amount of email or event activity.

Considerations for Creating Contacts

Before you create contacts, consider a few key points.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: all editions

- You can create a contact from these places in Salesforce.
 - Create a contact on an account's detail page.
 - Import a contact from a mobile device using the Salesforce app or [using a CSV file](#).
 - Create a contact from the Contacts area and associate an account to it. If you don't, the contact is private. Private contacts are accessible only to their owner, Salesforce admins, or anyone who has the View All Records and Modify All Records permissions.
 - Create a contact from the Contact Suggestions area on the Seller Home page.
 - Create a contact from the buyer relationship map for an account.
 - Create a contact automatically from email and calendar activity by using Automatic Contact Creation.
 - Create a contact from the Potential Connections section of the Email Message home page.
- To create a contact that's automatically associated with an account, create the contact from the account's detail page.
- To track a contact's relationship with more than one account, use the Related Accounts related list to

add additional account-contact relationships. By tracking all related accounts on a single contact record, you avoid creating duplicate contacts. Make sure your admin has set up Contacts to Multiple Accounts.

- If your Salesforce org uses record types, you're sometimes prompted to choose a **Record Type** when creating a contact. Different record types can have different fields and picklist values.
- If your Salesforce org uses divisions, the division of a new contact is automatically set to the division of the related account.

See Also

- [Contacts](#)
- [Deleting Records](#)
- [Create and Update Records](#)
- [Contact Fields](#)

Guidelines for Viewing and Managing Contacts

When viewing and managing your contacts, consider a few key points.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

User Permissions Needed

To view contacts:	Read on contacts
To create contacts:	Create on contacts

- Person accounts don't appear in the Recently Viewed list on the Contacts home page.
- If you're using Salesforce Classic, a printable view of the contacts list is available. You can save the printable view as a PDF.
- When you select a person account from a contact list view, the corresponding person account appears on the Accounts page.
- To view a filtered list of contacts, select a predefined view from the dropdown list. Admins of Professional, Enterprise, Unlimited, Performance, and Developer Edition orgs can grant access to contacts beyond what the sharing model allows. See [Share Contacts](#).

If you're using Salesforce Classic:

- To define your own custom view, click **Create New View**.
- To edit or delete a view that you created, select it from the **View** dropdown list, and then click **Edit**.
- To make person accounts easy to find, create a custom list view, adding the **Is Person Account** icon as a column.
- If you're using Salesforce Classic, to add contacts to a campaign, select the checkbox next to one or more contacts, and then click **Add to Campaign**. To select all displayed records, select the checkbox in the column header.

- Modifications to the related lists for a contact aren't tracked in the contact history.

See Also

- [Contacts](#)
- [Create and Update Records](#)
- [Considerations for Changing the Account for Contacts](#)
- [Contact Fields](#)

Contact Intelligence View

View contact activity and engagement metrics, see insights, take action, and update records all in one place in the Contact Intelligence View.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Professional, Enterprise, Performance, and Unlimited Editions with Sales Cloud

USER PERMISSIONS NEEDED

To view Contacts tab:	Read on contacts
To view contacts:	Read on contacts
To create contacts:	Create on contacts

To see the Intelligence View, go to the Contact home page and click **Intelligence View**. To return to the original list view, click **List View**.

In the Contact Intelligence View, you can quickly filter your contacts, see aggregate activity statistics for the resulting records, and take action to reach out, right from the Contacts tab.

To see detailed activity for individual records, click the side panel icon next to the record name. The side panel also includes case insights, email insights, and Einstein Conversation Insights.



Contact activity metrics include:

- Total Contacts: The total number of contacts that meet your filter criteria.
- No Activity: Contacts with no completed activities.
- Idle: Contacts with past activity, but no completed activities in the last 30 days.
- No Upcoming: Contacts with recently completed activity but no future activities scheduled.
- Overdue: Contacts with activities that are overdue.
- Due Today: Contacts with activities due today.
- Upcoming: Contacts with activities due in the next 30 days.

Activity metrics include events as well as tasks.

Engagement metrics include:

- Not contacted
- Contact attempted
- Engaged
- Meeting scheduled
- Meeting declined
- Disqualified

To see the Contact Intelligence View, your Salesforce Administrator must turn it on in Setup and add the Intelligence View button to the Contact List View button layout.

Considerations for Deleting Contacts

Most contacts can be deleted with one click. However, before you delete a contact, be aware of who can delete contacts and what happens to records that are associated with deleted contacts.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: all editions

- You can delete a contact if you're an administrator, the contact owner, or a user above the contact owner in the organization role hierarchy, *and* if you have the Delete permission on the Contact object. If you meet these requirements, you see **Delete** as an option on the contact's detail page and on its row on the contact list page in.
- If you delete a contact, these associated records are also deleted. You don't need the "Delete" permission on the associated records.
 - Assets (without cases)
 - Attachments
 - Campaign history
 - Events
 - Notes
 - Tasks

Accounts, entitlements, and opportunities that are associated with the contact aren't deleted.

- To delete a contact related to an entitlement, delete the associated entitlement contact records or remove the roll-up summary field from the Contact object.
- The deleted contact is moved to the Recycle Bin. If you undelete the contact, any associated records are restored, including any inactive Self-Service usernames.
- If you delete or remove an activity's primary contact, another contact becomes the primary contact in its place. You can edit the activity to manually select another primary contact.
- You can't delete contacts that have these records associated with them.
 - Assets (with cases)

- Cases
- Contracts
- Partner user
- Service contracts
- Active Self-Service users
- Active Customer Portal users

See Also

[Deleting Records](#)
[Contact Fields](#)

Merge Duplicate Contacts

Keep your records clean and free of duplicates so you can reach more customers and maintain better relationships with them.

[Merge Duplicate Contacts in Lightning Experience](#)

Merge duplicate contacts using Lightning Experience.

[Merge Duplicate Contacts in Salesforce Classic](#)

Merge duplicate contacts using Salesforce Classic.

[Retain Recently Updated Data Privacy Records for Merged Leads and Contacts](#)

Associate the most recently updated data privacy record whenever you merge duplicate leads and contacts.

[Considerations for Merging Duplicate Contacts](#)

Keep these considerations in mind when you merge duplicate contact records.

[Considerations for Merging Contacts Associated with Portal Users](#)

Keep these considerations in mind before merging contacts associated with portal users.

Merge Duplicate Contacts in Lightning Experience

Merge duplicate contacts using Lightning Experience.

REQUIRED EDITIONS

Available in: Lightning Experience

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

User Permissions Needed	
To merge contacts:	Delete on contacts
To merge Customer Portal enabled contacts:	Delete on contacts

User Permissions Needed	
	AND Manage Customer Users OR Edit Self-Service Users
To merge Partner Portal enabled contacts:	Delete on contacts AND Manage External Users OR Manage Partners

 **Note** If duplicate contacts aren't getting flagged, see "Standard Contact Matching Rule" in Salesforce Help to learn how Salesforce identifies duplicate records. Work with your Salesforce admin to fine-tune your matching rules if necessary.

1. Choose a contact record. A message tells you if duplicates exist for that record. To see them, click **View Duplicates**. 
2. Choose up to three contact records to merge. Click **Next**.

Potential Duplicate Records

View Duplicates

To merge duplicates, choose up to 3 contacts. Then click Next and choose the fields to keep.

✓ **Contacts (2)**

Name	Account Name	Phone	Email	Contact Owner Alias
<input checked="" type="checkbox"/> Janet Smith	Acme	5551212	✉ info@globalmedia.com	ymartin
<input checked="" type="checkbox"/> Janet Smith	Acme	(415) 555-1212	✉ info@acme.com	ymartin

These duplicates can't be merged with contacts.

✓ **Leads (1)**

Name	Title	Company	Phone	Email	Lead Status	Owner Alias
Janet Smith		ACME	5551212	✉ info@acme.com	New	ymartin

Next

3. Choose one contact as the principal contact, and choose the field values that you want to keep. Click **Next**.

Potential Duplicate Records

Compare contacts

When you merge, the master record is updated with the values you choose, and relationships to other items are shifted to the master record.

PRINCIPAL RECORD	<input type="radio"/> Janet Smith Select All	<input checked="" type="radio"/> Janet Smith Select All
PHONE	<input type="radio"/> 5551212	<input checked="" type="radio"/> (415) 555-1212
EMAIL	<input type="radio"/> info@globalmedia.com	<input checked="" type="radio"/> info@acme.com
TITLE	<input checked="" type="radio"/> VP	<input type="radio"/> [empty]
CREATED DATE	9/7/2023, 10:05 AM	9/7/2023, 10:06 AM
LAST MODIFIED DATE	9/7/2023, 10:56 AM	9/7/2023, 10:06 AM

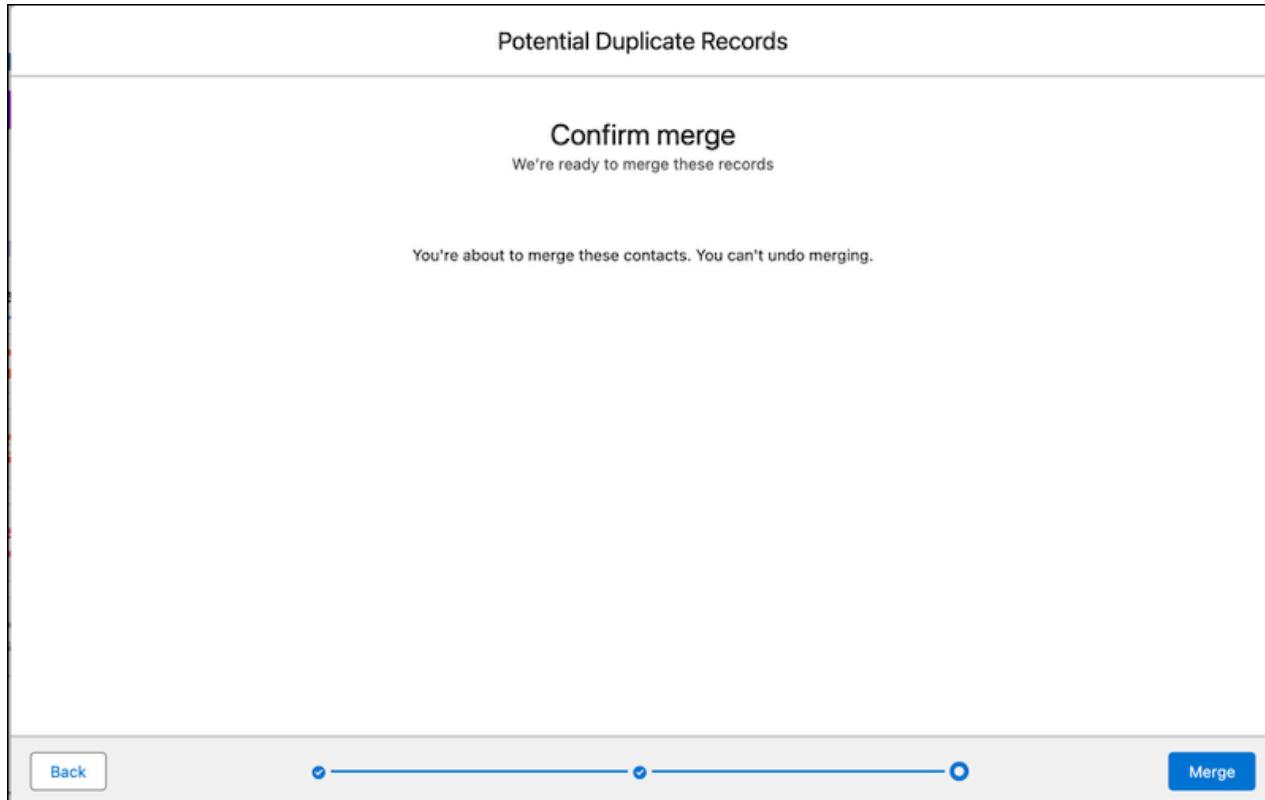
Showing fields with different values. [Show All Fields](#)

Back Next



Note In Lightning Experience, portal user status isn't shown during merging.

4. Confirm your choices and merge.



See Also

- [Standard Contact and Lead Matching Rule](#)
- [Things to Know About Matching Rules](#)
- [Considerations for Merging Duplicate Contacts](#)
- [Considerations for Merging Contacts Associated with Portal Users](#)
- [Retain Recently Updated Data Privacy Records for Merged Leads and Contacts](#)

Merge Duplicate Contacts in Salesforce Classic

Merge duplicate contacts using Salesforce Classic.

REQUIRED EDITIONS

Available in: Salesforce Classic

Available in: All Editions

User Permissions Needed

To merge contacts:	Delete on contacts
To merge Customer Portal enabled contacts:	Delete on contacts AND

User Permissions Needed	
	Edit Self-Service Users
To merge partner portal enabled contacts:	Delete on contacts
	AND
	Manage Partners

1. From the Contacts related list of an account, click **Merge Contacts**.
2. Select up to three contacts to merge. Use the search box to refine the list, or click **All Contacts** to view the full list of contacts. Click **Next** to continue.
3. Select one contact as the principal record.
4. If your organization uses a partner or customer portal, you can select which record you want to retain as the portal user. If you don't want the merged contact to include a portal user, select **Not a portal user**.
5. Select the fields values that you want to retain from each record. Fields with conflicting values are highlighted.
6. Click **Merge**.

See Also

[Standard Contact and Lead Matching Rule](#)

[Things to Know About Matching Rules](#)

[Considerations for Merging Duplicate Contacts](#)

[Considerations for Merging Contacts Associated with Portal Users](#)

[Retain Recently Updated Data Privacy Records for Merged Leads and Contacts](#)

[Retain Recently Updated Data Privacy Records for Merged Leads and Contacts](#)

Associate the most recently updated data privacy record whenever you merge duplicate leads and contacts.

Available in: Salesforce Classic

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

1. From Setup, enter *Individual Settings* in the Quick Find box, and then select **Individual Settings**.
2. Select **Retain the most recently modified data privacy record**.

[Considerations for Merging Duplicate Contacts](#)

Keep these considerations in mind when you merge duplicate contact records.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: all editions

Primary Account

In Lightning Experience, you can merge contacts that have different primary accounts unless the contact is associated with a portal user. In Salesforce Classic, you can merge only contacts that have the same primary account. The primary account is the account listed in the Account Name field on the contact record.

Data Privacy Preferences

When you merge duplicate leads or contacts, you also associate a data privacy record with the primary record. If you selected the option [to retain the most recently updated data privacy record](#) for merging leads and contacts, we associate the correct record for you. Otherwise, we prompt you to select the one you want to retain for the records you merge.

Redundant Relationships

If you try to merge contacts that are indirectly related to the same account, Salesforce displays a message suggesting that you remove the redundant relationship. On contact records, indirect relationships are managed from the Related Accounts related list.

Contact Roles

When contacts are merged, contact roles on non-master contacts lose their status as the primary contact.

Portal Users

When you use Lightning Experience to merge contacts associated with portal users, the portal user status isn't shown during merging. The merged record retains the portal user status of the primary record.

When you use Salesforce Classic to merge contacts associated with portal users, the portal user status is shown during merging. You choose the portal status you want to retain in the merged record. In both Lightning Experience and Salesforce Classic, the primary contact must be associated with a portal user. The merged contact retains the portal user status of the primary contact. If a non-master contact is associated with a portal user, that user is deactivated.

Campaigns

When duplicate contacts that are members of different campaigns are merged, Salesforce retains the Member Status Updated date for each campaign the merged contact is a member of.

Related Items, Chatter Feeds, and Attachments

When duplicate records are related to items such as campaigns or activities, Salesforce relates the items to the merged record, with some exceptions. Chatter feeds are retained from the primary record only. Salesforce Files attached in the Chatter feed or Files related list are retained in the merged record.

Hidden and Read-Only Fields

Salesforce retains any data in hidden or read-only fields, such as sharing settings from the primary record. Hidden fields aren't shown while you merge. A merged record retains the Created By user and Created Date from the oldest record merged, regardless of which record is the primary. The record shows the merge date as the Last Modified By date.

Non-Master Contacts

The non-master contacts are moved to the Recycle Bin.

See Also

[Merge Duplicate Contacts](#)

[Retain Recently Updated Data Privacy Records for Merged Leads and Contacts](#)

Considerations for Merging Contacts Associated with Portal Users

Keep these considerations in mind before merging contacts associated with portal users.

Available in: Salesforce Classic

The customer portal is available in: **Enterprise, Performance, Unlimited, and Developer** Editions

The partner portal is available in: **Enterprise, Performance, and Unlimited** Editions

- You can merge a portal contact with another portal contact.
- You can merge Customer Community enabled person accounts with Customer Community Plus person accounts.
- Before you merge contacts that include partner users *and* customer users, decide which type of portal user to retain. The user that you don't retain is disabled. However, after the contacts are merged, you can enable the contact for access to the portal from which it was removed during the merge process.
- You can merge contacts that are associated with various accounts by [transferring the contacts that you want to merge into one account](#) and then [merging the contacts that are associated with the common](#)

account.

See Also

[Merge Duplicate Contacts](#)

[Retain Recently Updated Data Privacy Records for Merged Leads and Contacts](#)

Update Contacts with Third-Party Data

Your Salesforce admin can set up features for comparing your contacts to records from Lightning Data. Depending on the way your admin sets up these features, your contacts are updated when information changes, and you can also review and update contacts manually.

See Also

[Use Third-Party Data to Update and Add Records to Salesforce](#)

[Deleting Records](#)

[AppExchange: Lightning Data](#)

Share Contacts

Share contacts with other users to make it easier to collaborate within your sales team.

REQUIRED EDITIONS

Available in: Salesforce Classic

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

To share contact records with other users, those users must have Read permission for Contacts. When you share a contact record that has an associated account, the account is also shared only if you have permission to share account records.

1. On a contact's detail page, click **Sharing**. The sharing detail page lists the users, groups, roles, and territories that have sharing access to the contact.
2. On the sharing detail page, do any of the following.
 - To show a filtered list of items, select a predefined list from the **View** dropdown 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** dropdown list and click **Edit**.
 - To edit or delete any view you created, select it from the **View** dropdown list and click **Edit**. Click **Expand List** to view all users that have access to the record.
 - To grant access to the record to other users, groups, roles, or territories, click **Add**.
 - For manual sharing rules that you created, click **Edit** or **Del** next to an item in the list to edit or delete the access level.
3. Save your changes.

See Also

[Considerations for Sharing and Accessing Contacts](#)

Considerations for Sharing and Accessing Contacts

Here's some things to know about sharing and accessing contact records.

REQUIRED EDITIONS

Available in: Salesforce Classic

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

- You can't restrict access to contacts beyond your organization's default access levels.
- You need at least read access to the contacts and leads that you invite to an event. You need at least "Add Events" on a resource to invite it to an event.
- A contact that isn't linked to an account is always private, regardless of your organization's sharing model. Only the owner of the contact and administrators can view it. Sharing rules and workflow rules don't apply to private contacts. If your organization uses divisions, private contacts always belong to the global division.
- If a recipient doesn't have access to the account, you can't share the contact unless you also have permission to share the account.
- If your organization-wide default for contacts is set to Controlled by Parent, the **Contact Access** options aren't available when you share related records such as accounts. Instead, all access to contacts is determined by the user's access to the contact's account.
- If your organization-wide default for contacts is Controlled by Parent and your organization-wide default for accounts is Private, you can't view contacts for accounts that you don't own, even if you have the View All Records permission on the account object. However, if you own a contact on an account, you can view other contacts on the same account. (Access to a parent account gives you access to the associated child records.)

See Also

[Share Contacts](#)

Import Contacts from Mobile Device Contact Lists into Salesforce

Sales reps can save time and eliminate typos by using the Salesforce mobile app to import contacts from mobile device contact lists into Salesforce. This feature is available only in Salesforce for Android and Salesforce for iOS.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

1. In the Salesforce mobile app, navigate to where you create contacts.
2. To open the device's contact list, tap **Import from Device**.
3. Select a contact.

4. To associate the contact with an account in Salesforce, go to the contact record in Salesforce and add an account.

When importing contacts from a mobile device, these fields are mapped from your device's contact to the Salesforce contact.

- Email
- Home Phone
- Mailing City
- Mailing Country
- Mailing Postal Code
- Mailing State
- Mailing Street
- Mobile
- Other Phone
- Phone

 **Note** In some situations, mappings from the local device don't map as expected to the Salesforce contact record.

See Also

[Considerations for Importing Contacts from a Mobile Device](#)

Considerations for Importing Contacts from a Mobile Device

When importing contacts into Salesforce from a mobile device's contact lists, there are a few things to be aware of.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: all editions

- To use the Import from Device button, you need the Allow Salesforce to import Contacts from mobile device Contact lists permission.
- When importing contacts from an Android or iOS device using Salesforce into an org that has State and Country picklist fields enabled, the **State** field isn't populated.
- If you have multiple mobile phone fields in your mobile device's contact, and the **Phone** field in Salesforce is empty:
 - The first mobile phone field maps to the **Phone** field in Salesforce.
 - The second mobile phone field maps to the **Mobile** field in Salesforce.
- When you select emails from the mobile device, the Salesforce mobile app typically pulls the second email address location. If labels are created on the device, the integration tries to map from the local work email address to the standard contact email address in Salesforce.

See Also

[Import Contacts from Mobile Device Contact Lists into Salesforce](#)

Automatic Contact Creation

Create contacts automatically from your email and calendar interactions. You can also set thresholds to create or suggest contacts after a certain amount of email or event activity.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with **Einstein 1 Sales Edition**

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions and for an extra cost in **Enterprise** Edition

Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

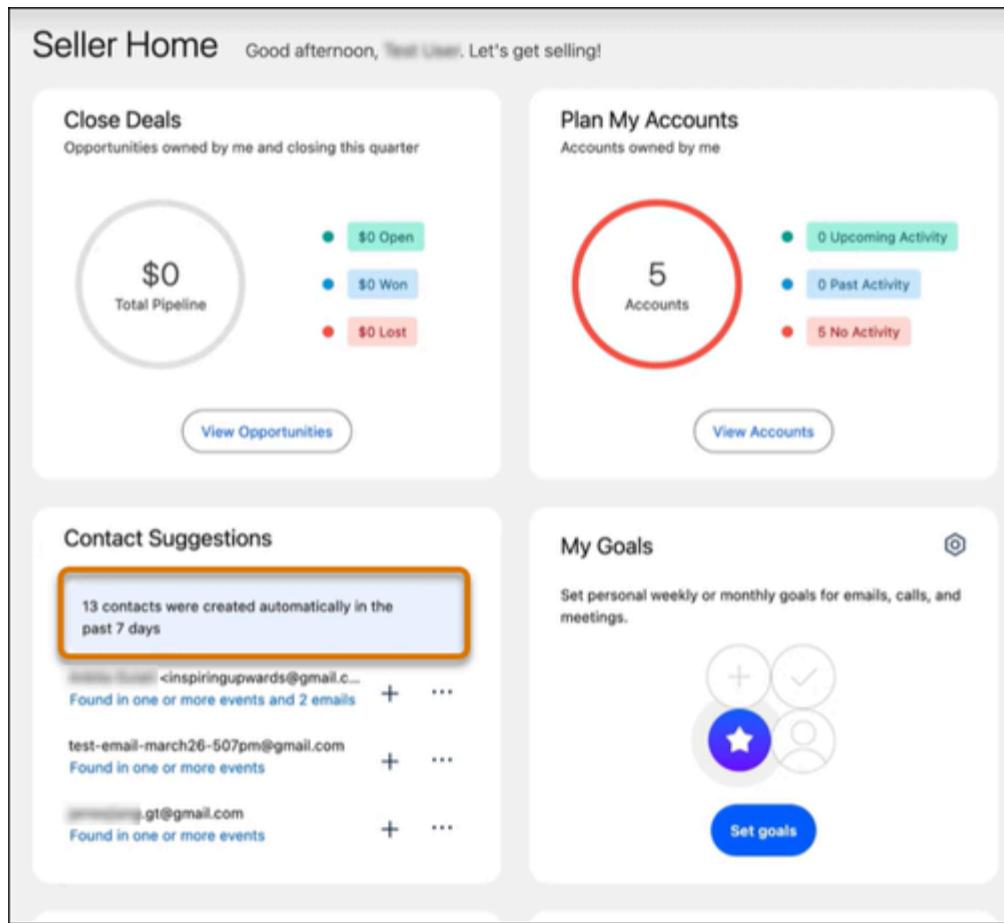
Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

Automatic Contact Creation looks for external people with email addresses that don't already belong to contacts. A contact is created after one of these situations occurs.

- A user receives an email from an external person the number of times specified in the email threshold. If a user sends an email to an external person in the To, cc, or bcc fields, it doesn't count towards the threshold for automatic contact creation.
- A user meets with an external person the number of times specified in the event threshold.

For details about how an account is associated with the automatically created contact, see [Considerations for Automatic Contact Creation](#).

On Seller Home, see how many contacts were automatically created in the last 7 days.



Considerations for Automatic Contact Creation

Learn about requirements, email filters, and other considerations for Automatic Contact Creation.

See Also

[Set Up Automatic Contact Creation](#)

[See an Overview of Metrics, Goals, Suggestions, Tasks, and Activities in Seller Home](#)

Considerations for Automatic Contact Creation

Learn about requirements, email filters, and other considerations for Automatic Contact Creation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with **Einstein 1 Sales Edition**

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions and for an extra cost in **Enterprise** Edition

Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is

also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

Requirements

[Enable Einstein Activity Capture](#).

Limitations

- No standard list views or reports show automatically created contacts.
- Automatic Contact Enhancements doesn't update contacts added by Automatic Contact Creation unless they're in a Buyer Relationship Map.
- Salesforce makes the best attempt to accurately associate the contact with the right account. While we can't guarantee it's always accurate, these rules promote correct associations.
 - Salesforce checks whether any account has contacts with the same email domain as the new contact. The account that has the most contacts with the same email domain as the new contact is selected.
 - If the first rule doesn't associate an account to the new contact, Salesforce selects the account with the most related contacts from the group of contacts. Related contacts are identified from emails and events. Each email and event includes a group of other contacts.
 - If no matching account record can be determined, the contact isn't created.



Note Contacts the user owns are considered for matching.

Filtered Emails

Information from emails likely sent by bots or from unmonitored email accounts isn't used to detect potential contacts. For example, Automatic Contact Creation ignores emails with sender addresses containing "no-reply" or "@group.calendar.google.com."

New Contact Field

After Automatic Contact Creation is enabled, the `ContactSource` field on the `Contact` object is available. After a contact is created automatically, the field is set to `Auto Create`.

Automatic Retry Behavior

Sometimes, the automatic process can't create a new contact record. For example, a record isn't created when no matching account exists. If a contact record isn't created, the process waits at least 24 hours before running again for that potential contact. 24 hours after the first attempt, the automatic creation process runs again when a newly captured email or event includes that potential contact.

When an automatically created contact record gets deleted, there's no retry until 30 days after the original record creation date.

See Also

[Set Up Automatic Contact Creation](#)

Set Up Contacts

Contacts are great, but when you add basic contact features such as sharing rules and hierarchies they're even better.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

[Turn On Contact Intelligence View](#)

To let your users view contact activities, take action, and update records, all in one place, turn on the Contact Intelligence View.

[Enable Self-Service for Contacts and Person Accounts](#)

To provide access to your Self-Service portal, enable Self-Service for a customer's contact or person account record. A Self-Service user can view cases in the Self-Service portal only if they're associated with the user's account record.

[Display Contact Hierarchies](#)

Give your sales team a key tool for planning their sales strategy by showing contacts in a hierarchy or org chart.

[Allow Users to Create Private Contacts](#)

Private contacts are contacts that aren't associated with an account. To give your users the ability to create private contacts, adjust your contact page layouts so the **Account Name** field isn't required.

[Set Up Automatic Contact Creation](#)

Turn on Automatic Contact Creation and specify criteria for when contacts are created.

Turn On Contact Intelligence View

To let your users view contact activities, take action, and update records, all in one place, turn on the Contact Intelligence View.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To set up contacts: Modify Application

 **Tip** Check out this feature in Salesforce Go! Find a guided setup experience, explore more content, discover related features, and monitor feature usage. See [Discover and Set Up Features With Salesforce Go.](#)

1. From Setup, enter *Contact Intelligence View* in the **Quick Find** box, then select **Contact Intelligence View Setup**.
2. Turn on Contact Intelligence View.
3. Add the Intelligence View button to your Contact List View button layout.
4. To get the most out of Contact Intelligence View, turn on Einstein Activity Capture.

Enable Self-Service for Contacts and Person Accounts

To provide access to your Self-Service portal, enable Self-Service for a customer's contact or person account record. A Self-Service user can view cases in the Self-Service portal only if they're associated with the user's account record.

REQUIRED EDITIONS

Available in: Salesforce Classic

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

User Permissions Needed

To enable Self-Service users: Edit Self-Service Users

 **Note** Starting with Spring '12, the Self-Service portal isn't available for new Salesforce orgs. Existing orgs continue to have access to the Self-Service portal.

1. From the contact or person account detail page, click **Enable Self-Service**.
2. Verify the general information and locale settings, and enter any missing information. The customer's Self-Service **Username** defaults to the customer's **Email**.
3. To enable the customer as a Self-Service super user, select the **Super User** checkbox. Super users can view case information, add comments, and upload attachments for all cases that anyone in their company submits.
4. To email a Self-Service username and password to the customer, select **Generate new password and notify user immediately**.
5. Click **Save**.

Display Contact Hierarchies

Give your sales team a key tool for planning their sales strategy by showing contacts in a hierarchy or org chart.

[Set Up Contact Hierarchy in Lightning Experience](#)

Show the contacts on an account within a hierarchy for sales reps using Lightning Experience. To show the information that's most useful to your sales teams, customize the hierarchy columns.

[Display Contacts in an Org Chart in Salesforce Classic](#)

Show the contacts on an account within an org chart in Salesforce Classic.

Set Up Contact Hierarchy in Lightning Experience

Show the contacts on an account within a hierarchy for sales reps using Lightning Experience. To show the information that's most useful to your sales teams, customize the hierarchy columns.

REQUIRED EDITIONS

Available in: Lightning Experience

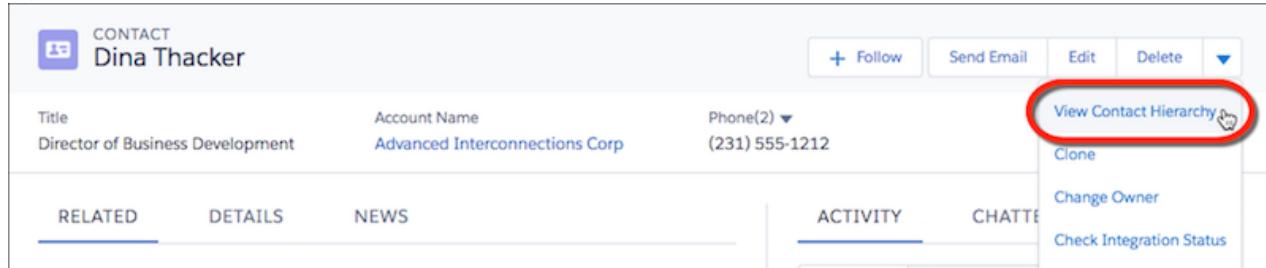
Available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

User Permissions Needed	
To view contact hierarchies:	Read on contacts
To create contact hierarchies:	Edit on contacts
To add, edit or delete hierarchy columns:	Modify All Data

Hierarchies show who reports to whom according to the Reports To field. If the Reports To field is empty, the associated hierarchy or org chart shows only one person, regardless of how many contacts are assigned to the account.

1. Give your sales reps access to contact hierarchies from contact pages. In Setup, in the Salesforce Mobile and Lightning Experience Actions section of your contact page layout, add the **View Contact Hierarchy** action.

The Actions menu includes the View Contact Hierarchy action unless you customized the contact page layout before Summer '17.



Sales reps can expand or collapse parts of a hierarchy as they navigate it. They can view up to 2,000 contacts from each point where they enter a hierarchy. To view contacts in a different part of the hierarchy, a sales rep can enter the hierarchy from a different contact.

CONTACT > DINA THACKER		
Contact Hierarchy		
NAME	TITLE	PHONE
▼ Kathy Fitzpatrick	President	(231) 555-1212
Brenda McClure	Chief Financial Officer	(231) 555-1212
▼ Mark Metz	Chief Executive Officer	(231) 555-0100
Dina Thacker CURRENT	Director of Business Development	(692) 555-1212
➤ Sean Murphy	Director of Marketing	(231) 555-0100
➤ Steve McDonald	Director of Information Technology	(231) 555-1212

Hovering over a contact's name shows more details.

CONTACT > DINA THACKER

Contact Hierarchy

NAME	
▼ Kathy Fitzpatrick	Dina Thacker Title: Director of Business Development Account Name: Advanced Interconnections... Phone: (231) 555-1212 Email: dina.thacker@advanced-int...
Brenda McClure	Cases (0)
▼ Mark Metz	Opportunities (1) Advanced Productions Corp* - 80K Stage: Prospecting Amount: \$80,000.00 Close Date: 12/16/2016
➤ Dina Thacker	Dina Thacker
➤ Sean Murphy	
➤ Steve McDonald	

[View All](#)

2. You can edit the hierarchy columns to show the information that's most useful to your sales reps.
 - a. From Setup, at the top of the page, select **Object Manager**.
 - b. In Contact, click **Hierarchy Columns** and then edit the columns.

You can include up to 15 columns.

By default, contact hierarchies display the same columns as the Recently Viewed Contacts standard list view. However, the list view columns don't change when you customize the hierarchy column.

The screenshot shows the 'Setup > Object Manager' interface for the 'Contact' object. On the left, a sidebar lists various setup categories. The 'Hierarchy Columns' link is highlighted with a red circle. The main content area is titled 'Hierarchy Columns' and shows a table with two columns: 'HIERARCHY VIEW NAME' and 'COLUMNS DISPLAYED'. A single row is present with 'Contact Hierarchy View' in the first column and 'Name, Title, Phone' in the second. To the right of the table is a small menu with 'Edit' and 'Delete' options, where 'Edit' is also circled in red. Below this, a modal window titled 'Choose Columns to Display' is open. It contains two lists: 'Available Fields' on the left and 'Columns Displayed' on the right. The 'Email' field from the available list has been selected and is highlighted with a blue border. A blue arrow points from the available list to the displayed list. At the bottom of the modal are 'Cancel' and 'Save' buttons.

- Note** After you customize hierarchy columns, the item Org_Contact_Hierarchy is added to the Contact list view menu. Deleting this item resets the columns to the defaults.

See Also

[Considerations for Using Contact Hierarchy in Lightning Experience](#)

Display Contacts in an Org Chart in Salesforce Classic

Show the contacts on an account within an org chart in Salesforce Classic.

REQUIRED EDITIONS

Available in: Salesforce Classic

Available in: All Editions

User Permissions Needed	
To view org chart:	Read on contacts
To change org chart:	Edit on contacts
To add, edit or delete hierarchy columns:	Modify All Data

Enter a contact in the Reports To field for every contact on an account except the one at the top of the org chart. If a contact's Reports To field is empty, the org chart shows only a single person, regardless of how many contacts are assigned to the account.

1. On the contact's details page, in the Reports To field, enter the name of the contact's manager. Save your change.
2. To view the contact within an org chart, on the contact's details page, click **View Org Chart**.

Allow Users to Create Private Contacts

Private contacts are contacts that aren't associated with an account. To give your users the ability to create private contacts, adjust your contact page layouts so the **Account Name** field isn't required.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: all editions

User Permissions Needed	
To customize page layouts:	Customize Application
To view page layouts:	View Setup and Configuration

Contacts that aren't associated with an account are always private, regardless of your organization's sharing model. Before allowing private contacts, consider the downside: they're easy to forget because they're hidden from all users except their owner and your Salesforce admin.

1. From the object management settings for contacts, go to Page Layouts.

2. Select the layout you want to edit.
3. Find the **Account Name** field on the layout and hover over it. Then, click the wrench icon to show the field properties.
4. Deselect the **Required** checkbox.
5. Confirm your changes.

Set Up Automatic Contact Creation

Turn on Automatic Contact Creation and specify criteria for when contacts are created.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with **Einstein 1 Sales Edition**

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions and for an extra cost in **Enterprise** Edition

Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

USER PERMISSIONS NEEDED

To enable or disable Automatic Contact Creation:

View Setup and Configurations

AND

Customize Application

To view the Autocreation Settings setup page:

View Setup and Configurations

AND

Customize Application

If you haven't already, [enable Einstein Activity Capture](#).

1. From Setup, in the Quick Find box, enter *autocreation*, and then select **Contact Creation Automation**.
2. Turn on Automatic Contact Creation.
3. Set thresholds as to how many times a person receives an email from or meets with an external person before a contact is created automatically. The email threshold also controls when a contact appears in

the Contact Suggestions tile on Seller Home.

Separate threshold settings for email and events lets you consider the type of relationship and interaction before automatically creating a contact record. For example, set a higher threshold for emails (three or four interactions) and a lower threshold for events (one meeting) to prioritize capturing contacts who are actively building relationships and in conversation with sales reps.

After a contact is created automatically, the ContactSource field on the Contact record is set to **Auto Create**.

See Also

[Considerations for Automatic Contact Creation](#)

Contacts to Multiple Accounts

People often work with more than one company. A business owner might own more than one company or a consultant might work on behalf of multiple organizations. Relate a single contact to multiple accounts so you can easily track the relationships between people and businesses without creating duplicate records.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

When you use Contacts to Multiple Accounts, each contact still requires a primary account (the account

in the **Account Name** field). The contact and its primary account have a *direct* relationship. But you can add other accounts to the contact. These secondary account-contact relationships are *indirect*.

Contacts to Multiple Accounts works with person accounts. That means a person account can be either a related contact on a business account or a related account on a contact. A person account can also be related to another person account as either a related contact or related account. When you relate a person account to an account or contact, the relationship is always indirect. That's because person accounts don't have primary accounts, so person accounts can't be directly related to business accounts. And person accounts can't be primary accounts for contacts, so person accounts can't be directly related to contacts. When Contacts to Multiple Accounts is enabled, an Account Contact Relationship record is created for each contact with a primary account, and for each person account.

Contacts to Multiple Accounts can't be enabled with the Metadata API.



Tip We recommend turning on this feature outside of regular business hours to ease setup if your org has a large number of contacts.



Example John Smith is president of Acme Corporations, and Acme is the account on his contact record. But John is also involved with the nonprofit media organization Greendot Media. By adding Greendot Media as a related account on John's contact record, you can track this other relationship. John is considered a *direct* contact to Acme because Acme is the account on his contact record. And he's considered an *indirect* contact to Greendot Media and any other accounts that he becomes related to. John also appears on the Related Contacts related list for Greendot Media and any other accounts that he's indirectly related to.

See Also

[Set Up Contacts to Multiple Accounts](#)

[Create and Edit Relationships Between Contacts and Accounts](#)

[Considerations for Relating a Contact to Multiple Accounts](#)

Comparing Contacts to Multiple Accounts to Other Options

Allowing your users to relate a contact to multiple accounts makes it easier for them to track the relationships between the people and businesses they work with. However, if you're already using Account Contact Roles or a custom-built solution with a junction object, here's a summary of how those solutions compare with Contacts to Multiple Accounts.

REQUIRED EDITIONS

Contacts to Multiple Accounts is available in: both Salesforce Classic and Lightning Experience

Contacts to Multiple Accounts is available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Feature or Functionality	Contacts to Multiple Accounts	Account Contact Roles	Custom Junction Object
Standard objects	✓	✓	
Custom fields	✓		✓
Custom layouts	✓		✓
Record types			✓
Field history			✓
Validation rules	✓		✓
Workflow	✓		✓
Process builder	✓		✓
Flow	✓		✓
Triggers	✓		✓
Custom actions	✓		✓
API accessible	✓	✓	✓
Single related list	✓		
Multiple relationship rows in database		✓	✓
Applies to storage limits			✓
Sharing and object permissions	Derived from Account and Contact	Derived from Account	Configured independently
Reporting	Custom report types	Standard report types Custom report types	Custom report types
User interface	Salesforce Classic Lightning Experience Salesforce app	Salesforce Classic Salesforce app (However, records in the Contact Roles related list are read only, and the Role field isn't available.)	Salesforce Classic Lightning Experience Salesforce app

See Also

- [Set Up Contacts to Multiple Accounts](#)
- [Considerations for Using Contact Roles](#)
- [Create a Many-to-Many Object Relationship](#)

Set Up Contacts to Multiple Accounts

Let your sales reps easily track the relationships between the customers and businesses they work with. Contacts to Multiple Accounts is quick to set up and allows reps to relate a single contact record to multiple accounts.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To enable Contact to Multiple Accounts: Customize Application

To view page layouts: View Setup and Configuration

To edit page layouts: Customize Application

 **Tip** Turn on this feature outside of regular business hours to ease setup if your Salesforce org has a large number of contacts.

If you're using Account Contact Roles or a custom-built solution with a junction object, [review how those solutions compare with Contacts to Multiple Accounts](#).

To help you set up Contacts to Multiple Accounts, follow the steps in the demonstration video: [Set Up Contacts to Multiple Accounts](#)

Enable Contacts to Multiple Accounts

1. From Setup, enter *Account Settings* in the Quick Find box, and then select **Account Settings**.
Only users with the Customize Application permission can view or edit Account Settings.
2. Click **Edit**.
3. Select **Allow users to relate a contact to multiple accounts** and click **Save**.

The screenshot shows the 'Account Settings' page under the 'SETUP' tab. At the top right is a 'Help for this Page' link. Below the title 'Account Settings' is a sub-section titled 'General Settings'. It contains a checkbox labeled 'Show View Hierarchy link on account pages' which is checked. An 'Edit' button is located above the checkbox. To the right of the checkbox is a note indicating it is required information. The 'General Settings' section ends with another 'Edit' button at the bottom.

- When the Contacts to Multiple Accounts Settings section appears, review the default options and save your changes.

The screenshot shows the 'Account Settings' page under the 'SETUP' tab. At the top right is a 'Help for this Page' link. Below the title 'Account Settings' is a sub-section titled 'Contacts to Multiple Accounts Settings'. Inside this section, there is a checkbox labeled 'Allow users to relate a contact to multiple accounts' which is checked. An 'Edit' button is located above the checkbox. Below this, there is a note indicating it is required information. Further down, there are two sections with radio button options: 'When users delete an account that has direct contacts that are related to other accounts:' (with 'Block users from deleting the account' selected) and 'When users replace the primary account on a contact record:' (with 'Save the relationship between the contact and the previous primary account as an indirect relationship' selected). Both of these sections are enclosed in a large orange rectangular box. The 'Contacts to Multiple Accounts Settings' section ends with a 'Save' button at the top and an 'Edit' button at the bottom.

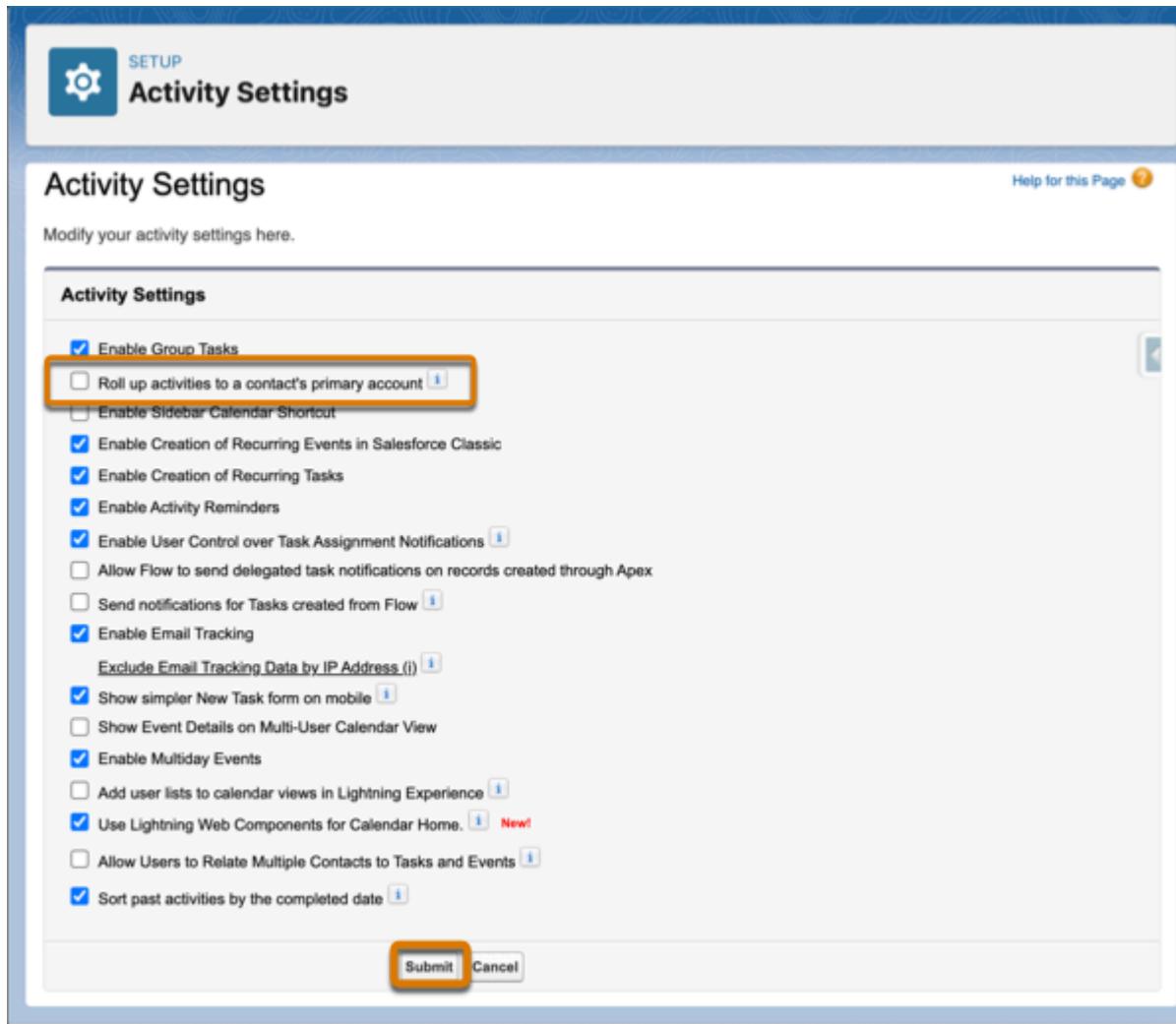
To capture unique information about relationships – for example, the best time to call a contact – create

custom fields on the Account Contact Relationship object. Be sure to add any new fields you create to the Account Contact Relationship page layouts. To learn more on how to create custom fields and page layouts, see Help.

Disable Roll Up of Activities to a Contact's Primary Account

When the option to roll up activities to a contact's primary account is enabled, activities associated with a contact are also shown on the contact's primary account. To avoid skewed data, deselect this option when you allow users to relate contacts to multiple accounts.

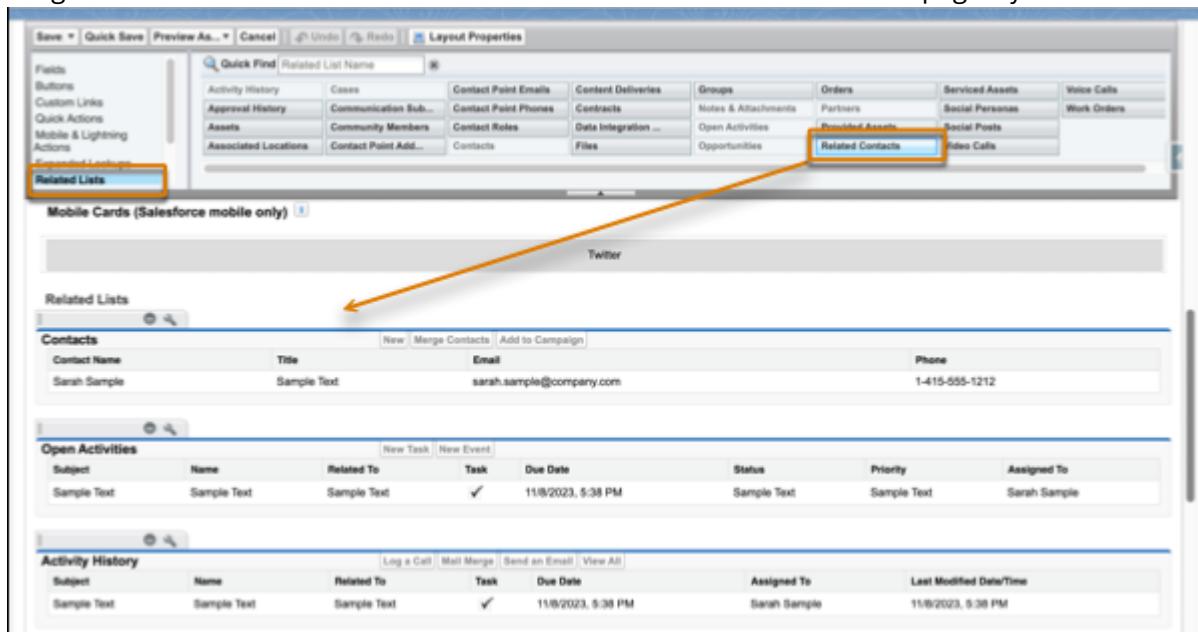
1. From Setup, enter *Activity Settings* in the Quick Find box, and then select **Activity Settings**.
2. Deselect **Roll up activities to a contact's primary account**.
3. Click **Submit**.



Add the Related Contacts Related List to the Account Page Layouts

1. From Setup, go to the Object Manager and select the Account object.
2. Select **Page Layouts**.

3. Click ▾ on a layout's row, and select **Edit**, or click the name of the layout.
4. From the palette at the top of the enhanced page layout editor, select **Related Lists**.
5. Drag the Related Contacts related list onto the Related Lists section of the page layout.



6. Add the Direct field to the Related Contacts related list.
 - a. Double-click the Related Contacts tab, or click . A related list configuration window appears.
 - b. From the Available Fields column, select the Direct field and click **Add**.
 - c. Click **OK**.

Related List Properties - Related Contacts

[Help](#) [?](#)

Columns

Select fields to display on the related list. You can also reorder the selected fields.

Available Fields

- ASST. Phone
- Birthdate
- Contact Owner Alias
- Created By Alias
- Created Date
- Data.com Key
- Department
- Direct**

Selected Fields

- Contact Name
- Account Name
- Title
- Email
- Phone
- Roles

Add **Remove** **Up** **Down**

Sort By: --Default-- **OK** **Cancel** **Revert to Defaults**

Buttons

- Because the Related Contacts related list includes all direct contacts, you can remove the Contacts related list on your account page layouts. To remove a related list, click the **-** icon.
- Save your changes.

The screenshot shows the 'Layout Properties' screen for an account object. The 'Related Lists' section is active. The 'Save' button at the top left is highlighted with a yellow box. Below it, the 'Related Contacts' list is highlighted with a yellow box. Within this list, the 'Direct' checkbox is checked and highlighted with a yellow box.

Next, repeat these steps to add the Related Accounts related list to the contact page layouts your reps use. To easily see which account is the contact's primary account, add the Direct field to the Related

Accounts related list. And, if you use person accounts, add the Related Accounts related list and the Related Contacts related list to the person account page layouts your reps use.

See Also

- [Create Custom Fields](#)
- [Customize Page Layouts with the Enhanced Page Layout Editor](#)
- [Customize Related Lists](#)
- [Considerations for Disabling Roll Up of Activities to a Contact's Primary Account](#)
- [Validation Rules for Account Contact Relationships](#)

Account Contact Relationship Fields

Contacts to Multiple Accounts lets you associate a single contact to multiple accounts through the Account Contact Relationship object. Your page layout and field-level security settings determine which fields are visible and editable.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Field	Description
Account	The name of the company the contact is related to.
Active	Indicates whether the contact is actively involved with the company.
Contact	The name of the person that's related to the account.
Direct	Indicates whether the account associated with the contact is the contact's primary account. This read-only field is based on the Account Name field on the contact record. For example, on the Acme account record, the Related Contacts related list automatically includes all contacts that have Acme in the Account Name field and marks them as direct contacts.
End Date	The date a relationship between a contact and account ended. Use with the Start Date field to keep a history of the relationship.
Roles	<p>The contact's participating role in the account; for example, Buyer, Decision Maker, or Evaluator. You can select multiple roles for a contact. Customize the roles in the picklist by editing the field.</p> <p>This field is separate from the Role field on Account Contact Roles.</p>
Start Date	The date a relationship between a contact and account began. Use with the End Date field to keep a history of the relationship.

See Also[Contacts to Multiple Accounts](#)

Create Custom Report Types for Account Contact Relationships

If you've enabled Contacts to Multiple Accounts, run reports that show the relationships between contacts and accounts. First, set up custom report types so that sales managers and other teammates can create the reports they need.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To create or update custom report types: Manage Custom Report Types

To delete custom report types: Modify All Data

1. Make sure you're familiar with custom report types and the general steps for creating and maintaining them.
2. Create custom report types with the appropriate object relationships, and configure them as necessary.

Check out these examples of custom report types to get you started.

Report type	Lets teammates run reports that show	A (Primary Object)	B	C	Make sure you also
Related Contacts	All the contacts, both direct and indirect, that are related to accounts.	Accounts	Contact Relationships		Add the Direct and Full Name fields to the Contact Relationships page layout.
Related Accounts	All the accounts, both direct and indirect, that are related to contacts.	Contacts	Account Relationships		

Report type	Lets teammates run reports that show	A (Primary Object)	B	C	Make sure you also
Related Contacts with or without Activities	All the contacts, both direct and indirect, that are related to accounts, and whether there's recent activity.	Accounts	Contact Relationships	Activities	

3. Deploy the report types you want to make available.
4. Let your sales teams know that they can create reports using these custom report types.

See Also

[Contacts to Multiple Accounts](#)

[Set Up Contacts to Multiple Accounts](#)

Validation Rules for Account Contact Relationships

If your org uses Contacts to Multiple Accounts and you've created validation rules for the Account Contact Relationship object, you must bypass those validation rules in some cases.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

When a contact with a related account is created, a direct Account Contact Relationship record is also created. Similarly, when a contact gets a new primary account, the current direct Account Contact Relationship record is modified. Validation rules for the Account Contact Relationship are run immediately after the contact is saved to the database.

Because the Account Contact Relationship records are created behind the scenes and users can't access the Account Contact Relationship fields when creating or editing a contact, validation rules can block the contact from being saved.

For example, the following Account Contact Relationship validation rule requires a value for the Roles field.

ISNULL (Roles)

However, a user can't access the Roles field on the Account Contact Relationship object when creating or editing the contact. Therefore, the criteria in the validation rule can't be met, and the contact can't be saved.

To bypass the validation rule when a direct Account Contact Relationship is created, add the following syntax to your Account Contact Relationship validation rule.

```
(NOT (ISNEW() && IsDirect)) && (NOT ISCHANGED(IsDirect))
```

Now, the Account Contact Relationship validation rule states that the Roles field is required only if the Account Contact Relationship isn't a direct relationship.

```
(NOT (ISNEW() && IsDirect)) && (NOT ISCHANGED(IsDirect))  
&&  
ISNULL(Roles)
```

See Also

[Contacts to Multiple Accounts](#)

[Set Up Contacts to Multiple Accounts](#)

Create and Edit Relationships Between Contacts and Accounts

To easily track the relationships between people and the businesses they work with, relate a single contact record to multiple account records.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To create, edit, or delete relationships between account and contacts	Read on accounts and Edit on contacts
---	---------------------------------------

To view relationships between account and contacts	Read on accounts and contacts
--	-------------------------------

[Watch a Demo](#) (English only)

- From an account record, use the Related Contacts related list to create or manage relationships between accounts and contacts or person accounts.
 - Create a relationship by clicking **Add Relationship**.

- b. Edit an existing relationship by clicking **View Rel** (in Salesforce Classic) or **View Relationship** (in Lightning Experience). Then click **Edit Relationship**.
 - c. Remove an existing relationship by clicking **Remove Relationship**. The relationship is deleted and can't be restored from the Recycle Bin.
2. Fill in the account-contact relationship information.
-  **Note** The **Direct** field indicates whether the account associated with the contact is the contact's primary account. The field is read only because it's a system-generated field based on the **Account Name** field on the contact. To remove a direct relationship between a contact and an account, change the contact's primary account or delete the contact. Person accounts always have indirect relationships to business accounts.
3. Save your changes.

To create and edit account and contact relationships from a contact or person account record, use the Related Accounts related list.

See Also

- [Contacts to Multiple Accounts](#)
- [Considerations for Relating a Contact to Multiple Accounts](#)
- [Account Contact Relationship Fields](#)

Considerations for Relating a Contact to Multiple Accounts

Get familiar with tips, tricks, and potential pitfalls before you relate a contact to more than one account.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

General

- Contacts to Multiple Accounts is enabled via Setup and not via the Metadata API.
- The account in the Account Name field on a contact record is the contact's *primary* account. The relationship between the contact and its primary account is a *direct* relationship. All other accounts that are related to the contact are *indirect* relationships.
- Disabling Contacts to Multiple Accounts deletes all indirect account-contact relationships. Associations between a contact and its primary account remain.
- To remove a direct relationship between a contact and an account, change the contact's primary account or delete the contact.
- Most features continue to reference a contact's primary account. For example, duplicate management uses the primary account when comparing records. For that reason, indirect account-contact relationships can't be included in the matching criteria used to find duplicate records.

- Indirect contacts aren't available in reports run from an Account & Contact standard report type.
- You can import account-contact relationships with the Data Loader but not with the Data Import Wizard.
- In Lightning Experience and the Salesforce mobile app, the Add to Campaign action isn't available on items in the Related Contacts related list on account records. To see the full related list and access the Add to Campaign mass action, click **View All**.
- If the Require permission to view record names in lookup fields setting is enabled, users don't see names of related accounts that they don't have access to in lookup fields. To show the data, give users read access to the record or the View All Lookup Record Names permission. See [Require Permission to View Record Names in Lookup Fields](#).
- You can create Experience Cloud site users from Contacts to Multiple Accounts. To grant access to their records, configure a sharing set.

Account Contact Relationships

- All direct contacts appear in the account record's Related Contacts related list. But it's possible that your admin removed the Contacts related list from your page layouts.
- When you have access to a particular account, the related contacts that you have Read access to appear in the Related Contacts related lists. When you have access to a particular contact, all related accounts appear in the Related Accounts related list. You can open the ones to which you have Read access.
- When creating indirect relationships between accounts and contacts, the contact must have a primary account—it can't be a private contact.
- You can't create a contact from the Account Contact Relationship detail page.
- Changing a contact's primary account can trigger a workflow rule that changes the primary account to something else. In that event, Salesforce saves the relationship between the contact and the account you selected as an indirect relationship. Your admin controls the settings for saving previous relationships.
- Some lists of most recently used items (such as a contact lookup field) only show direct relationships.
- When you remove indirect relationships, they're deleted and can't be restored from the Recycle Bin.
- If you delete a direct relationship, indirect relationships are removed. In this case, if the direct relationship is restored, the indirect relationship is also restored.
- When Contacts to Multiple Accounts is enabled, an Account Contact Relationship record is created for each contact with a primary account, and for each person account.

Merging

- If you try to merge contacts that are indirectly related to the same account, an error message instructs you to remove the duplicate relationship. The same is true when merging accounts that are indirectly related to the same contact. The error message includes which account-contact relationships prevent the merge, regardless of whether you have access to the records. Without access to a record, you can't navigate to it.
- When merging person accounts, indirect relationships with accounts and indirect relationships with contacts are evaluated separately. If you have conflicts with both, resolve the two errors separately.

Microsoft Integration

- When syncing contacts between Salesforce and Microsoft Outlook, only the primary account relationship is synced.
- If you remove the account name from a contact in Outlook, the contact can't sync to Salesforce if the contact has relationships to other accounts.

Admin Settings

- What happens when you attempt to delete an account that includes direct contacts related to other accounts depends on what your admin has specified. You're either blocked from deleting the account or allowed to delete the account. Deleting the account also deletes the account's direct contacts, regardless of whether they have relationships to other accounts.
- When you change a contact's primary account, Salesforce either deletes the previous account, or saves it as an indirect relationship. Your admin's settings determine what happens to the previous account.
- Whether activities roll up to a contact's parent account depends on what your admin specified in the activity settings.

Account Contact Relationship Object

- The following custom field types aren't supported.
 - Lookup relationship
 - Master-detail relationship
 - Roll-up summary
 - Text area (long)
 - Text area (rich)
- The following features and customizations aren't supported.
 - Field history
 - Field sets
 - Approvals
 - Record types
 - Field label renaming
- Custom actions are supported, but with limitations.
 - Custom actions must be specific to the Account Contact Relationship object. Global actions aren't supported.
 - You can create actions that update records or invoke Lightning components or Visualforce pages. However, you can't create actions that create records.
 - You can't create actions that send emails or log calls because the Account Contact Relationship object can't have activities related to it.
 - You can't override the default actions on the Account Contact Relationship object.
 - Only custom actions that are created on the Contact object can use the Account Contact Relationship object as a target object.
 - Chatter standard actions aren't supported because the Account Contact Relationship object doesn't have a Chatter feed.

- Custom buttons are supported, but a custom button on a list view can't have a Visualforce page as the content source.

See Also

[Contacts to Multiple Accounts](#)

[Create and Edit Relationships Between Contacts and Accounts](#)

[Require Permission to View Record Names in Lookup Fields](#)

[Create a Sharing Set](#)

Contact Roles

Contact roles specify the part that each contact plays in an account, case, contract, or opportunity. When you use contact roles, your sales team always knows who to contact and when.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

[Set Up Contact Roles](#)

When you use contact roles, your sales team always knows who to contact and when. Set up contact roles for each available object you want to use them with. You can define which roles to use and how they appear to your sales reps.

[Add and Manage Contact Roles](#)

To specify the part that each contact plays in your business process, add contact roles to accounts, cases, contracts, and opportunities. For example, at AW Computing, Mary Smith evaluates all proposals and then forwards them to Tom Jones for a final decision. In the opportunity record for AW Computing, designate Mary Smith as the Evaluator and Tom Jones as the Decision Maker. Now you know who to contact first!

[Considerations for Using Contact Roles](#)

Contact roles let you specify the part that a person plays in an account, case, contract, or opportunity. When you use contact roles, you have more information about who to contact and when. Examples of contact roles include decision maker, business user, and executive sponsor. There are some things to be aware of when using contact roles.

[Contact Role Fields](#)

Contact Roles define the role that a contact or person account plays in an account, case, contract, or opportunity. A contact role has the following fields.

Set Up Contact Roles

When you use contact roles, your sales team always knows who to contact and when. Set up contact roles for each available object you want to use them with. You can define which roles to use and how they appear to your sales reps.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

! **Important** In Salesforce Classic, contact roles are available for accounts, opportunities, cases, and contracts. In Lightning Experience, contact roles are available for opportunities, contracts, and cases. Although contact roles work similarly for each available object, they work independently. Therefore, you need to set them up and use them separately for each object. Before setting up contact roles for accounts, consider using [Contacts to Multiple Accounts](#) instead.

1. From Setup, enter *Contact Roles* in the **Quick Find** box, then select the contact roles you want to set up.
2. Modify the picklist values as needed. You can even create new values and add color to the values whenever they appear in charts.
3. Save your changes.
4. Add the Contact Roles related list to the appropriate page layout.

For example, if you're creating contact roles for opportunities, add the Contact Roles related list to the opportunity page layouts that your sales reps use.

See Also

[Considerations for Using Contact Roles](#)

[Add and Manage Contact Roles](#)

Add and Manage Contact Roles

To specify the part that each contact plays in your business process, add contact roles to accounts, cases, contracts, and opportunities. For example, at AW Computing, Mary Smith evaluates all proposals and then forwards them to Tom Jones for a final decision. In the opportunity record for AW Computing, designate Mary Smith as the Evaluator and Tom Jones as the Decision Maker. Now you know who to contact first!

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

USER PERMISSIONS NEEDED

To add or edit contact roles:

Edit on the object the contact roles are on, such as opportunities or contracts

AND

USER PERMISSIONS NEEDED

Read on contacts

To view contact roles:	Read on the object the contact roles are on, such as opportunities or contracts
------------------------	---

! **Important** In Salesforce Classic, contact roles are available for accounts, opportunities, cases, and contracts. In Lightning Experience, contact roles are available for opportunities, contracts, and cases. Although contact roles work similarly for each available object, they work independently. Therefore, you need to set them up and use them separately for each object.

Add and Manage Contact Roles in Lightning Experience

To specify the part that each contact plays in your business process, add contact roles to opportunities or contracts.

1. In the Contact Roles related list of an opportunity or contract, click **Add Contact Roles**.
2. Select the contacts to add.
 - To add contacts to an opportunity, select the checkboxes next to the contacts you want to add. All contacts for the account are populated in the list.
 - To add contacts to a contract, use the lookup icon to choose a contact or person account.
3. Select roles for the contacts. If you don't select a role, the contact is still added to the Contact Roles related list and can be edited later.
4. Save your changes. It can take up to 30 minutes before the new contact role appears in the Contact Roles related list.

Add and Manage Contact Roles in Salesforce Classic

To specify the part that each contact plays in your business process, add contact roles to accounts, cases, contracts, and opportunities.

1. In a record's Contact Roles related list, click **New**.
 - To add contacts to an opportunity, select a role for each contact in the list you wish to add.
 - To add contacts to an account, contract, or case, use the lookup icon to choose a contact or person account. Select a role for the contact.
2. Optionally, designate a primary contact for the record. Cases don't have this option.
3. Save your changes. It can take up to 30 minutes before the new contact role appears in the Contact Roles related list.

See Also

- [Considerations for Using Contact Roles](#)
- [Contact Role Fields](#)
- [Set Up Contact Roles](#)
- [Considerations for Cloning Opportunities](#)

Considerations for Using Contact Roles

Contact roles let you specify the part that a person plays in an account, case, contract, or opportunity. When you use contact roles, you have more information about who to contact and when. Examples of contact roles include decision maker, business user, and executive sponsor. There are some things to be aware of when using contact roles.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: all editions

! **Important** In Salesforce Classic, contact roles are available for accounts, opportunities, cases, and contracts. In Lightning Experience, contact roles are available for opportunities, contracts, and cases. Although contact roles work similarly for each available object, they work independently. Therefore, you need to set them up and use them separately for each object.

- To view the contact records that are listed in the Contact Roles related lists, you must have the proper user permissions and sharing access to those records.
- When contacts are merged, contact roles on non-master contacts lose their status as the primary contact.
- When you add contact roles to opportunities, you can save up to 200 contacts at a time. All contacts that are associated with the record's account are prepopulated. You can also search for other contacts that are not associated with the record's account.
- A single contact or person account can have a different contact role on different records.
- Adding person accounts to contact roles on accounts is available but not recommended. Instead, use the Partners related list to associate person accounts to other accounts.
- When you create an opportunity from a contact detail page, that contact becomes the primary contact on the opportunity. However, a contact role isn't automatically assigned.
- On case contact roles, the **Primary** option isn't available. The primary contact on a case is always the contact listed under **Contact Name** in the Case Detail section.

Contact Role Fields

Contact Roles define the role that a contact or person account plays in an account, case, contract, or opportunity. A contact role has the following fields.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

Field	Description
Contact	The name of the contact or person account. Select an existing contact or create a new one.
Primary	<p>When selected, identifies the person as the primary contact for the record.</p> <p>The Primary option isn't available for cases. Instead, the contact listed in the Contact Name field on the case record is automatically the primary contact.</p>
Role	The role of the contact for the record. Your administrator can customize the selections for this picklist.

See Also[Contact Roles](#)

Opportunity Contact Roles

Opportunity contact roles specify the part that each contact plays in a deal. When you use and customize opportunity contact roles, your sales team knows who to contact and when.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

 **Note** This information applies to opportunity contact roles, a type of [contact role](#).

[Set Up and Customize Opportunity Contact Roles](#)

Opportunity contact roles let your sales team know who to contact and when for each deal. In Lightning Experience, you can give your sales reps even more insight into their opportunity contacts by customizing the opportunity contact role object.

[Add and Manage Opportunity Contact Roles](#)

To specify the part that each contact plays in a deal, add contact roles to your opportunities. For example, at AW Computing, Mary Smith evaluates all proposals and then forwards them to Tom Jones for a final decision. In the opportunity record for AW Computing, you designate Mary Smith as the Evaluator and Tom Jones as the Decision Maker. Then, you know who to contact first.

[Guidelines for Using Opportunity Contact Roles](#)

Before you use opportunity contact roles, make sure that you're aware of some important considerations.

Opportunity Contact Role Fields

Opportunity Contact Roles define the role that a contact or person account plays in a deal. An opportunity contact role has the following fields. Depending on your page layout and field-level security settings, some fields may not be visible or editable.

Set Up and Customize Opportunity Contact Roles

Opportunity contact roles let your sales team know who to contact and when for each deal. In Lightning Experience, you can give your sales reps even more insight into their opportunity contacts by customizing the opportunity contact role object.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **All** Editions

 **Note** This information applies to opportunity contact roles, a type of [contact role](#).

Set Up and Customize Opportunity Contact Roles in Lightning Experience

Opportunity contact roles let your sales team know who to contact and when for each deal. In Lightning Experience, you can give your sales reps even more insight into their opportunity contacts by customizing the opportunity contact role object. Create custom fields and buttons, and determine how page layouts appear to your sales reps. Use triggers and validation rules to tailor the opportunity contact role to your company's requirements.

Considerations for Customizing Opportunity Contact Roles

Review considerations for customizing opportunity contact roles in Lightning Experience, and understand the differences from Salesforce Classic.

Set Up Opportunity Contact Roles in Salesforce Classic

Opportunity contact roles let your sales team know who to contact and when for each deal.

Set Up and Customize Opportunity Contact Roles in Lightning Experience

Opportunity contact roles let your sales team know who to contact and when for each deal. In Lightning Experience, you can give your sales reps even more insight into their opportunity contacts by customizing the opportunity contact role object. Create custom fields and buttons, and determine how page layouts appear to your sales reps. Use triggers and validation rules to tailor the opportunity contact role to your company's requirements.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **All** Editions

USER PERMISSIONS NEEDED

To set up and configure opportunity contact roles: Customize Application

 **Note** This information applies to opportunity contact roles, a type of [contact role](#).

1. From Setup, open the Object Manager, and click Opportunity Contact Role. Go to the section you want to set up or customize.
2. Create custom fields, buttons and links, and compose your page layouts. You can create a maximum of 100 custom fields.
3. Determine validation rules and set up triggers.
4. Save your changes.

 **Note** When you make customizations in Lightning Experience, your users will not see them in the Contact Roles related list on an opportunity in Salesforce Classic. In Salesforce Classic, the Add and Edit pages show only the contact, role and primary contact on the opportunity.

Considerations for Customizing Opportunity Contact Roles

Review considerations for customizing opportunity contact roles in Lightning Experience, and understand the differences from Salesforce Classic.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **All** Editions

USER PERMISSIONS NEEDED

To set up and configure opportunity contact roles: Customize Application

 **Note** This information applies to opportunity contact roles, a type of [contact roles](#).

Lightning Experience

- You can create a maximum of 100 custom fields for an opportunity contact role.
- When you make customizations in Lightning Experience, your users don't see them in the Contact Roles related list on an opportunity in Salesforce Classic.
- Custom fields, buttons, and page layouts, along with validation rules and Apex triggers, are only available in Lightning Experience.
- Contacts marked as primary appear first in the contact roles related list on opportunities, with the  icon. When you remove the Primary field from the contact roles related list on the opportunity page layout, the  icon no longer appears next to the primary contact. You can't remove the Primary field from the opportunity contact role page layout.

Salesforce Classic

- You can add and edit opportunity contact role picklist values in Setup. Customization options such as custom fields, buttons, and page layouts, along with validation rules and Apex triggers, aren't available in Salesforce Classic.
- The Add and Edit pages show only the contact, role, and primary contact for the opportunity.

Set Up Opportunity Contact Roles in Salesforce Classic

Opportunity contact roles let your sales team know who to contact and when for each deal.

REQUIRED EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions

USER PERMISSIONS NEEDED

To set up and configure opportunity contact roles: Customize Application

 **Note** This information applies to opportunity contact roles, a type of [contact role](#).

1. From Setup, in the object management settings for contact roles on opportunities, select the contact roles you want.
2. Modify the picklist values.
3. Create values and add color to the values whenever they appear in charts as needed.
4. Save your changes.

 **Note** In Salesforce Classic, you can only add and edit contact role values in the picklist. Customization options such as custom fields, buttons, and page layouts, along with validation rules and Apex triggers, are only available in Lightning Experience.

Add and Manage Opportunity Contact Roles

To specify the part that each contact plays in a deal, add contact roles to your opportunities. For example, at AW Computing, Mary Smith evaluates all proposals and then forwards them to Tom Jones for a final decision. In the opportunity record for AW Computing, you designate Mary Smith as the Evaluator and Tom Jones as the Decision Maker. Then, you know who to contact first.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

USER PERMISSIONS NEEDED

To add or edit opportunity contact roles:

Edit on opportunities

AND

Read on contacts

To view opportunity contact roles:

Read on opportunities and contacts



Note This information applies to opportunity contact roles, a type of [contact roles](#).

1. In the Contact Roles related list on an opportunity, select **Add Contact Roles**.
The list includes all contacts for the account that is associated with the opportunity, even if you've applied a lookup filter on the Contact field.
2. To add a role to a contact, select the dropdown next to the contact, or select the contact and select **Edit Contact Role**.

To add a new contact, select **Edit Contact Role** and add the contact name to a blank row and select the contact role. Add more rows, as needed.

If you don't select a role, the contact is still added to the Contact Roles related list in the opportunity. You can edit it later.

3. Optionally, designate a primary contact for the opportunity.
4. Save your changes.



Note You can save up to 200 opportunity contact roles at a time.

5. To keep the opportunity contact roles up to date, edit and delete the roles as contacts change.

When converting a lead to an opportunity, a contact is associated with the opportunity as a contact role if the contact and opportunity are created during the conversion process.

Guidelines for Using Opportunity Contact Roles

Before you use opportunity contact roles, make sure that you're aware of some important considerations.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

USER PERMISSIONS NEEDED

To add or edit opportunity contact roles:

Edit on opportunities

USER PERMISSIONS NEEDED

AND

Read on contacts

To view opportunity contact roles:

Read on opportunities and contacts



Note This information applies to opportunity contact roles, a subset of [contact roles](#).

- To add and edit opportunity contact roles, users must have read access to the Account Name field on the Contact object.
- To view the contact records in the Opportunity Contact Role related list, you must have the proper user permissions and sharing access to those records.
- A single contact or person account can have a different opportunity contact role on multiple records.
- In Salesforce Classic, if a contact has multiple opportunity contact roles on one opportunity, the Opportunities related list on the Contact record shows duplicates. In Lightning Experience, the related list doesn't show duplicates.
- When contacts are merged, opportunity contact roles on non-master contacts lose their status as the primary contact.
- If you have an opportunity with the same opportunity contact roles for multiple contacts, and the contacts are merged, the opportunity contact roles aren't merged. After the contacts merge, the original opportunity contact role records still exist. The opportunity contact roles have the same contact, opportunity, and role. For example, let's say your opportunity had three Decision Maker opportunity contact roles, but each one was a different contact. The three contacts merged into one contact, but your opportunity still has the same three contacts with the same opportunity contact roles.
- When you delete and later undelete an opportunity or contact, the opportunity contact role is also undeleted. Opportunity contact roles can't be undeleted independently.
- When an opportunity or contact is undeleted, the related opportunity contact roles don't keep their primary status.
- Inserting and updating multiple opportunity contact roles at one time works differently in Salesforce Classic and Lightning Experience.
 - In Salesforce Classic, each record is inserted or updated individually. If you use triggers that execute when you insert or delete multiple opportunity contact roles, a separate trigger executes for each record.
 - In Lightning Experience, all of the records are inserted or updated together. If your triggers execute when you insert or update multiple contact roles, one trigger executes for all of the records in a bulk transaction.
- When you create multiple opportunity contact roles by inserting multiple opportunities with the ContactId field populated, Salesforce creates each contact role in an individual transaction. A separate trigger executes for each contact role record.

Opportunity Contact Role Fields

Opportunity Contact Roles define the role that a contact or person account plays in a deal. An opportunity contact role has the following fields. Depending on your page layout and field-level security settings, some fields may not be visible or editable.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

 **Note** This information applies to opportunity contact roles, a type of [contact roles](#).

Field	Description
Contact	The name of the contact or person account.
Opportunity	The opportunity that's associated with the opportunity contact role.
Primary	When selected, Primary identifies the person as the primary contact for the opportunity.
Role	The role of the contact for the record. Your Salesforce admin can customize the selections for this picklist.

Things to Know About Contacts

Review additional considerations for contacts.

[Considerations for Changing the Account for Contacts](#)

Consider key points before changing the account that's associated with a contact.

[Considerations for Using Contact Hierarchy in Lightning Experience](#)

Keep these considerations in mind when you create contact hierarchies.

[Contacts: What's Different or Not Available in the Salesforce Mobile App](#)

Not every Lightning Experience feature is in the Salesforce mobile app. Find out what's different.

[Contact Fields](#)

Your page layout and field-level security settings determine which contact fields are visible and editable.

Considerations for Changing the Account for Contacts

Consider key points before changing the account that's associated with a contact.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: all editions

-  **Note** If the contact has a parent account, and the organization-wide default is Controlled by Parent, Edit access on the account is required to edit the contact.
- If any of the following are true, you can change the account that's associated with a contact.
 - You have access to the contact, and you're the owner of the target account or the manager of the owner in the role hierarchy.
 - You're the owner of the contact, or you have access to the contact, and you have access to the target account.
 - You're an admin.
 - If you don't meet any of these conditions, contact your admin to change the associated account.
 - If you change the **Account Name** field:
 - Cases and opportunities that are associated with the contact remain associated with the previous account and don't roll up to the new account.
 - New cases and opportunities that are created for the contact are associated with the new account.
 - If the contact's associated account is enabled for Experience Cloud sites, to change the account to an account that's not yet enabled for Experience Cloud sites, you must have either the Manage External Users or Manage Users permission. To change the contact's associated account to an account that's already enabled for Experience Cloud sites, you must have either the Manage External Users, Manage Users, or Manage Roles permission.

See Also

[Contacts](#)

[Share Contacts](#)

Considerations for Using Contact Hierarchy in Lightning Experience

Keep these considerations in mind when you create contact hierarchies.

REQUIRED EDITIONS

Available in: Lightning Experience

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

User Permissions Needed

To view contacts:	Read on contacts
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Display of Contacts

The Contact Hierarchy page displays up to 2,000 contacts in Lightning Experience. (To view

contacts in a different part of the hierarchy, enter the hierarchy from a different contact.) The hierarchy doesn't display details of contacts you don't have permission to view.

If the current displayed record exists in the middle of the hierarchy (for example, the parent record has 500 children and the current record is child #250), then the parent record isn't visible when the Account Hierarchy page first appears. To see results further up in the hierarchy, scroll up.

Person Accounts Not Supported

Person accounts aren't supported for the Reports To field or the View Contact Hierarchy action.

See Also

[Set Up Contact Hierarchy in Lightning Experience](#)

Contacts: What's Different or Not Available in the Salesforce Mobile App

Not every Lightning Experience feature is in the Salesforce mobile app. Find out what's different.

- Contacts to Multiple Accounts:
 - Only the list item actions that are specific to the Account Contact Relationship object are available on the Related Accounts and Related Contacts related lists. Therefore, you see actions to view or remove the account-contact relationship, but not to edit or delete the contact or account record.
 - From the Related Contacts related list, you can navigate to a contact record, but not an account record.
- You can't view the contact hierarchy.
- Activity logs aren't created when you use the  icon to send emails.
- The **Request Update**, **Manage External User**, and **Enable Customer User** buttons aren't available.
- You can't add a contact to a campaign.
- You can't merge contacts.
- You can't use the Salesforce mobile app to edit or delete a person account in a contact list view or related list. To edit or delete a person account on a mobile device, navigate to the person account record.

Contact Fields

Your page layout and field-level security settings determine which contact fields are visible and editable.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: all editions

Field	Description
Account Name	The account that the contact is linked to. Enter the account name, select the account from a list, or create an account. Private contacts don't have an account.
Allow Customer Portal Self-Registration	If you allow access to a customer portal, when selected, allows contacts to self-register for it.
Assistant	The contact's assistant. Maximum 40 characters.
Asst. Phone	The assistant's phone number. Maximum 40 characters.
Birthdate	The contact's birthday. Click the field, and then choose a date from the calendar.
Contact Currency	The default currency for all currency amount fields in the contact. Amounts are displayed in the contact currency and converted to the user's personal currency. Available when multiple currencies are used.
Contact Division	The division that the contact belongs to. This value is inherited from the related account. Available when divisions are used to segment data.
Contact Owner	The contact's assigned owner. Not available in Personal Edition.
Contact Record Type	The name of the field that determines what picklist values are available for the record. Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.
Created By	The user who created the contact. Includes creation date and time. Read only.
Custom Links	A list of custom links for contacts, as set up by your administrator.
Department	The associated business or organizational unit. Maximum 80 characters.
Description	The contact's description. Maximum 32 KB of data. The first 255 characters appear in reports.

Field	Description
Email	<p>The contact's email address. A valid email address is required. Maximum 80 characters.</p> <p>Click the email address in this field to send an email using your personal email application. This action isn't logged as an activity on the contact record.</p> <p>If the Gmail Buttons and Links feature is enabled, click the Gmail link next to the field to send an email from your Gmail account.</p>
Email Opt Out	<p>Whether the contact wants to receive email (<code>false</code>) or not (<code>true</code>).</p>
Engagement History	<p>A chart showing the contact's inbound and outbound engagements for the last 30 days. Available with Sales Engagement.</p>
Fax	<p>The contact's fax number. Maximum 40 characters.</p>
First Name	<p>The contact's first name, as displayed on the contact edit page. Maximum 40 characters.</p>
First Name (Local)	<p>The contact's first name, translated into the local language.</p>
Gender Identity	<p>The contact's personal and self-identified experience of their gender, which may or may not correspond to the contact's designated sex at birth.</p>
Home Phone	<p>The contact's home phone number. Maximum 40 characters.</p>
Last Modified By	<p>The user who last changed the contact fields, including modification date and time. This field doesn't track changes that were made to any of the related list items on the contact. Read only.</p>
Last Name	<p>The contact's last name as displayed on the contact edit page. Maximum 80 characters.</p>
Last Name (Local)	<p>The contact's last name, translated into the local language.</p>
Lead Source	<p>The record source: for example, Advertisement,</p>

Field	Description
	Partner, or Web. The entry is selected from a picklist of available values, which the administrator sets. Maximum 40 characters for each picklist value.
Mailing City	The city in the mailing address. Maximum 40 characters.
Mailing Country	The country in the mailing address. Maximum 80 characters.
Mailing State/Province	The state or province in the mailing address. Maximum 80 characters.
Mailing Street	The street in the mailing address. Maximum 255 characters.
Mailing Zip/Postal Code	The zip or postal code in the mailing address. Maximum 20 characters.
Middle Name	<p>The contact's middle name, as displayed on the contact edit page. Maximum 40 characters.</p> <p>To enable this field, from Setup, enter <i>User Interface</i> in the Quick Find box, then select User Interface. Then select Enable Middle Names for Person Names.</p>
Middle Name (Local)	<p>The contact's middle name, translated into the local language.</p> <p>To enable this field, from Setup, enter <i>User Interface</i> in the Quick Find box, then select User Interface. Then select Enable Middle Names for Person Names.</p>
Mobile	The contact's mobile phone number. Maximum 40 characters. The API field name on the Contact object is MobilePhone .
Name	The contact's combined first name, middle name, last name, and suffix, as displayed on the contact detail page.
Other City	The city in another address for the contact. Maximum 40 characters.

Field	Description
Other Country	The country in another address for the contact. The entry is selected from a picklist of standard values or entered as text. If the field is a text field, maximum 80 characters.
Other State/Province	The state or province in another address for the contact. The entry is selected from a picklist of standard values or entered as text. If the field is a text field, maximum 80 characters.
Other Street	The street address in another address for the contact. Maximum 255 characters.
Other Zip/Postal Code	The zip or postal code in another address for the contact. Maximum 20 characters.
Other Phone	Another phone number for the contact. Maximum 40 characters.
Phone	The contact's primary phone number. Maximum 40 characters. On the Contact object, the API label for this field is Business Phone .
Pronouns	The contact's personal pronouns, reflecting their gender identity. The entry is selected from a picklist of available values, which the administrator sets. Maximum 40 characters.
Reports To	The name of the contact's manager. Enter a contact name, or select a contact from the list.
Salutation	The title for addressing the contact, for example, Mr., Ms., or Dr. The entry is selected from a picklist of available values, which the administrator sets. Maximum 40 characters.
Suffix	<p>The suffix in the contact's name, as displayed on the contact edit page. Maximum 40 characters.</p> <p>To enable this field, from Setup, enter User Interface in the Quick Find box, then select User Interface. Then select Enable Middle Names for Person Names.</p>
Title	The contact's position within the organization. Maximum 128 characters.

Field	Description
Total Cadences	The number of Sales Engagement cadences the contact is assigned to. This field is only available in list views.
Username	<p>For Self-Service contacts only. The Username defaults to the Email. Contacts enter their usernames when logging in to the Self-Service portal.</p> <p> Note Starting with Spring '12, the Self-Service portal isn't available for new Salesforce orgs. Existing orgs continue to have access to the Self-Service portal.</p>

See Also

- [Considerations for Creating Contacts](#)
- [Considerations for Changing the Account for Contacts](#)

Showing Customers and Prospects on a Map

Let your reps identify customers and prospects on a map. That way, your reps can better plan their routes with fewer miles and set up appointments with fewer gaps in their schedules using Salesforce Maps Lite.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Eligible **Performance** and **Unlimited** Editions with Sales Cloud, Service Cloud, Industry Clouds, and Government Cloud Plus. Not available for customers complying with Hyperforce European Union Operating Zone data residency requirements. For eligibility requirements, contact your account executive.

[Before You Turn On Salesforce Maps Lite](#)

Anticipate the behaviors and outcomes that your sales reps experience when you turn on Salesforce Maps Lite.

[Visualize Customers and Prospects on a Map](#)

Keep reps focused on meeting and exceeding sales targets as they plan for in-person and virtual visits with accounts, contacts, and leads in key geographic areas with Salesforce Maps Lite. Identifying customers and prospects on a map helps your reps better plan their routes with fewer miles and set up appointments with fewer gaps in their schedules.

[Resolve Latitude and Longitude Discrepancies](#)

Unblock your reps so that they can plan for in-person and virtual visits when they identify accounts, contacts, and leads on a map using Salesforce Maps Lite. If your reps can't plot records, or the records appear in the wrong locations, you can help resolve any geographical location issues.

Before You Turn On Salesforce Maps Lite

Anticipate the behaviors and outcomes that your sales reps experience when you turn on Salesforce Maps Lite.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Eligible **Performance** and **Unlimited** Editions with Sales Cloud, Service Cloud, Industry Clouds, and Government Cloud Plus. Not available for customers complying with Hyperforce European Union Operating Zone data residency requirements. For eligibility requirements, contact your account executive.

Your Reps' Goal	What to Expect from Salesforce Maps Lite
Plot records on the map	<p>It determines record locations using coordinates in latitude and longitude fields. Those fields differ depending on the kinds of records that your reps plot. Specifically:</p> <ul style="list-style-type: none">• Accounts require Billing Latitude and Billing Longitude fields.• Contacts require Mailing Latitude and Mailing Longitude fields.• Leads require Latitude and Longitude fields. <p>That way, the map can:</p> <ul style="list-style-type: none">• Show up to 50 records at a time, providing they include accurate addresses.• Include pagination that lets reps access other records in batches of 50 or fewer. <p>But for your reps to plot records without latitude and longitude coordinates, Salesforce Maps Lite generates coordinates for them. Generated coordinates last for just that session in Salesforce Maps Lite.</p>
Work with records in bulk	<p>It includes a list of the records that correspond with the record markers that appear on the map. The list:</p> <ul style="list-style-type: none">• Shows up to 50 records simultaneously.• Provides up to 15 fields for each record based on the fields that appear in the object's list views.

Your Reps' Goal	What to Expect from Salesforce Maps Lite
	<ul style="list-style-type: none"> Lets reps locate a specific record marker on the map when they select its corresponding record from the list. Indicates which records don't appear on the map because they require address corrections.
Perform actions on individual records	<p>It includes functions directly in record markers on the map. When your reps select record markers:</p> <ul style="list-style-type: none"> The same fields appear as the ones in the list of records. Clustered with other nearby markers relative to their zoomed view, reps can navigate them using pagination functions or show the cluster of records in a list.

Visualize Customers and Prospects on a Map

Keep reps focused on meeting and exceeding sales targets as they plan for in-person and virtual visits with accounts, contacts, and leads in key geographic areas with Salesforce Maps Lite. Identifying customers and prospects on a map helps your reps better plan their routes with fewer miles and set up appointments with fewer gaps in their schedules.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Eligible **Performance** and **Unlimited** Editions with Sales Cloud, Service Cloud, Industry Clouds, and Government Cloud Plus. Not available for customers complying with Hyperforce European Union Operating Zone data residency requirements. For eligibility requirements, contact your account executive.

USER PERMISSIONS NEEDED

To turn on Salesforce Maps Lite:	Customize Application
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- From Setup, in the Quick Find box, enter *Maps and Location Settings*, and then select **Maps and Location Settings**.
- Click **Edit**.
- Select the option that enables Maps Lite.

Maps Lite Settings

Give reps context into records such as accounts and contacts directly on a map using Salesforce Maps Lite.

Enable Maps Lite for all users *

* The Maps Lite feature is a limited version of the Salesforce Maps service and will process some information submitted to the Services, including but not limited to addresses, using separate infrastructure, which (i) may involve privacy & security protections that are different than your other services; (ii) may be hosted in physical locations that are different than your other services; and (iii) is further described in the Salesforce Trust and Compliance Documentation: <https://www.salesforce.com/company/legal/trust-and-compliance-documentation> Effective 8/25/2023

[Edit](#)

Your sales reps can then plot up to 50 accounts, contacts, or leads simultaneously on the map from the Maps Lite tab.

Account Name	Website	Billing City	Annual Revenue	Employees
atominc.com	atominc.com	Mt Holly	USD 10,000,000.00	500
buzzcityclt.com	buzzcityclt.com	Charlotte	USD 5,000,000.00	100
charlotteenergybusinesservicesllc.com	charlotteenergybusinesservicesllc.com	Charlotte	USD 17,500,000.00	28000
charlottencbest.com	charlottencbest.com	Monroe	USD 12,000,000.00	250

Resolve Latitude and Longitude Discrepancies

Unblock your reps so that they can plan for in-person and virtual visits when they identify accounts, contacts, and leads on a map using Salesforce Maps Lite. If your reps can't plot records, or the records appear in the wrong locations, you can help resolve any geographical location issues.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Eligible **Performance** and **Unlimited** Editions with Sales Cloud, Service Cloud, Industry Clouds, and Government Cloud Plus. Not available for customers complying with Hyperforce European Union Operating Zone data residency requirements. For eligibility requirements, contact your account executive.

USER PERMISSIONS NEEDED

To turn on Salesforce Maps Lite:

Customize Application

1. Confirm whether you have these data integration rules activated: Geocodes for Account Billing Address, Geocodes for Contact Mailing Address, and Geocodes for Lead Address.
See [Activate the Data Integration Rule for a Data Service](#).

If you don't have data integration rules activated, skip to Step 4.

2. Verify the addition of latitude and longitude coordinates in Salesforce records.
See [Use Lightning Experience and the API to Verify That Geocodes Were Added](#).
3. If you verified the addition of latitude and longitude coordinates in those records, identify and resolve any discrepancies.
See [Check the Match Rates for a Data Service](#).
4. If you don't have data integration rules activated, but you have latitude and longitude coordinates in Salesforce records, update the coordinates manually in those records. Or remove the coordinates altogether so that Salesforce Maps Lite generates them.
Generated coordinates last for just the session in Salesforce Maps Lite and don't populate location fields in Salesforce records.

If you don't have data integration rules activated, and you don't have latitude and longitude coordinates in Salesforce records, Salesforce Maps Lite generates them. Generated coordinates last for just the session in Salesforce Maps Lite and don't populate location fields in Salesforce records. You can investigate any location issues related to generated coordinates using these resources.

See [Troubleshooting Expectations when Using Salesforce Maps for Address Geocoding](#) and [Salesforce Maps Geocoding FAQ](#).

See Also

[Showing Customers and Prospects on a Map](#)

Manage a Sales Team

Forecast sales based on your opportunity pipeline, set up sales territories, and organize reps into selling teams. Split revenue and credit for deals even if you use multiple currencies. Use Path and WDC to help reps follow your business process and increase performance.

[Sales Insights](#)

Sales Insights is a data-driven sales solution that unites Tableau Next dashboards and analytics with an easy-to-visualize view of your sales pipeline.

[Revenue Intelligence](#)

Revenue Intelligence is a data-driven sales solution that unites CRM Analytics dashboards and analytics with an easy-to-visualize pipeline progress flow chart in Pipeline Inspection, and more.

[Pipeline Inspection](#)

Pipeline Inspection gives sales teams a consolidated view of pipeline metrics, opportunities, week-to-week changes, AI-driven insights, and activity information. With this intelligence, sales teams can focus on the most important opportunities and forecast revenue more accurately.

Account-Based Selling

Empower sales teams to manage and grow key accounts strategically. With Salesforce tools such as Account Plans, Action Plans, and a suite of Einstein features, your sales reps gain deeper insights into account health, can forecast sales more accurately, and enjoy enhanced collaboration across teams.

Salesforce Forecasting

Feel confident about your sales projections by working with live forecast rollups, visual indicators, AI predictions, and historical trends to generate accurate sales predictions. In Winter '25, Salesforce Forecasting is also referred to as Collaborative Forecasts in some places.

Sales Territories

Manage and maintain your company's sales territories. Create territory types, build a model, and then add and test your account assignment rules. When you're satisfied with your model, activate it, then assign accounts, leads, and users. Roll out your model to your team, and then run reports to assess its impact and make adjustments as needed.

Opportunity Teams and Opportunity Splits

Create opportunity teams to make it easier to collaborate and track progress on deals. Use opportunity splits and opportunity product splits to share revenue from a Closed Won opportunity among team members.

Manage Multiple Currencies

Give your sales team the ability to use multiple currencies in opportunities, forecasts, quotes, reports, and other data.

Guide Users with Path

Boost productivity and help reps gather complete data. Create paths to guide your users through steps of a business process, such as working an opportunity from a fresh lead to a successfully closed deal. At each step of a path, you can highlight key fields and include customized guidance for success.

Build a Culture of Recognition with WDC

WDC is a suite of tools that help reps, managers, and teams enter and endorse skills, and give thanks. These activities build a culture of recognition.

Sales Insights

Sales Insights is a data-driven sales solution that unites Tableau Next dashboards and analytics with an easy-to-visualize view of your sales pipeline.

REQUIRED EDITIONS

Sales Insights includes Tableau Next and customer engagement features packed with customer data to help sales teams win deals with confidence.

Available in: Lightning Experience

Available with Sales Cloud with **Agentforce 1 Edition** or Agentforce for Sales Add-on license in: **Enterprise, Performance, and Unlimited** Editions.

 **Note** As of October 14, 2025, Data Cloud has been rebranded to Data 360. During this transition,

you may see references to Data Cloud in our application and documentation. While the name is new, the functionality and content remains unchanged.

Set Up Sales Insights

Give your sales teams access to Sales Insights dashboards and analytics. Make sure to enable other relevant features to get the most out of Sales Insights.

Sales Insights Dashboards

Sales Insights helps sales teams make fast decisions to improve ROI in every part of the sales cycle.

Set Up Sales Insights

Give your sales teams access to Sales Insights dashboards and analytics. Make sure to enable other relevant features to get the most out of Sales Insights.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud with **Agentforce 1 Edition** or Agentforce for Sales Add-on license in: **Enterprise, Performance, and Unlimited** Editions.

Considerations for Setting up Sales Insights

When you set up Sales Insights, you must have certain settings configured in your org, and you must have certain objects to populate the dashboards correctly.

Add Row-Level Security with a Data Governance Policy

You must create a role hierarchy to define your sales teams and the data each role can access before you set up Sales Insights. The following example shows you how policies might be set up.

Row-Level Security Example based on Role Hierarchy

This policy leverages the Salesforce Role Hierarchy to allow managers/supervisors to view not only their own records but also the records belonging to their subordinates. This capability uses the specialized hierarchy operator in Data 360.

Row-Level Security Example based on Manager Hierarchy

This policy is used in organizations where reporting structure is managed by a specific Manager field rather than the formal Role Hierarchy. This also relies on the specialized hierarchy operator.

Sales Insights Assets

When you set up Sales Insights, specific assets are included. To modify dashboards, you can modify these assets.

Enable and Configure Sales Insights

Set up and configure Sales Insights so that your sales teams can access performance dashboards and analytics.

Create a Data 360 Salesforce CRM Connection for Sales Insights

Before installing the Sales data kit and Sales Insights, connect Data 360 to Sales Cloud.

Install the Sales Data Kit for Sales Insights

If you have not already installed the Sales Cloud bundle and the Sales Cloud data kit, do this first.

Install the C360 Semantic Model

The C360 semantic data model (SDM) is a unified semantic model that serves as a central foundation to define and manage metrics derived from standard Salesforce objects. It defines the relationships between Sales Insights objects.

Sales Insights Post Installation Steps

To make it easy to view your insights, add the Sales Insights App to your Navigation Bar.

Monitor, Update, and Delete Sales Insights Apps

Use the app management tab to monitor the status of install requests, view logs to troubleshoot install issues, track app usage statistics, and update and delete apps.

Troubleshoot Sales Insights Enablement

When enabling Sales Insights, a few common errors can occur. You may have the wrong objects or custom objects. You may have Org configurations that are incompatible with the requirements of the app. The following sections can help you troubleshoot these common issues.

Select Who Can Manage Sales Insights

The Sales Insights User permission sets have all the permissions to get your sales team started using Sales Insights dashboards and analytics.

Considerations for Setting up Sales Insights

When you set up Sales Insights, you must have certain settings configured in your org, and you must have certain objects to populate the dashboards correctly.

Forecast and Quota Data Considerations

The current version of Sales Insights does not support Salesforce Pipeline Forecasting and Quota data objects.

Requirements to Use a Standard Fiscal Year

If you use a standard fiscal year, you must enable the fiscal year configuration for Data 360.

Considerations for Including Non-Default Dataspaces and Personal Orgs

Non-default dataspaces are supported. Personal orgs are not currently supported.

Considerations for Embedded Dashboards

When you create the app, dashboards are generated, but you will need to manually embed the dashboard.

Considerations for Multicurrency

Multicurrency is not currently supported.

Considerations for Mobile

Metrics are supported in Mobile environments; however, dashboards are not yet supported on mobile.

Requirements to Include Role Hierarchy and Row Level Security (RLS)

Role hierarchy and Row level security are supported in Data 360 and Tableau Next Data policies need to be set up on the data model objects (dmo) in Data Governance in Data 360. These policies are a prerequisite to app setup.

- ! **Important** For more detailed information about creating role-based access for Data 360 objects, see [Create a Role-Based Access Control Policy in Data Cloud](#).
- ! **Note** You might experience a fifteen minute latency when updating row level security or role hierarchy changes.

Add Row-Level Security with a Data Governance Policy

You must create a role hierarchy to define your sales teams and the data each role can access before you set up Sales Insights. The following example shows you how policies might be set up.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud with **Agentforce 1 Edition** or Agentforce for Sales Add-on license in: **Enterprise, Performance, and Unlimited** Editions.

USER PERMISSIONS NEEDED

To manage Data 360:	Data Cloud Architect
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To manage Sales Insights:	Sales Insights User permission set
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To use Sales Insights:	Tableau Next Limited Consumer
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- ! **Important** For more detailed information about creating role-based access for Data 360 objects, see [Create a Record-Level Policy in Data Cloud](#).

Row-Level Security Example based on Record Ownership

This policy ensures that a user can only view records (for example, Opportunities) that they are explicitly

designated as the owner of.

1. Determine Which Data DMO to Include in the Policy.
2. The policy must be applied to the primary DMO that contains the record ownership field.

DMO	ssot__Opportunity__dlm
Description	The fact object containing sales opportunity details.
Controlling Field (User Context)	ssot__OwnerId__c (Record Owner ID)

3. Add Policy/Author
 - a. Navigate to the Data Governance tab in Data 360 and create a new Data Policy.
 - b. Set the Resource to Record.
 - c. Select the DMO: ssot__Opportunity__dlm.
 - d. Set the Action to Deny. (This is often used to override the default "Allow All" policy, or you can use an Allow policy that explicitly filters.).
 - e. Define the Condition (the security predicate):
 - f. Set the rule to Deny access to the record unless the record's owner matches the logged-in user.
 - g. Condition Logic: ssot__Opportunity__dlm.ssot__OwnerId__c Is Not Equal To \$User.ssot__Id__c
Interpretation: If the opportunity owner ID does not match the logged-in user's ID, deny access to that record.

Row-Level Security Example based on Role Hierarchy

This policy leverages the Salesforce Role Hierarchy to allow managers/supervisors to view not only their own records but also the records belonging to their subordinates. This capability uses the specialized hierarchy operator in Data 360.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud with **Agentforce 1 Edition** or Agentforce for Sales Add-on license in: **Enterprise, Performance, and Unlimited** Editions.

USER PERMISSIONS NEEDED

To manage Data 360:	Data Cloud Architect
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To manage Sales Insights:	Sales Insights User permission set
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To use Sales Insights:	Tableau Next Limited Consumer
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Determine Which Data DMO to Include in the Policy

The policy must be applied to the DMO being secured, linking its owner field back to the user/role

structure.

1. Determine Which Data DMO to Include in the Policy.
2. The policy must be applied to the DMO being secured, linking its owner field back to the user/role structure.

DMO	ssot__Opportunity__dlm
Description	The fact object containing sales opportunity details.
Controlling Field (User Context)	ssot__OwnerId__c (Record Owner ID)

3. Add Policy/Author
 - a. In the Data Governance Policy Builder, create a new Data Policy.
 - b. Select the DMO: ssot__Opportunity__dlm.
 - c. Set the Action to Allow.
 - d. Define the Condition using the hierarchy operator.
 - e. Set the rule to Allow access to the record IF the logged-in user is hierarchically above the record owner in the Role Hierarchy.
 - **Condition Logic (Conceptual Implementation):**
 - **ssot__Opportunity__dlm.ssot__OwnerId__c Is Hierarchically Above In \$Role Hierarchy**
 - Interpretation: Deny access to the record if the logged-in user's role is NOT hierarchically above the record owner's role, thus limiting visibility to the user's role and all roles above them in the hierarchy.

Row-Level Security Example based on Manager Hierarchy

This policy is used in organizations where reporting structure is managed by a specific Manager field rather than the formal Role Hierarchy. This also relies on the specialized hierarchy operator.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud with **Agentforce 1 Edition** or Agentforce for Sales Add-on license in: **Enterprise, Performance, and Unlimited** Editions.

USER PERMISSIONS NEEDED

To manage Data 360:	Data Cloud Architect
To manage Sales Insights:	Sales Insights User permission set
To use Sales Insights:	Tableau Next Limited Consumer

Determine Which Data DMO to Include in the Policy

The policy must be applied to the DMO being secured, linking its owner field back to the user/role structure.

1. Determine Which Data DMO to Include in the Policy.
2. This policy is best applied to fact DMOs that link records to an Owner or User ID.

DMO	ssot__Opportunity__dlm
Description	The fact object containing sales opportunity details.
Controlling Field (User Context)	ssot__OwnerId__c (Record Owner ID)

3. Add Policy/Author
 - a. In the Data Governance Policy Builder, create a new Data Policy.
 - b. Select the DMO: ssot__Opportunity__dlm.
 - c. Set the Action to Allow.
 - d. Define the Condition using the hierarchy operator against the Manager structure: Set the rule to Allow access to the opportunity record IF the logged-in user is hierarchically above the opportunity owner (based on the Manager field of the user profile).
 - **Condition Logic (Conceptual Implementation):**
 - **ssot__Opportunity__dlm.ssot__OwnerId__c Is Hierarchically Above In \$User.ManagerId.**
 - Interpretation: Deny access to the opportunity record if the logged-in user is not the manager (or a manager above) of the opportunity owner.

Sales Insights Assets

When you set up Sales Insights, specific assets are included. To modify dashboards, you can modify these assets.

Resources

The app assets associated with your Sales Insights app are listed under Resources on the Setup page for your app after successful installation. These include analytics assets, such as dashboards, workspaces, metrics and visualizations; intelligence assets, such as Einstein Discovery and Einstein Studio models; data assets, such as semantic data models, data model objects, data lake objects, and data streams; and transformations, such as data transforms and recipes. When you select an asset, it opens in its respective tool for detailed inspection.

Enable and Configure Sales Insights

Set up and configure Sales Insights so that your sales teams can access performance dashboards and analytics.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud with **Agentforce 1 Edition** or Agentforce for Sales Add-on license in: **Enterprise, Performance, and Unlimited** Editions.

USER PERMISSIONS NEEDED

To manage Data 360:	Data Cloud Architect
To manage Sales Insights:	Sales Insights User permission set
To use Sales Insights:	Tableau Next Limited Consumer

1.  **Note** High level steps are included here, but see the following sections for more detailed steps.
From Setup, in the Quick Find box, enter *Sales Insights*, and then select **Sales Insights Setup**.
2. On the Sales Insights setup page, verify that you have set up Data 360 and connected it to Tableau Next. To complete this process, click **Setup**.
3. Ensure you have installed and deployed the Sales Insights data kit. Data kits support the creation of data stream bundles and include data model customization and relationships.
4. Install the C360 Semantic model. The C360 semantic data model (SDM) is a unified semantic model that defines the relationships between sales objects.

For more information about the C360 semantic model, see [The C360 Semantic Model](#)

5. Assign the **Sales Insights User** permission sets for the admin user. This is the user who needs to configure and deploy Sales Insights.
6. Install the Sales Insights app. To start the installation, click **Setup**.
7. Assign user permissions. For users who manage the Sales Insights dashboards, assign the **Sales Insights User** permission set. For users who need read-only access to the dashboards, assign the **Tableau Next Limited Consumer** permission set. To set up these permissions, click **Assign**.

Create a Data 360 Salesforce CRM Connection for Sales Insights

Before installing the Sales data kit and Sales Insights, connect Data 360 to Sales Cloud.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud with the Agentforce for Sales Add-on license in: **Enterprise, Performance, and Unlimited** Editions and Agentforce 1 Edition in: **Performance and Unlimited** Editions.

USER PERMISSIONS NEEDED

To manage Data 360:	Data Cloud Architect
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USER PERMISSIONS NEEDED

To manage Sales Insights: Sales Insights User permission set

To use Sales Insights: Tableau Next Limited Consumer

! **Important** Sales Insights currently supports only an internal Salesforce connection.

1. On the Sales Insights setup page, click **Connect** for the Create the Data Cloud Salesforce CRM Connection step.
2. Ensure you have an internal Salesforce connection.
 - a. If no connections are listed, click **Connect**. Then click **Connect** again for the Salesforce org.
 - b. If connections exist, make sure that you have a connection to the Salesforce org. If you don't, click **New** and then click **Connect** for the Salesforce org.

Your Salesforce org is now connected as a data source and data action target.

Install the Sales Data Kit for Sales Insights

If you have not already installed the Sales Cloud bundle and the Sales Cloud data kit, do this first.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud with the Agentforce for Sales Add-on license in: **Enterprise**, **Performance**, and **Unlimited** Editions and Agentforce 1 Edition in: **Performance** and **Unlimited** Editions.

USER PERMISSIONS NEEDED

To manage Data 360: Data Cloud Architect

To manage Sales Insights: Sales Insights User permission set

To use Sales Insights: Tableau Next Limited Consumer

! **Important** If you have not yet installed the Sales Cloud package, first follow the standard process for installing a package. For more information, see [Installing Packages](#).

1. Go to **Data Cloud > Data Streams** and click **New**.
2. Select **Salesforce CRM** and click **Next**.
3. Select **Sales Insights** and click **Next**.

To view the data kit details, go to Data Cloud Setup. Under Tools, select **Data Kits** and then click **Sales Insights**.

Install the C360 Semantic Model

The C360 semantic data model (SDM) is a unified semantic model that serves as a central foundation to define and manage metrics derived from standard Salesforce objects. It defines the relationships between Sales Insights objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud with the Agentforce for Sales Add-on license in: **Enterprise, Performance, and Unlimited** Editions and Agentforce 1 Edition in: **Performance and Unlimited** Editions.

USER PERMISSIONS NEEDED

To manage Data 360: Data Cloud Architect

To manage Sales Insights: Sales Insights User permission set

To use Sales Insights: Tableau Next Limited Consumer

For more information about the C360 semantic model, see [The C360 Semantic Model](#)

1. From the Setup menu, go to **Apps > Intelligent Apps > C360 Semantic Model**.
2. From the C360 Semantic Model setup page, click **Install** and allow some time for the components to install.
3. To verify the install, go to **Data Cloud > Semantic Layer** and look for the C360 Semantic Model.

Sales Insights Post Installation Steps

To make it easy to view your insights, add the Sales Insights App to your Navigation Bar.

Add Sales Insights to your Navigation Bar

To add Sales Insights to your navigation bar, create a lightning page and then add the dashboard to the page via the Lightning app builder. For information about building a lightning page with the Lightning App Builder, see [Create an App Home Page with the Lightning App Builder](#)

Monitor, Update, and Delete Sales Insights Apps

Use the app management tab to monitor the status of install requests, view logs to troubleshoot install issues, track app usage statistics, and update and delete apps.

From the Setup menu, installed versions of Sales Insights display as separate tabs. To view details about the app installation, select an app tab. The app details include the installation status, a list of installation events, and the tasks for each event. You can schedule app refreshes or refresh manually and see details

of all the installed app resources like dashboards and recipes.

Troubleshoot Sales Insights Enablement

When enabling Sales Insights, a few common errors can occur. You may have the wrong objects or custom objects. You may have Org configurations that are incompatible with the requirements of the app. The following sections can help you troubleshoot these common issues.

Failure due to App Configuration

The app can fail if a part of the configuration is incorrect. To verify you have met all the requirements, review the **Considerations** section before enabling your app.

If you can correct issues by changing an answer or selection in the wizard, perform one of the following actions:

- Delete the App and create an entirely new version of the App.
- Reset the App and choose different answers, as appropriate.

Select Who Can Manage Sales Insights

The Sales Insights User permission sets have all the permissions to get your sales team started using Sales Insights dashboards and analytics.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud with the Agentforce for Sales Add-on license in: **Enterprise**, **Performance**, and **Unlimited** Editions and Agentforce 1 Edition in: **Performance** and **Unlimited** Editions.

USER PERMISSIONS NEEDED

To manage Data 360:	Data Cloud Architect
To manage Sales Insights:	Sales Insights User permission set
To use Sales Insights:	Tableau Next Limited Consumer

1. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.
2. Click the **Sales Insight User** permission set.
3. Click **Manage Assignments**, and then **Add Assignments**. Then assign the permission set to users.
4. Click **Done**.

Sales Insights Dashboards

Sales Insights helps sales teams make fast decisions to improve ROI in every part of the sales cycle.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud with the Agentforce for Sales Add-on license in: **Enterprise, Performance, and Unlimited** Editions and Agentforce 1 Edition in: **Performance** and **Unlimited** Editions.

Use Sales Insights to help sales teams gain performance insights to build stronger pipelines and generate more revenue.

Sales Performance

The Sales Insights Sales Performance tab shows how your sales are trending over time. Compare by team member, month, or quarter to see whether sales are trending up or down.

Sales Leaderboard

Get all the details you need for sales success from the Sales Leaderboard. You can see how your team is performing, which opportunities are stuck, and overdue activities. At a glance, you quickly understand your top open opportunities, the most recent opportunity changes, and the opportunities that need attention.

Sales Team Performance

Quickly identify opportunities for managers to coach or representatives to work on performance. See details, such as the average win rate, open pipeline, and activities completed. It's easy to assess the top accounts, opportunities, and products, so you know where to focus your efforts.

Sales Stage Analysis Progression

Sales Stage Analysis Progression shows how deals move through stages of the sales process and if deals are moving smoothly. It also reveals bottlenecks and exposes at-risk opportunities.

Sales Stage Analysis Conversion

Dive into the details of your pipeline using stage conversion analysis. You can answer questions such as what percentage of the pipeline progressed beyond each stage in a time period. You can see what percentage of pipeline progressed to close from this stage on the same day of this last period. You can understand what is the average conversion rate for open opportunities for the selected stage.

Sales Lead Analysis

Use the Sales Lead Analysis dashboard to better understand your lead conversion rate, where your leads are coming from, how quickly the leads are converting, and which activities are generating opportunities.

Sales Performance

The Sales Insights Sales Performance tab shows how your sales are trending over time. Compare by team member, month, or quarter to see whether sales are trending up or down.

From the top of the dashboard, select from the filters to narrow the scope of the analysis:

- Time period. Filter by month, day, year.
- Team member. Filter by team member.
- Lead Source. Source of the lead.
- Opportunity Type. Account names related to opportunities in the dashboard
- State/Province. Area of the billing grouped by state or Province.
- City. Area of the billing grouped by state or Province.
- Owner. Names of opportunity owners. It can include inactive users or users who don't own any deals in the selected period

KPI	CALCULATION
Closed Won Sales	The total Amount of all Closed Won Opportunities.
Commit	The total amount of all Open Opportunities where the Forecast Category is equal to Commit.
Best Case	Open Opportunities where the Forecast Category is Best Case.
Open Pipeline	The total amount of all Open Opportunities where the Forecast Category is equal to Pipeline, Best Case, Most Likely, or Commit.
Average Sale Size	The total amount of all Closed Won Opportunities divided by the total number of Closed Won Opportunities.
Average Days to Close	The sum of CloseDate minus CreatedDate for all Closed Won Opportunities divided by the total number of Closed Won Opportunities.
Win Rate	The percentage of Closed Won Opportunities to Closed Opportunities (including both won and lost).
Closed Opportunities	The total number of closed Opportunities (won and lost).
Activities Completed	The total number of Activities (Task and Events) where the Status is equal to Complete.
Open Activities	The total number of Activities (Task and Events) where today is less than the Due Date and Status is not equal to Complete.
Overdue Activities	The total number of Activities (Task and Events) where today is greater than the Due Date and Status is not equal to Complete.

Sales Leaderboard

Get all the details you need for sales success from the Sales Leaderboard. You can see how your team is performing, which opportunities are stuck, and overdue activities. At a glance, you quickly understand your top open opportunities, the most recent opportunity changes, and the opportunities that need attention.

From the top of the dashboard, select from the filters to narrow the scope of the analysis:

- Time Period/Close Date. Sort by month, day, close date.
- Team member. Sort by sales team member.

You can also use the Snapshot Date selector. Select a date period to affect the all the open opportunity metrics, including Commit, Best Case Forecast and open pipeline.

KPI	CALCULATION
Commit	The total amount of all Open Opportunities where the Forecast Category is equal to Commit. Understand if the commit totals are in the expected range from the forecast.
Best Case Forecast	Open Opportunities where the Forecast Category is Best Case. Understand if the open opportunities totals are in the expected range.
Open Pipeline	Open Opportunities where the Forecast Category is Pipeline. Understand if the open opportunity totals are in the expected range from the forecast.

KPI Calculations for Team Closed Won Sales

The On and Off Track chart shows the following metrics:

- **Closed Won:** The total amount of all Closed Won Opportunities.
- **Commit:** The total amount of all Open Opportunities where the Forecast Category is equal to Commit.

KPI Calculations for Opportunities Needing My Attention:

The following calculations are for opportunities needing my attention:

- **No Activity:** This metric can be one of two measures. No recent activity (Open opportunities with no activity in the last fourteen days), or No upcoming activity (Open opportunities with no activities scheduled in the future from today.)
- **No Next Step:** Open Opportunities where the Next Step field is blank.
- **Stuck in Stage:** Opportunities that have been in the same stage for more than fourteen days longer than the average days in the stage.

KPI Calculations for Opportunity Changes.

The Opportunity Changes metrics are calculated in the following way:

- **Amount:** Open Opportunities where the Amount field has changes in the last seven days.
- **Close Date:** Open Opportunities where the Close Date field has changes in the last seven days.

- **Forecast Category:** Open Opportunities where the Forecast Category field has changes in the last seven days.
- **New:** Open Opportunities that have been created in the last seven days.
- **Lost:** Closed Lost Opportunities in the last seven days.

KPI Calculations for Top Open Opportunities

The Top Open Opportunities are calculated in the following ways:

- **Commit:** Open Opportunities where the Forecast Category is Commit.
- **Most Likely:** Open Opportunities where Forecast Category is Most Likely.
- **Best case:** Open Opportunities where the Forecast Category is Best Case.
- **Pipeline:** Pipeline:Open Opportunities where the Forecast Category is Pipeline.

Sales Team Performance

Quickly identify opportunities for managers to coach or representatives to work on performance. See details, such as the average win rate, open pipeline, and activities completed. It's easy to assess the top accounts, opportunities, and products, so you know where to focus your efforts.

The Team view helps you to quickly make decisions about how to increase productivity among your team members. You can also see an overview of the top accounts, top open opportunities, and top products. You can select four metrics to view at a time.

From the top of the dashboard, select from the filters to narrow the scope of the analysis:

- Time period/ Close date. Sort by team member or close date.
- Team member.Sort by team member.

KPI	CALCULATION
Open Pipeline	The total amount of all Open Opportunities where the Forecast Category is equal to Pipeline, Best Case, Most Likely, or Commit.
Closed Won Sales	The total Amount of all Closed Won Opportunities.
Commit	The total amount of all Open Opportunities where the Forecast Category is equal to Commit.
Top Accounts	Top accounts where the Forecast Category is Commit.
Top Open Opportunities	Top open Opportunities where the Forecast Category is Commit.
Opportunities with Overdue Activities	The total number of Activities (Task and Events) where today is greater than the Due Date and Status is not equal to Complete.

Sales Stage Analysis Progression

Sales Stage Analysis Progression shows how deals move through stages of the sales process and if deals are moving smoothly. It also reveals bottlenecks and exposes at-risk opportunities.

The Sales Stage Analysis dashboard compares how long current opportunities take in each stage of your pipeline with data on historic deals. The main chart shows the historic and current average number of days deals spend in that stage. By comparing current with historical data, the dashboard determines which deals are at risk and displays them in neglected, stalled, and pushed opportunities charts at the bottom of the dashboard.

From the top of the dashboard, select from the filters to get the details you want to see:

- **Name:** Account names related to opportunities in the dashboard.
- **Opportunity Stage:** Names in the standard StageName field in the Opportunities object.
- **Owner Name:** Names of opportunity owners. It can include inactive users or users who don't own any deals in the selected period.
- **State/Province:** State or Province associated to the opportunity.
- **Country:** Country associated to the opportunity.

KPI	CALCULATION
Historical Average	Number of days each opportunity stay in each stage. Average days in stage for all opportunities in the OpportunityHistory object, based on the period set in the Historical Time Frame filter.
Open Opportunities	Number of days current open opportunities stay in each stage. Average days in stage to date for all open opportunities with close dates within the period selected in the Close Date filter.
Opportunity Days in Each Stage	Shows the number of opportunities moved from the stage selected in the main chart to other stages based on period set in the Historical Time Frame filter.
Neglected Opportunities	Top open opportunities by amount that haven't been touched in 60 days that are set to close in the selected period.
Stalled Opportunities	Top open opportunities by amount that have stayed in current stage at least one day longer than historical average for all opportunities. Based on the close date in the selected period.
Pushed Opportunities	Top open opportunities by push count based on the close date in the selected period.

Sales Stage Analysis Conversion

Dive into the details of your pipeline using stage conversion analysis. You can answer questions such as what percentage of the pipeline progressed beyond each stage in a time period. You can see what

percentage of pipeline progressed to close from this stage on the same day of this last period. You can understand what is the average conversion rate for open opportunities for the selected stage.

In the dashboard, view the details of the progression of opportunities from Discovery to Closed Won or Closed Lost. See how opportunities represent different industries, and State and Billing provinces. You can also see opportunity details and sort by current opportunities or historical opportunities.

From the top of the dashboard, select from the filters to narrow the scope of the analysis:

- Account Name. Account names related to opportunities in the dashboard
- Stage. Names in the standard StageName field in the Opportunities object.
- Owner. Names of opportunity owners. It can include inactive users or users who don't own any deals in the selected period
- State/Province. Area of the billing grouped by state or Province.
- Country. Area of the opportunity sorted by country.

KPI	CALCULATION
Opportunity Stage Movement	The average conversion rate for open opportunities for the selected stage.
Opportunity by Industry	Opportunities within the given time frame sorted by industry.
Opportunity by Billing State/ Province	Opportunities within the given time frame sorted by billing state or province.
Opportunity Details	Total closed won/Total opportunities based on the selected stage during the period set in the Historical Time Frame filter. If no stage is selected, it shows the win rate.

Sales Lead Analysis

Use the Sales Lead Analysis dashboard to better understand your lead conversion rate, where your leads are coming from, how quickly the leads are converting, and which activities are generating opportunities.

From the top of the dashboard, select from the filters to narrow the scope of the analysis:

- Lead status. Status of leads created during period selected in Lead Created Date filter.
- Owner. Names of opportunity owners. It can include inactive users or users who don't own any deals in the selected period
- Created date. Date the lead was created.

KPI	CALCULATION
Open Leads	Total number of open leads created during the selected period.
Conversion rate	Lead conversion rate. Calculated as Leads converted / Leads created during the selected period.

KPI	CALCULATION
Lead Conversion Over Time	Lead conversion tracked during specified time period.
Lead Age	Lead age, dynamically broken down by lead age ranges or buckets.
Lead Source	Lead source sorted by type. For example, advertisement, external referral, or trade show.
Leads by Region	Lead source sorted by region. For example, country and state.
Lead Performance	Detailed list of leads and performance for each lead.

Revenue Intelligence

Revenue Intelligence is a data-driven sales solution that unites CRM Analytics dashboards and analytics with an easy-to-visualize pipeline progress flow chart in Pipeline Inspection, and more.

Revenue Intelligence includes Einstein Forecasting, Einstein Activity Capture, CRM Analytics, and other AI, forecasting, and customer engagement features packed with customer data to help sales teams win deals with confidence.

Revenue Intelligence includes the following apps:

- Revenue Insights
- Einstein Account Management

Available in: Lightning Experience

Available with Sales Cloud and Government Cloud Plus for an additional cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

Set Up Revenue Intelligence

Give your sales teams access to Revenue Insights sales performance dashboards and analytics. Make sure to enable other relevant features to get the most out of Revenue Intelligence.

Revenue Insights

Use Revenue Insights to help sales teams gain performance insights to build stronger pipelines, improve forecast accuracy, and generate more revenue.

Einstein Account Management

Einstein Account Management provides dashboards and Einstein Discovery models to help you see which of your accounts has potential for growth and which of your accounts need attention.

Set Up Revenue Intelligence

Give your sales teams access to Revenue Insights sales performance dashboards and analytics. Make

sure to enable other relevant features to get the most out of Revenue Intelligence.

Available in: Lightning Experience

Available with Sales Cloud and Government Cloud Plus for an additional cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

Considerations for Setting up Revenue Insights

When you set up Revenue Insights, you must have certain settings configured in your org, and you must have certain objects to populate the dashboards correctly.

Revenue Insights Assets

When you set up Revenue Insights, specific assets are included. To modify dashboards, you can modify these assets. It's a good idea to understand the datasets and recipes that are used to populate your dashboards.

Enable and Configure Revenue Insights

Set up and configure Revenue Insights so that your sales teams can access performance dashboards and analytics.

Revenue Insights Post Installation Steps

To see your data in the dashboards after you install Revenue Insights, you must schedule your app to refresh. You can add Revenue Insights to your navigation bar or edit your permission settings depending on configuration settings. Lastly, you can add additional filters to your panels.

Monitor, Update, and Delete Revenue Insights Apps

Use the app management tab to monitor the status of install requests, view logs to troubleshoot install issues, track app usage statistics, and update and delete apps.

Troubleshoot Revenue Insights Enablement

When enabling Revenue Insights, a few common errors can occur. You may not have configured data sync, you may have the wrong objects or custom objects. You may have Org configurations that are incompatible with the requirements of the app. The following sections can help you troubleshoot these common issues.

Select Who Can Use Revenue Intelligence

The Revenue Intelligence permission sets have all the permissions to get your sales team started using Revenue Insights dashboards and analytics. The Revenue Intelligence permission sets also give users access to the Pipeline Inspection Flow Chart. Assign the Revenue Intelligence permission sets to your users.

Enable More Features for Revenue Intelligence

Get the most out of Revenue Intelligence by enabling optional features that give your users more data and insights.

Considerations for Setting up Revenue Insights

When you set up Revenue Insights, you must have certain settings configured in your org, and you must have certain objects to populate the dashboards correctly.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Government Cloud Plus for an additional cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

-  **Note** The Analytics Apps and Template functionality included as a part of CRM Analytics is available in English only.

Requirements to Install Revenue Insights

- Enable data sync or direct data.
- Your org needs at least one record of each of these objects: Account, Opportunity, User, UserRole, Task, and Events.
- Role hierarchy must be set up with at least two layers. For example, you have one Sales Manager and one Sales Rep.
- Because Revenue Insights uses security predicates in its models, you must set it up from the Setup menu rather than Analytics Studio. This best practice ensures that all records in the dataset are used when training the models. Running setup from Analytics Studio can result in inaccurate or failed models

-  **Note** Even if you use Territory hierarchy, you must have set up a role hierarchy.

Requirements to Include Forecast Data

Forecast data comes from Salesforce Forecasting, a feature of Sales Cloud. When you set up forecasting, you create and activate a forecast type.

- You must have an active forecast type that matches one of these types:

OBJECT	MEASURE*	DATA TYPE	HIERARCHY
Opportunity	Currency	CloseDate (standard)	Role hierarchy
Opportunity Splits	Currency	CloseDate (standard)	Role hierarchy
Opportunity	Currency	CloseDate (standard)	Territory hierarchy

-  **Note** *Revenue Insights supports the standard Amount field or a custom field of type Currency.

- For a role hierarchy-based forecast, go to **Setup > Forecast Hierarchy** and assign forecast managers to at least two layers.
- For a territory hierarchy-based forecast, go to **Setup > Sales > Territories > Territory Models** and assign forecast managers to at least two layers.
- Go to **Forecasts > Quota** and load at least one quota value for your forecast type.
- If your forecast type is based on the Opportunity Splits object, you must have at least one Opportunity

- Split record.
- The measure you use in your forecast type must have historical trending enabled on the opportunity object. If you use an opportunity split, ensure that the associated rollup field on the opportunity object is trended.

Requirements to Include Forecast and Quota Data

Quota data comes from Salesforce Forecasting, a feature of Sales Cloud. Or, you can upload quota data from a CSV file, which allows you to use quota data stored outside of Salesforce. If you use Salesforce Forecasting, see the notes in Requirements to Add Forecast Data. To use a CSV file: Create a CSV file with your quota data and save it. Then, navigate to the **CRMA Analytics Studio** > **quota** dataset. Edit the dataset by uploading your CSV file, which replaces the default quota dataset. To ensure the recipe runs again and pulls in your quota data, refresh the app.

Requirements and Considerations to use Forecast Insights Dashboards

Forecast Insights dashboards are populated from Salesforce Forecasting, a feature of Sales Cloud. Forecasts must be enabled and configured to use Forecast Insights. Territory forecasts aren't supported. Opportunity split-based forecasts aren't supported.

Requirements to Use a Standard Fiscal Year

If you use a standard fiscal year, enable the fiscal year configuration for CRMA recipes in the Data Prep settings. For details about how to configure fiscal year settings, For more information about Einstein Discovery specified limits, see [Data Prep Configuration](#).

After Installing Revenue Insights

After installing Revenue Insights, navigate to **App Launcher** > **Data Manager** and follow steps to schedule data sync and recipes.

-  **Note** When you turn on CRM Analytics for your org, a default Analytics Integration User is created. This "user" accesses the data within Salesforce when the recipe is used to bring data in as datasets to CRM Analytics. It's important that this user has the proper level of permissions to access your data. For example, the integration user needs have object level access to all the objects from which data you want to pull, and field level access to the fields within those objects. If you have trouble in creating your app or can't view data, you sometimes must modify either object or field permissions to allow the integration user to access them.

See Also

- [Enable and Configure Revenue Insights](#)
- [Revenue Insights Post Installation Steps](#)

Revenue Insights Assets

When you set up Revenue Insights, specific assets are included. To modify dashboards, you can modify these assets. It's a good idea to understand the datasets and recipes that are used to populate your dashboards.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Government Cloud Plus for an additional cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

Resources

The app assets are listed under Resources on the Setup page for your app after successful installation. These include Einstein Studio models and CRM Analytics dashboards, components, recipes, and datasets. When you select an asset, it opens in its respective tool for detailed inspection.

The screenshot shows the Salesforce Setup interface for the 'Revenue Insights App 03-27-2024'. At the top, there are tabs for 'Setup' and the app name. Below that, there are fields for 'Template Name' (RevenueInsights), 'Template Version' (1.31), 'Status' (Success), 'Created By' (Automated Process), and 'Created On' (03/27/2024). There are 'Edit' and 'Delete' buttons. A blue button labeled 'Open in Analytics Studio' is also present. The main area is titled 'Resources' and contains sections for 'Analytics', 'Intelligence', 'Data', and 'Transformations'. Under 'Analytics', three specific resources are listed: 'Revenue Insights App 03-27-2024 test Activity Recipe', 'Revenue Insights App 03-27-2024 test Main Recipe', and 'Revenue Insights App 03-27-2024 test Opportunity Re...'. Each resource has a small icon, a name, and a note indicating it was last modified on 03/27/2024 by an Admin User.

Datasets

Revenue Insights creates the following datasets.

Dataset Name	Contents	Source	Used by	Security Predicate	Special Requirements
Activity	Data about	Salesforce	All	Owner.Roles.Roles' ==	None.

Dataset Name	Contents	Source	Used by	Security Predicate	Special Requirements
	events and tasks.	object -> Recipe	dashboards	"\$User.UserId" 'OwnerId' == "\$User.Id" 'Opp.Account.OwnerId' == "\$User.Id" 'Opp.OwnerId' == "\$User.Id"	
Account	Data about accounts. Includes accounts without opportunities.	Salesforce object -> Recipe	Not referenced in dashboards	'Owner.Roles.Roles' == "\$User.UserId" 'OwnerId' == "\$User.Id"	None.
Forecast	Data about forecasts and forecast adjustments.	Salesforce object -> Recipe	All dashboards	'User.Roles.Roles' == "\$User.UserId" 'UserId' == "\$User.Id"	Forecasting must be enabled to generate this dataset.
Forecasting Quota	Data about forecasting quotas.	Salesforce object -> Recipe	All dashboards	'Quota.Roles.Roles' == "\$User.UserId" 'Quota.Id' == "\$User.Id"	Forecasting must be enabled to generate this dataset.
Opportunity	Data about accounts, opportunities, and users.	Salesforce object -> Recipe	Not referenced in dashboards	'Owner.Roles.Roles' == "\$User.UserId" 'OwnerId' == "\$User.Id" 'Account.OwnerId' == "\$User.Id"	None.
Opportunity Splits	Data about Opportunities broken out by split percentage by owner.	Salesforce object -> Recipe	All dashboards	'Opportunity.Owner.Roles.Roles' == "\$User.UserId" 'Opportunity.OwnerId' == "\$User.Id" 'Opportunity.Account.OwnerId' == "\$User.Id"	None.
Opportunity History	Data about historical information for opportunities.	Salesforce object -> Recipe	All dashboards	'Opp.Owner.Roles.Roles' == "\$User.UserId" 'Opp.OwnerId' == "\$User.Id" 'Opp.Account.OwnerId' == "\$User.Id"	None.

Dataset Name	Contents	Source	Used by	Security Predicate	Special Requirements
Opportunity RevInsights	Opportunity data with calculated fields and joins used in the Revenue Insights app.	Salesforce object -> Recipe	All dashboards	'Owner.Roles.Roles' == "\$User.UserRoleId" 'OwnerId' == "\$User.Id" 'Account.OwnerId' == "\$User.Id"	None.
OpptyProduct	Data about products with opportunities and accounts.	Salesforce object -> Recipe	All dashboards	'Opportunity.Owner.Roles.Roles' == "\$User.UserRoleId" 'Opportunity.OwnerId' == "\$User.Id" 'Opportunity.Account.OwnerId' == "\$User.Id"	None.
Product	List of all products.	Salesforce object -> Recipe	Not referenced in dashboards	None.	None.
Territory 2	Data about territory forecasts and forecast adjustments.	Salesforce object -> Recipe	All dashboards	See note about security predicates for territory hierarchy.	None.
User	Provides details about all users in an org.	Salesforce object -> Recipe	Not referenced in dashboards	'Role.Roles' == "\$User.UserRoleId" 'Id' == "\$User.Id"	None.
User Role	Basic data about user roles.	Salesforce object -> Recipe	All dashboards	'Roles.Roles' == "\$User.UserRoleId" 'Id' == "\$User.Id"	None.

-  **Note** If you use a territory hierarchy, the following security predicate is appended to the datasets' existing predicates: 'Territory2.Users.Level1.UserId' == "\$User.Id" || 'Territory2.Users.Level2.UserId' == "\$User.Id" || 'Territory2.Users.Level3.UserId' == "\$User.Id" || 'Territory2.Users.Level4.UserId' == "\$User.Id" || 'Territory2.Users.Level5.UserId' == "\$User.Id" || 'Territory2.Users.Level6.UserId' == "\$User.Id" || 'Territory2.Users.Level7.UserId' == "\$User.Id" || 'Territory2.Users.Level8.UserId' == "\$User.Id" || 'Territory2.Users.Level9.UserId' == "\$User.Id" || 'Territory2.Users.Level10.UserId' == "\$User.Id"

Recipes Used in Revenue Insights

The following recipes are used in Revenue Insights:

Recipe Name	Description
Revenue Insights User Recipe	This recipe pulls in User Role information and creates multivalue fields for role hierarchy and forecast hierarchy.
Revenue Insights Opportunity Recipe	This recipe pulls in Opportunity, Account, Oppty Line item, Opportunity History, Product, and Pricebook Entry datasets and augments user and account information onto the Opportunity dataset.
Revenue Insights Activity Recipe	This recipe pulls in Task and Event datasets and joins them into a single dataset called Activities. It also augments User Account and Opportunity information onto Activity.
Revenue Insights Main	This recipe pulls in ForecastingItem and Forecastingquota (if Forecasting is enabled) datasets. It adds some app-specific fields and joins to the Opportunity dataset to be used by the Revenue Insights app.
Territory Recipe	This recipe pulls in Territory2 information and creates multivalue fields for territory hierarchy.

Enable and Configure Revenue Insights

Set up and configure Revenue Insights so that your sales teams can access performance dashboards and analytics.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Government Cloud Plus for an additional cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS NEEDED

To turn on Revenue Insights: Revenue Intelligence Admin permission set

To assign permission sets: Assign Permission Sets

When enabling Revenue Insights from the Setup menu, the app detects whether you have enabled Salesforce Forecasting. If not, the app is installed using role hierarchy. If you use forecasts, a list of supported forecast types displays. Select the type that meets your team's needs. Complete the required setup steps, and then give access to users.

1. From Setup, in the Quick Find box, enter *Revenue Insights*, and then select **Revenue Insights**

Setup.

2. On the Revenue Insights setup page, click **Start** for the Revenue Insights Installation Prerequisites step.
This step performs 3 actions. It enables CRM Analytics to provide access to the Revenue Insights dashboards and analytics. Next, it assigns the Revenue Intelligence Admin permission set to you. Finally, it sets up historical trending for the Opportunity object.
3. To specify what data your sales team can access, create a role hierarchy.
4. Enable and configure forecasts (recommended)
5. Set Up Historical Trending for the **Forecasting Item** object (recommended).
6. After you complete all the required steps, turn on Revenue Insights. The app installation process can take up to 24 hours. The installation status shows on the **Revenue Insights Setup** page. If the app doesn't have sufficient prerequisites, the installation is skipped with a message explaining steps to meet the prerequisites.
7. Assign user permissions. For users who manage the Revenue Insights dashboards, assign the **Revenue Intelligence Admin** permission set. For users who need read-only access to the dashboards, assign the **Revenue Intelligence User** permission set.

See Also

- [Controlling Access Using Hierarchies](#)
- [Set Up Historical Trend Reporting](#)
- [Turn On Salesforce Forecasting and Define Forecasts Settings](#)
- [Get Started Using CRM Analytics](#)
- [Select Who Can Use Revenue Intelligence](#)

Revenue Insights Post Installation Steps

To see your data in the dashboards after you install Revenue Insights, you must schedule your app to refresh. You can add Revenue Insights to your navigation bar or edit your permission settings depending on configuration settings. Lastly, you can add additional filters to your panels.

Schedule the App

You can set or change the app schedule or refresh the data as needed on the app management tab. For more information, see [Change Your Intelligent App Settings](#).

Select a time outside normal work hours so the data refresh doesn't interrupt business activities.

The app now syncs and runs the recipes in the correct order every day at the time you set.

Add Revenue Insights to your Navigation Bar

To make it easy to view your insights, add the Revenue Insights App to your Navigation Bar.

1. From the Sales App, click the pencil icon.
2. From the **Edit Sales App Navigation Items** select **Add More Items**.

3. From the **Available Items** column, click **All**.
4. In the Search field, enter **Revenue Insights**.
5. Select Revenue Insights, and click **Add 1 Nav Item** and click **Save**.

Verify Your Permission Settings

When you turn on CRM Analytics for your org, a default Analytics Integration User is created. This "user" accesses the data within Salesforce when the recipe is used to bring data in as datasets to CRM Analytics. It's important that this user has the proper level of permissions to read the data you're trying to pull from the org to CRM Analytics. For example, the integration user must have object-level access to all the objects from which data you want to pull. And you need field level access to the fields within those objects. If you have trouble in creating your app or can't view data, modify either object or field permissions. You must allow the integration user profile to have read access them.

Add Additional Filters to Your Dashboards

You can add additional filters to the Sales Performance dashboard. This dashboard has a **Compare by** selection as well as five global filters by default. You can add additional filters to the Overview dashboard.

To add an additional global filter in the filter row of the Sales Performance dashboard:

1. From the Sales Performance dashboard, select **Edit** in the upper right-hand corner.
2. Click in the panel that displays the five global filters.
3. On the panel on the right, select **Manage Global Filters**.
4. Click **Add a Global Filter**.
5. From the menu, select the Opportunity RevInsights dataset.
6. Select the field you want to add. For example, you can select Industry.
7. Choose the field you want like to add and click **Create**.
8. By default, the filter panel shows five filters in one row. Edit the number of filters displayed to view your new filter in the row of default filters.
9. Click in the filters panel again to open the right side panel. You can see that the **Filters per Row** field is set to 5.
10. On the side panel change the **Filters Per Row** to 6.
11. To view the changes, click **Preview**.
12. Click **Save** if you're satisfied with the changes.

To add another option to the **Compare by** filter of the Sales Performance dashboard:

1. From the Sales Performance dashboard, select **Edit** in the upper right-hand corner.
2. Click in the **Compare by** field.
3. On the panel on the right, select **Advanced Editor**. The widget JSON code displays.
4. To show the query code, select **Query**.
5. Copy and paste the last code snippet that looks like the following:

{

```
        "Display": "Opportunity Owner",
        "Field": "'User.UniqueUserName'",
        "projection": ", closed['User.UniqueUserName'] as 'User.UniqueUs
erName'",
        "saqlField": ", 'User.UniqueUserName'"
    }
```

6. To use the compare by field you want to add, edit the code snippet. For example

```
{  
    "Display": "Industry",  
    "Field": "'Account.Industry'",  
    "projection": ", closed['Account.Industry'] as 'Account.Industr
y'",  
    "saqlField": ", 'Account.Industry'"  
}
```



Note Only fields from the Opportunity RevInsights dataset can be added as options.

7. Save your changes.

To add a filter to the Overview dashboard:

- Note** The Overview page combines multiple datasets and live queries. The challenge of adding a filter here means that the field-selected needs to apply to all of the data sources. For example, you want to add a Region filter, such as Billing Country, to the dashboard. This field is in the Opportunity RevInsights dataset so most of the widgets on Overview will facet automatically by default. However, the SOQL queries look at the ForecastingItem object. This object doesn't have a way to filter by country because the forecast is done at the individual person level.

1. Drag a list filter to the desired location on the dashboard.



Note Don't select global filters.

2. Select the dataset that includes your field. Salesforce recommends you use the Opportunity RevInsights dataset because most queries on the dashboard use this dataset.
3. Select a field and configure the design.
4. Open up the dataset connections and add a connection for your field, if applicable. Most queries on Overview, Team Performance, and Sales Performance tabs can facet based on these steps. The top section on the Overview dashboard, including the Team Quota Attainment, KPIs, as well as the forecasting chart may not facet. The faceting doesn't happen because there are live queries based on Forecasting Item. The dashboard uses the following datasets:
 - Opportunity RevInsights
 - UserRole
 - OppyProduct
 - Activity
 - OpportunityHistory

- Forecasting Quota
5. Modify queries beginning with **soql_**. If there's a field that can be found in the ForecastingItem object and is pulled in for the Revenue Insights app, in addition to adding dataset connections, the soql queries require an additional binding. The following shows the default query for **soql_user_closed_won**:

```
"query": "SELECT SUM(ForecastAmount) ForecastAmount FROM ForecastingItem {{t
oArray( toArray(\"Owner.UserId\"), \"IN\", row(intermediate_step.result,
[0], [\"UserId\"])), toArray(\"ForecastingTypeId\", \"IN\", row(forecast
ing_type.selection, [0], [\"ForecastingTypeId\"])), toArray(\"OwnerId\", \"I
N\", row(intermediate_step.result, [0], [\"Id\"])), toArray(\"Period.StartDa
te\", \"BETWEEN\", row(CloseDate_1.selection, [0], [\"min\", \"max\"])).asS
QLWhere(\"sobject\", true)}} AND ForecastingItemCategory = 'ClosedOnly'",
```

6. If an additional field is added, use an additional binding:

```
"query": "SELECT SUM(ForecastAmount) ForecastAmount FROM ForecastingItem {{t
oArray( toArray(\"Owner.UserId\"), \"IN\", row(intermediate_step.result,
[0], [\"UserId\"])), toArray(\"ForecastingTypeId\", \"IN\", row(forecast
ing_type.selection, [0], [\"ForecastingTypeId\"])), toArray(\"OwnerId\", \"I
N\", row(intermediate_step.result, [0], [\"Id\"])), toArray(\"Period.StartDa
te\", \"BETWEEN\", row(CloseDate_1.selection, [0], [\"min\", \"max\"])).asS
QLWhere(\"sobject\", true), toArray(\"NewField\", \"IN\", row(listfilter_nam
e.selection, [0], [\"FieldName_in_listfilter\"]))}} AND ForecastingItemCateg
ory = 'ClosedOnly'",
```

Create Other Versions of Revenue Insights

After the initial instance of Revenue Insights is auto-created, you can create other versions via Analytics Studio so that your team members can use the version that meets their needs. You can create as many versions as you need. When your team members go to view the dashboard from the Revenue Insights tab, they can select the appropriate instance of Revenue Insights depending on their forecast type.

 **Note** While you can create as many Revenue Insights versions as you like, recipe and data sync limits apply.

To create other versions of Revenue Insights:

1. From Setup, in the Quick Find box, enter **Revenue Insights**, and then select **Revenue Insights Setup**.
2. From Revenue Insights Setup, you can see details about your auto-installed app and a link to Analytics Studio. To create more versions of Revenue Insights, click the link to **Analytics Studio**.
3. In Analytics Studio, click **Create** in the upper right corner.
4. To open the template picker, select **App**, then **Create App from Template**.
5. Locate the **Revenue Insights** tile, select it, and click **Continue**.

6. Review the app preview page, and click **Continue** to open the configuration wizard.
7. If you're offered a choice of basing your app on an existing app or creating a one, select **Create a brand new app** and click **Continue**. The app runs a compatibility check against your org to ensure it includes the data to successfully create the app's datasets, recipes, and dashboards. If it doesn't, follow the instructions in the error message to add the required data and start the app creation process again.
8. When the org compatibility check succeeds, click **Looks good, next**.
9. Name your app, and click **Create**.

Monitor, Update, and Delete Revenue Insights Apps

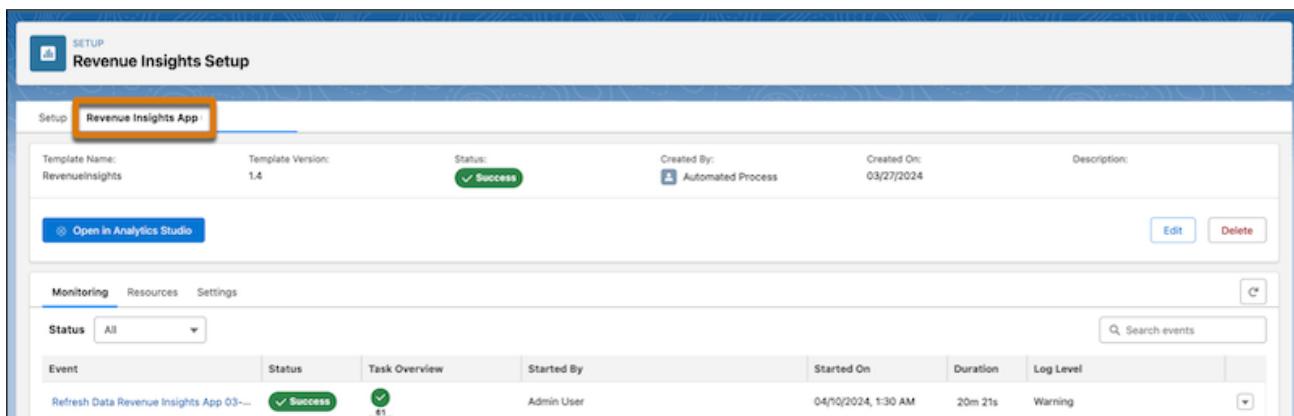
Use the app management tab to monitor the status of install requests, view logs to troubleshoot install issues, track app usage statistics, and update and delete apps.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Government Cloud Plus for an additional cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

From the Setup menu, installed versions of Revenue Insights display as separate tabs. To view details about the app installation, select an app tab. The app details include the installation status, a list of installation events, and the tasks for each event. You can schedule app refreshes or refresh manually and see details of all the installed app resources like dashboards and recipes. For more information about app management, see [Manage Your Intelligent Apps](#).



Troubleshoot Revenue Insights Enablement

When enabling Revenue Insights, a few common errors can occur. You may not have configured data sync, you may have the wrong objects or custom objects. You may have Org configurations that are incompatible with the requirements of the app. The following sections can help you troubleshoot these common issues.

Understand Enablement Steps

Revenue Insights dashboards are created by CRM Analytics with the following flow:

1. The Enablement Wizard runs.
2. Placeholder datasets and dashboards are created.
3. Recipes are generated.
4. Extended metadata is applied to the populated datasets.

If the recipe fails, the app creation process will not complete successfully. The impact of this may manifest as dashboard errors, format issues in displayed data, or other unexpected behavior

Failure due to field availability or Org configuration

If the recipe failure can be corrected by changing the Org configuration (for example, field availability, user roles , or running replication recipes), complete the following steps:

1. Correct the org configuration.
2. Manually start the recipe through the Data Manager.
3. Once the recipe completes, click **Reset** in the App.
4. Do not change any of the options in the wizard, and complete the reset process.

Upon completion of the reset, the app creation succeeds.

Failure due to Data Sync

When Data Sync is enabled for CRM Analytics, the creation of new Apps may fail during recipe execution due to the fact that objects or fields referenced in the apps have not yet been created successfully in a connected dataset via Data Sync. Failures can also occur when there is a new version of the CRM Analytics App that includes additional default fields.

If your app fails due to data sync issues, complete the following steps:

1. After the app failure, go to **Data Manager > Connect**, and run Data Sync for any SFDC Local connections.
2. Open the App folder for the failed app and click the **Reset** button.
3. Do not change any of the options in the wizard. Complete the reset process.

Failure due to App Configuration

The recipe can fail if a part of the configuration is incorrect. For example, the recipe could include a field reference whereas your Org contains custom references. Or, the recipe may require you have Forecasting enabled, and you do not have it enabled. To verify that this might be an issue review the **Considerations** section before enabling your app.

If you can correct the issue by changing an answer or selection in the wizard, perform one of the

following actions:

- Delete the App and create an entirely new version of the App.
- Reset the App and choose different answers, as appropriate.

Select Who Can Use Revenue Intelligence

The Revenue Intelligence permission sets have all the permissions to get your sales team started using Revenue Insights dashboards and analytics. The Revenue Intelligence permission sets also give users access to the Pipeline Inspection Flow Chart. Assign the Revenue Intelligence permission sets to your users.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Government Cloud Plus for an additional cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS NEEDED

To assign permission sets: [Assign Permission Sets](#)

To assign Revenue Intelligence User permission set [Revenue Intelligence Admin permission set](#)

 **Note** Assign the Revenue Intelligence Admin permission set to users who need to manage Revenue Insights dashboards. Assign the Revenue Intelligence User permission set to users who only need to view Revenue Insights dashboards.

1. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.
2. Click the **Revenue Intelligence Admin** or **Revenue Intelligence User** permission set.
3. Click **Manage Assignments**, and then **Add Assignments**. Then assign the permission set to users.
4. Click **Done**.

See Also

[Enable and Configure Revenue Insights](#)
[Revenue Insights](#)

Enable More Features for Revenue Intelligence

Get the most out of Revenue Intelligence by enabling optional features that give your users more data and insights.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Government Cloud Plus for an additional cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

Feature	What It Does	How To Set Up
Pipeline Inspection Flow Chart	Shows users pipeline changes in a dynamic chart.	Requires admins to enable it in Pipeline Inspection Setup
Einstein Forecasting	Adds AI predictions to forecasts.	Requires admins to enable it in Assisted Setup .
Forecast changes shown in last 7 days in Forecasting	Lets users see recent changes to forecasts.	Requires admins to enable historical trending for forecasts. After the trending data is ready, users can select Show Changes in Last 7 Days in their forecasts page display options.
Custom calculated columns in Forecasting	Adds custom columns based on formulas to the forecasts page.	Requires admins to create the columns in Forecasts Settings. See Create Custom Calculated Columns .

See Also

[Pipeline Inspection Flow Chart](#)

[Pipeline Inspection](#)

[Build a Smarter Pipeline with Einstein Forecasting](#)

[Salesforce Forecasting](#)

Revenue Insights

Use Revenue Insights to help sales teams gain performance insights to build stronger pipelines, improve forecast accuracy, and generate more revenue.

Available in: Lightning Experience

Available with Sales Cloud and Government Cloud Plus for an additional cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

Understand the trends and the details using four tabs: Overview, Team Performance, Sales Performance, and Historic Trends.

Revenue Insights includes the following dashboards:

- Revenue Insights
- Revenue Insights by Territory
- Sales Perf Card (Sales Performance)

- Sales Rep Command Center
- Sales Stage Analysis
- Forecast Insights
- Commit Calculator
- Product Insights

Revenue Insights Dashboard

Get a comprehensive view of your revenue performance from the Overview tab. Your most critical information is instantly available. The chart helps point to the areas to focus on, such as whether opportunities are moving to the next stage. Quickly determine whether sales are trending up or down with details such as average win rates, days to close, and average sales size.

Sales Rep Command Center Dashboard

Get all the details you need for sales success from the Sales Rep Command Center. You can see whether you're aligned to meet your quotas, which opportunities are stuck, and overdue activities. You can also see step progression, and amount changes.

Sales Stage Analysis Dashboard

The Sales Stage Analysis dashboard shows how deals move through stages of the sales process and how conversion takes place in each pipeline stage. It also reveals bottlenecks and exposes at-risk opportunities.

Forecast Insights Dashboard

Track changes in your sales forecast in the Forecast Insights dashboard. Monitor velocity, pipe coverage, and other KPIs with period-over-period analysis.

Commit Calculator Dashboard

Use the Commit Calculator to test different scenarios and understand how changes to your pipeline can affect your bottom line.

Product Insights Dashboard

Optimize your sales strategy using the Product Insights dashboard. Track customer purchases, opportunities to position products in new segments, and market trends. Quickly see how well your sales teams deliver new offerings to the market.

Revenue Insights Dashboard

Get a comprehensive view of your revenue performance from the Overview tab. Your most critical information is instantly available. The chart helps point to the areas to focus on, such as whether opportunities are moving to the next stage. Quickly determine whether sales are trending up or down with details such as average win rates, days to close, and average sales size.

The Revenue Insights Dashboard

Revenue Insights includes the following tabs:

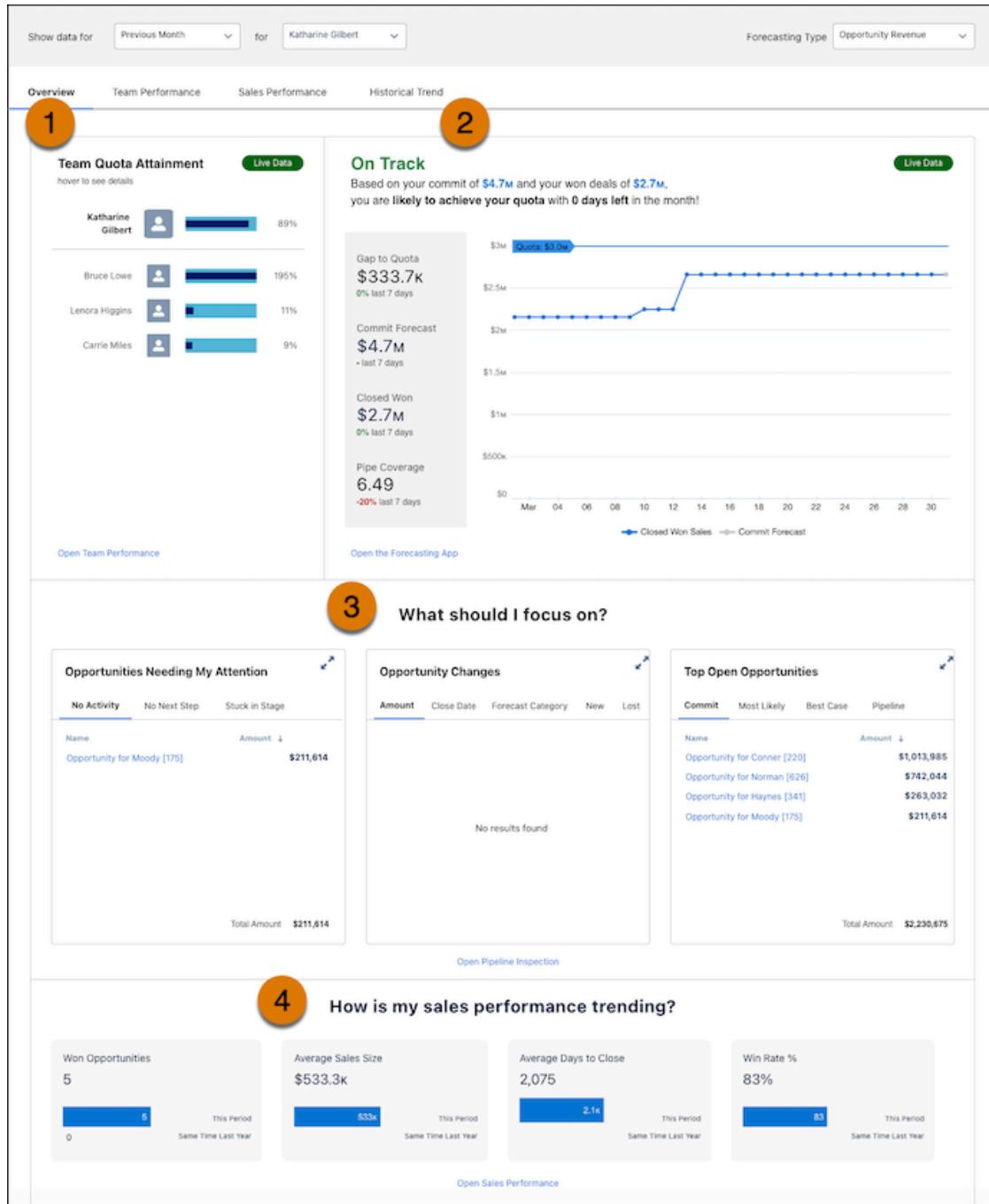
- **Overview:** Get a comprehensive view of your revenue performance from the Overview tab.
- **Team:** Quickly identify opportunities for managers to coach or representatives to work on performance. See details, such as the sales leader, average win rate, open pipeline, and activities

completed. It's easy to assess the top accounts, opportunities, and products, so you know where to focus your efforts.

- **Sales Performance:** The Revenue Insights Sales Performance tab shows how your sales are trending over time. Compare by product area, month, or quarter to see whether sales are trending up or down.
- **Forecast Historical Trend:** If you've enabled historical trending on the forecast item object, you can view the new forecast historical trend chart in Revenue Insights.

The Revenue Insights Overview Tab

The Overview tab includes an overview chart that is designed to give you a high level view of your pipeline, teams, and sales.

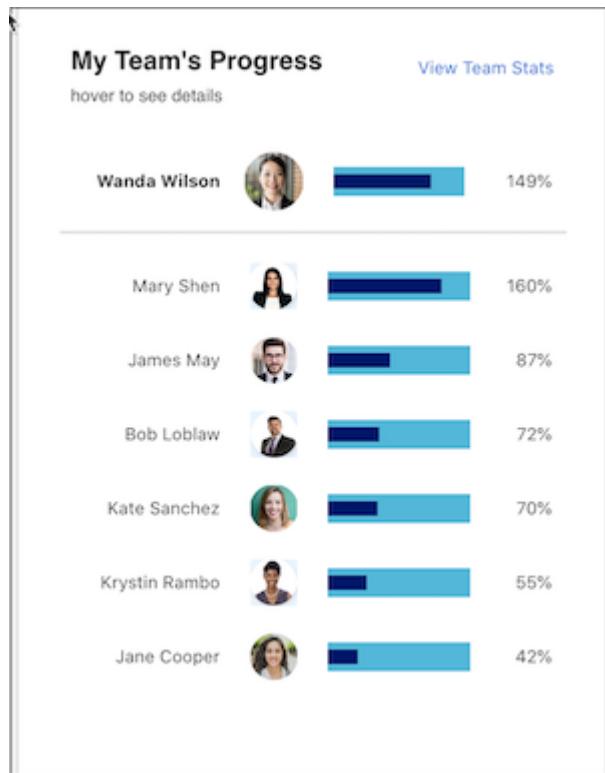


In Team Quota Attainment, you can see, at-a-glance how close your team members are to reaching their quotas (1). In the On Track/Off Track chart, you can easily understand your gap to meeting your quota goals (2). In the What should I focus on? section, you can easily determine the next steps to take to meet your quotas. You can see what opportunities need attention, what changes have occurred in your opportunities, and details about your top open opportunities, including what stage they are in (3). Lastly, follow your bottom line in the How is my sales performance trending? section (4).

KPI Calculations for My Team's Quota Attainment.

When you view the My Team's Quota Attainment chart, you can see quota status for your team

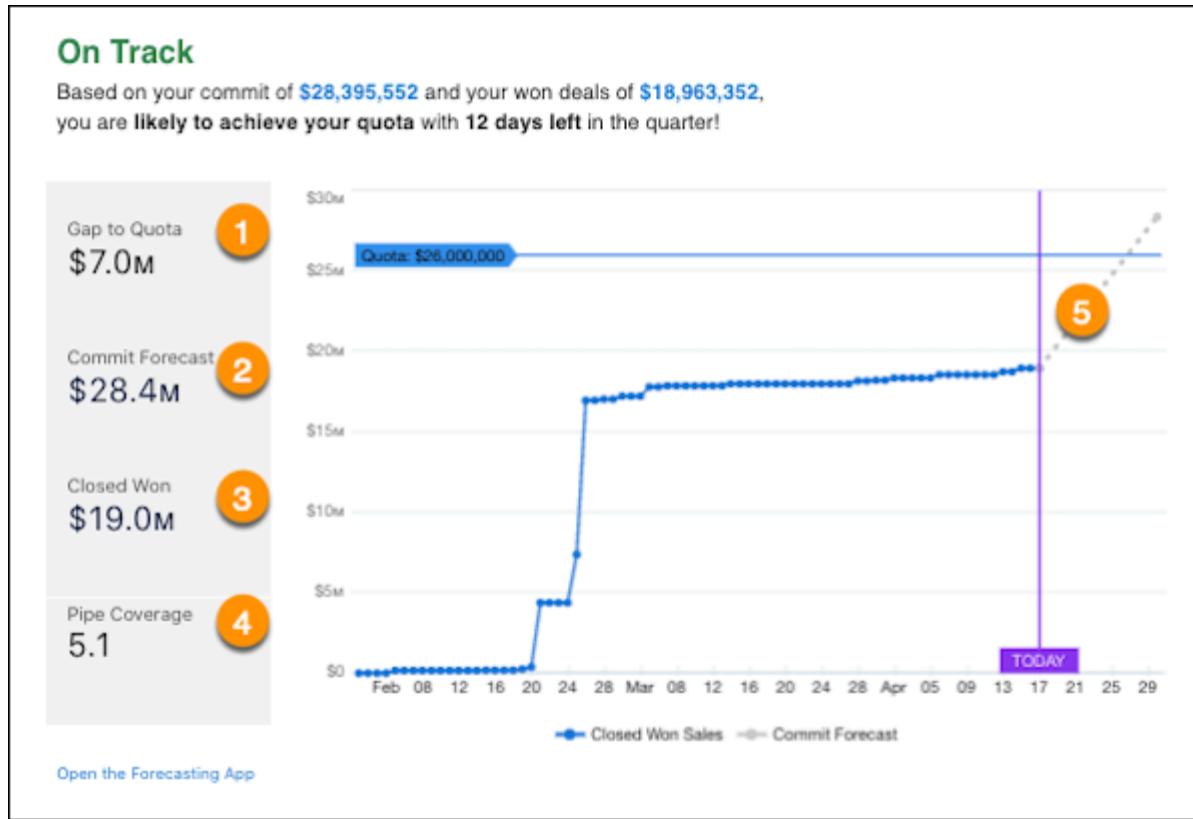
members.



The quota attainment metric represents the percentage of closed won to quota.

KPI Calculations for On Track/Off Track Chart

The On Track/Off Track chart shows the following metrics:

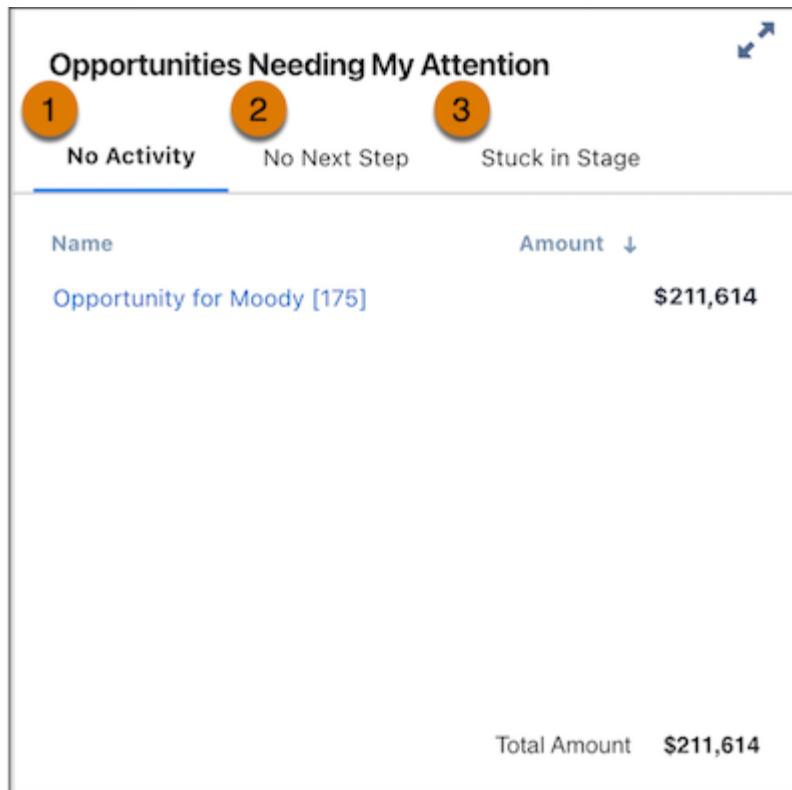


- Gap to Quota: Quota minus Closed Won (1).
- Commit Forecast: The total amount of all Open Opportunities where the Forecast Category is equal to Commit (2).
- Closed Won: The total amount of all Closed Won Opportunities (3).
- Pipe Coverage: Open Pipeline divided by Gap to Quota (4).
- Commit Forecast axis: Shows the line from Today to Commit Forecast (5).

Note Percent changed reflects changes in the last seven days for each metric.

KPI Calculations for Opportunities Needing My Attention

The Opportunities Needing My Attention chart shows the following metrics:



- No Activity: This metric can be one of two measures. No recent activity (Open opportunities with no activity in the last fourteen days), or No upcoming activity (Open opportunities with no activities scheduled in the future from today) (1).
- No Next Step: Open Opportunities where the Next Step field is blank (2).
- Stuck in Stage: Opportunities that have been in the same stage for more than fourteen days longer than the average days in the stage (3).

All of the charts in the What should I focus on? sections show the top fifty Opportunities by amount for the top area columns. Totals are calculated by using all Opportunities that meet the criteria.

Note Click the pop-out button to see more details of the opportunities needing your attention.

KPI Calculations for Opportunity Changes.

The Opportunity Changes chart shows the following metrics:

- Amount: Open Opportunities where the Amount field has changes in the last seven days.
 - Row level: Shows Opportunity Amount and the change in Amount.
 - Aggregate level: Shows the total net Opportunity Amount changed over the last seven days.
- Close Date: Open Opportunities where the Close Date field has changes in the last seven days.
 - Row level: The old Close Date and new Close Date display.
 - Aggregate level: Shows the total number of opportunities whose date moved in or moved out in the last seven days.
- Forecast Category: Open Opportunities where the Forecast Category field has changes in the last

seven days.

- Row level: The old Forecast Category and new Forecast Category display.
- Aggregate level: The total number of opportunities with forecast category changes.
- New: Open Opportunities that have been created in the last seven days.
- Lost: Closed Lost Opportunities in the last seven days.

All of the charts in the What should I focus on? section shows the top fifty Opportunities by amount for the top area columns. Totals calculated by using all Opportunities that meet the criteria.

 **Note** Click the pop-out button to see more details of the opportunity changes.

KPI Calculations for Top Open Opportunities

The Top Open Opportunities chart shows the following metrics:

Top Open Opportunities			
1	2	3	4
Commit	Most Likely	Best Case	Pipeline
Name			Amount ↓
Opportunity for Conner [220]			\$1,013,985
Opportunity for Norman [626]			\$742,044
Opportunity for Haynes [341]			\$263,032
Opportunity for Moody [175]			\$211,614
			Total Amount \$2,230,675

- Commit: Open Opportunities where the Forecast Category is Commit (1).
- Most Likely: Open Opportunities where Forecast Category is Most Likely (2).
- Best case: Open Opportunities where the Forecast Category is Best Case (3).
- Pipeline: Pipeline:Open Opportunities where the Forecast Category is Pipeline (4).

All of the charts in the What should I focus on? section show the top fifty Opportunities by amount for the top area columns. Totals calculated by using all Opportunities that meet the criteria

 **Note** Click the pop-out button to see more details of your top open opportunities.

KPI Calculations for How Is My Sales Performance Trending?

The How is my sales performance trending? chart shows the following metrics:



- Won Opportunities: Total number of Closed Won Opportunities.
- Average Sales Size: The sum of all Closed Won Opportunities divided by the total number of Closed Won Opportunities.
- Average Days to Close: The sum of CloseDate minus CreatedDate for all Closed Won Opportunities divided by the total number of Closed Won Opportunities.
- Win Rate %: The percentage of Closed Won Opportunities to Closed Opportunities (including both won and lost).

Revenue Insights Team Tab

Quickly identify opportunities for managers to coach or representatives to work on performance. See details, such as the sales leader, average win rate, open pipeline, and activities completed. It's easy to assess the top accounts, opportunities, and products, so you know where to focus your efforts.

Revenue Insights Sales Performance Tab

The Revenue Insights Sales Performance tab shows how your sales are trending over time. Compare by product area, month, or quarter to see whether sales are trending up or down.

Revenue Insights Forecast Historical Trend Tab

If you've enabled historical trending on the forecast item object, you can view the new forecast historical trend chart in Revenue Insights.

See Also

[Revenue Insights Sales Performance Tab](#)

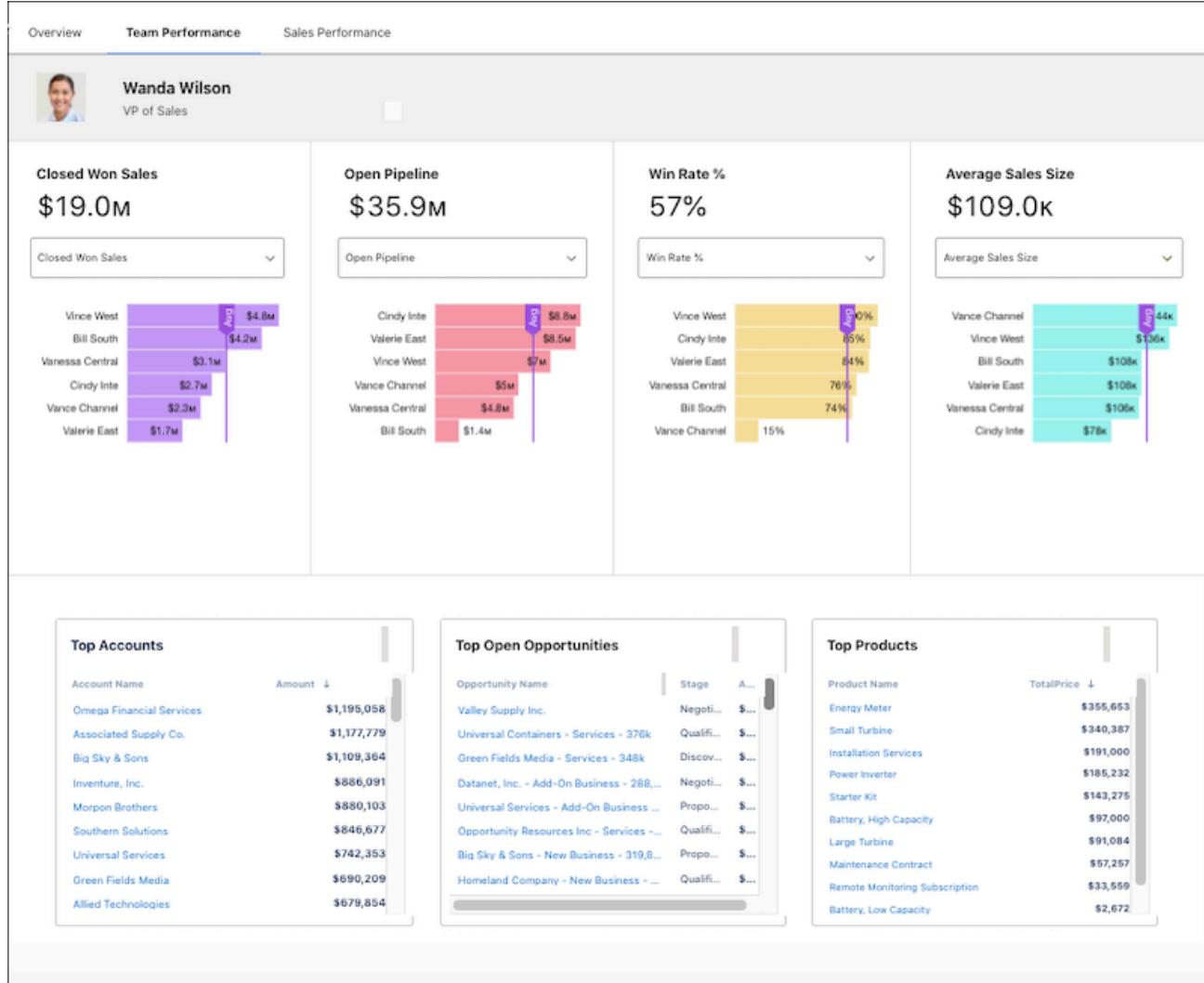
[Revenue Insights Team Tab](#)

Revenue Insights Team Tab

Quickly identify opportunities for managers to coach or representatives to work on performance. See details, such as the sales leader, average win rate, open pipeline, and activities completed. It's easy to assess the top accounts, opportunities, and products, so you know where to focus your efforts.

Use the Charts

The Team view helps you to quickly make decisions about how to increase productivity among your team members. You can also see an overview of the top accounts, top open opportunities, and top products. You can select four metrics to view at a time.



KPI Calculations

- Closed Won Sales:** The total Amount of all Closed Won Opportunities.
- Quota:** The quota for a given sales representative.
- Quota Attainment %:** The percentage of Closed Won Sales to Quota.
- Gap to Quota:** Quota minus Closed Won.
- Commit:** The total amount of all Open Opportunities where the Forecast Category is equal to Commit.
- Open Pipeline:** The total amount of all Open Opportunities where the Forecast Category is equal to Pipeline, Best Case, Most Likely, or Commit.
- Pipeline Coverage:** Open Pipeline divided by Gap to Quota.
- Average Sales Size:** The sum of all Closed Won Opportunities divided by the total number of Closed

Won Opportunities.

- **Average Days to Close:** The sum of CloseDate minus CreatedDate for all Closed Won Opportunities divided by the total number of Closed Won Opportunities.
- **Win Rate %:** The percentage of Closed Won Opportunities to Closed Opportunities (won and lost).
- **Closed Opportunities:** The total number of Opportunities (won and lost).
- **Activities Completed:** The total number of Activities (Tasks and Events) where the Status is equal to Complete.
- **Open Activities:** The total number of Activities (Task and Events) where Status is not equal to Complete.
- **Overdue Activities:** The total number of Activities (Task and Events) where today is greater than the Due Date and Status is not equal to Complete.

See Also

[Revenue Insights Dashboard](#)

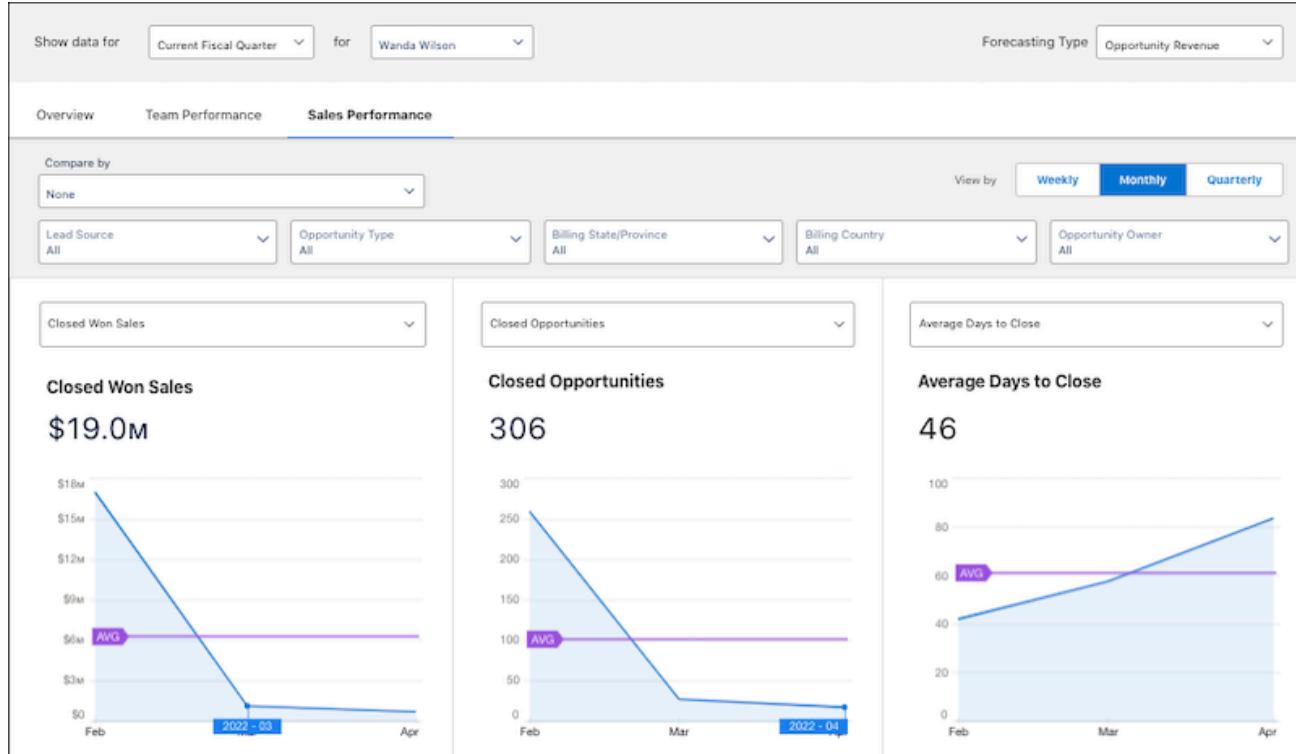
[Revenue Insights Sales Performance Tab](#)

Revenue Insights Sales Performance Tab

The Revenue Insights Sales Performance tab shows how your sales are trending over time. Compare by product area, month, or quarter to see whether sales are trending up or down.

Use the Sales Performance Chart

Use the Sales Performance chart for a comprehensive view of your sales trends over time. You can select three metrics at a time.



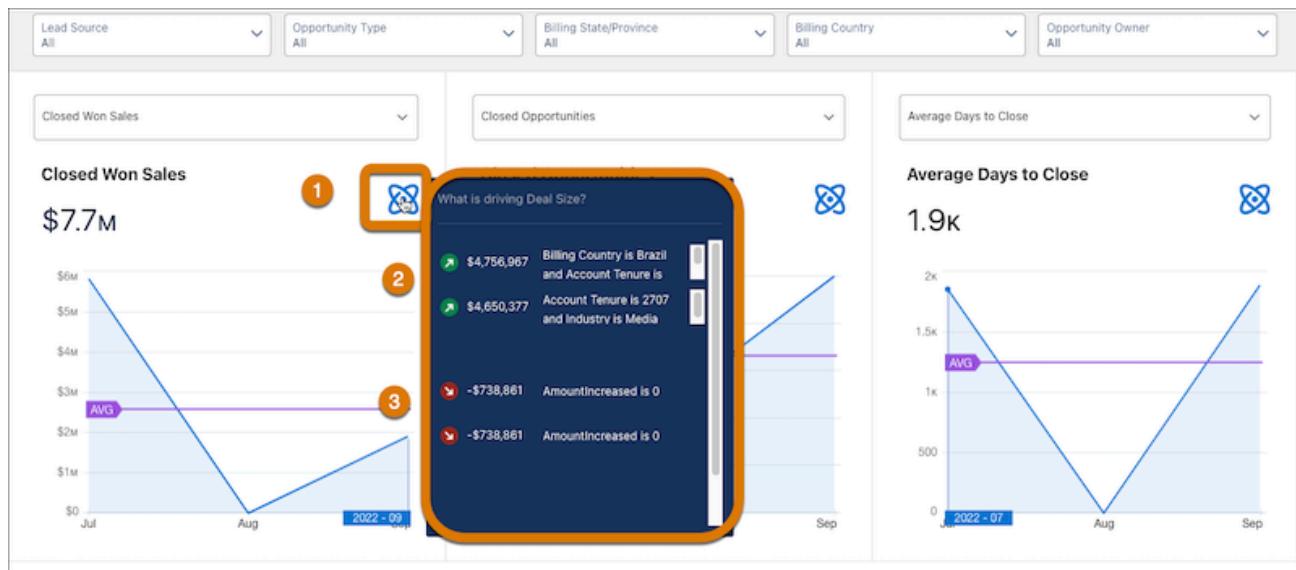
KPI Calculations

- **Closed Won Sales:** The total amount of all Closed Won Opportunities.
- **Closed Opportunities:** The total number of Opportunities (won and lost).
- **Won Opportunities:** The total number of Closed Won Opportunities.
- **Average Sales Size:** The total amount of all Closed Won Opportunities divided by the total number of Closed Won Opportunities.
- **Average Days to Close:** The sum of CloseDate minus CreatedDate for all Closed Won Opportunities divided by the total number of Closed Won Opportunities.
- **Win Rate %:** The percentage of Closed Won Opportunities to Closed Opportunities (including both won and lost).

ED Models

Get predictive insights directly from your Revenue Insights dashboard using embedded Einstein Discovery models. Einstein Discovery uses your data to create customized predictive models in a simple visual way. The models help you to understand what activities promote good outcomes and which activities negatively affect your outcomes for the following three areas: Deal Size, Win Rate, and Time to Close.

Click the Einstein Discovery icon (1) to open the insights. Einstein Discovery shows positive factors with green arrows pointing upwards (2). Einstein Discovery shows detrimental factors with red arrows pointing downwards (3).



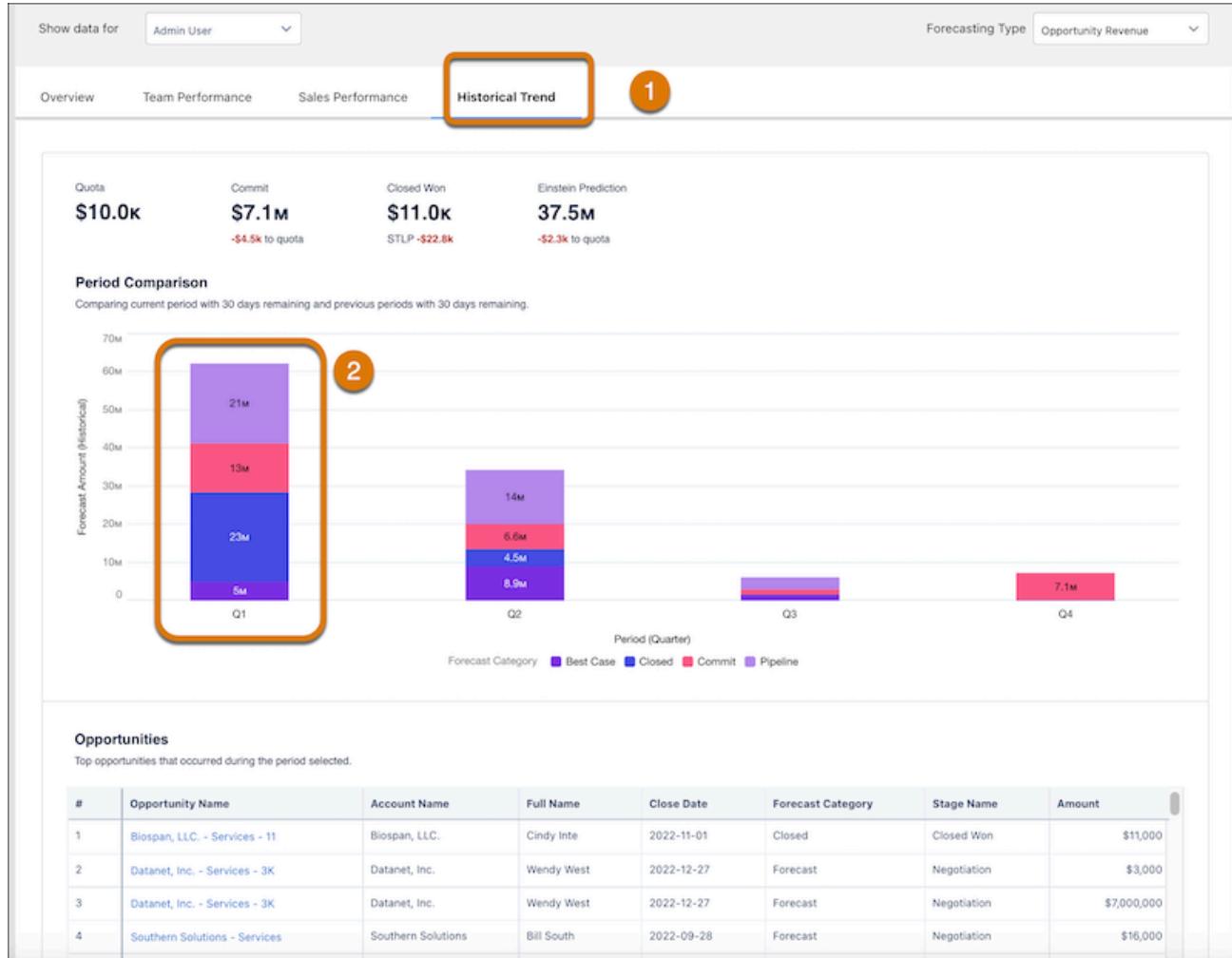
See Also

[Revenue Insights Dashboard](#)
[Revenue Insights Team Tab](#)

Revenue Insights Forecast Historical Trend Tab

If you've enabled historical trending on the forecast item object, you can view the new forecast historical trend chart in Revenue Insights.

With forecast historical trend, you can keep up to a year of historical data on your forecast item. The default is just over a year. Use Forecast Historical Trend to see how your current forecast compares to the same time period in previous forecasts. For example, if you have 20 days left in Q4, the chart compares your forecast to previous quarters when you had 20 days left.



Click the Historical Trend tab to open the page (1) Click the columns to populate the opportunities table (2). If there's no historical trending for opportunities, the table doesn't populate.

Sales Rep Command Center Dashboard

Get all the details you need for sales success from the Sales Rep Command Center. You can see whether you're aligned to meet your quotas, which opportunities are stuck, and overdue activities. You can also see step progression, and amount changes.

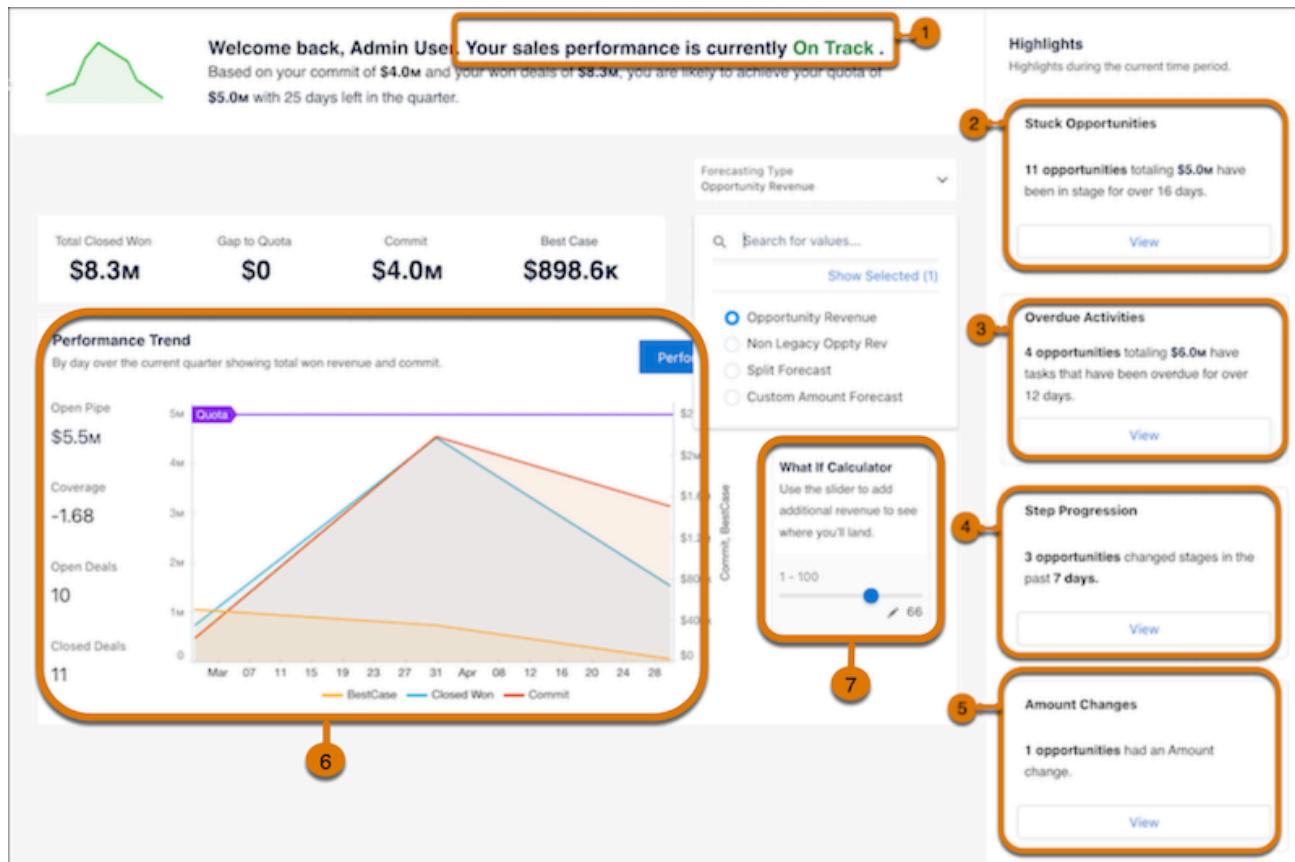
REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Government Cloud Plus for an additional cost in: **Enterprise**, **Performance**, and **Unlimited** editions

In the Sales Rep Command Center, Sales reps immediately see if they're on track (1). You can view stuck opportunities (2), overdue activities (3), step progression (4), and amount changes (5). Choose between the Performance Trend dashboard and the Pipeline Overview dashboard (6). Use the "What If" Calculator to see how adding revenue affects the sales outcome. By default the calculator values are set 0 through 100,000 in increments of 1000, but you can adjust the values in the widget to suit your needs (7).

- Note** By default, the dashboard shows stuck opportunities, overdue activities, step progression, and amount changes in the highlights. However, you can modify the widgets to show different metrics.



KPI Calculations for on and off Track Metrics

The On and Off Track chart shows the following metrics:

- **Closed Won**: The total amount of all Closed Won Opportunities.
- **Gap to Quota**: Quota minus Closed Won.

- **Commit:** The total amount of all Open Opportunities where the Forecast Category is equal to Commit.
- **Best Case:** Open Opportunities where the Forecast Category is Best Case.

KPI Calculations for Sales Stage Metrics:

The following calculations are for sales stage metrics:

- **No Activity:** This metric can be one of two measures. No recent activity (Open opportunities with no activity in the last fourteen days), or No upcoming activity (Open opportunities with no activities scheduled in the future from today.)
- **No Next Step:** Open Opportunities where the Next Step field is blank.
- **Stuck in Stage:** Opportunities that have been in the same stage for more than fourteen days longer than the average days in the stage.

KPI Calculations for Opportunity Changes.

The Opportunity Changes metrics are calculated in the following way:

- **Amount:** Open Opportunities where the Amount field has changes in the last seven days.
- **Close Date:** Open Opportunities where the Close Date field has changes in the last seven days.
- **Forecast Category:** Open Opportunities where the Forecast Category field has changes in the last seven days.
- **New:** Open Opportunities that have been created in the last seven days.
- **Lost:** Closed Lost Opportunities in the last seven days.

KPI Calculations for Top Open Opportunities

The Top Open Opportunities are calculated in the following ways:

- **Commit:** Open Opportunities where the Forecast Category is Commit.
- **Most Likely:** Open Opportunities where Forecast Category is Most Likely.
- **Best case:** Open Opportunities where the Forecast Category is Best Case.
- **Pipeline:** Pipeline:Open Opportunities where the Forecast Category is Pipeline.

Sales Stage Analysis Dashboard

The Sales Stage Analysis dashboard shows how deals move through stages of the sales process and how conversion takes place in each pipeline stage. It also reveals bottlenecks and exposes at-risk opportunities.

The Sales Stage Analysis dashboard has two tabs that focus on different aspects of stage analysis. Sales Stage Progression focuses on how deals are progressing through the pipeline, while Sales Stage Conversion helps you understand how well you're converting opportunities to deals.

[Sales Stage Analysis Progression](#)

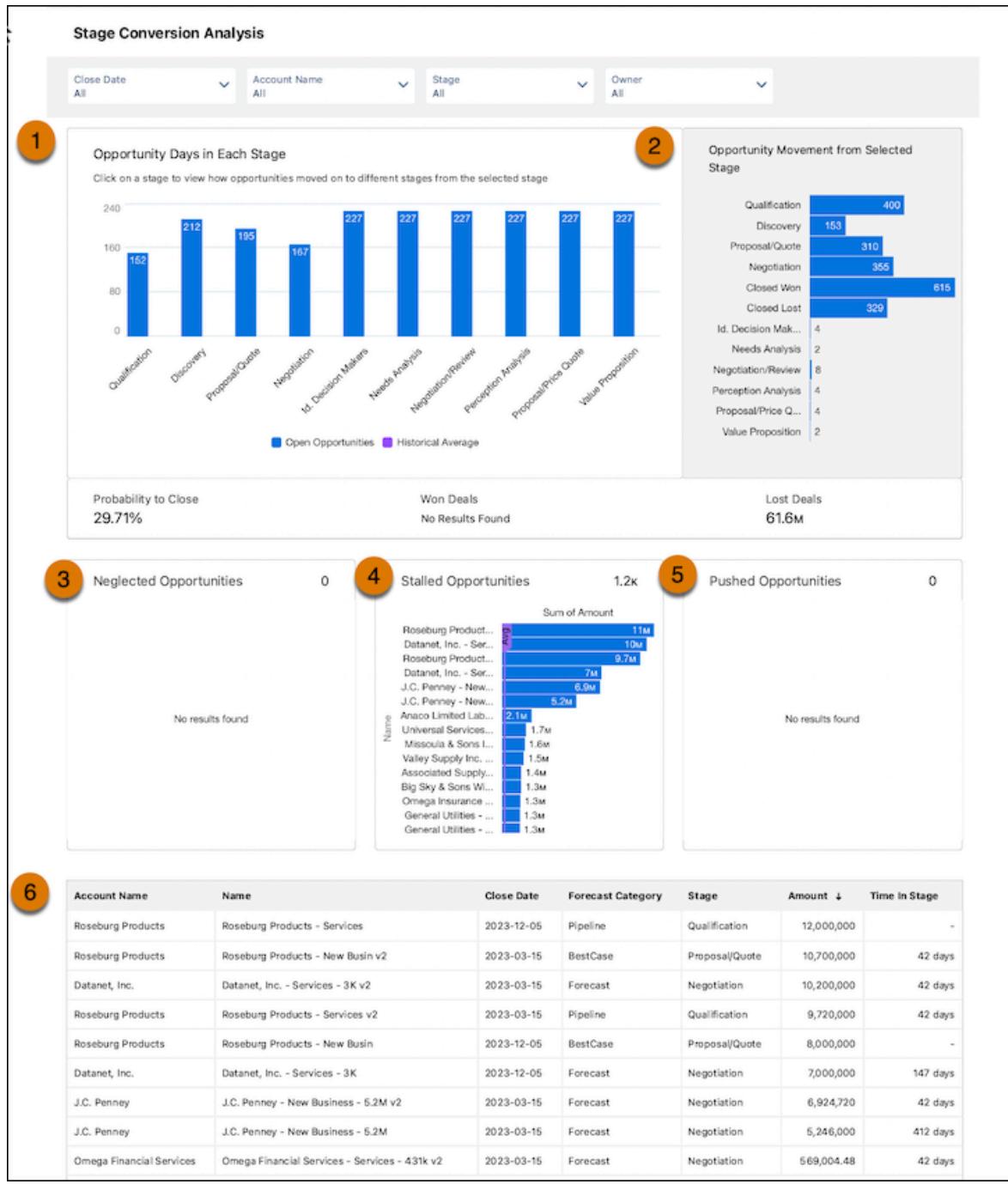
Sales Stage Analysis Progression shows how deals move through stages of the sales process and if deals are moving smoothly. It also reveals bottlenecks and exposes at-risk opportunities.

Sales Stage Analysis Conversion

Dive into the details of your pipeline using Stage Conversion analysis. You can answer questions such as what percentage of the pipeline progressed beyond each stage in a time period. You can see what percentage of pipeline progressed to close from this stage on the same day of this last period. You can understand what is the average conversion rate for open opportunities for the selected stage.

Sales Stage Analysis Progression

Sales Stage Analysis Progression shows how deals move through stages of the sales process and if deals are moving smoothly. It also reveals bottlenecks and exposes at-risk opportunities.



In the Sales Stage Analysis dashboard, view how long a deal was at each stage and the number of won and lost deals (1). Track opportunity movement (2) and neglected opportunities (3). You can also see which deals have been in the same stage for more than 30 days (4) and pushed opportunities (5). Lastly, take a deep dive into the different deals (6).

The Sales Stage Analysis dashboard compares how long current opportunities take in each stage of your pipeline with data on historic deals. The main chart shows the historic and current average number of days deals spend in that stage. By comparing current with historical data, the dashboard determines which deals are at risk and displays them in neglected, stalled, and pushed opportunities charts at the bottom of the dashboard.

From the top of the dashboard, select from the filters to get the details you want to see:

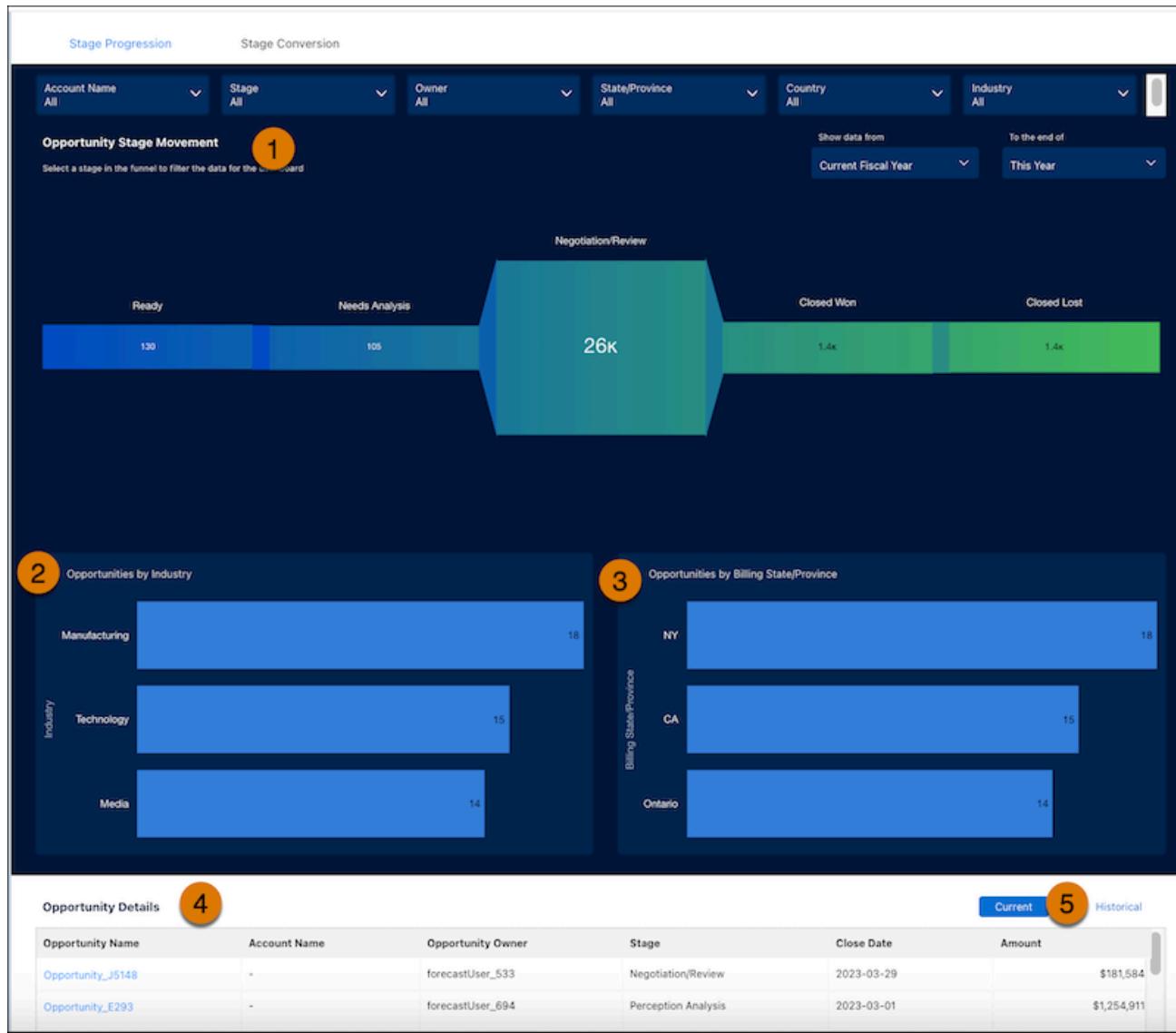
- **Account:** Account names related to opportunities in the dashboard
- **Owner Name:** Names of opportunity owners. It can include inactive users or users who don't own any deals in the selected period
- **Owner Role:** Role name of opportunity owners.
- **Stage Name:** Names in the standard StageName field in the Opportunities object.
- **Record Type:** Opportunity record type names defined in your org.
- **Close Date:** Opportunity closed date based on Salesforce fiscal year settings.
- **Historical Time Frame:** Period used to calculate the average time in stage.

KPI	CALCULATION
Historical Average	Number of days each opportunity stay in each stage. Average days in stage for all opportunities in the OpportunityHistory object, based on the period set in the Historical Time Frame filter.
Open Opportunities	Number of days current open opportunities stay in each stage. Average days in stage to date for all open opportunities with close dates within the period selected in the Close Date filter.
Opportunity Days in Each Stage	Shows the number of opportunities moved from the stage selected in the main chart to other stages based on period set in the Historical Time Frame filter.
Probability to close	Total closed won/Total opportunities based on the selected stage during the period set in the Historical Time Frame filter. If no stage is selected, it shows the win rate.
Won Deals	Total amount won during the period set in the Historical Time Frame filter.
Lost Deals	Total amount won during the period set in the Historical Time Frame filter.
Neglected Opportunities	Top open opportunities by amount that haven't been touched in 60 days that are set to close in the selected period.
Stalled Opportunities	Top open opportunities by amount that have stayed in current stage at least one day longer than historical average for all opportunities. Based on the close date in the selected period.
Pushed Opportunities	Top open opportunities by push count based on the close date in the selected period.

Sales Stage Analysis Conversion

Dive into the details of your pipeline using Stage Conversion analysis. You can answer questions such as what percentage of the pipeline progressed beyond each stage in a time period. You can see what

percentage of pipeline progressed to close from this stage on the same day of this last period. You can understand what is the average conversion rate for open opportunities for the selected stage.



In the Sales Stage Analysis dashboard, view the details of the progression of opportunities from Discovery to Closed Won or Closed Lost (1). See how opportunities represent different industries (2) and State and Billing provinces (3). You can also see opportunity details (4) and sort by current opportunities or historical opportunities (5).

From the top of the dashboard, select from the filters to narrow the scope of the analysis:

- Account Name. Account names related to opportunities in the dashboard
- Stage. Names in the standard StageName field in the Opportunities object.
- Owner. Names of opportunity owners. It can include inactive users or users who don't own any deals in the selected period
- State/Province. Area of the billing grouped by state or Province.
- Country. Area of the opportunity sorted by country.

- Industry. Opportunities sorted by industry.

KPI	CALCULATION
Opportunity Stage Movement	The average conversion rate for open opportunities for the selected stage.
Opportunity by Industry	Opportunities within the given time frame sorted by industry.
Opportunity by Billing State/ Province	Opportunities within the given time frame sorted by billing state or province.
Opportunity Details	Total closed won/Total opportunities based on the selected stage during the period set in the Historical Time Frame filter. If no stage is selected, it shows the win rate.

Forecast Insights Dashboard

Track changes in your sales forecast in the Forecast Insights dashboard. Monitor velocity, pipe coverage, and other KPIs with period-over-period analysis.

REQUIRED EDITIONS

Available in: Revenue Intelligence, which is available for an additional cost in Enterprise and Unlimited editions.

The screenshot shows the Forecast Insights dashboard with several numbered callouts:

- 1**: Shows the search bar at the top left where you can select a timeframe (This Quarter) and team (My Team). It also includes a search icon and a button to "Go to Collaborative Forecasting".
- 2**: Located in the "Commit" section, it shows a "Show Analysis" button.
- 3**: Located in the "Forecast Review" section, it shows tabs for "Commit", "Best Case", "Most Likely", and "Pipeline".
- 4**: Located in the "Evaluate Team Performance" section, it shows a table with columns for Name, Commit, Mgr Commit, Seller Commit, Velocity, Create / Close, YOY Growth, Pipe Covg., and Participation. It includes a "Highlight benchmark above: 15% or below -15%" filter.
- 5**: Located in the "Review Key Deals" section, it shows a table with columns for Opportunity Name, Account, Close Date, Amount, MFJ, Days Last Act., and Next Step. It lists deals from AJC Corporation, Towson Inc., Goodman Imports, Biospan, LLC., Acme Corp, AJC Corporation, Towson Inc., and Goodman Imports.

In the Forecast Insights dashboard, select the timeframe and team you want to analyze (1). You can see details for the managers and sellers that report to you. Click Show Analysis (2) to see how your metrics are trending over time. Looking across your sales, click Commit, Best Case, Most Likely or Pipeline (3) to remove that category from the pipeline and understand its overall impact. Set the benchmark values so that the high and low benchmarks display on the table (4). See the key details for your largest opportunities (5).

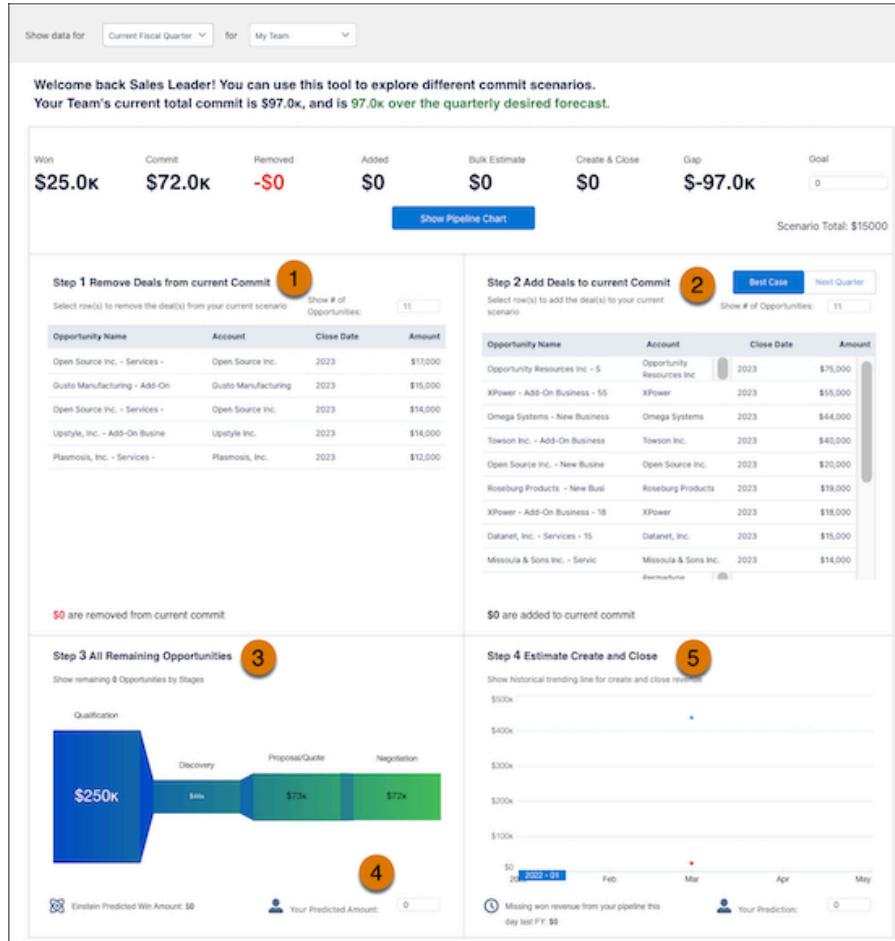
KPI	CALCULATION
Attainment	% of target = (Closed Won Amt./Target quota) * 100.
Closed Won (Current)	Total amount of closed won opportunities for the current selected period.
Commit	Commit for the user's role. Shows adjustment if one is entered.
Commit Attainment	% of target = ((Commit Amount + Closed Won Amt.)/Target quota) * 100.
Commit (Manager)	Sum of commit for lowest forecast manager in the hierarchy.
Commit (Seller)	Sum of commit for the lowest layer in the role hierarchy.
Historical Velocity	% Attainment same time last year.
Velocity	closed won attainment % same time last year.
Open Pipeline	Open pipe (Current) = Pipeline + Best Case + Commit.
Pipeline Coverage (Current)	Pipe Coverage = (Target - Closed Won)/(Open Pipe).
Pipeline Coverage (Mature)	Best case and commit amount or custom amount/ (Commit adjustment-Won).
Quota	Quota for the current period.
Velocity	Closed won attainment % same time last year.
Year over year (Commit)	(Commit forecast Amount at the same time last year- Current Commit Forecast Amount)/(Commit forecast Amount at the same time last year) * 100.
Year over year (Closed won)	(Closed Won Amount at the same time last year- Current Closed Won Amount)/(Closed Won Amount at the same time last year) * 100
Year over year (Open Pipeline)	(Open pipe amount at the same time last year- Current open pipe amount)/(Open pipe amount at the same time last year) * 100.
Year over year (Quota)	(Last year's quota - Current year's quota)/(Last year's quota) * 100.

Commit Calculator Dashboard

Use the Commit Calculator to test different scenarios and understand how changes to your pipeline can affect your bottom line.

REQUIRED EDITIONS

Available in: Revenue Intelligence, which is available for an additional cost in Enterprise and Unlimited editions.



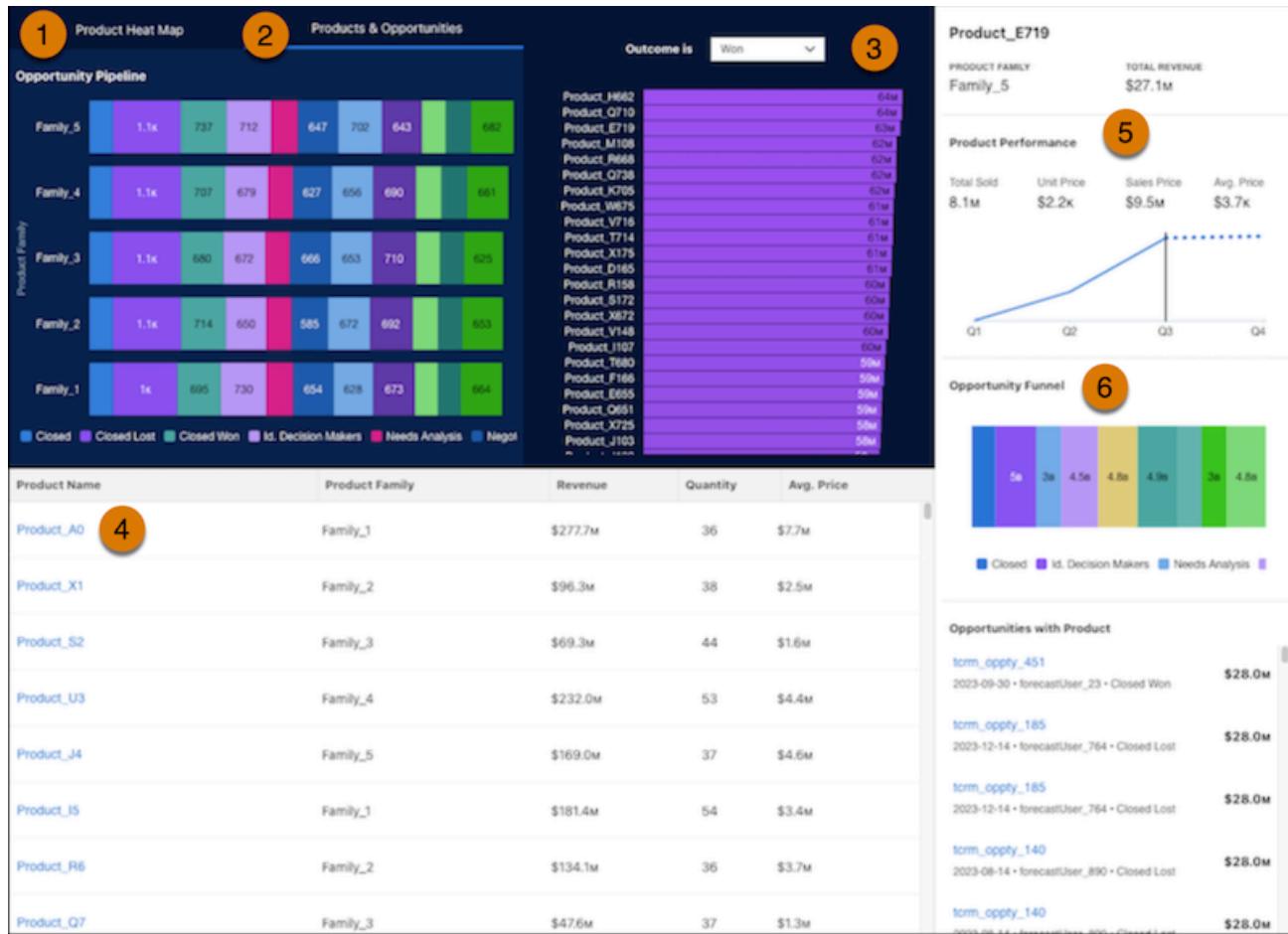
In the Commit Calculator, test scenarios to see their impact on your sales. Remove commits from your pipeline (1) or add deals to your pipeline (2). Test scenarios for remaining deals (3) and add the predicted amount for these deals not yet accounted for in the pipeline (4). Estimate deals created and closed (not accounted for in the pipeline) (5).

Product Insights Dashboard

Optimize your sales strategy using the Product Insights dashboard. Track customer purchases, opportunities to position products in new segments, and market trends. Quickly see how well your sales teams deliver new offerings to the market.

REQUIRED EDITIONS

Available in: Revenue Intelligence, which is available for an additional cost in Enterprise and Unlimited editions.



In the Product Insights dashboard, understand your sales cycles with a laser focus on products. Click Product Heat Map (1) to see how your product families are performing, and click Products & Opportunities (2) to see your opportunity pipeline sorted by product family. Click on a product family to zoom in on just that product group. Select Won or Lost (3) to sort by won or lost sales. Click a product family (4) to populate the charts with details about the selected product. See the Opportunity Funnel (5) to understand how your products are distributed across your pipeline.

Einstein Account Management

Einstein Account Management provides dashboards and Einstein Discovery models to help you see which of your accounts has potential for growth and which of your accounts need attention.

REQUIRED EDITIONS

Available in: Revenue Intelligence, which is available for an additional cost in: Enterprise and Unlimited editions.

Considerations for Einstein Account Management

When you set up Einstein Account Management, you must have certain settings configured in your org, and you must have certain objects to populate the dashboards correctly.

Set Up Einstein Account Management

Set up Einstein Account Management dashboards from the Setup menu.

Use Einstein Account Management

Einstein Account Management provides dashboards and Einstein Discovery models to help you see which of your accounts has potential and which accounts have product white space. You can also see which of your accounts need attention.

Considerations for Einstein Account Management

When you set up Einstein Account Management, you must have certain settings configured in your org, and you must have certain objects to populate the dashboards correctly.

- Einstein Account Management is powered by CRM Analytics, so you must enable CRM Analytics.
- Einstein Account Management requires you to have Customer Insights version 1.5 or higher enabled and configured. By default, the auto-installed version is prioritized during setup.
- If multiple versions of Customer Insights have been created, Einstein Account Management uses the most recently installed compatible version.
- Einstein Account Management uses the same security predicate as your Customer Insights app. If you selected a custom security predicate from the wizard, it inherits this selection.
- Einstein Account Management uses the same field as your Customer Insights app to track the total amount of the opportunity. By default the amount field is used.
- To create the default Einstein Discovery Account Health model, you must have 400 unique accounts that experienced a change in win rate between two specified time periods: 12-6 months ago, and 6 months ago to present. If you don't yet have enough data, the Einstein Discovery models can't be created initially. In this case, the app is created without Einstein Discovery models. You can go back later and recreate the app when you later have enough data. For more information about Einstein Discovery specified limits, see [Einstein Discovery Limits](#).
- To create the default Einstein Discovery Account Upside model, you need at least 400 unique accounts that experienced a change in product count or quantity between two specified time periods. For more information about Einstein Discovery specified limits, see [Einstein Discovery Limits](#).
- Salesforce recommends that you schedule the Einstein Account Management recipe to run on a regular cadence that is scheduled within 24 hours of your Customer Insights recipes.

Note these requirements for using Einstein Account Management:

-  **Note** When you turn on CRM Analytics for your org, a default Analytics Integration User is created. This "user" accesses the data within Salesforce when the recipe is used to bring data in as datasets to CRM Analytics. It's important that this user has the proper level of permissions to access your data. For example, the integration user needs have object level access to all the objects from which data you want to pull, and field level access to the fields within those objects. If you have trouble in creating your app or can't view data, you sometimes must modify either object or field permissions to allow the integration user to access them.

Recipes, ED Models, Components, and Datasets

The Einstein Account Management Accounts Recipe is used in Einstein Account Management:

- This recipe pulls in Account information and adds multiple aggregated metrics across Opportunities, Tasks, Events, Products, and LineItems.

The Account Health and Account Upside ED Models are created. In addition, the Account Inspector with Predictions component is created. Einstein Account Management uses all the datasets created by Customer Insights. In addition, the Einstein Account Management - Accounts dataset is created:

Dataset Name	Contents	Source	Used by	Security Predicate	Special Requirements
Einstein Account Management - Accounts	Aggregated data about accounts	Salesforce object -> Recipe	All dashboards	The security predicate is inherited from Customer Insights. By default the predicate is: <code>'Owner.Role.Roles' == "\$User.UserRoleId" 'OwnerId' == '\$User.Id'</code>	None.

-  **Note** Because Einstein Account Management uses security predicates in its models, you must set it up from the Setup menu rather than Analytics Studio. This best practice ensures that all records in the dataset are used when training the models. Running setup from Analytics Studio can result in inaccurate or failed models

Set Up Einstein Account Management

Set up Einstein Account Management dashboards from the Setup menu.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Government Cloud Plus for an additional cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS NEEDED

To turn on Einstein Account Management:	Revenue Intelligence Admin permission set
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To use Einstein Account Management:	Assign Revenue Intelligence User Permission Sets
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-  **Note** You must have CRM Analytics enabled and you must have Customer Insights version 1.5 or higher to use Einstein Account Management. If you have existing versions of Customer Insights,

ensure that you have the latest version.

To set up Einstein Account Management, use the following steps.

1. From Setup, in the Quick Find box, enter **Einstein Account Management**, and then select **Einstein Account Management Setup**.
2. Verify that the Revenue Intelligence Admin permission set is assigned to you.
3. To make Einstein Account Management dashboards and analytics available, enable CRM Analytics. Enabling CRM Analytics automatically installs the Customer Insights app.
4. Customer Insights version 1.5 or higher is required to run Einstein Account Management. If multiple versions of Customer Insights have been created, Einstein Account Management uses the most recently installed compatible version.
If you need to modify Customer Insights, go to the Auto-Installed Apps page in Setup. Otherwise, manage Customer Insights directly in Analytics Studio.
5. Turn on Einstein Account Management. The app installation process can take up to 24 hours. The installation status shows on the Einstein Account Management Setup page.
You must have 400 rows on your account objects to create the Einstein Discovery models. If you don't yet have enough data, the Einstein Discovery models can't be created initially. If you have enough data later, you can go back later and recreate the app.
6. Assign user permissions. For users who manage the Revenue Insights dashboards, assign the Revenue Intelligence Admin permission set. For users who need read-only access to the dashboards, assign the Revenue Intelligence User permission set.
7. Schedule the Einstein Account Management Accounts recipe.
 - a. In CRM Analytics Studio, click the wheel icon at upper right and select **Data Manager**. Or, click the **Data Manager** link in the left-hand column.
 - b. Select the **Recipes** tab on the left.
 - c. Select the **Einstein Account Management Accounts** recipe, and click the triangle to the far right.
 - d. Select **Schedule**, then select an event-based or time-based schedule. Salesforce recommends that you schedule the recipe to run on a regular cadence that is scheduled within 24 hours of your Customer Insights recipes.
 - e. Save your settings.
8. Schedule the data sync.
 - a. In Analytics Studio, click the wheel icon at upper right and select **Data Manager**. Or, click the **Data Manager** link in the left-hand column.
 - b. Select the **Connect tab** on the left.
 - c. Click the arrow to the far right of SFDC_LOCAL, which is the name of the connection your app uses. From the menu that appears, select **Schedule**.
 - d. Set a time for running the data sync. It's best to select a time outside normal working hours so the sync and recipe don't interrupt business activities. Save your changes

Use Einstein Account Management

Einstein Account Management provides dashboards and Einstein Discovery models to help you see which of your accounts has potential and which accounts have product white space. You can also see which of your accounts need attention.

REQUIRED EDITIONS

Available in: Revenue Intelligence, which is available for an additional cost in Enterprise and Unlimited editions.

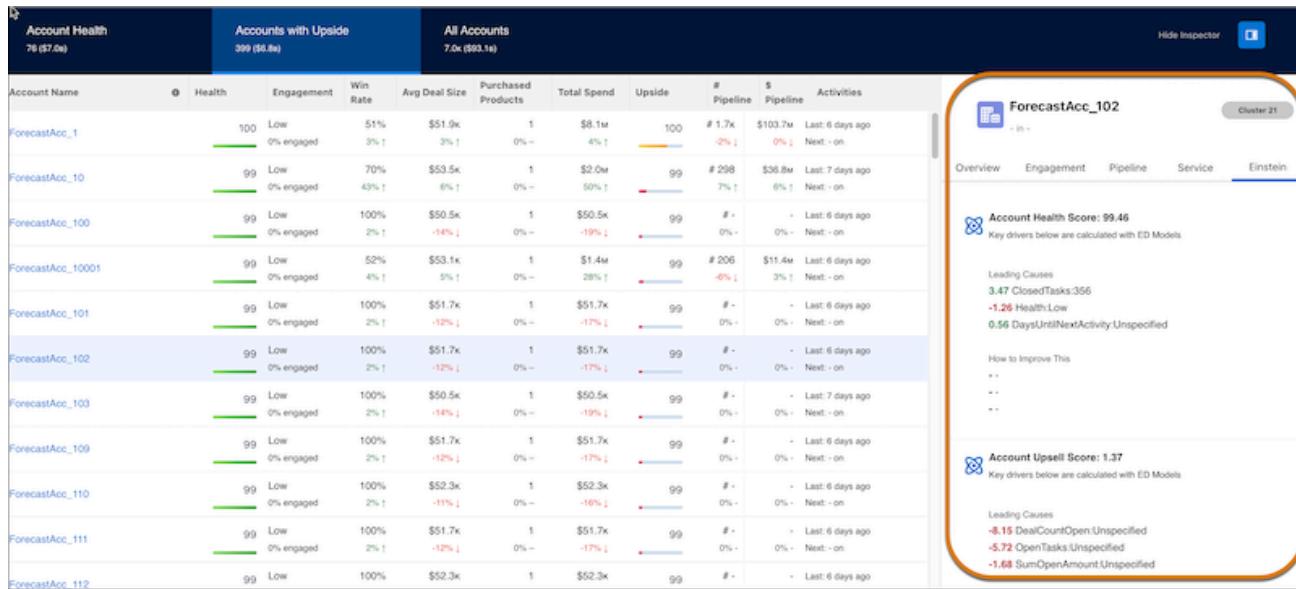
Use the Einstein Account Management table for a comprehensive view of your account health. Select **Account Health** to see accounts that need attention.

Predicted Account Health & Upside										
Account Name	Industry	Account Type	Account Owner	Account Cohort	Data updated: Feb 28, 2023 at 3:17 PM					
All	All	All	All	All	Last refreshed on 2023-02-28					
Account Name	Health	Engagement	Win Rate	Avg Deal Size	Purchased Products	YTD Spend	Upside	# Pipeline	\$ Pipeline	Activities
Acme	Low 73 18% engaged	Low 0% -	71%	\$318.9k 0% -	265	\$566.3k 0% -	73	# 1.7k 0% -	\$99.0m 0% -	Last: 95 days ago Next: 0 days on None
Airway Technologies	Low 92 0% engaged	Low 0% ↓	50%	\$50.8k 1% ↑	-	-	92	# 217 3% ↑	\$10.2m 2% ↑	Last: 46 days ago Next: 0 days on None
ClearSky Technologies	N/A 95 0% engaged	N/A 0% ↑	53%	\$50.0k -1% ↓	-	-	95	# 205 -3% ↓	\$9.7m -4% ↓	Last: 46 days ago Next: 0 days on None
ForecastAcc_2092	Low 93 0% engaged	Low 0% ↓	50%	\$48.8k -3% ↓	-	-	93	# 222 5% ↑	\$10.7m 2% ↑	Last: 95 days ago Next: 0 days on None
ForecastAcc_2298	Low 89 0% engaged	Low 40% ↑	67%	\$51.5k 2% ↑	-	\$298.6k 18% ↑	89	# 285 0% ↑	\$37.7m -2% ↓	Last: 95 days ago Next: 0 days on None
ForecastAcc_2320	Low 95 0% engaged	Low 24% ↑	62%	\$57.3k 14% ↑	-	-	95	# 212 1% ↑	\$10.3m -2% ↓	Last: 95 days ago Next: 0 days on None
ForecastAcc_2368	Low 95 0% engaged	Low -4% ↓	48%	\$49.5k -2% ↓	-	-	95	# 210 0% ↓	\$10.0m -5% ↓	Last: 95 days ago Next: 0 days on None
ForecastAcc_2614	Low 92 0% engaged	Low 28% ↑	64%	\$52.8k 5% ↑	-	-	92	# 222 5% ↑	\$10.6m 1% ↑	Last: 95 days ago Next: 0 days on None
ForecastAcc_2736	Low 94 0% engaged	Low 0% ↓	50%	\$56.2k 12% ↑	-	-	94	# 207 -2% ↓	\$10.4m -1% ↓	Last: 95 days ago Next: 0 days on None
ForecastAcc_2848	N/A -	40%	\$59.4k -	-	-	-	-	# 189	\$9.6m -	Last: 421 days ago

ACCOUNT HEALTH KPI	CALCULATION
Health	Einstein Discovery Account Health. See the inspector view for top predictors. For a description of how the model is created, see the section, “Understand the Einstein Discovery Health Model.”
Engagement	Number of total contacts compared to contacts engaged on activities.
Win Rate	Percentage of opportunities won compared to opportunities closed.
Avg Deal Size	Average sum of amount for closed won opportunities.
Products Purchased	The number of unique products purchased.
YTD Spend	Total amount of closed won opportunities year to date.
Upside	Einstein Discovery Account Upside. See the inspector view for top predictors.
Pipeline #	Open number of opportunities by count.
Pipeline \$	Open number of opportunities by total amount.
Activities	Past and future Activities (include tasks and events).

Click **Accounts with Upside** to see Accounts with upside potential, and click **Show Inspector** to see the predictions based on the ED models.

When you open the Account Inspector, you can see predictions for individual accounts, including scores and the types of events that impacted that score. Click each of the tabs to see more details for Overview, Engagement, Service, and Einstein.



ACCOUNT UPSIDE KPI	CALCULATION
Engagement	Number of total contacts compared to contacts engaged on activities.
Win Rate	Percentage of opportunities won compared to opportunities closed.
Avg Deal Size	Average sum of amount for closed won opportunities.
Products Purchased	The number of unique products purchased.
YTD Spend	Total amount of closed won opportunities year to date.
Upside	Einstein Discovery Account Upside model. See the inspector view for top predictors. For a description of how the model is created, see the section, “Understand the Einstein Discovery Account Upside Model.”
Pipeline #	Open number of opportunities by count.
Pipeline \$	Open number of opportunities by total amount.
Activities	Past and future Activities (include tasks and events).

Acme
Prospect in Manufacturing Cluster 10

	Overview	Engagement	Pipeline	Service	Einstein
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Account Details

	Account Owner Admin User	Account Tenure 1 years
Annual Revenue \$100.0M	Employees 680	

Account Risk Factors

Days Since Last Activity 3,000 days	Overdue Activities 0
Avg Deal Age 182 days	Sales vs Previous Year -1,752%
Open Cases 2	Escalated Cases 0

Cohort Benchmarks

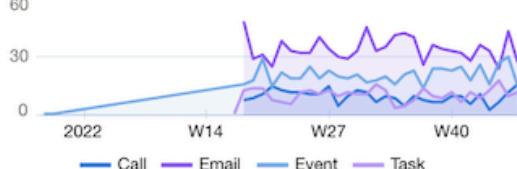
Compared with similar accounts in cohort

Win Rate 74%	Cohort Win Rate 74% 0% –
Average Deal Size \$340.0k	Cohort Average Deal Size \$340.0k 0% –
Open Pipeline 1.7k \$99.9M	Cohort Open Pipeline 1.7k 99.9M

Acme
Prospect in Manufacturing Cluster 10

	Overview	Engagement	Pipeline	Service	Einstein
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Engagement Trending Over Time



Engagement Contacts

Carole White VP Sales (415) 555-1212 info@salesforce.com	Edward Stamos President and CEO (212) 555-5555 info@salesforce.com	Geoff Minor President (415) 555-1212 info@salesforce.com
Calls: 25 Email: 0 Last Activity: 3,000 days Upcoming: 0	Calls: 37 Email: 0 Last Activity: 2,900 days Upcoming: 0	Calls: 38 Email: 0 Last Activity: 3,280 days Upcoming: 0

ACCOUNT INSPECTOR OVERVIEW	CALCULATION
Total Sales	Number of total contacts compared to contacts engaged on activities.
Annual Revenue	Standard field on account layout.
Employees	Standard field on account layout.
Account Tenure	Number of days or years since account creation.
Days Since Last Activity	Standard field on account layout.
Overdue Activities	Number of activities where ActivityDate is in the past and is still open.

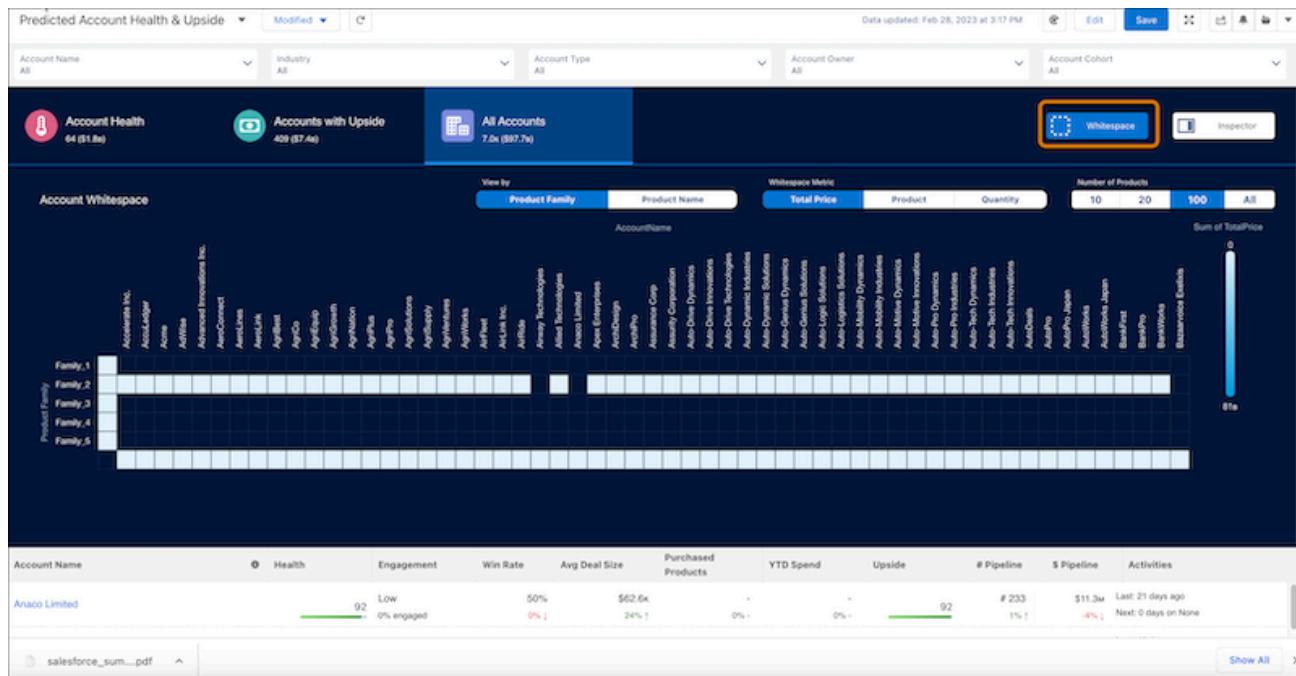
ACCOUNT INSPECTOR OVERVIEW	CALCULATION
Avg Deal Age	Avg of Opportunity Age (Customer Insights derived column).
Sales vs. Previous Year	Closed won opportunities YTD compared to previous years - $(\text{CurrentYearWon} - \text{PreviousYearWon}) / \text{CurrentYearWon}$.
Open Cases	Number of open cases linked to account.
Escalated Cases	Number of escalated open cases linked to account.

ACCOUNT INSPECTOR ENGAGEMENT	CALCULATION
Calls	Number of total contacts compared to contacts engaged on activities.
Emails	Standard field on account layout.
Last Activity	Standard field on account layout.
Upcoming	Number of days or years since account creation.

ACCOUNT INSPECTOR PIPELINE	CALCULATION
Open Deals	Number of open opportunities.
Open Pipeline	Open Opportunity Amount.
Lost Deals	Total Opportunities closed where IsWon = false.
Lost Amount	Total opportunity amount where IsWon = false.

ACCOUNT INSPECTOR SERVICE	CALCULATION
Open Cases	Number of open cases linked to account.
Closed Cases	Number of closed cases linked to account.
Escalated Cases	Number of escalated cases linked to account.
Avg Days Open	Avg number of days a case is open.

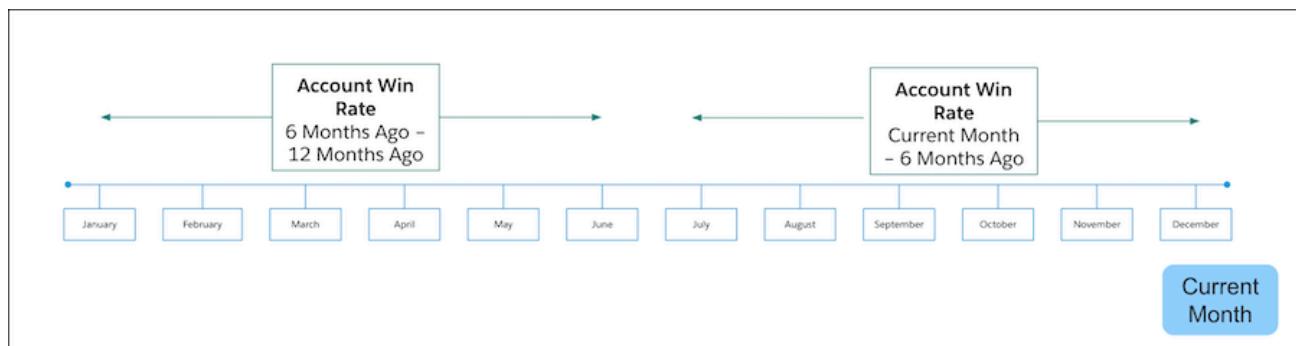
Click **Whitespace** to see accounts with product whitespace.



WHITESPACE	CALCULATION
Sum of total price	Sum of total price from the Opportunity Line Items.
Count of product	Count of products sold, sorted by account from the Opportunity Line Items.
Sum of quantity	Sum of products sold, sorted by account from the Opportunity Line Items.

Understand the Einstein Discovery Account Health Model

The recipe for the Einstein Discovery Account Health model calculates the win rate for each account for two time periods. The first period is the current month to 6 months ago. The second period is from 6 months to 12 months ago. If the win rate for the account has gone up between those two time periods, the Spend Health value is equal to high. If the win rate has gone down, it equals to low.

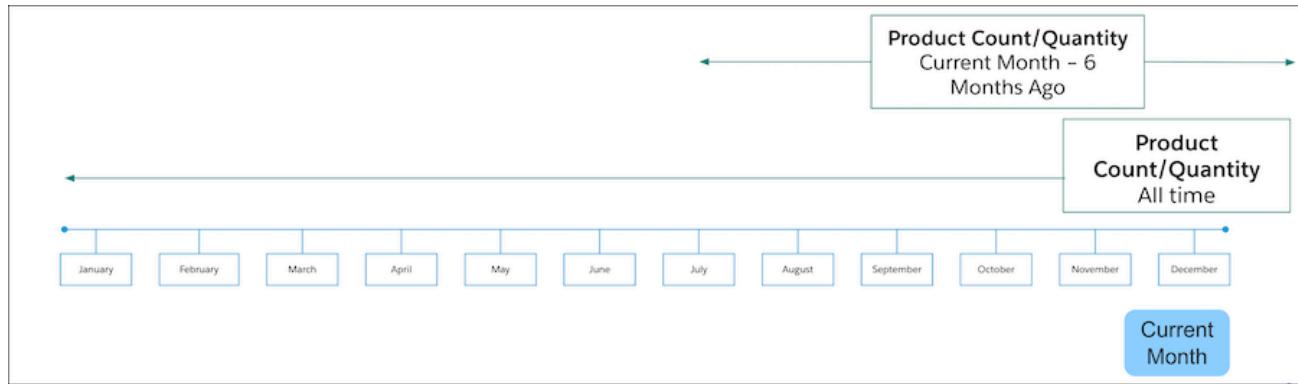


Note The time periods described are the default values. However, you may have different requirements in your organization. You can modify the time periods in the recipe to match your

company's needs.

Understand the Einstein Discovery Account Upside Model

By default, the recipe for the Einstein Discovery Account Upside model aggregates the number of products purchased and quantity for each account across two time periods. The first period is the current month to 6 months ago. The second period is looking at all time. If the product count or quantity for the account has gone up in the last 6 months, Product Health equals high. If the product count or quantity for the account has gone down, it equals to low.



 **Note** The time periods described are the default values. However, you may have different requirements in your organization. You can modify the time periods in the recipe to match your company's needs.

Pipeline Inspection

Pipeline Inspection gives sales teams a consolidated view of pipeline metrics, opportunities, week-to-week changes, AI-driven insights, and activity information. With this intelligence, sales teams can focus on the most important opportunities and forecast revenue more accurately.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Revenue Intelligence, which is available for an additional cost in: **Enterprise** and **Unlimited** Editions

 **Important** Starting in Summer '25, data from Activity Metrics and Activity 360 Reporting isn't available in Pipeline Inspection unless previously set up. This change affects the counts of activities by type in Activity Timeline and the Who's Involved feature. If you're already using Activity Metrics and Activity 360 Reporting data in Pipeline Inspection, you can continue to do so until Summer '26 when these Einstein Activity Capture reporting tools are scheduled for retirement. See [Einstein](#)

[Activity Capture](#) [Activity 360 Reporting](#), [Activity Metrics](#), [Activities Dashboard](#) Upcoming Retirement (Summer '26).

Set Up Pipeline Inspection

Get your sales teams started managing their pipelines with a single view of pipeline metrics, opportunities, and week-to-week deal changes. Show insights from call recordings, emails, opportunity scores, and cases in the same view.

Drive Predictable Revenue with Pipeline Inspection

Get a consolidated pipeline view, with key metrics, opportunities, and weekly changes in close dates, amounts, stages, forecast categories. See when next steps aren't updated, and get deal insights and activity details. Use these insights to help forecast revenue more accurately and focus on the most important opportunities.

Set Up Pipeline Inspection

Get your sales teams started managing their pipelines with a single view of pipeline metrics, opportunities, and week-to-week deal changes. Show insights from call recordings, emails, opportunity scores, and cases in the same view.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Revenue Intelligence, which is available for an additional cost in: **Enterprise** and **Unlimited** Editions

 **Tip** Check out this feature in Salesforce Go! Find a guided setup experience, explore more content, discover related features, and monitor feature usage. See [Discover and Set Up Features With Salesforce Go](#).

 **Important** Starting in Summer '25, data from Activity Metrics and Activity 360 Reporting isn't available in Pipeline Inspection unless previously set up. This change affects the counts of activities by type in Activity Timeline and the Who's Involved feature. If you're already using Activity Metrics and Activity 360 Reporting data in Pipeline Inspection, you can continue to do so until Summer '26 when these Einstein Activity Capture reporting tools are scheduled for retirement. See [Einstein Activity Capture](#) [Activity 360 Reporting](#), [Activity Metrics](#), [Activities Dashboard](#) Upcoming Retirement (Summer '26).

Considerations for Setting Up Pipeline Inspection

Review important considerations before setting up and configuring Pipeline Inspection.

Turn On Pipeline Inspection

To get your sales teams started managing their pipelines, enable and configure Pipeline Inspection.

Select Who Can Use Pipeline Inspection

Get your sales team started managing their pipelines.

Select Summary Fields For Pipeline Inspection Metrics

Give sales teams a choice of fields that they can use to summarize pipeline metrics.

Manage Pipeline Inspection Metrics

Show metrics groups so your sales teams can view their pipelines with forecast categories or metrics that indicate changes over time.

Select a Forecast Rollups Method in Pipeline Inspection

Choose the rollup method that's best for your sales teams. Cumulative forecast rollups are selected by default, but you can change this setting as needed.

Configure Deal Insights in Pipeline Inspection

Einstein Deal Insights gives sales reps predictions and recommendations from opportunities, calls, emails, and cases, right in the Pipeline Inspection view. Choose which insights to show in Pipeline Inspection to help sales reps move deals forward.

Show Opportunity Scores in Pipeline Inspection

In Pipeline Inspection, opportunity scores are shown in tiers instead of numeric scores. When the score goes up or down a tier, the changes are highlighted.

Enable the Flow Chart in Pipeline Inspection

Give Revenue Intelligence users access to a dynamic chart in Pipeline Inspection that shows the changes to opportunities in forecast categories over time, based on the time filters they set.

Enable More Features for Pipeline Inspection

Make the most out of Pipeline Inspection by setting up optional features that give your users more helpful data and insights.

See Also

[Pipeline Inspection](#)

Considerations for Setting Up Pipeline Inspection

Review important considerations before setting up and configuring Pipeline Inspection.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Enterprise, Performance, and Unlimited** Editions

Available with Revenue Intelligence, which is available for an additional cost in: **Enterprise and Unlimited** Editions

 [Ensuring Sales Rep Accountability with Pipeline Inspection \(English Only\)](#)

Activities and Activity Metrics

! **Important** Starting in Summer '25, data from Activity Metrics and Activity 360 Reporting isn't available in Pipeline Inspection unless previously set up. This change affects the counts of activities by type in Activity Timeline and the Who's Involved feature. If you're already using Activity Metrics and Activity 360 Reporting data in Pipeline Inspection, you can continue to do so until Summer '26 when these Einstein Activity Capture reporting tools are scheduled for retirement. See [Einstein Activity Capture Activity 360 Reporting, Activity Metrics, Activities Dashboard Upcoming Retirement \(Summer '26\)](#).

- To see counts of recent activities in the side panel, set up either Activity 360 Reporting or Activity Metrics in Einstein Activity Capture, or both. If you've enabled both, your activity metrics come from Activity 360 Reporting.

Einstein Features and Insights in Pipeline Inspection

- To show the Opportunity Score field, enable Einstein Opportunity Scoring. Opportunity scores are shown in tiers instead of numerical values.
- Einstein Deal Insights includes insights based on Einstein Opportunity Scoring. To show these insights, first enable Einstein Opportunity Scoring. These insights are available only in Pipeline Inspection.
- To get more activity-based insights in Einstein Deal Insights, we recommend setting up Einstein Activity Capture.
- To get more email-based insights in Einstein Deal Insights, set up Einstein Activity Capture and Einstein Email Insights.
- To get insights based on call recordings in Einstein Deal Insights, set up Einstein Conversation Insights.
- To get insights about service cases, use cases. Insights are shown about service cases for the opportunity's associated accounts, contacts, or products. If you use the Product field on cases, you get more data. The Product field is available only if entitlements are set up to include products.
- To allow users to add contacts to cadences from deal insights and opportunities, add the Add to Cadence action to the opportunity record layout. Your company must have a Sales Engagement (High Velocity Sales) license, and users need Sales Engagement (High Velocity Sales) permissions.

Filters

- Users can filter by opportunity owner, opportunity teams, or territories.
- Managers can see deals for users who have subordinate roles in the role hierarchy, where the user is either the opportunity owner or on the opportunity team.
- Users with View All Records permission on opportunities can search for any user and see opportunities owned by that user and other users with subordinate roles in the role hierarchy.
- To see deals where reports are on the opportunity team, users must be in the same branch of the role hierarchy.

Flow Chart

- To enable the Pipeline Inspection flow chart, you must have the Revenue Intelligence add-on license.
- To access the Pipeline Inspection flow chart, users must be assigned a Revenue Intelligence permission set.
- The flow chart is the corresponding chart where you view the forecast category metrics. If you turn on the flow chart but don't enable the forecast category metrics, your users don't see the flow chart.
- To get data in the flow chart, make sure historical trending is enabled for opportunities.

Waterfall Chart

- When pipeline changes metrics are enabled, a waterfall chart is shown to users on the Chart tab.
- To get data in the waterfall chart, make sure historical trending is enabled for opportunities.

Historical Trending

- When you turn on Pipeline Inspection, historical trending is enabled for opportunities if it's not already enabled. Five fields are set up for tracking by default: Amount, Close Date, Forecast Category, Probability, and Stage. You can enable 3 more fields for a total of 8 fields.
- The Next Step field is automatically set up in historical trending when you enable Pipeline Inspection and uses one of the allocated opportunity fields.
- Historical trending must be enabled to:
 - View opportunity changes and insights when you hover over the Amount, Change, Close Date, Forecast Category, and Stage fields and your custom currency and number fields. Changes are indicated for open and in progress deals only.
 - Show the New, Won, Increased, Moved In, Moved Out, Decreased, and Lost metrics in the pipeline changes metrics grouping, and the corresponding lists of opportunities.
 - Show the Change field on opportunities when filtering the list by the Increased or Decreased metrics in the pipeline changes metrics grouping.
 - Get details of the last update when the Next Step field hasn't been updated in 7 days or more.
 - View data in the flow or waterfall charts.
- Although you can use the Expected Revenue and Quantity fields as summary fields, they aren't available in historical trending. If you use these fields as summary fields, some metrics or charts don't show data.
- After the Next Step field is enabled in historical trending, it takes at least 7 days to collect historical data before you see the last update details.
- If you make configuration changes in historical trending, such as adding filters, some records and fields don't show opportunity changes and insights. For example, when you add a filter, the Next Step field doesn't show as Trending. The opportunity amounts can also be excluded from metric calculations and charts.
- If historical trending was enabled for opportunities before you enable Pipeline Inspection, your historical trending configuration doesn't change.
- When you enable Historical Trending in Pipeline Inspection, 3 months of historical data plus the current month is copied to the historical trending table, and the data is stored for 12 months. If you've

- used opportunities more than 3 months before the month you enable historical trending, your pipeline inspection metrics show data only for the past 3 months and the current month.
- Field history for custom number or currency fields is tracked starting on the day that you enable them in Historical Trending.

Pipeline Metrics and Fields

- Pipeline Inspection supports number and currency fields, both standard and custom, for summarizing pipeline metrics. Amount is the default field. Based on the fields that an admin configured, users can set or change the summary field in their pipeline views using the available fields in the List View Controls menu.
- Formula fields can't be used as summary fields.
- You can rename the forecast category metrics that display in the Pipeline Inspection view. All the links to rename forecast category metrics are accessible from the Pipeline Inspection Setup page. If you select **single category rollups**, rename forecast categories in Object Manager. If you select **cumulative forecast rollups**, rename forecast categories directly on the Setup page. To edit what appears in other languages for both settings, go to the Pipeline Inspection Metric Configuration page in Translation Workbench.
- The Pipeline Changes metrics show a Change field in the opportunity list when users filter the view by the Increased and Decreased metrics. The Change field is excluded from the limit of 15 fields users can display in the Pipeline view.
- You can't show custom rich text area fields in the opportunity list in Pipeline Inspection.
- You can't rename the pipeline changes metrics.

Push Count Field

- The Push Count field is enabled by default in Pipeline Inspection and opportunities. To control visibility of the field, go to Opportunity Settings in Setup.
- To see the Push Count field in the Opportunity list in Pipeline Inspection, users must add it. To show it in the list, go to the List View Controls menu under the gear icon, and choose **Select Fields to Display**.
- You can't add the Push Count field to opportunity record layouts.

Top Contacts and Users Involved in Deals

- To show in the side panel who's involved in opportunities, enable Activity 360 Reporting in Einstein Activity Capture settings.
- If Sync Email as Salesforce Activity is enabled, the external contacts and who's involved in deal sections aren't available.

See Also

[Turn On Pipeline Inspection](#)

[Set Up Historical Trend Reporting](#)

[Historical Trend Report Limits, Limitations, and Allocations](#)

[Configure Deal Insights in Pipeline Inspection](#)

Show Opportunity Scores in Pipeline Inspection

Turn On Pipeline Inspection

To get your sales teams started managing their pipelines, enable and configure Pipeline Inspection.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Revenue Intelligence, which is available for an additional cost in: **Enterprise** and **Unlimited** Editions

User Permissions Needed	
To turn on Pipeline Inspection:	Customize Application
	OR
	Modify All Data

! **Important** Starting in Summer '25, data from Activity Metrics and Activity 360 Reporting isn't available in Pipeline Inspection unless previously set up. This change affects the counts of activities by type in Activity Timeline and the Who's Involved feature. If you're already using Activity Metrics and Activity 360 Reporting data in Pipeline Inspection, you can continue to do so until Summer '26 when these Einstein Activity Capture reporting tools are scheduled for retirement. See [Einstein Activity Capture](#) [Activity 360 Reporting](#), [Activity Metrics](#), [Activities Dashboard Upcoming Retirement \(Summer '26\)](#).

1. From Setup, in the Quick Find box, enter *Pipeline Inspection*, and then select **Pipeline Inspection Setup**.
2. Turn on Pipeline Inspection.
3. Verify that historical trending is enabled and configured for opportunities. The fields required for Pipeline Inspection features are trended by default, including the Next Step field.
4. Add the Pipeline Inspection button to the Opportunity tab.

? **Note** When you turn on Pipeline Inspection, historical trending is enabled for opportunities if it's not already enabled. If you use a custom field to summarize your metrics, the field must also be set up in historical trending.

See Also

[Considerations for Setting Up Pipeline Inspection](#)

[Select Who Can Use Pipeline Inspection](#)

[Set Up Historical Trend Reporting](#)

Configure Deal Insights in Pipeline Inspection

Select Who Can Use Pipeline Inspection

Get your sales team started managing their pipelines.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Revenue Intelligence, which is available for an additional cost in: **Enterprise** and **Unlimited** Editions

User Permissions Needed

To assign permission sets:	Assign Permission Sets
----------------------------	------------------------

Users get access to Pipeline Inspection with a Standard User or System Administrator profile. Or, you can assign users one of the Pipeline Inspection permission sets.

1. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.
2. Click the Pipeline Inspection permission set. Or, if you have Salesforce Unlimited Edition, click the Pipeline Inspection Included permission set. You can assign Pipeline Inspection permissions to users with a Salesforce Standard User License.
3. Click **Manage Assignments**, and then **Add Assignments**. Then assign the permission set to users and click **Done**.

You can also grant access with the Revenue Intelligence Admin or Revenue Intelligence User permission sets. You can assign users a Pipeline Inspection permission set or a Revenue Intelligence permission set, but assigning the same user more than one permission set consumes multiple license seats.

See Also

[Turn On Pipeline Inspection](#)

[Standard Profiles](#)

Select Summary Fields For Pipeline Inspection Metrics

Give sales teams a choice of fields that they can use to summarize pipeline metrics.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Revenue Intelligence, which is available for an additional cost in: **Enterprise** and **Unlimited** Editions

User Permissions Needed	
To turn on Pipeline Inspection:	Customize Application OR Modify All Data
To select summary fields:	Pipeline Inspection Admin Included or Revenue Intelligence Admin permissions

You can select from Amount, Quantity, Expected Revenue, or any custom currency or number field. Users choose from the available summary fields to view metrics totals in their pipeline views and in the Flow Chart.

1. From Setup, in the Quick Find box, enter *Pipeline Inspection*, and then select **Pipeline Inspection Setup**.
2. In the Define How Metrics Are Summarized section, click **Edit**, and then select the fields that you want to show to users.
3. Move your selected fields to the available fields list, and then save your changes.
4. To ensure recent changes are highlighted for your selected fields, and to show totals in the Flow tab, enable your fields for tracking in historical trending.

See Also

- [Turn On Pipeline Inspection](#)
[Considerations for Setting Up Pipeline Inspection](#)
[Manage Pipeline Inspection Metrics](#)

Manage Pipeline Inspection Metrics

Show metrics groups so your sales teams can view their pipelines with forecast categories or metrics that indicate changes over time.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Revenue Intelligence, which is available for an additional cost in: **Enterprise** and **Unlimited** Editions

User Permissions Needed	
To turn on pipeline changes metrics:	Customize Application OR Modify All Data
To access pipeline changes metrics:	Pipeline Inspection or Revenue Intelligence permissions

1. From Setup, in the Quick Find box, enter *Pipeline Inspection*, and then select **Pipeline Inspection Setup**.
 2. In the Define How Metrics Are Grouped section, make sure that the metric groupings that you want to show are selected. Select **Pipeline Changes**, **Forecast Category**, or both.
-  **Note** If you select Pipeline Changes metrics, users see a waterfall chart on the Chart tab when viewing the metrics.
3. Make sure to enable the custom currency and number fields that you use for summarizing metrics in Historical Trending. The Amount field is enabled in Historical Trending by default. To show data for pipeline changes metrics, and in the waterfall chart, this step is required.

Select a Forecast Rollups Method in Pipeline Inspection

Choose the rollup method that's best for your sales teams. Cumulative forecast rollups are selected by default, but you can change this setting as needed.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Revenue Intelligence, which is available for an additional cost in: **Enterprise** and **Unlimited** Editions

User Permissions Needed	
To select a forecast rollup method:	Customize Application OR Modify All Data

With single category rollups, each Pipeline Inspection metric represents opportunities from only one of the forecast categories. If users want to see their totals for the month or quarter with this type of rollup,

they add the Best Case, Commit, and Closed forecasts together manually.

With cumulative rollups, the metrics show cumulative amounts from the opportunities in the named forecast category and subsequent categories in your sales pipeline. This view makes it easy for sales team members to see the total numbers that they're likely to bring in without combining the category totals themselves.

1. From Setup, in the Quick Find box, enter *Pipeline Inspection*, and then select **Pipeline Inspection Setup**.
2. In the Define How Metrics Are Grouped section, select how to organize forecast categories in rollups.
 - Single category rollups - Show one forecast category per metric.
 - Cumulative forecast rollups - Show multiple related forecast categories per metric.



Note The forecast rollup method you select in Pipeline Inspection is separate from the forecast rollup setting for Salesforce Forecasting.

See Also

[Turn On Pipeline Inspection](#)

[Manage Pipeline Inspection Metrics](#)

[Considerations for Setting Up Pipeline Inspection](#)

Configure Deal Insights in Pipeline Inspection

Einstein Deal Insights gives sales reps predictions and recommendations from opportunities, calls, emails, and cases, right in the Pipeline Inspection view. Choose which insights to show in Pipeline Inspection to help sales reps move deals forward.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Revenue Intelligence, which is available for an additional cost in: **Enterprise** and **Unlimited** Editions

Depending on which Einstein features you've enabled, some insights are selected for you. To turn off these insights, disable the corresponding Einstein features.

1. From Setup, in the Quick Find box, enter *Pipeline Inspection*, and then select **Pipeline Inspection Setup**.
2. In the Turn on Einstein Deal Insights section, review any preselected insights.

Opportunity Closing Likelihood	Insights about deal progression and sales activities. If Einstein Opportunity Scoring is enabled, this checkbox is selected.
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Call Recordings	Trends surfaced from voice and video calls. If Einstein Conversation Insights is enabled, this checkbox is selected.
Emails	Insights and context from relevant emails. If Einstein Activity Capture and Email Insights are enabled, or if Activity Sharing with Non-Einstein Activity Capture Users is enabled, this checkbox is selected.

3. Select additional insights you want to see.

Service Cases	Insights from service cases related to opportunities. To get insights about service cases, use cases.
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See Also

[Enable Einstein Opportunity Scoring](#)
[Enable Einstein Opportunity Scoring](#)
[Set Up Einstein Activity Capture](#)
[Turn On Einstein Email Insights](#)

Show Opportunity Scores in Pipeline Inspection

In Pipeline Inspection, opportunity scores are shown in tiers instead of numeric scores. When the score goes up or down a tier, the changes are highlighted.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Revenue Intelligence, which is available for an additional cost in: **Enterprise** and **Unlimited** Editions

User Permissions Needed	
To turn on Pipeline Inspection:	Customize Application or Modify All Data
To set up Einstein Opportunity Scoring:	Customize Application AND Modify All Data AND

User Permissions Needed	
	View All Profiles

1. To show users opportunity scores and related insights in Pipeline Inspection [set up Einstein Opportunity Scoring](#).
2. To view opportunity score tiers, ask your users to add the Opportunity Score field to their Pipeline Inspection views.

See Also

[Enable Einstein Opportunity Scoring](#)
[Configure Deal Insights in Pipeline Inspection](#)

Enable the Flow Chart in Pipeline Inspection

Give Revenue Intelligence users access to a dynamic chart in Pipeline Inspection that shows the changes to opportunities in forecast categories over time, based on the time filters they set.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Revenue Intelligence and Government Cloud Plus for an additional cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

User Permissions Needed	
To turn on the Flow Chart:	Customize Application or Modify All Data
To access the Flow Chart:	Revenue Intelligence User or Revenue Intelligence Admin permission set

1. From Setup, in the Quick Find box, enter *Pipeline Inspection*, and then select **Pipeline Inspection Setup**.
2. Turn on the Pipeline Inspection flow chart.

 **Note** When summary fields other than Amount are configured in Pipeline Inspection Setup, you must enable the fields for tracking in historical trending to see data for the pipeline metrics in the flow chart. Fields include: Quantity, Expected Revenue, or any custom currency or number field on the opportunity object.

See Also

[Turn On Pipeline Inspection](#)
[Considerations for Setting Up Pipeline Inspection](#)

Enable More Features for Pipeline Inspection

Make the most out of Pipeline Inspection by setting up optional features that give your users more helpful data and insights.

REQUIRED EDITIONS

Available in: Lightning Experience



Example

! **Important** Starting in Summer '25, data from Activity Metrics and Activity 360 Reporting isn't available in Pipeline Inspection unless previously set up. This change affects the counts of activities by type in Activity Timeline and the Who's Involved feature. If you're already using Activity Metrics and Activity 360 Reporting data in Pipeline Inspection, you can continue to do so until Summer '26 when these Einstein Activity Capture reporting tools are scheduled for retirement. See [Einstein Activity Capture Activity 360 Reporting](#), [Activity Metrics](#), [Activities Dashboard Upcoming Retirement \(Summer '26\)](#).

Feature	What It Does	How to Set Up
Activity 360 Reporting from Einstein Activity Capture	See top contacts and users that are involved in an opportunity with engagement metrics, and activity metrics and details on the activities panel.	Requires admin to set up in Einstein Activity Capture settings. See Set Up Activity 360 for Einstein Activity Capture
Activity Metrics with Einstein Activity Capture	Show users activities on the Overview tab on the insights panel.	Requires admin to set up and configure. See Turn On Activity Metrics If both Activity 360 and Activity Metrics are enabled, activity data comes from Activity 360.
Einstein Activity Capture	Capture activity data for engagement metrics and details, and to generate insights.	Requires admin to set up. See Admin Setup for Einstein Activity Capture Requires user to configure. See End-User Setup for Einstein Activity Capture
Einstein Conversation Insights	Show users insights about calls on the Overview tab on the insights panel.	Requires admin to set up and configure. See Set Up Einstein Conversation Insights
Einstein Deal Insights	Show insights and	Requires admin to set up. See

Feature	What It Does	How to Set Up
	predictions to sales teams about deal health, and recommended actions they can take to move deals forward.	Configure Deal Insights in Pipeline Inspection
Einstein Email Insights	Show users email insights on the Overview tab on the insights panel.	Requires admin to set up. See Turn On Einstein Email Insights
Einstein Opportunity Scoring	Show users tiered opportunity scores and related insights on the Overview tab on the insights panel.	Requires admin to set up. See Einstein Opportunity Scoring

See Also

[Turn On Pipeline Inspection](#)
[Revenue Intelligence](#)

Drive Predictable Revenue with Pipeline Inspection

Get a consolidated pipeline view, with key metrics, opportunities, and weekly changes in close dates, amounts, stages, forecast categories. See when next steps aren't updated, and get deal insights and activity details. Use these insights to help forecast revenue more accurately and focus on the most important opportunities.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Revenue Intelligence, which is available for an additional cost in: **Enterprise** and **Unlimited** Editions

[Managing Pipelines with Pipeline Inspection](#)

Get an all-in-one single pipeline view, with multiple filtering options and key opportunity changes and insights about the health of your deals. And summarize your pipeline metrics by amount, currency, and number fields to align your view with the way you track your sales.

[Set or Change the Summary Field for Pipeline Inspection Metrics](#)

Select from several field types to summarize metrics in Pipeline Inspection, based on fields that your Salesforce admin configured. For example, use a currency field to see totals for annual recurring revenue, or a number field to view product quantities. Available fields include Amount, Quantity,

Expected Revenue, and custom currency and number fields.

Pipeline Inspection Charts

Users with access to Revenue Intelligence can see recent changes to forecast category metrics on a flow chart, and all Pipeline Inspection users can view pipeline changes metrics on a waterfall chart. The charts show the changes to opportunities for the different sets of metrics over time. Filter results to see the most relevant data.

Einstein Features in Pipeline Inspection

Let AI help your sales team focus on the right opportunities so they can close more deals.

Guidelines and Limits for Pipeline Inspection

Keep in mind some important guidelines and limits of the Pipeline Inspection features so that you can manage your pipeline more effectively and close more deals.

Pipeline Inspection Metrics and Fields

The metrics shown in Pipeline Inspection are key performance indicators tracked in sales pipelines.

The fields in the Pipeline Inspection opportunity list give more detailed information about the opportunities in the pipeline.

Managing Pipelines with Pipeline Inspection

Get an all-in-one single pipeline view, with multiple filtering options and key opportunity changes and insights about the health of your deals. And summarize your pipeline metrics by amount, currency, and number fields to align your view with the way you track your sales.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Revenue Intelligence, which is available for an additional cost in: **Enterprise** and **Unlimited** Editions

Ensuring Sales Rep Accountability with Pipeline Inspection (English Only)

! **Important** Starting in Summer '25, data from Activity Metrics and Activity 360 Reporting isn't available in Pipeline Inspection unless previously set up. This change affects the counts of activities by type in Activity Timeline and the Who's Involved feature. If you're already using Activity Metrics and Activity 360 Reporting data in Pipeline Inspection, you can continue to do so until Summer '26 when these Einstein Activity Capture reporting tools are scheduled for retirement. See [Einstein Activity Capture Activity 360 Reporting, Activity Metrics, Activities Dashboard Upcoming Retirement \(Summer '26\)](#).

Access Pipeline Inspection from the Opportunities tab.

	<input type="checkbox"/> Opportunity Name ↑	Account Name	Amount	Close Date	Stage	Forecast Cat...	Next Step
1	<input type="checkbox"/> Accusage, Inc. - New B...	Accusage, Inc.	\$49,300.00	8/28/2021...	Negotiation	Commit	Follow up with ...
2	<input type="checkbox"/> Accusage, Inc. - New B...	Accusage, Inc.	\$6,499.00	10/17/2021...	Proposal/Q...	Most Likely	Need to get th...
3	<input type="checkbox"/> Accusage, Inc. - New B...	Accusage, Inc.	\$35,000.00	7/17/2021	Proposal/Q...	Most Likely	
4	<input type="checkbox"/> Accusage, Inc. - Services	Accusage, Inc.	\$85,000.00	6/4/2021	Closed Won	Closed	

Pipeline Views and Saved Filters

You can filter the Pipeline Inspection view multiple ways.

1) Quick filters for Close Date, This Quarter, Owner, My Team, Changes Since, and Start of the Period.

2) Pipeline metrics like Overdue.

3) List View Controls menu under the gear icon.

4) Pipeline view controls under the gear icon.

5) Saved Filters panel.

6) Filter Logic panel.

Use the quick filters to narrow the view by time period, sales rep, team, or territory (1). Click any of the pipeline metrics, such as Overdue (2) in the pipeline changes metrics group, to see a list of matching opportunities. To create custom filters and saved views (3), use the List View Controls menu under the gear icon (4). You can create, clone, rename, or delete pipeline views. Add filters to view the opportunities that meet your filter criteria. Using the filter panel, add more criteria such as accounts, amounts, and stages (5), and add filter logic to get an even narrower view of your pipeline (6).

Mark Opportunities as Important

The screenshot shows the Pipeline view in the Sales app. At the top, there's a navigation bar with a crown icon, 'Opportunities', 'My Pipeline' (with a dropdown arrow), and a search bar. A large orange circle with the number '8' highlights the 'My Pipeline' dropdown. In the top right, there are buttons for 'Showing Pipeline Changes', 'New', and 'List View'. Below the navigation is a toolbar with 'Inspection' and 'Chart' tabs, and filters for 'Close Date', 'This Quarter', 'Owner', 'My Team's Opportunity Teams', 'Changes Since', and 'Start of the Period'. A timestamp 'Last updated 4 minutes ago' is also present. The main area displays summary statistics: Open Pipeline (\$629K), New (\$0), Won (\$0), Increased (\$0), Moved In (\$72K), Moved Out (\$0), Decreased (\$0), Lost (\$0), and Overdue (\$293K). A large orange circle with the number '9' highlights the 'Start of the Period' filter. Below this is a table titled '7 items • Sorted by Opportunity Name • Filtered by Close Date, My Team's Opportunity Teams, Marked as Important, Open Pipeline'. The table has columns for Opportunity Name, Opportunity Score, Amount, Close Date, Stage, Next Step, and Recent Activity. Row 1 (highlighted with a blue circle and the number '7') shows 'Dataset, Inc. - New Business - 91K' with a 'Med' score, \$90,921.54 amount, 9/14/2023 close date, 'Proposal/Quote' stage, 'Updating today' next step, and 'None' recent activity. Other rows show similar details for different opportunities.

To help you track your priority deals, use the icon next to the opportunity name in the list to mark the opportunity as important (7). To view all the opportunities that you marked as Important, use the My Important Opportunities view in the pipeline views dropdown (8). You can also view just the important opportunities for any other saved view by applying the important opportunities filter (9).

Recent Opportunity Changes

The screenshot shows the Pipeline view with a focus on recent changes. The top navigation and toolbar are identical to the previous screenshot. The main area displays summary statistics: Open Pipeline (\$43M), New (\$150K), Won (\$461K), Increased (\$404K), Moved In (\$72K), Moved Out (\$0), Decreased (\$12K), Lost (\$80K), and Overdue (\$65M). Below this is a table titled '25+ items • Sorted by Close Date • Filtered by Close Date, My Team, Open Pipeline'. The table has columns for Opportunity Name, Opportunity Score, Amount, Close Date, Stage, and Next Step. Row 3 (highlighted with a blue circle) shows 'Green Fields Media - Add-On Business' with a 'High' score, \$63,000.00 amount, 7/1/2023 close date, 'Proposal/Quote' stage, and 'Discovery' next step. A red callout box with the text 'Next Step not updated' and 'Last updated 35 days ago' is overlaid on the 'Discovery' cell. Row 5 shows 'Roseburg Products - Add-On Bus...' with a 'High' score, \$10,000.00 amount, 7/1/2023 close date, 'Negotiation' stage, and 'Meeting next week' next step. A red callout box with the text 'Updated by Catherine Smith on 6/14/2023' is overlaid on the 'Meeting next week' cell.

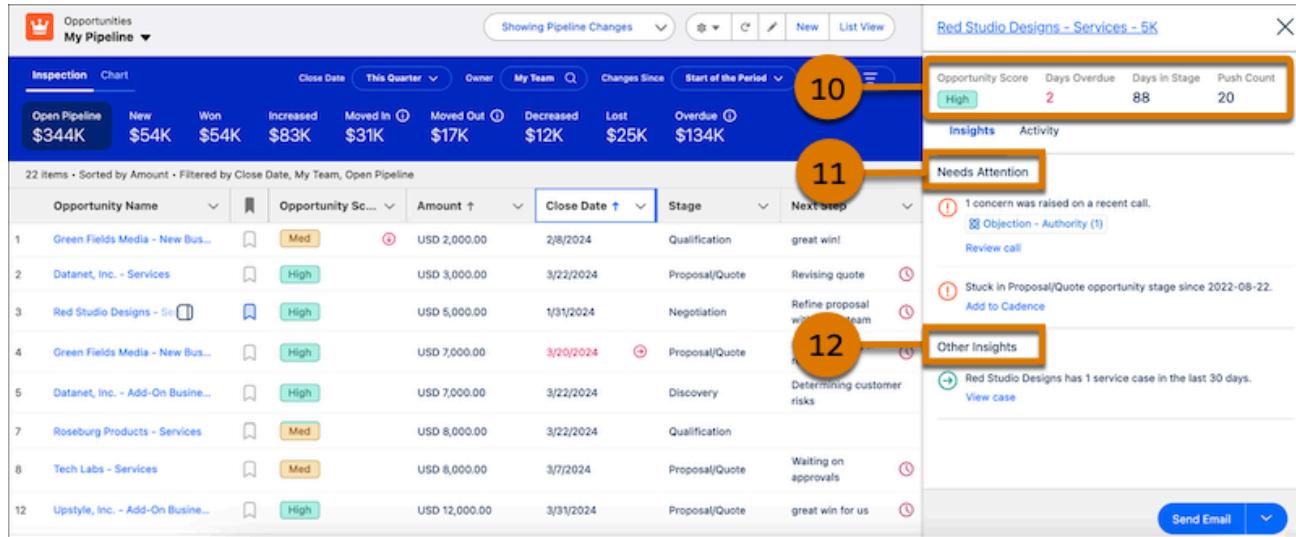
To help you identify deals that need more attention, changes that occurred in the last 7 days are highlighted in the opportunity list. Changes to amounts, close dates, forecast categories, and stages are highlighted with red and green text and arrows. To get more insights, such as what changed, when, and who made the change, hover over the field with a change.

Opportunities with no updates to the Next Steps field in 7 days or more are also called out with a red

clock icon.

Einstein Deal Insights and Activity Details

Get a deeper understanding of deal health and activity. AI insights from call recordings, emails, service cases, and other sources are shown in the Insights tab on a side panel. To open the panel, click the side panel icon .



The screenshot shows the Salesforce Opportunities page with the Einstein Deal Insights and Activity Details feature enabled. The Insights panel is open on the right side of the screen, displaying three main sections:

- Opportunity Score:** Shows a High score (circled 10). This section includes metrics like Days Overdue (2), Days in Stage (88), and Push Count (20).
- Needs Attention:** Shows a concern about a recent call (circled 11). It also lists a proposal-quote opportunity stuck since August 22nd.
- Other Insights:** Shows a service case for Red Studio Designs (circled 12).

The main Opportunities list on the left shows 22 items, sorted by amount and filtered by close date, my team, and open pipeline. The top navigation bar includes tabs for Inspection and Chart, and filters for Close Date (This Quarter), Owner (My Team), Changes Since, Start of the Period, and Pipeline Changes.

You also get a snapshot of opportunity metrics (10), essential insights that indicate a deal's likelihood of closing (11), and informational insights about the opportunity or its account (12).

Activity details and aggregate activity counts are shown on the Activity tab, letting sales teams see recent and upcoming activities. And aggregate activity counts help sales managers understand deal activity.

The screenshot shows the Salesforce Opportunities page with the following key elements:

- Header:** Opportunities, My Pipeline, Showing Pipeline Changes, New, List View.
- Top Bar Metrics:** Open Pipeline (\$344K), New (\$54K), Won (\$54K), Increased (\$83K), Moved In (31K), Moved Out (17K), Decreased (\$12K), Lost (\$25K), Overdue (134K).
- Table:** A list of 22 opportunities, each with columns for Name, Score (e.g., Med, High), Amount (USD), Close Date, Stage, and Recent (e.g., 1 day ago). An orange circle labeled 14 points to the "Who's Involved (3)" section.
- Right Panel:**
 - Activity Tab:** Shows 13 activities over the last 7 days. An orange circle labeled 13 highlights the tab.
 - Who's Involved (3):** 2 external contacts and 1 internal user. An orange circle labeled 14 points here.
 - Activity Types (15):** 3 All Activity, 1 Meetings, 2 Calls, 0 Emails.
 - Upcoming Activity (16):** A call at 12:00 PM on Feb 5. An orange circle labeled 16 points here.
 - Opportunity Next Step (17):** Over 7 days since last update, refine proposal with buyer team. An orange circle labeled 17 points here.
 - Recent Activities (18):** A meeting at 12:00 PM yesterday. An orange circle labeled 18 points here.
 - Action Button (19):** Send Email.

When your admin enables Activity 360 Reporting in Einstein Activity Capture, the Activity tab (13) shows valuable information. There's a summary (14) of how many internal and external people have been involved in an activity during the selected time period. The total number of activities and the activities broken down by type (15) are also shown. You see upcoming activities (16), the next step (17), and past activity along with relevant insights (18). And you can take immediate action, such as sending an email (19).

Tiered Einstein Opportunity Scores

The screenshot shows the Salesforce Opportunities page with the following key elements:

- Header:** Opportunities, My Pipeline, Close Date This Month, Owner, My Team, Changes Since 2 Weeks Ago.
- Top Bar Metrics:** Open Pipeline (\$1.2M), New (\$352K), Won (\$227K), Increased (\$0), Moved In (1.1M), Moved Out (0), Decreased (\$0), Lost (\$0), Overdue (\$22M).
- Table:** A list of 8 opportunities, each with columns for Name, Score (e.g., High, Not Available), Amount, Close Date, Stage, Next Step, Recent Activity, and Forecast. An orange circle labeled 19 points to the Einstein Scoring modal.
- Modal (Einstein Scoring):**
 - Score:** 61 (highlighted with an orange circle).
 - Top Positives:** No top positives are available for this opportunity. [More info.](#)
 - Top Negatives:** No top negatives are available for this opportunity. [More info.](#)

In Pipeline Inspection, opportunity scores are grouped into tiers. The tiers and score ranges are High (67–99), Medium (34–66), and Low (1–33). To see the opportunity score, key factors, and score changes, click the tier. When an opportunity score moves up or down a tier within the last 7 days, an arrow shows in the field.

Inline Editing

Sales teams can keep their opportunities accurate by editing fields inline while they're reviewing their pipelines. The Amount field is editable inline on opportunities without products in pipeline views. You can edit opportunities of multiple record types inline in the same list view.

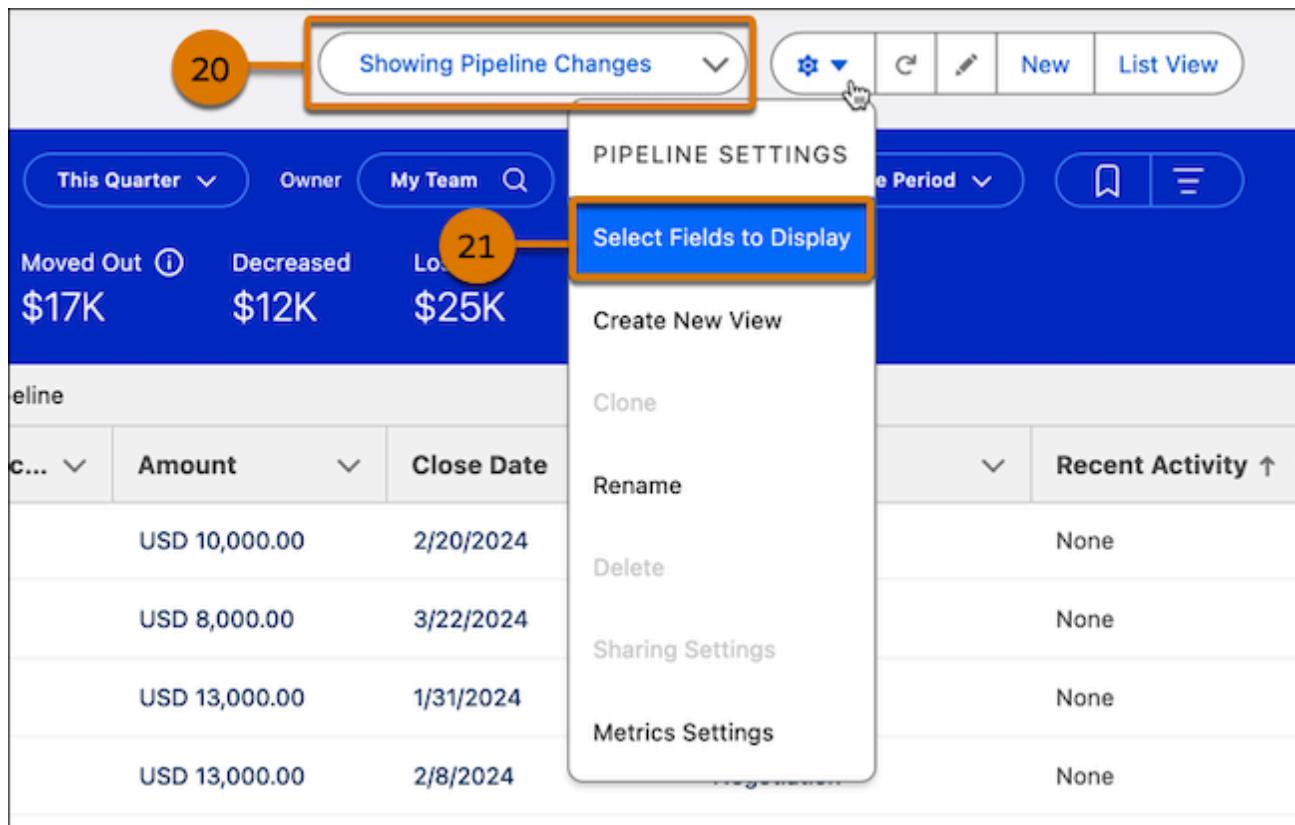
The screenshot shows the Pipeline Inspection view in Salesforce. At the top, there are tabs for 'Inspection' and 'Chart', and filters for 'Close Date' (set to 'This Quarter'), 'Owner', and 'My Team'. Below the filters, summary metrics are displayed: Open Pipeline (\$43M), New (\$150K), Won (\$461K), Increased (\$404K), Moved In (\$72K), Moved Out (\$0), and Decreased (\$12K). A message indicates '175+ items · Sorted by Close Date · Filtered by Close Date, My Team, Open Pipeline'. The main area is a list of opportunities with columns for Opportunity Name, Opportunity Score, Amount, and Close Date. Opportunity 2, 'Wellspring, Inc. - New Business - 250K', has its 'Opportunity Score' field highlighted with a blue border and a pencil icon, indicating it is currently being edited. A hand cursor is shown clicking the pencil icon. The other opportunities listed are: 1. Vand Enterprises, Inc. - Services - 35K (High, \$35,000.00, 7/1/2023); 3. Green Fields Media - Add-On Business (High, \$63,000.00, 7/1/2023); 4. Advanced Communications - New Bus... (Med, \$8,000.00, 7/1/2023).

Opportunity Name	Opportunity Sc...	Amount	Close Date
Vand Enterprises, Inc. - Services - 35K	High	\$35,000.00	7/1/2023
Wellspring, Inc. - New Business - 250K	High	\$5,000.00	7/1/2023
Green Fields Media - Add-On Business	High	\$63,000.00	7/1/2023
Advanced Communications - New Bus...	Med	\$8,000.00	7/1/2023

To edit an opportunity field, hover over the field. Similar to other list views, if the field is editable, a pencil appears.

Pipeline Metrics

Use forecast category or pipeline changes metrics groups (20), based on which groups are enabled, to view and filter your pipeline from different perspectives. Change your metrics view using the dropdown menu. To summarize pipeline metrics, select from Amount, Quantity, Expected Revenue, or any custom currency or number field, based on what your Salesforce admin configured. The default field shown in the My Pipeline view is Amount. Set or change the view in the Pipeline Settings menu when you're creating a view (21).



See Also

- [Guidelines and Limits for Pipeline Inspection](#)
- [Einstein Features in Pipeline Inspection](#)
- [Pipeline Inspection Metrics and Fields](#)

Set or Change the Summary Field for Pipeline Inspection Metrics

Select from several field types to summarize metrics in Pipeline Inspection, based on fields that your Salesforce admin configured. For example, use a currency field to see totals for annual recurring revenue, or a number field to view product quantities. Available fields include Amount, Quantity, Expected Revenue, and custom currency and number fields.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Revenue Intelligence, which is available for an additional cost in: **Enterprise** and **Unlimited** Editions

User Permissions Needed

To set or change summary fields:

Pipeline Inspection User or Revenue Intelligence User permissions

1. On the **Opportunities** tab, click **Pipeline Inspection**.
2. To set the summary field in a new pipeline view, select **Create New View** in the List View Controls menu  . Select the summary field after you enter a name, and then save your changes.
3. To change the summary field in a Pipeline Inspection view, use the Metrics Settings option in the List View Controls menu. Select a summary field, and then save your changes.

See Also

- [Guidelines and Limits for Pipeline Inspection](#)
[Managing Pipelines with Pipeline Inspection](#)

Pipeline Inspection Charts

Users with access to Revenue Intelligence can see recent changes to forecast category metrics on a flow chart, and all Pipeline Inspection users can view pipeline changes metrics on a waterfall chart. The charts show the changes to opportunities for the different sets of metrics over time. Filter results to see the most relevant data.

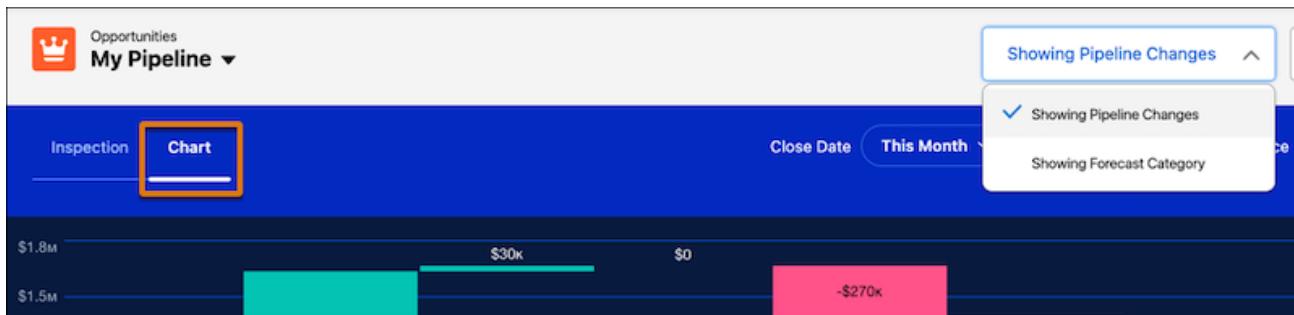
REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

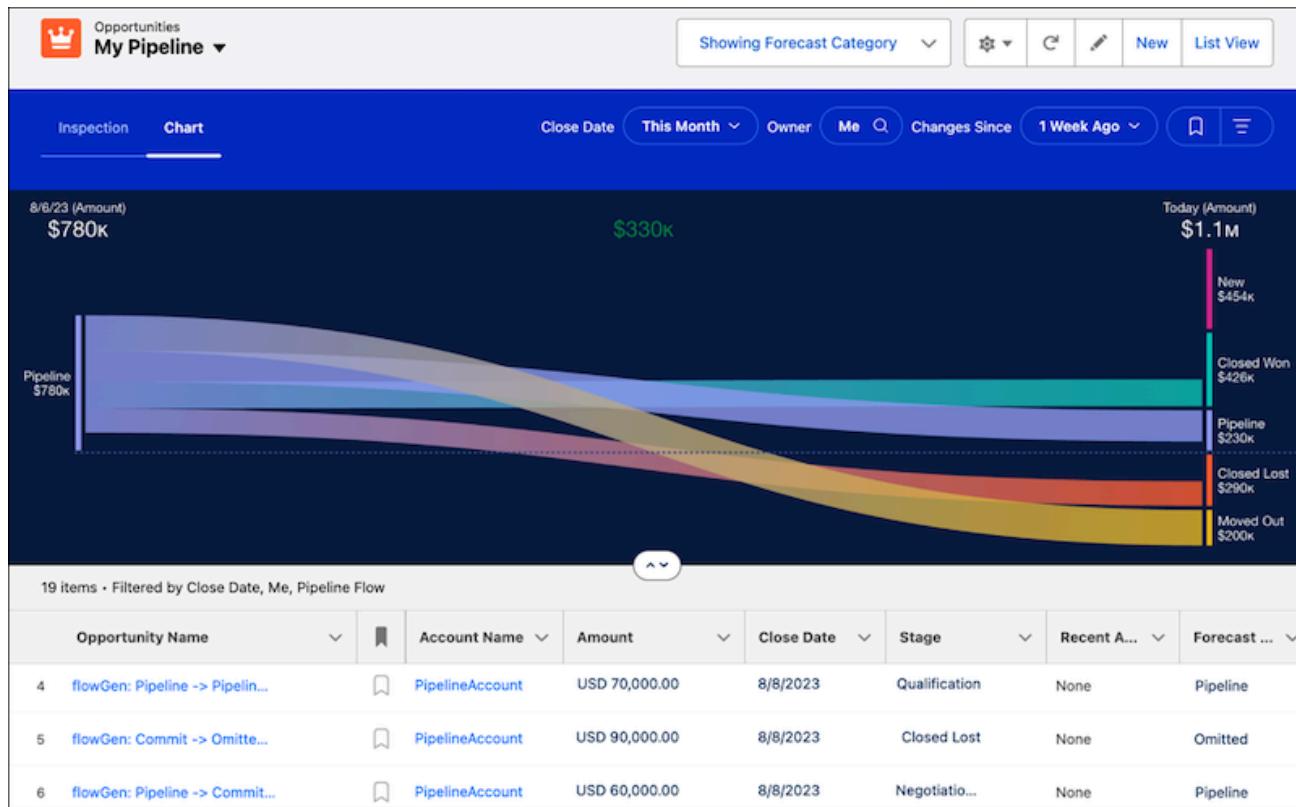
Available with Revenue Intelligence, which is available for an additional cost in: **Enterprise** and **Unlimited** Editions

To access charts in Pipeline Inspection, go to the Chart tab. To see the flow chart, select **Forecast Category** in the Metrics dropdown. To see the waterfall chart, select **Pipeline Changes** in the Metrics dropdown menu. The metrics and charts you can see depend on the settings enabled.

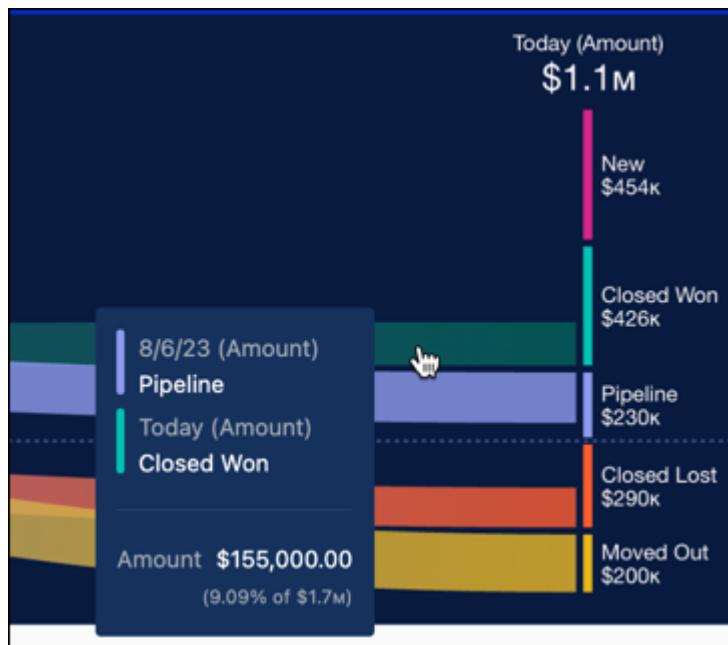


Flow Chart

The flow chart shows the change in opportunity forecast categories according to your filter criteria. To specify the opportunities that you want to focus on, use the filters for close date and user. Also, specify the time period that you want to show in the chart.



The chart shows pipeline changes starting from the date that you choose to the present day. To highlight the changes related to that forecast category, click a band in the chart. The list below the chart also updates to show opportunities related to your selection.



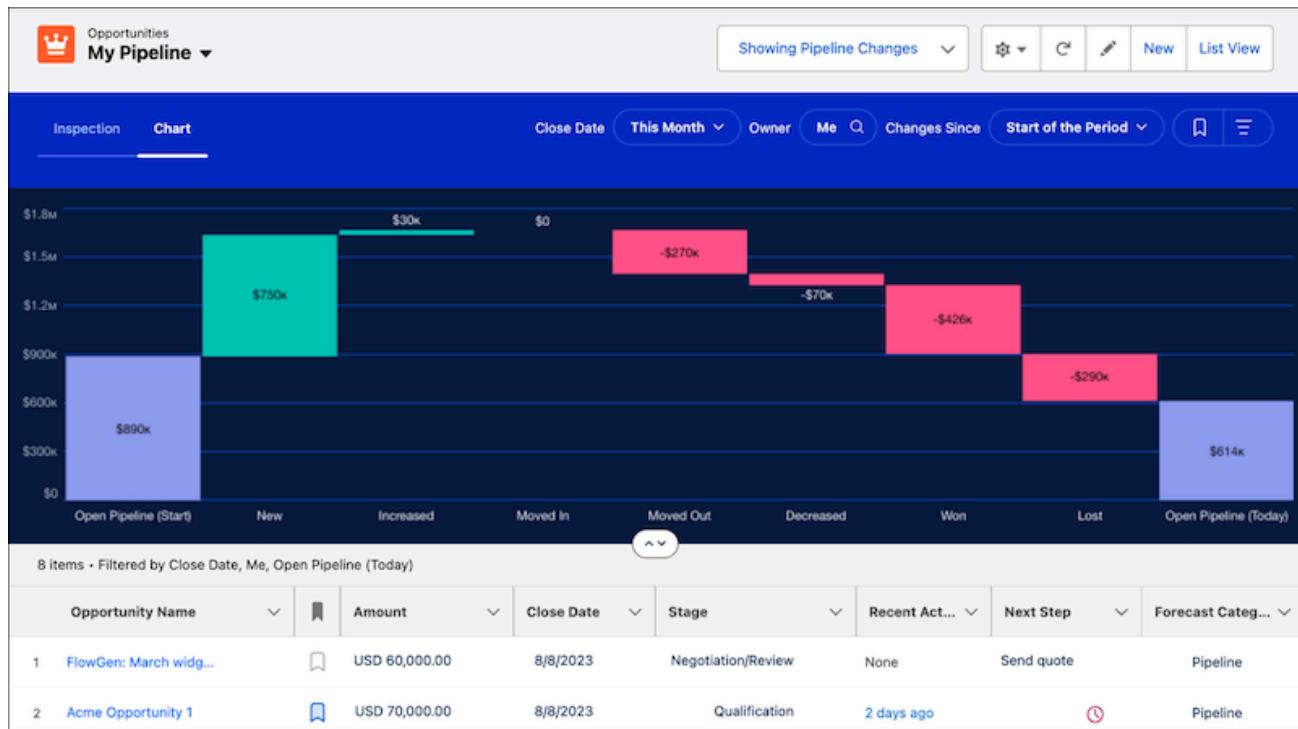
The data shown in the chart is for individual forecast categories. You can select from amount, currency, or number fields to summarize metrics in Pipeline Inspection and the flow chart, based on what your Salesforce admin configured. For example, use a currency field to see data for annual recurring revenue,

or use a number field to view product quantities.

The forecast categories are defined by Salesforce, and sometimes they don't correspond precisely to the labels of the forecast categories that you use. Your admin can customize the labels.

Waterfall Chart

The waterfall chart shows changes in pipeline categories such as opportunities created, increases and decreases in your pipeline, and won and lost amounts. It also shows amounts for opportunities moved in and out of the period. You specify the opportunities to view using the quick filters for close date and user and then the time period to show.



The chart data shows the net change to the pipeline over the selected period. The fields used to summarize your data are the same as the fields used for the flow chart and are based on the fields your admin configured.

The metrics names, such as New, Increased, and Won, in the pipeline changes metrics group shown in the waterfall chart are specified by Salesforce and can't be changed.

Note The charts don't support Expected Revenue and Quantity as summary fields.

See Also

[Revenue Intelligence](#)

[Revenue Insights](#)

[Set or Change the Summary Field for Pipeline Inspection Metrics](#)

Einstein Features in Pipeline Inspection

Let AI help your sales team focus on the right opportunities so they can close more deals.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Revenue Intelligence, which is available for an additional cost in: **Enterprise** and **Unlimited** Editions

[Einstein Deal Insights](#)

Einstein Deal Insights uses data science and machine learning to show insights and predictions about deal health. Sales teams also get recommended actions they can take to move deals forward.

[Tiered Einstein Opportunity Scores](#)

Opportunity scores tell you the likelihood that an opportunity will be won. For each opportunity score, Einstein shows the positive and negative factors that contribute the most to the score. In Pipeline Inspection, opportunity scores are shown in tiers instead of numeric scores. When the score goes up or down a tier, a red or green arrow indicates the change.

Einstein Deal Insights

Einstein Deal Insights uses data science and machine learning to show insights and predictions about deal health. Sales teams also get recommended actions they can take to move deals forward.

REQUIRED EDITIONS

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Available with Revenue Intelligence, which is available for an additional cost in: **Enterprise** and **Unlimited** Editions

Insights from Einstein Opportunity Scoring

Show insights about deal progression and sales activities. To get the most out of these insights, use Einstein Activity Capture to connect your email, calendar, events, and contacts to Salesforce.

Einstein analyzes patterns in your data to build a data model. Insights appear in Pipeline Inspection if the Einstein Opportunity Scoring model determines that they're influential in the deal's likelihood to close. The insights can be positive or negative factors. Einstein analyzes the opportunity data weekly and refreshes the model. Then, the model is used multiple times daily to update the insights you see.

Criteria Used to Generate Insights	Reasons Insights Aren't Shown
<ul style="list-style-type: none"> Standard opportunity fields, opportunity record history, tasks, and activities Automatically synced email and calendar data (if Einstein Activity Capture is enabled) 	<ul style="list-style-type: none"> An insight that's generated isn't one of the top supporting factors for the opportunity score. There's not enough activity data. Either Einstein Activity Capture isn't set up, or not enough activity data is associated with the opportunity. The opportunity is closed, so insights are removed.

Insights about Service Cases

Show insights about service cases that can affect the progress of an opportunity.

When the Pipeline Inspection side panel is opened, Salesforce checks for cases related to the opportunity. If service cases are found, insights are shown.

Criteria Used to Generate Insights	Reasons Insights Aren't Shown
<ul style="list-style-type: none"> Cases for opportunity contacts, products, and the opportunity's account Related cases within the last 30 days 	<ul style="list-style-type: none"> You don't use cases. There are no cases within the last 30 days for an opportunity contact, opportunity product, or an opportunity's account. The opportunity is closed, so insights are removed.

Insights from Einstein Activity Capture and Einstein Email Insights

Show email-related insights that indicate whether contacts have raised concerns about competition or pricing. Einstein analyzes email sent to Einstein Activity Users only.

Criteria Used to Generate Insights	Reasons Insights Aren't Shown
<ul style="list-style-type: none"> Competition Mentioned. An email where the sender mentions a competitive business situation Pricing Discussed. An email where the sender discusses or asks for pricing or billing information 	<ul style="list-style-type: none"> Einstein Activity Capture was turned off, and past emails were hidden. The user's email isn't connecting or syncing properly with Einstein Activity Capture. There were no email insights within the last 7 days. Einstein Email Insights isn't enabled.

Insights from Einstein Conversation Insights

Show insights based on call recordings that reveal specific customer concerns.

Einstein analyzes voice and video calls and shows conversation trends and insights. Calls are recorded and analyzed for mentions of specific keywords, phrases, and points of interest.

Criteria Used to Generate Insights	Reasons Insights Aren't Shown
<ul style="list-style-type: none">• Objections related to budget, authority, need, or timing• Mentions of specific competitor names, raised in the context of a challenge• Challenges related to topics such as trust, privacy, compliance, ethics, or security• Calls without any action items identified	<ul style="list-style-type: none">• There were no insights from the most recent call within the last 7 days.

Insights about Buyers

Show insights based on contacts that are detractors on deals.

Einstein analyzes contacts across company levels on accounts and opportunities to discover key stakeholders, deal champions, and potential risks. Buyer insights are shown if a contact on the opportunity is marked as a detractor on the Buyer Attributes field.

Criteria Used to Generate Insights	Reasons Insights Aren't Shown
<ul style="list-style-type: none">• Contacts marked as detractors on the opportunity	<ul style="list-style-type: none">• The opportunity has no contacts.• None of the contacts on the opportunity are marked as a detractor.

See Also

[Tiered Einstein Opportunity Scores](#)

[Understand How Einstein Scores Your Opportunities](#)

[Managing Pipelines with Pipeline Inspection](#)

[Automatic Contact Enhancements](#)

Tiered Einstein Opportunity Scores

Opportunity scores tell you the likelihood that an opportunity will be won. For each opportunity score, Einstein shows the positive and negative factors that contribute the most to the score. In Pipeline Inspection, opportunity scores are shown in tiers instead of numeric scores. When the score goes up or down a tier, a red or green arrow indicates the change.

REQUIRED EDITIONS

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Available with Revenue Intelligence, which is available for an additional cost in: **Enterprise** and **Unlimited** Editions



Opportunity Score Tiers

The color-coded tiers are shown in the Pipeline Inspection opportunity list in place of the 1–99 scores traditionally shown in opportunities. The opportunity score tiers and thresholds are:

- High: 67–99
- Med: 34–66
- Low: 1–33

Opportunity Score Change Alerts

When an opportunity score changes enough to move up or down a tier, the change is highlighted with an arrow to the tier in the Pipeline Inspection list view. A green up arrow shows that the opportunity score has increased from its prior score. A red down arrow shows that the opportunity score has decreased from its prior score.

See Also

[Understand How Einstein Scores Your Opportunities](#)

[Einstein Deal Insights](#)

[Managing Pipelines with Pipeline Inspection](#)

Guidelines and Limits for Pipeline Inspection

Keep in mind some important guidelines and limits of the Pipeline Inspection features so that you can manage your pipeline more effectively and close more deals.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Revenue Intelligence, which is available for an additional cost in: **Enterprise** and **Unlimited** Editions



Ensuring Sales Rep Accountability with Pipeline Inspection (English Only)

! **Important** Starting in Summer '25, data from Activity Metrics and Activity 360 Reporting isn't available in Pipeline Inspection unless previously set up. This change affects the counts of activities by type in Activity Timeline and the Who's Involved feature. If you're already using Activity Metrics and Activity 360 Reporting data in Pipeline Inspection, you can continue to do so until Summer '26 when these Einstein Activity Capture reporting tools are scheduled for retirement. See [Einstein Activity Capture Activity 360 Reporting, Activity Metrics, Activities Dashboard Upcoming Retirement \(Summer '26\)](#).

Filtering

- If a search returns 2,000 or more records, a total for the selected metric isn't shown.
- The Moved Out metric looks at opportunities with close dates within 6 months after the selected period to determine whether those deals meet the Moved Out criteria. The searched records count toward the record limit.
- Even if the maximum record limit is reached for any of the pipeline metrics, and the total for the metric isn't shown, the list still shows records.
- When filtering by a pipeline metric, the list sometimes shows fewer than the maximum opportunities even when the actual number of matching opportunities is more than the maximum.
- The All Opportunities owner filter isn't supported.
- You can filter by opportunity owner, opportunity teams, or territories.
- To filter by any user's opportunities, make sure you have View All Records permission on opportunities.
- Managers can see deals for users who have subordinate roles in the role hierarchy, where the user is either the opportunity owner or on the opportunity team. Managers can also see deals for users with subordinate portal roles.
- To see opportunities where your reports are on the opportunity team, make sure the manager and the opportunity team members are in the same branch of the role hierarchy. If you don't use a role hierarchy, add the opportunity team members to the Opportunity Team related list.
- Filter logic is supported for the AND, NOT, and OR operators.

Pipeline Views and Custom Filters

- The default pipeline views are My Pipeline and My Important Opportunities. You can't share, clone, or delete default pipeline views.
- To create or edit public pipeline views, users must have the Manage Public List Views permission. Other users can only create private views.
- Pipeline views are created with fields that users have permission to view. When users gain access to fields they didn't previously have access to, they can manually add the fields to their private views. Users with the Manage Public List Views permission can add the fields to public views.
- Pipeline views and saved filters aren't shared between Pipeline Inspection and Opportunity list views.
- To create and edit all types of list views, users must have the Create and Customize List Views permission.
- When a user is saved in the Owner filter, you can't update the sharing settings for a pipeline view.

Opportunity Changes

- The Amount field highlights changes only when the currency is the same for the before and changed-to values.
- The value in the Recent Activity field is the difference, in days, between the current day and a past activity. The value in this field can also represent the number of days between the current day and an upcoming activity.
- New tasks created on opportunities don't appear in the Recent Activity field in Pipeline Inspection until they're completed. New calls and events show at the time they're created, regardless of their status.
- The Stage and Forecast Category changes shown in red and green text with arrows indicate stages or categories that are advancing or reverting. The progression of stages follows the order set by your Salesforce admin when they selected the picklist values for opportunity stages and mapped them to forecast categories.

Opportunities Marked as Important

- Users can mark up to 200 opportunities as important.
- Important opportunities are visible only to the user who marked them and can't be shared with other users.
- You can see and mark opportunities as important in Pipeline Inspection only.

Inline Editing

- Not all fields in the list view can be inline edited. Editable fields have a pencil when you hover over the field. Non-editable cells have a lock .
- When you're making inline edits, required fields can't be left blank and read-only fields can't be edited. However, field-level security (FLS) settings take precedence over how a field is configured on the page layout. For example, if a field is set to Read-Only for a specific profile, but Editable on the page layout, users with that profile can't inline edit the field in the list view.
- You can edit the following field types inline in Pipeline Inspection: Checkbox, Currency, Date, Email, External Lookup, Lookup, Number, Percent, Picklist, Multi-Select Picklist, Phone, Text, and URL.
- These opportunity fields are also editable inline: Amount (on opportunities without products), Close Date, Quantity, and Stage. Stage is editable inline only when no other validations or dependent fields have been added.
- You can't edit the Forecast Category and Probability fields, because these fields are updated when the Stage field is edited.
- Although you can edit dependent picklist fields in Opportunity list views, they aren't editable inline in Pipeline Inspection.
- You can edit opportunities of multiple record types inline in the same list view.

Activity Timeline in Side Panel

- The filter selections must be set each time you view an opportunity.

- In the Upcoming Activity section, only one open activity is shown, and its due date must be within 6 months from the current date. Open tasks that don't have a due date aren't included. Open tasks that are overdue are included.

Deal Insights in Side Panel

- To view deal insights in the side panel, you must have at least one of these features enabled in your org: Einstein Conversation Insights, Einstein Deal Insights (in Pipeline Inspection), Einstein Email Insights, or Einstein Opportunity Scoring.
- When a required feature is enabled and a user has access, a side panel icon  appears next to the opportunity name in the list. Clicking the icon opens a side panel that shows the opportunity metrics and insights on the Insights tab.
- If a user doesn't have access to the required features, the icon that opens the panel to view the deal insights is hidden.
- Einstein Activity Capture, Einstein Conversation Insights, Einstein Deal Insights, Einstein Email Insights, Einstein Opportunity Scoring, and service cases supply the insights shown on the Insights tab. Activity-related insights include manually entered activities, and activities logged in Einstein Activity Capture.
- You can add contacts to a cadence from some Deal Insights. The limit that you can add is 20 contacts at a time, rather than 200 for the other objects supported by cadences.

Top Contacts and Users Involved in Deals

- You can see up to three external contacts (people whose email address isn't from your company), and two internal users (people whose email address is from your company). An admin must configure this feature.
- Contacts or users related to an opportunity who have no activity in the past seven or 30 days don't show in the side panel.

Pipeline Inspection Metrics

- The pipeline changes metrics include a Change field in the opportunity list that shows only when you filter by Increased or Decreased.
- The Push Count field tracks the number of times a close date is pushed out past a calendar month only. It doesn't track close dates pushed out within the same calendar month.
- The total number of pushes doesn't decrease when an opportunity's close date is pulled in by a calendar month.
- The Push Count field isn't shown in the list of opportunities in Pipeline Inspection by default. To show this field, click the gear icon and select the **Select Fields to Display** option.
- The available fields for summarizing pipeline metrics are Amount, Quantity, Expected Revenue, and custom currency and number fields. Formula fields can't be used as summary fields. When you use Quantity or Expected Revenue as summary fields, some data doesn't show in the pipeline metrics group and charts.

Charts

- If the summary values are negative or zero, the charts don't show data.
- If a search returns 2,000 or more opportunity records, the charts don't show data.

See Also

[Managing Pipelines with Pipeline Inspection](#)

[Pipeline Inspection Metrics and Fields](#)

[Einstein Features in Pipeline Inspection](#)

Pipeline Inspection Metrics and Fields

The metrics shown in Pipeline Inspection are key performance indicators tracked in sales pipelines. The fields in the Pipeline Inspection opportunity list give more detailed information about the opportunities in the pipeline.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Revenue Intelligence, which is available for an additional cost in: **Enterprise** and **Unlimited** Editions

Pipeline Inspection Metrics

Users can choose from two groups of metrics in Pipeline Inspection to view their pipelines. The metrics groups are based on forecast categories or pipeline changes. Number values for the metrics are shown in the user's currency.

Forecast category metrics are configurable as single or multiple category rollups.

For summarizing metrics, Pipeline Inspection supports the Amount field, and custom currency and number fields. Formula fields can't be used as summary fields.

Forecast Category Metrics Group

The Forecast Category metrics show how your pipeline metrics map to the forecast categories in your company's sales cycle.

 **Note** When multiple category rollups are enabled and the Most Likely category is set up, Most Likely is included in Best Case, Most Likely, Pipeline, and Total.

Metric	Represents the Total for Opportunities
Best Case	With forecast categories of Closed, Commit, Best Case, or Most Likely (optional).
Closed Lost	In a stage classified as Closed/Lost.
Closed Won	In a stage classified as Closed/Won.
Commit	With forecast categories of Closed or Commit.
Most Likely	With forecast categories of Closed, Commit, and Most Likely (optional).
Pipeline	With forecast categories of Best Case, Commit, Most Likely (optional), or Pipeline.
Total	With forecast categories of Closed, Commit, Best Case, Most Likely (optional), or Pipeline.

Opportunities with a Forecast Category of **Omitted** are excluded from the forecast.

Pipeline Changes Metrics Group

The Pipeline Changes metrics show how your pipeline changes over time. The Close Date filter shows opportunities based on their scheduled close date for the time period you specified. The Changes Since filter defines the time period in which changes for these opportunities occurred.

For example, a common snapshot a sales manager looks at is, “For my team’s opportunities with close dates in this quarter, what changes took place between the first day of the quarter and today?” To create a snapshot, pipeline metrics are compared over the two dates.

To see this snapshot, select these filters:

- Close Date: This Quarter
- Owner: My Team
- Changes Since: Start of the Period

To validate the change metrics, you can use one of these options: field history tracking, historical trend reporting, or opportunity stage history. From any of these sources, get the field values on the first day of the period and compare them to the current value.

 **Example** On the first day of the quarter, Bill has a \$100,000 deal with Acme Co. with a close date in next quarter. As of today, the close date on the Acme deal is in this quarter and the deal is Closed Won. In the Pipeline Changes view, the metrics show \$100,000 in Moved In and \$100,000 in Won.

Metric	Represents the Total for Opportunities
Open Pipeline	With forecast categories of Best Case, Commit, Most Likely (optional),

Metric	Represents the Total for Opportunities
	Omitted, or Pipeline, and that have a close date currently within the close date filter range.
New	Created or reopened within the change date filter range, and that have a close date currently within the close date filter range.
Won	Won within the change date filter range and that have a close date currently within the close date filter range.
Increased	With an amount in the summary field that's higher than at the beginning of the change date filter range. Opportunities in Increased are open opportunities that, when the time period in the change date filter started, had close dates in the period and are currently closing within the period.
Moved In	Moved into the close date filter range. The opportunities in Moved In are those opportunities that, when the time period in the change date filter started, had close dates in a future period.
Moved Out	Moved out of the close date filter range. The opportunities in Moved Out are those opportunities that, when the time period in the change date filter started, had close dates after the end of the close date period.
Decreased	With an amount in the summary field that's lower than at the beginning of the change date filter range. Opportunities in Decreased are open opportunities that, when the change date filter period started, had close dates in the period and that are currently closing within the period.
Lost	Lost within the change date filter range, and that have a close date currently within the close date filter range.
Overdue	With close dates within the last 90 days and that are still open.

Opportunities with a Forecast Category of **Omitted** are included in the pipeline. To exclude omitted opportunities from Pipeline Changes metrics, adjust the filter logic using the side panel.

Opportunity List Fields

The default fields shown in the opportunity list in Pipeline Inspection include Pipeline Inspection fields and standard opportunity fields.

These standard opportunity fields are in the list by default: Opportunity Name, Account Name, Amount, Close Date, Stage, Forecast Category, Next Step, Recent Activity, Opportunity Score (if enabled), Owner Full Name. For field descriptions, see [Opportunity Fields](#).

Salesforce admins can also add custom fields, with the exception of rich text area fields. Users can change and reorder some of the fields in the list. If Pipeline Inspection is enabled, some of the Pipeline Inspection fields are also visible on opportunities.

Pipeline Inspection Field	Description
Age	The number of days since the opportunity was created.
Change	The net change to the pipeline contributed by the opportunity over the selected time period. When users view the pipeline changes metrics group, the Change field shows when they filter the opportunity list by the Increased and Decreased metrics.
Days In Stage	The number of days the opportunity has spent in this stage since the last change to the Stage field. This field doesn't represent the aggregate number of days spent in this stage.
Important	Whether the opportunity is tracked as important.
Opportunity Score	The Einstein Opportunity Score, shown in tiers. The opportunity score tiers are High (67-99), Medium (34-66), and Low (1-33). Tiered opportunity scores are available in Pipeline Inspection only.
Push Count	The number of times an opportunity's close date was pushed out by a calendar month. The Push Count field isn't shown in list views by default.
Recent Activity	The number of days since the most recent activity on the opportunity. This field can also show the number of days until the next scheduled activity.

See Also

[Guidelines and Limits for Pipeline Inspection](#)

[Manage Pipeline Inspection Metrics](#)

[Opportunity Fields](#)

Account-Based Selling

Empower sales teams to manage and grow key accounts strategically. With Salesforce tools such as Account Plans, Action Plans, and a suite of Einstein features, your sales reps gain deeper insights into account health, can forecast sales more accurately, and enjoy enhanced collaboration across teams.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Sales Cloud

Einstein features available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Sales add-on

[Sales Account Plans](#)

Give your sales teams a dedicated workspace to nurture and grow key accounts. With sales account plans, sales teams can capture customer needs, analyze strengths and weaknesses, and define and

track objectives with measurable metrics, all in one place.

Sales Action Plans

Provide accountability, visibility, and alignment on your sales account team members' activities. With sales action plans, specify the tasks and events that you want users to achieve. Associate sales action plans with accounts, account plan objectives, cases, campaigns, contacts, contracts, leads, and opportunities.

Sales Account Research

Perform your external company research without leaving Salesforce. Use generative AI to gather valuable company insights such as competitive strengths and weaknesses, strategic initiatives, and key performance indicators. Then, to reduce research time and boost your ability to grow key accounts strategically, populate account and account plan fields with the results. For a personalized experience, create custom prompt templates with your own research topics.

Sales Account Plans

Give your sales teams a dedicated workspace to nurture and grow key accounts. With sales account plans, sales teams can capture customer needs, analyze strengths and weaknesses, and define and track objectives with measurable metrics, all in one place.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Einstein 1 Sales Edition** Editions with Sales Cloud

 **Note** Looking for Trade Promotion Management account plans? See [Review Your Sales Targets with TPM Account Plans](#).

Turn on Sales Account Plans

To get started with long-term account growth strategies, turn on sales account plans, assign a permission set, update page layouts, and set up related features.

Select Who Can Use Sales Account Plans

By default, only Salesforce admins can access the sales account plan objects. To get your sales teams started with account planning, create a permission set that gives them access to the appropriate objects and optimize your sharing settings.

Focus Your Strategic Efforts with Sales Account Plans

In a sales account plan, you can research and analyze accounts, set objectives with actionable metrics, and keep tabs on growth and development.

Sales Account Plan Objectives, Measures, and Calculation Definitions

Add specific, actionable, and measurable goals to your team's long-term growth strategy with sales account plans. When you add an objective to a sales account plan, you can specify how the objective is measured, select a calculation definition, and select related records. The selections you make for a measure, calculation definition, and related records determine how the objective tracks activity and

how the objective's current value is updated.

Strategic Tracker with Sales Action Plans

Give your sales team members specific steps to complete as they work toward completing account plan objectives. Each objective's Strategic Tracker uses sales action plans to organize the tasks and events that you want team members to complete.

Turn on Sales Account Plans

To get started with long-term account growth strategies, turn on sales account plans, assign a permission set, update page layouts, and set up related features.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Einstein 1 Sales Edition** Editions with Sales Cloud

USER PERMISSIONS NEEDED

To turn on Sales Account Plans:

Customize Application

OR

Modify All Data

 **Tip** Check out this feature in Salesforce Go! Find a guided setup experience, explore more content, discover related features, and monitor feature usage. See [Discover and Set Up Features With Salesforce Go](#).

1. From Setup, in the Quick Find box, enter *Account Plans*, and then select **Sales Account Plans**.
2. Turn on Sales Account Plans.
 **Note** To set up Business Relationship Plans for finance, stop here. Then follow the guided setup in Business Client Engagement Settings.
3. Create a permission set for users to access the account plan objects. See [Select Who Can Use Sales Account Plans](#).
4. Add the Account Plans related list to the Account page layouts.
5. Optionally, customize these standard objects for your business needs by using Object Manager.
 - Account Plan
 - Account Plan Objective
 - Account Plan Objective Measure
 - Account Plan Objective Measure Relation
6. To link to the account's buyer relationship map from an account plan, turn on Buyer Relationship Map. See [Set Up Buyer Relationship Map](#).

7. To help your sales teams track their progress toward your account plan's measurable objectives, create calculation definitions.
Calculation definitions are optional. Two prebuilt calculation definitions are available and active by default. Start using these calculation definitions, or create your own. See [Sales Account Plan Objectives, Measures, and Calculation Definitions](#).
 - a. In the Define Objective Measure Calculations section of the Sales Account Plans page, click **New Calculation Definition**.
 - b. Specify a name and description that helps your sales team choose the appropriate calculation definition for the objectives they create. Users can see your description when they add an objective to a sales account plan and select the calculation definition.
 - c. Specify an object, field, and calculation type: Count, Sum, Maximum, or Minimum.
 - d. Optionally, specify filter conditions for identifying the specific records you want to track.
 - e. Save and activate the calculation definition.
8. To populate the Strategic Tracker on your account plan objectives with tasks and events for your sales team to complete, set up sales action plans. See [Turn On Sales Action Plans](#).

See Also

- [Customize Page Layouts with the Enhanced Page Layout Editor](#)
- [Customize Related Lists](#)
- [Buyer Relationship Map](#)
- [Select Who Can Use Sales Account Plans](#)
- [Focus Your Strategic Efforts with Sales Account Plans](#)

Select Who Can Use Sales Account Plans

By default, only Salesforce admins can access the sales account plan objects. To get your sales teams started with account planning, create a permission set that gives them access to the appropriate objects and optimize your sharing settings.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Einstein 1 Sales Edition** Editions with Sales Cloud

USER PERMISSIONS NEEDED

To create permission sets:	Manage Profiles and Permission Sets
To assign permission sets:	Assign Permission Sets
To set field level security:	Manage Profiles and Permission Sets

AND

USER PERMISSIONS NEEDED

Customize Application

Create a Permission Set for Sales Account Plans

1. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.
2. Select the license type for the permission set.
When you create a permission set, the license type you select determines which objects and other data are available to users who have the permission set assigned. For access to the account plan objects, we recommend the standard Salesforce license. See [Standard User Licenses](#).
3. Click **New**.
4. Enter your permission set information.
5. Save your changes.

Add Object and Field Permissions to the Sales Account Plans Permission Set

1. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.
2. Select the permission set for sales account plans.
3. On the permission set overview, select **Object Settings**.
4. Select **Account Plans**.
5. Click **Edit**, select the object and field permissions you want to give your sales team members, and save your changes.
6. Repeat these steps for these objects:
 - Account Plan Objective
 - Account Plan Objective Measure
 - Account Plan Objective Measure Relation

Assign the Sales Account Plans Permission Set to Users

1. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.
2. Select the permission set for sales account plans.
3. In the permission set toolbar, click **Manage Assignments** and then **Add Assignments**.
4. Select the checkboxes next to the names of the users you want assigned to the permission set, and then click **Assign**.

Share Sales Account Plans with Other Users

By default, sales account plans are private. Reps can choose to share their individual account plans with other team members via sharing settings on the account plan record page. If you want members of your sales team to be able to see their colleagues' account plans by default, update the organization-wide settings.

1. From Setup, in the Quick Find box, enter *Sharing Settings*, and then select **Sharing Settings**.
2. Click **Edit**.
3. Select the access policies you want for the Account Plan and Account Plan Objective objects.
4. Click **Save**.

See Also

[Permission Sets](#)

[Enable Object Permissions in Permission Sets](#)

[Manage Permission Set Assignments](#)

[Sharing Settings](#)

[Focus Your Strategic Efforts with Sales Account Plans](#)

Focus Your Strategic Efforts with Sales Account Plans

In a sales account plan, you can research and analyze accounts, set objectives with actionable metrics, and keep tabs on growth and development.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Einstein 1 Sales Edition** Editions with Sales Cloud



Warning Turning on sales account plans in Government Cloud Plus orgs can send data outside the authorization boundary. Contact your Salesforce account executive for more details.

Accessing Sales Account Plans

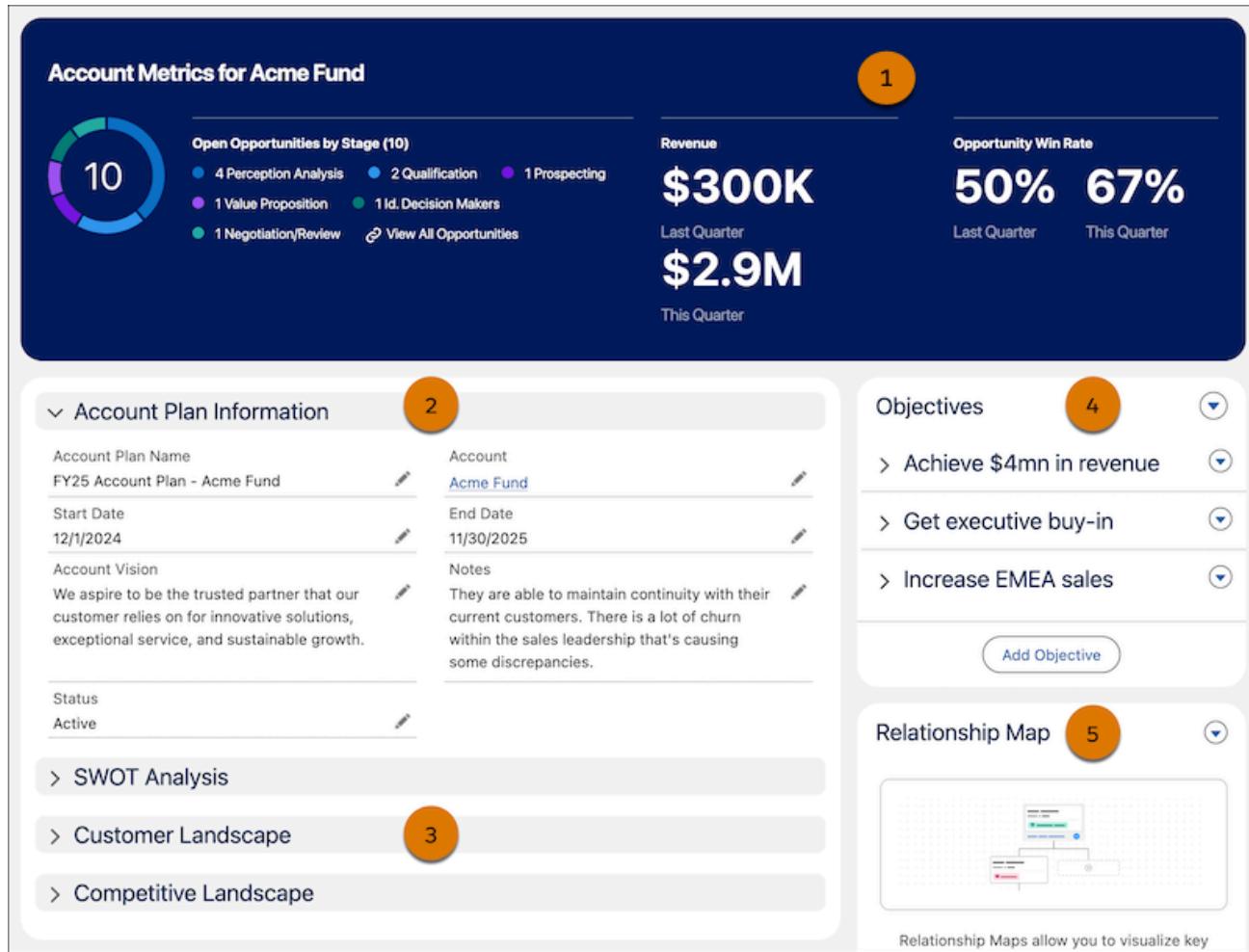
Access sales account plans from the Account Plans related list on the account home page.

The screenshot shows the Account details page for 'Acme Fund'. At the top, there's a navigation bar with icons for Account, Follow, Edit, New Contact, New Case, and a dropdown menu. Below the header, there are fields for Type (Partner), Phone, Website, Account Owner (with a small profile icon), Industry (Chemicals), and Billing Address. On the left, under 'Related' tabs, there are sections for Contacts (0) and Account Plans (1). The 'Account Plans' section is highlighted with an orange border. It contains a table with columns for Account Plan Name, Status, Start Date, and End Date. One row is visible: 'FY25 Account Pl...' (Status: Active, Start Date: 12/1/2024, End Date: 11/30/2025). A 'View All' link is at the bottom. On the right, there are sections for Activity (with four buttons for different activity types) and Chatter (with a message feed showing three items: Upcoming & Overdue, November 2024, and October 2024). A note says 'No more past activities to load.' There are also filters and refresh buttons.

Or, from the App Launcher, search for Account Plans.

Getting to Know Your Account Plan

The sales account plan details page is your home for long-term account growth strategy planning.

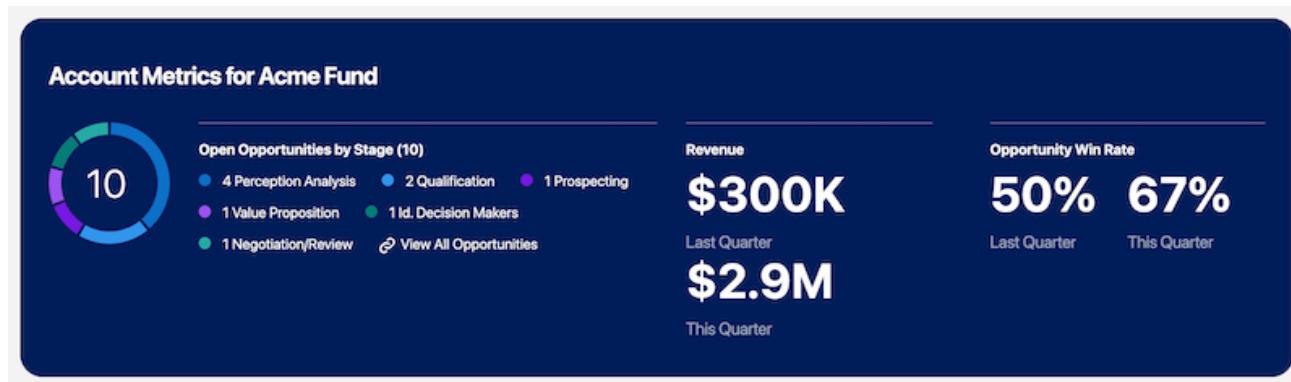


Review account KPIs (1), find an overview of the account plan details (2), and capture and evaluate customer needs (3). Determine and track measurable objectives (4), and go to the account's buyer relationship map (5).

Viewing Key Metrics on the Account Plan KPIs Dashboard

The Account Plan KPIs dashboard shows the number of open opportunities by stage for an account. The dashboard shows up to 10 stages with the most open opportunities, but open opportunities in other stages are grouped in Other. Closed opportunities, both won and lost, aren't included in the count of opportunities.

You can't customize the Account Plan KPIs dashboard. However, you can add your own dashboard by using Lightning App Builder.



The Account Plan KPIs dashboard also provides these metrics.

KPI	DESCRIPTION
Revenue	The sum of amounts from Closed Won opportunities for the quarter, either current or previous.
Opportunity Win Rate	The percentage of Closed Won opportunities for the quarter. The Opportunity Win Rate is calculated from Closed Won opportunities where the Amount field is populated. The number of Closed Won opportunities is divided by the total number of closed opportunities (both won and lost), and then the result is multiplied by 100.

Identifying and Evaluating Account Needs

In the SWOT Analysis panel, identify the account's strengths, weaknesses, opportunities, and threats. This analysis helps remove barriers and implement new strategies for your long-term growth strategy. Format and organize your thoughts with the built-in rich text editor.

> Account Plan Information

✓ SWOT Analysis

Strengths

- Ease of interoperability
- Unification and optimization on a single platform

Weaknesses

- Support is overloaded and cannot address their concerns
- Weak partner ecosystem impacting implementation timelines

Opportunities

- They are our existing customer and we are core to their business operations
- The new leadership team members are our strongest sponsors

Threats

- Competition is offering better discounts
- No strong customer stories to build trust, unlike our competition

> Customer Landscape

> Competitive Landscape

In the Customer Landscape and Competitive Landscape panels, gather details that help your sales teams fully understand the account's biggest areas of opportunity and risk within the marketplace.

The screenshot shows a sales dashboard with the following sections:

- Customer Landscape** (highlighted with an orange box):
 - Strategic Priorities**:
 - Achieve \$1B in revenue with an aggressive growth strategy
 - Consolidate sales technologies
 - Expand into LATAM
 - Challenges**:
 - Slowing macroeconomic environment with measured buying behavior
 - Internal alignment on identifying and resourcing consolidation
 - New market landscape
 - KPIs**:
 - \$1B revenue
 - 40% reduction in sales tech tools
 - 10% penetration into LATAM market
 - Industry Trends**:
 - Exploring where generative AI plays a role in effectively managing resources
 - Getting partners more engaged in widening the market
- Competitive Landscape** (highlighted with an orange box):
 - Competitive Strengths**:
 - Offer higher discounts
 - Aggressive bundling strategies that show higher ROI
 - Competitors**:
 - Current Corp
 - Envision Acceleration
 - Competitive Weaknesses**:
 - No best practices model
 - Core team lacks domain expertise

Identifying Potential Sales Opportunities with Product Whitespace

The Product Whitespace map shows top-selling products from Closed Won opportunities in the past year across related accounts so that you can find potential products for upselling and cross-selling. By default, the map shows product data for the account associated with the account plan. When the account is part of a hierarchy, the map includes data for up to four other accounts closest to it in the hierarchy.

You can't customize the Product Whitespace map, but you can modify which information appears. To adjust the default view, click **Account Hierarchy** (1) and select up to 20 accounts to show. View data by product family or name (2), and filter by metrics such as opportunity product amount, count, or quantity (3).

Lighter colors represent zero or lower values of the metric, and darker colors represent higher values. The maximum value helps calculate the range of values represented by a color. As a result, small values can appear in white, and similar values can appear in two different colors despite being close.



Measuring Account Growth Objectives

The Objectives panel shows progress toward measurable goals that support your long-term growth strategy for the account. Measure the currency, percent, or number value that aligns with a specific goal, such as achieving a certain amount of revenue. To calculate an objective's current value automatically, use a calculation definition that identifies the specific object, field, and other conditions you care about, and then select specific records to track. See [Sales Account Plan Objectives, Measures, and Calculation Definitions](#).

The screenshot shows the Salesforce Objectives interface. It displays three objectives:

- Achieve \$4mn in revenue**:
 - Start Date: 11/30/2024
 - End Date: 11/29/2025
 - Objective Owner: Bob Smith
 - Strategic Tracker: 1 Action Plan
- Get executive buy-in**:
 - Start Date: 1/31/2025
 - End Date: 9/29/2025
 - Objective Owner: Bob Smith
 - Actions dropdown: Edit Objective, View Objective (highlighted), Delete, Add Measure
- Increase EMEA sales**:
 - Start Date: 3/2/2025
 - End Date: 10/30/2025
 - Objective Owner: Bob Smith
 - Strategic Tracker: 1 Action Plan

Related Opportunities are listed for each objective. A callout box highlights the 'Strategic Tracker' section for the first objective, which contains a link to '1 Action Plan'. Another callout box highlights the 'View Objective' option in the actions dropdown for the second objective.

The Strategic Tracker (1) links to sales action plans that organize the specific tasks and events for your sales team members as they work toward an objective. See [Strategic Tracker with Sales Action Plans](#).

- !** **Important** Sales action plans are available on a rolling basis starting in Spring '25. To access sales action plans in a sandbox, they must be available in production first. Then, run the Match Production Licenses to Sandbox tool or request a refresh. See [Push Updated Licenses to Sandbox Orgs.](#)

To see a more detailed view of the objective, select **View Objective** (2) from the objective's actions dropdown.

Visualizing Account Contacts

Gain insight into the relationships between the account's contacts by easily linking to the account's buyer

relationship map from an account plan. When the Buyer Relationship Map is turned on, you can access the map from an account plan with one click.

 **Note** Buyer Relationship Map is managed separately from sales account plans.

See Also

[Turn on Sales Account Plans](#)

[Select Who Can Use Sales Account Plans](#)

[Manage a Sales Team](#)

[Buyer Relationship Map](#)

[Knowledge Article: Account Plan KPIs Dashboard Stage Groupings](#)

Sales Account Plan Objectives, Measures, and Calculation Definitions

Add specific, actionable, and measurable goals to your team's long-term growth strategy with sales account plans. When you add an objective to a sales account plan, you can specify how the objective is measured, select a calculation definition, and select related records. The selections you make for a measure, calculation definition, and related records determine how the objective tracks activity and how the objective's current value is updated.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Einstein 1 Sales Edition** Editions with Sales Cloud

Qualitative Objectives

A qualitative objective has no specific, measurable goal. Success is measured subjectively. These goals don't use measures or calculation definitions and they don't show a current value. Related records are optional and can add context to the objective but they aren't used for any calculations.

Example Objective	Measure?	Calculation Definition?	Related Records?
Launch a customer support program.	No	No	No
Get buy-in from the executive team.	No	No	Contacts that represent the executive team

Quantitative Objectives

A quantitative objective has a specific, measurable goal. Success is measured objectively by specifying a target value to achieve.

These goals use measures, but calculation definitions and related records are optional.

- If you don't select a calculation definition, related records are optional and can add context to the objective but aren't used for calculating the objective's current value. Instead, users must update the current value manually.
- If you select a calculation definition, related records are required. Activity on those records that satisfies the criteria of the calculation definition counts toward calculating the objective's current value.

Example Objective	Measure?	Calculation Definition?	Related Records?
Improve overall customer satisfaction by achieving a higher Net Promoter Score.	<p>Yes The target value is a number that represents the score to achieve.</p>	No	No
Increase EMEA sales by 20%.	<p>Yes The target value is the percent amount to achieve.</p>	No	Opportunities for the target region
Achieve \$100 million in revenue.	<p>Yes The target value is the currency amount to achieve.</p>	<p>Yes Calculate the sum of opportunity amounts if the Stage is Closed Won.</p>	Opportunities that count toward the revenue target

When Admins Create Calculation Definitions

Salesforce admins create calculation definitions on the Sales Account Plans page in Setup. Keep these considerations in mind when creating calculation definitions.

- Two calculation definitions are available and activated by default, or you can create your own.
- The description that you enter for a calculation definition is visible to users when they add an objective to a sales account plan and select the calculation definition.
- You can track activity on campaigns, cases, contacts, and opportunities.
- Calculation definitions remain in Draft status after you create them and aren't available for users to select until you select **Activate** from the actions dropdown menu.
- You can edit only inactive calculation definitions that are in Draft status.

When Users Select Calculation Definitions and Related Records

Sales team members can select a calculation definition when adding an objective to a sales account plan. Keep these considerations in mind when using calculation definitions and related records with objectives.

- A calculation definition tracks activity on only one type of object. You can select records of other supported object types, but only records that match the calculation definition's criteria count toward the objective's current value. Records of other object types can add context to the objective but don't count toward the current value.
- For cases, contacts, and opportunities, you can search for the records that you want to include in the objective. For campaigns, search isn't available, but you can select from campaigns that are available to the account.
- As sales team members complete activity that satisfies the calculation definition's criteria, the objective's current value is updated. The current value is updated daily based on activity on the selected records. When users select a different calculation definition or select different records, the current value is updated immediately.
- Objectives created from an Account Plan record page use the default record type.
- You can relate up to 15 records to an objective.

Custom Fields in Measures and Calculation Definitions

If an admin modifies the Account Plan Objective Measure object by adding a custom field, these considerations apply.

- The Create Objective or Edit Objective windows don't show the custom field.
- The Objectives panel on the sales account plan details page doesn't show the custom field.

If a calculation definition references a custom field and the field's data type changes after the calculation definition is activated, the objective's current value is no longer updated. Also, the calculation definition is removed from the list of available definitions in Setup, but its record remains accessible by API.

Strategic Tracker with Sales Action Plans

Give your sales team members specific steps to complete as they work toward completing account plan objectives. Each objective's Strategic Tracker uses sales action plans to organize the tasks and events that you want team members to complete.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and in **Einstein 1 Sales Edition**

Sales Action Plans and Sales Action Plan Templates

Sales action plans extend Industries action plans and use the same standard objects, but they add a unique item type: Event. To get started with sales action plans, your Salesforce admin first assigns permissions and sets up sales action plan templates.

Account Plan Objective

Achieve \$1M in revenue

Account Plan: FY25 Growth Plan | Objective Owner: [User Icon] [User Name] | Start Date: 11/26/2024 | End Date: 12/31/2025

Current Value: \$42.5K | Target Value: \$1M | Related Opportunities: 3 | Field Name Amount

Strategic Tracker

Provide transparency and accountability for your sales team as they work toward this objective. Add one or more sales action plans that specify the tasks and events that you want your team to achieve.

Create Sales Action Plan

Increase sales effectiveness

Items Completed	Status	Owner Name	Start Date	Schedule Frequency
0 of 4	In Progress	[User Icon] [User Name]	11/26/2024	None

Tasks (2)

Subject	Status	Due Date	Prerequisites	Priority	Required	Reminder	Assigned To
Identify solutions to resell	Not Started	Dec 17, 2024		High	<input type="checkbox"/>		[User Icon] [User Name]
Audit existing sales processes	Not Started	Dec 23, 2024		High	<input type="checkbox"/>		[User Icon] [User Name]

Events (2)

Subject	Status	Due Date	Scheduled On	Is Adhoc Item	Required	Assigned To
Sales team training	None	Jan 7, 2025	-	<input type="checkbox"/>	<input type="checkbox"/>	Action Plan Creator
Quarterly busin...	Pending	Dec 2, 2024	Dec 02, 2024, 3:0... Dec 02, 2024, 4:0...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[User Icon] [User Name]

! **Important** Sales action plan templates are required to create individual sales action plans.

To add sales action plans for the Strategic Tracker on your account plan objectives, your sales action plan templates require these values.

- **Action Plan Type** is *Sales*.
- **Target Object** is *Account Plan Objective*.

Two default sales action plan templates with these values are available. Use these default templates, or clone and modify them for your needs.

For more information about setting up sales action plans, see [Turn On Sales Action Plans](#). For more information about how Industries action plans work, see [Work with Action Plans and Templates](#).

Limits

Keep these limits in mind when adding sales action plans to an account plan objective's Strategic Tracker.

- Each objective has one Strategic Tracker section.
- Each Strategic Tracker section can have multiple sales action plans.
- Each sales action plan can contain up to 100 tasks and 100 events.
- Strategic Tracker tasks that are updated by a flow require a page refresh.

Examples

To help you get started with Strategic Trackers and sales action plans for your account plan objectives, review these examples.

Objective	Strategic Trackers	Sales Action Plan Items
Increase EMEA sales by 20%.	Improve sales effectiveness	<ul style="list-style-type: none">• Task: Identify more solutions to resell• Event: Arrange sales training
	Hire 40 new sales team members	<ul style="list-style-type: none">• Task: Draft a job post and get approval• Task: Publish the job post• Task: Interview candidates
Grow customer loyalty with exceptional service and support.	Accelerate customer support and engagement activities	<ul style="list-style-type: none">• Task: Identify opportunities for upselling and cross-selling• Task: Arrange kickoff calls• Event: Conduct quarterly business reviews• Task: Provide ongoing support and monitoring

See Also

[Work with Action Plans and Templates](#)

Sales Action Plans

Provide accountability, visibility, and alignment on your sales account team members' activities. With sales action plans, specify the tasks and events that you want users to achieve. Associate sales action plans with accounts, account plan objectives, cases, campaigns, contacts, contracts, leads, and

opportunities.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud, and in **Einstein 1 Sales Edition**

Sales action plans extend Industries action plans and use the same Action Plan and Action Plan Template standard objects, but with these key differences.

- Sales action plans aren't compatible with Industries objects.
- Sales action plans don't support custom objects.
- Sales action plans can include both tasks and events, but Industries action plans don't support events.

For information about Industries action plans, see [Action Plans](#).

If you also use sales account plans, sales action plans appear in the Strategic Tracker on your account plan objectives.

[Turn On Sales Action Plans](#)

To get started with sales action plans, go to Setup and assign permissions, and then create sales action plan templates. Optionally, customize the action plan objects.

See Also

[Strategic Tracker with Sales Action Plans](#)

Turn On Sales Action Plans

To get started with sales action plans, go to Setup and assign permissions, and then create sales action plan templates. Optionally, customize the action plan objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud, and in **Einstein 1 Sales Edition**

USER PERMISSIONS NEEDED

To turn on sales action plans:

Customize Application

OR

Modify All Data

1. From Setup, in the Quick Find box, enter *Sales Action Plans*, and select **Sales Action Plans**.
 2. Assign the Sales Action Plans default permission set to users who access sales action plans.
 3. To help users access sales actions plans more easily, add the Action Plans related list to any of these page layouts: Account, Case, Campaign, Contact, Contract, Lead, or Opportunity.
 4. Optionally, customize these standard objects for your business needs by using Object Manager.
 - Action Plan
 - Action Plan Template
-  **Note** These objects are shared with Industries.
5. Create sales action plan templates with the Action Plan Template object.
-  **Important** Sales action plan templates are required to create individual sales action plans.
- a. For Action Plan Type, select **Sales**.
 - b. For Target Object, select the object where users can access the sales action plan. For sales action plans used with a sales account plan objective's Strategic Tracker, select **Account Plan Objective**. By default, two action plan templates are available for sales account plan objectives. Start by using these default templates, or clone and modify them for your needs.

See Also

[Strategic Tracker with Sales Action Plans](#)

[Customize Page Layouts with the Enhanced Page Layout Editor](#)

[Customize Related Lists](#)

Sales Account Research

Perform your external company research without leaving Salesforce. Use generative AI to gather valuable company insights such as competitive strengths and weaknesses, strategic initiatives, and key performance indicators. Then, to reduce research time and boost your ability to grow key accounts strategically, populate account and account plan fields with the results. For a personalized experience, create custom prompt templates with your own research topics.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Sales or Industry add-on license or included in Agentforce 1 Sales Edition.

[Turn On Sales Account Research](#)

To use generative AI for external company research directly within Salesforce, turn on and configure Account Research.

[Sales Account Research Overview](#)

Gain a deep understanding of your customers' needs with generative AI-driven account research. Research and compile answers to key strategic questions with one click. Then, update account and account plan fields with the results. That way you save time and boost your ability to grow and retain customer relationships.

Customize Sales Account Research for Your Business Needs

The Account Research Lightning component comes with seven pre-configured research topics. To create custom research topics that fit your unique business requirements, use Prompt Builder.

Considerations for Using Sales Account Research

Before you research accounts with generative AI, consider supported functionality, usage, limitations and allowances, limits, and other issues.

See Also

[About Einstein Generative AI](#)

Turn On Sales Account Research

To use generative AI for external company research directly within Salesforce, turn on and configure Account Research.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Sales or Industry add-on license or included in Agentforce 1 Sales Edition.

USER PERMISSIONS NEEDED

To set up Sales Cloud Einstein:

Customize Application

AND

Modify All Data

To turn on Data 360

Data Cloud Architect Permission Set

To turn on Account Research:

Customize Application

OR

Modify All Data

To edit prompt templates and manage research topics:

Manage Prompt Template

AND

Data Cloud Architect Permission Set

To view, edit, and conduct account research:

Research Records

To view research by other users:

Read on Account

Before you can use Account Research, [Set up Einstein Generative AI](#). To get the most out of Account Research, [Turn on Sales Account Plans](#).

1. From Setup, in the Quick Find box, enter *Account Research*, and then select **Account Research**.
2. Turn on [Data Cloud](#).
3. Turn on Account Research.
4. Add the Record Research standard component to the Lightning record pages of the Account object.
 - a. From the Object Manager, select **Account** and then select **Lightning Record Pages**.
 - b. Select the name of the record page you want to add the component to, and then click **Edit**.
 - c. Drag the Record Research component from the list of components onto the canvas.
 - d. Save and activate your page.
5. If you use account plans, repeat Step 4 for the Account Plan object.
6. To give sales team members the ability to research accounts and view the results, assign them the Research Records permission set.
 - a. From the Account Research Settings page in Setup, select **Go to Permission Sets**.
 - b. In the permission set toolbar, click **Manage Assignments** and then **Add Assignments**.
 - c. Select the checkboxes next to the names of the users you want assigned to the permission set, and then click **Assign**.

For a personalized experience, customize your record research prompt templates.

See Also

[About Einstein Generative AI](#)

[Create and Configure Lightning Experience Record Pages](#)

[Manage Permission Set Assignments](#)

[Unlock Actionable Company Insights with Sales Account Research](#)

Sales Account Research Overview

Gain a deep understanding of your customers' needs with generative AI-driven account research. Research and compile answers to key strategic questions with one click. Then, update account and account plan fields with the results. That way you save time and boost your ability to grow and retain customer relationships.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Sales or Industry add-on license or included in Agentforce 1 Sales Edition.

Accessing Essential Information with Sales Account Research

Sales professionals need a deep understanding of their customers to create effective solutions that drive business growth and retention. The significant research involved with developing account strategies can

be labor intensive. Using generative AI to assist with account planning significantly reduces the time spent on this research.

The screenshot shows the 'Account Plan' section for the 'Salesforce Fall Quarter Account Plan'. At the top, there's a summary card for 'Account Metrics for salesforce.com' with a circular icon showing '3' opportunities, a bar chart for 'Open Opportunities by Stage (3)', and financial data: Revenue '\$975K' vs '\$500K' (Last Quarter vs This Quarter), and Opportunity Win Rate '100% 100%' (Last Quarter vs This Quarter).

Below this is the 'Account Plan Information' section, which includes fields for Account Plan Name ('Salesforce Fall Quarter Account Plan'), Start Date ('8/1/2025'), Account Vision, Status ('Active'), Account ('salesforce.com'), End Date ('10/31/2025'), Notes, and a 'SWOT Analysis' section.

A modal window titled 'Account Research' is overlaid on the page. It contains a 'Research Area' dropdown set to 'Company Overview' with a 'Research' button, a note that it was 'Researched Aug 7, 2025 at 2:54 PM by OrgFarm EPIC', a 'Business Model and Industry' section describing Salesforce as a leading CRM platform, an 'Expand' button, and a 'Sources (3)' section with an 'Add Results to Account Plan' button.

Access sales account research from the Account Research Lightning component on any account or account plan record page.

Getting to Know Sales Account Research

Sales account research helps you compile answers to key strategic questions about your accounts. Quickly get a company overview from any account or account plan record. And, get information on competitive strengths and weaknesses, industry trends, key performance indicators, strategic priorities, and top competitors to enrich your account plan strategies.

Account Research

Research Area

Strategic Priorities 1

Research

Researched Aug 7, 2025 at 2:42 PM by OrgFarm EPIC

Salesforce's Business Strategy

Salesforce's business strategy focuses on providing a cloud-based CRM platform that emphasizes scalability, flexibility, and robust data security. The company prioritizes customer success through comprehensive training programs and community engagement initiatives. This approach ensures that users can effectively leverage Salesforce tools to enhance their business operations....

Expand 2

> Sources (3) 3

4 Edit

5 Like Dislike

Add Results to Account Plan

The seven out-of-the-box research areas are powered by web search results (1). Expand the results to see comprehensive responses (2). To ensure accuracy and trust, citations are included as part of the research output (3). Maintain control over the information by expanding, editing, and refining the generated research output. You can rewrite the research using your own company style or choose which research to save (4). Use the feedback component (thumbs up and down) to further train the large language model (5).

Enrich Your Account Plans with Generated Insights

After research is generated for a research area, you can easily update corresponding fields on your account or account plan records, as long as you have permission to update them.

The screenshot shows a modal dialog titled "Update Account Plan". At the top, there's a section titled "Fields to Update" with the sub-instruction: "Select which fields to update with the latest research results." Below this, a note says: "If you don't see a research area listed here, return to the Account Research component, copy the research you'd like to retain, and manually add it to the appropriate record." A table lists the research areas and their mapped fields:

Research Area	Field to Update	Research Status
<input checked="" type="checkbox"/> Competitive Strengths	Competitive Strengths	Researched Aug 7, 2025 at 2:52 PM by OrgFarm EPIC
<input checked="" type="checkbox"/> Competitive Weaknesses	Competitive Weaknesses	Researched Aug 7, 2025 at 2:54 PM by OrgFarm EPIC
<input type="checkbox"/> Industry Trends	Industry Trends	Researched Aug 7, 2025 at 2:54 PM by OrgFarm EPIC
<input checked="" type="checkbox"/> Key Performance Indicators	KPIs	Researched Aug 7, 2025 at 2:42 PM by OrgFarm EPIC
<input checked="" type="checkbox"/> Strategic Priorities	Strategic Priorities	Researched Aug 7, 2025 at 2:42 PM by OrgFarm EPIC
<input checked="" type="checkbox"/> Top Competitors	Competitors	Researched Aug 7, 2025 at 2:42 PM by OrgFarm EPIC

At the bottom left is a "Cancel" button, and at the bottom right is a "Save" button with a note: "For all selected fields, existing field values will be replaced."

You have the flexibility to deselect individual fields. Be aware that preexisting data in the mapped fields is overwritten by the most recently generated research.

Research Areas

The out-of-the-box research areas map to these Account and Account Plan fields.

Research Area	Object	Field
Company Overview	Account	Description
Competitive Strengths	Account Plan	Competitive Strengths
Competitive Weaknesses	Account Plan	Competitive Weaknesses
Industry Trends	Account Plan	Industry Trends
Key Performance Indicators	Account Plan	KPIs
Strategic Priorities	Account Plan	Strategic Priorities
Top Competitors	Account Plan	Competitors

-  **Note** You can generate results for all research areas from an Account record or an Account Plan record. You can only add results to fields that are mapped to fields on the record you're currently on.

To best fit your unique business requirements, your Salesforce admin can use Prompt Builder to create custom research topics and map them to other account or account plan fields.

See Also

- [About Einstein Generative AI](#)
- [Prompt Builder](#)
- [Sales Account Plans](#)
- [Considerations for Using Sales Account Research](#)

Customize Sales Account Research for Your Business Needs

The Account Research Lightning component comes with seven pre-configured research topics. To create custom research topics that fit your unique business requirements, use Prompt Builder.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Sales or Industry add-on license or included in Agentforce 1 Sales Edition.

USER PERMISSIONS NEEDED

To set up Sales Cloud Einstein:

Customize Application

AND

Modify All Data

To edit prompt templates:

Manage Prompt Template

AND

Data Cloud Architect Permission Set

To map prompt templates to Account or Account Plan fields:

Edit access on the Account and Account Plan objects

Before you can use Account Research, [Set up Einstein Generative AI](#). Optionally, [Turn on Sales Account Plans](#). Then, turn on Account Research in Setup.

To create a custom record research prompt template for Account Research, start from an existing record research prompt template. Then, save it as a new prompt template with your specific customizations. For example, update the model or the data source used to conduct research. Or, research a new area, and store the results in a different field.

! **Important** If you create a new custom record research prompt template in Prompt Builder rather than cloning an existing one, always select Account as the object to research. You can map the results of the research to a standard field on either Account or on Account Plan.

In this example, we're creating a custom record research prompt template to research challenges in a customer's company landscape. It then stores the research results on a standard field on Account Plan. Refine the example to meet your specific needs.

-  **Note** To modify a standard research record prompt template without changing the field where it stores the research, deactivate the existing prompt template before saving as new.

1. From Setup, in the Quick Find box, enter *Prompt Builder*, and then select **Prompt Builder**.
2. In the list of prompt templates, select a prompt template with the Record Research template type. For this example, select the Research Company Strategic Priorities prompt template.
3. In the Prompt Template Workspace, click **Save as New Template**.
 - a. Specify a Prompt Template Name.
In this example, name it Custom Customer Landscape Challenges.
 - b. Make sure that the API name is unique.
 - c. Optionally, write a description for your prompt template.
4. Click **Save As**.
You're directed to the Prompt Template Workspace.
5. Replace the instructions with your custom instructions.

In this example, replace the first research instruction, leaving the data source and other prompt information as-is.

Specifically, remove this text.

You must write a summary of the company's top strategic initiatives for the current and coming year.

And replace it with this text.

Conduct a thorough analysis of the company's customer landscape to identify and describe the primary challenges they face. Describe the main weaknesses or vulnerabilities the company faces in its current market landscape. Focus on internal or market-based challenges. Focus on areas where the company may be underperforming or encountering difficulties in meeting customer expectations and needs. Consider aspects such as customer satisfaction, support effectiveness, product/service quality, customer retention, market position, and communication practices. Highlight specific issues, trends, and patterns that indicate potential areas for improvement.

6. Update the `fieldName` value at the end of the prompt.

For this example, replace `AccountPlan.AccountStrategicPriorities` with `AccountPlan.AccountChallenges`.

-  **Note** You can't update custom fields with Account Research results. Account Research results can be stored only in standard fields.

7. Preview your prompt template and view the LLM's response.

- a. Click **Save & Preview**.
- b. Under Inputs, search for and select a record.
- c. Click **Preview** and review the response.

If you prefer a different response, adjust the instructions and repeat step 7.

8. When you're satisfied with the result, activate the prompt template.

Now, when you visit the Account Research Lightning component, you see your custom prompt template listed in the research area dropdown.

-  **Note** Map only one prompt template per field. If you map more than one prompt template to a field, you see an error when trying to update the field with the research. You can still generate research, but you can't update the corresponding field.

Considerations for Using Sales Account Research

Before you research accounts with generative AI, consider supported functionality, usage, limitations and allowances, limits, and other issues.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Sales or Industry add-on license or included in Agentforce 1 Sales Edition.

Sales Account Research Language and Locale Support

Sales Account Research supports these languages and locales.

Language	Locale	Code
English	English (Australia)	en_AU
	English (United Kingdom)	en_GB
	English (United States)	en_US
Arabic (Beta)	None	ar
Bulgarian (Beta)	None	bg
Catalan (Beta)	None	ca
Chinese Simplified (Beta)	Chinese (China)	zh_CN

Language	Locale	Code
Chinese Traditional (Beta)	Chinese (Taiwan)	zh_TW
Croatian (Beta)	None	hr
Czech (Beta)	None	cs
Dutch (Beta)	None	nl
Danish (Beta)	None	da
Estonian (Beta)	None	et
Finnish (Beta)	None	fi
French (Beta)	French (Canada)	fr_CA
	French (France)	fr_FR
German (Beta)	German (Germany)	de_DE
Greek (Beta)	None	el
Hebrew (Beta)	None	iw
Hindi (Beta)	None	hi
Hungarian (Beta)	None	hu
Italian (Beta)	Italian (Italy)	it_IT
Japanese (Beta)	Japanese (Japan)	ja_JA
Korean (Beta)	None	ko
Norwegian (Beta)	None	no
Polish (Beta)	None	pl
Portuguese (Beta)	Portuguese (Brazil)	pt_BR
	Portuguese (Portugal)	pt_PT
Romanian (Beta)	None	ro
Spanish (Beta)	Spanish (Spain)	es_ES
	Spanish (Mexico)	es_MX
Swedish (Beta)	None	sv

Account Research stores results in the language of the user who generated it. Users see research results in the language last used for generation. Regenerating the research in a different language also updates the language of the results.

Account Research Large Language Model Support

Account Research supports these models.

Model
GPT-4o

Einstein Trust Layer Service Support

Account Research supports the Trust Layer services provided on the Salesforce generative AI platform, as described in [Einstein Trust Layer](#).

Service	Description
Data Masking	Account Research supports data masking provided by the Einstein Trust Layer. However, Account Research can't perform research on masked company names.

Ask your Salesforce admin about which Einstein Trust Layer services are enabled in your Salesforce org and available for Account Research.

Account Research Region Support

Account Research supports these models for geo-aware request routing.

Model
GPT-4o

Account Research and Generative AI Usage

Agentforce Usage Types (for Agentforce conversations) and Einstein Requests are metrics for generative AI. The use of generative AI capabilities, in either a production or sandbox environment, consumes Einstein Requests and possibly Data 360 credits. See [Generative AI Billable Usage Types](#).

Usage Types Billed by Account Research

Card	Type	Description	Notes
Einstein Requests	Einstein Requests	Usage is calculated based on API calls to the LLM gateway.	See Generative AI Billable Usage Types .

Limitations and Allowances

- Account Research only supports business accounts. You can't use Account Research on person accounts.
- Account Research isn't available in Government Cloud.
- You can't update fields with Account Research results in these situations.
 - When fields aren't on the page layout
 - When fields aren't editable by the running user
 - When a custom prompt template maps a research area to the same field as a pre-configured research area
- You can't update custom fields with Account Research results. Account Research results can be stored only in standard fields.
- Map only one prompt template per field when creating custom research areas with Prompt Builder.

Other Considerations

- The Agentforce for Sales add-on license or Agentforce 1 Sales Edition is required to access the Account Research feature and related permission sets.
- Running users must have edit access on Account and Account Plan to update fields with research results.

See Also

- [About Einstein Generative AI](#)
[Set up Einstein Trust Layer](#)
[Large Language Model Data Masking](#)

Salesforce Forecasting

Feel confident about your sales projections by working with live forecast rollups, visual indicators, AI predictions, and historical trends to generate accurate sales predictions. In Winter '25, Salesforce Forecasting is also referred to as Collaborative Forecasts in some places.

REQUIRED EDITIONS

Available in: Lightning Experience

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

Take a Look Around

An accurate forecast is the window into your company's overall sales health. Knowing what's ahead is crucial to making business decisions and planning for the future. Using Salesforce to create and monitor your forecasts gives you the tools you need to feel confident that your forecast is accurate.

Take a guided tour to see the features and benefits of forecasting in Salesforce.



 **Note** As of October 14, 2025, Data Cloud has been rebranded to Data 360. During this transition, you may see references to Data Cloud in our application and documentation. While the name is new, the functionality and content remains unchanged.

Learn More with These Resources

	<p>Use Trailhead to build and test your skills.</p> <ul style="list-style-type: none">• Salesforce Forecasting: Quick Look• Salesforce Forecasting
	<p>Watch this video series to see forecasts in action.</p> <ul style="list-style-type: none">• Forecast with Confidence Using Salesforce
	<p>Dive deeper into setup and key features in Salesforce Help.</p> <ul style="list-style-type: none">• Set Up Salesforce Forecasting (Salesforce Admin)• Project Your Sales (Forecast Managers, Sales Reps)• Report on Sales Projections (Sales Leaders and Operations)• Salesforce Forecasting in Copilot

Explore Related Areas

Check out these product and features related to forecasts. Some items listed may not be available in your Salesforce edition or with your current license structure.

- [Sales Territories](#)
- [Revenue Intelligence](#)

[Set Up Salesforce Forecasting](#)

Set up the required features to start forecasting using Salesforce and enable additional features as you're ready. Give forecast managers, reps, and others who need it access to the forecasts page and the features that they need.

[Project Sales with Accurate Forecasts](#)

Using Salesforce for forecasting makes it easy for teams to project sales.

[Report on Forecasts](#)

Unlock details about forecasts and forecasts trends when you create custom report types for forecasts. For example, help managers and other stakeholders see the accuracy of planned forecasts versus adjusted and closed forecasts.

[Salesforce Forecasting: What's Different or Not Available in the Salesforce Mobile App](#)

Not every Lightning Experience feature is in the Salesforce mobile app. Find out what's different.

[Salesforce Forecasting Elements](#)

If you're using forecasting features in Salesforce, learn about the elements that comprise a forecast.

Set Up Salesforce Forecasting

Set up the required features to start forecasting using Salesforce and enable additional features as you're ready. Give forecast managers, reps, and others who need it access to the forecasts page and the features that they need.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

[Set Up Users for Forecasting](#)

Sales reps, sales managers, and sales executives need permission to use forecasts and access to the Forecasts tab. They must also be part of the forecast hierarchy.

[Set Up Pipeline Forecasting](#)

Set up Salesforce so that your teams can work with forecasts based on pipeline opportunities captured in opportunity records.

[Set Up Consumption Forecasting](#)

Use this step-by-step guidance to start forecasting your consumption-based businesses. Make sure you enable Salesforce Forecasting and Data 360 in the same Salesforce org.

[Get the Most from Salesforce Forecasting](#)

To help users get the most from the forecasting information that they see, customize the forecasts page layout, allow for adjustments to forecasts, setup quotas, and more.

[Considerations for Disabling Salesforce Forecasting Features](#)

Before you disable any forecasting features, find out how data is affected.

[Forecast Period Row Generation in Salesforce Forecasting](#)

Review how forecast period rows are generated based on fiscal year, default settings, and forecastable items per user.

Set Up Users for Forecasting

Sales reps, sales managers, and sales executives need permission to use forecasts and access to the Forecasts tab. They must also be part of the forecast hierarchy.

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

Give Users Access to Forecasts

Give all users who review and interact with forecasts user permission to access the forecast features and access to the Forecasts tab.

Define Forecast Managers and Their Subordinates

The forecasts hierarchy is a nested, expandable list of forecast managers and subordinates that determines how forecasts roll up within your company and who can view and adjust them. The forecast hierarchy is based on the user role hierarchy, or the territory hierarchy if territory forecasts are enabled. To ensure that everyone has access to the forecasts they need, keep your forecast hierarchy up to date.

Enable Partner Portal Users to Add Opportunities to Pipeline Forecasts

If your sales team works with partners, you can include the forecasts from partner user opportunities and add partner portal users to your team's role-based forecast hierarchy. Your partner portal users can't access the Forecasts page or its functionality.

Give Users Access to Forecasts

Give all users who review and interact with forecasts user permission to access the forecast features and access to the Forecasts tab.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To enable forecasts users:

Manage Users

AND

Customize Application

To add a tab to an app:

Customize Application

To manage user profiles:

Manage Profiles and Permission Sets

Assign the Allow Forecasting Permission to Forecast Users

By assigning permission to individual users, you retain granular control over access even if multiple groups use the same profile. For example, if you have an Accounts Payable clerk and a sales manager assigned to the Standard User profile, you probably want to give forecasting ability to the sales manager but not to the clerk.

Assigning users to a role in the forecast hierarchy also assigns the Allow Forecasting permission. You can assign the permission to individual users via their user record.

1. From Setup, in the Quick Find box, enter *Users*, and then select **Users**.
2. For each user that you want to enable, click **Edit**.
3. Under General Information, select **Allow Forecasting**.
4. Save your changes.

Enabled users are listed in your forecast hierarchy. When you configure your role-based forecast hierarchy, you can enable more users or disable users.

 **Note** Users need the View Roles and Role Hierarchy permission to access role-based forecasts in Lightning Experience. This permission is assigned to all forecast users by default. The View Roles and Role Hierarchy permission is enabled for all Standard user types (full CRM license with user type S) and standard and custom profiles. You can also enable the permission for Power Customer Success (type C) and Power Portal User (type P) users. In addition, enabling the following user permissions automatically enables View Roles and Role Hierarchy.

- View Setup and Configuration
- View All Forecasts
- Override Forecasts
- Delegated External Portal User

Add a Forecasts Tab

Ensure that each user who has permission to use forecasts also has access to the Forecasts tab, which contains the forecast details.

1. To add the Forecasts Tab to a Lightning App, from Setup, in Lightning Experience, in the Quick Find box, enter *App Manager*, select **App Manager**, and then click the **Edit** quick action for your Lightning app. Then click **Navigation Items**.
In Salesforce Classic, click + and then **Customize My Tabs**.
2. Move Forecasts from the Available column to the Selected column.
3. Save your changes.

You can also add the Forecasts tab by setting it to Default On in each user profile.

See Also

Tab Settings

[View and Edit Tab Settings in Permission Sets and Profiles](#)

[View Other Users' Forecasts](#)

Define Forecast Managers and Their Subordinates

The forecasts hierarchy is a nested, expandable list of forecast managers and subordinates that determines how forecasts roll up within your company and who can view and adjust them. The forecast hierarchy is based on the user role hierarchy, or the territory hierarchy if territory forecasts are enabled. To ensure that everyone has access to the forecasts they need, keep your forecast hierarchy up to date.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (role-based forecast hierarchy only), **Performance**, and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

If you plan to use role-based forecasts, do the following to ensure everyone can see their forecasts.

- Set up your user role hierarchy.
- Assign a forecast manager to the top level of the forecast hierarchy.
- Verify that each sales manager with subordinates is designated as a forecast manager.

If you plan to use territory forecasts, assign a forecast manager to every territory for which you want to show rolled-up forecasts.

1. From Setup, in the Quick Find box, enter *Forecasts Hierarchy*, and then select **Forecasts Hierarchy**.
2. To see the available roles, click **Expand All**.
3. Click **Enable Users**, and then move users between the Available Users and Enabled Users lists. If you enabled a user page to allow forecasting, the user's name appears in the Enabled Users list.
4. To select a forecast manager for each manager role in the role-based hierarchy, click **Assign Manager** or **Edit Manager** next to the role, and then select a name from the Forecast Manager dropdown list.
5. Save your changes.
6. If you've enabled territory forecasts, [assign forecast managers to territories](#).

As roles or users change in your company, be sure to update the forecast hierarchy to reflect the correct forecast managers. If a user assigned as a forecast manager is deactivated or removed from Salesforce, or is removed from a role or territory, forecast numbers don't roll up correctly.

See Also

[Enable Forecast Adjustments](#)

[Assign the Allow Forecasting Permission to Forecast Users](#)

Enable Partner Portal Users to Add Opportunities to Pipeline Forecasts

If your sales team works with partners, you can include the forecasts from partner user opportunities and add partner portal users to your team's role-based forecast hierarchy. Your partner portal users can't access the Forecasts page or its functionality.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To enable forecasts users:

Manage Internal Users

AND

Customize Application

To assign partner profiles to partner portals:

Customize Application

1. Make sure that you've done the following.

- Enabled partner portals.
- Created a partner portal.
- Created a partner profile and assigned it to your partner portal.
- Enabled an account as a partner, and enabled partner portal login for a contact of that account.

2. From Setup, in the Quick Find box, enter *Users*, and then select **Users**

3. Select the partner portal contact that you created.

4. Make sure that **Active** and **Allow Forecasting** are selected.

5. Enable the partner portal user in the role-based forecast hierarchy. Make sure that the person is assigned to an active forecast manager in the role-based forecast hierarchy.

Set Up Pipeline Forecasting

Set up Salesforce so that your teams can work with forecasts based on pipeline opportunities captured in opportunity records.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

-  **Tip** Check out this feature in Salesforce Go! Find a guided setup experience, explore more content, discover related features, and monitor feature usage. See [Discover and Set Up Features With Salesforce Go.](#)

[Turn On Salesforce Forecasting and Define Forecast Settings](#)

Starting in Winter '24, forecasting is automatically enabled with default pipeline forecasting settings are configured for you. In orgs created before Winter '24, you can manually enable forecasting and take advantage of the same default settings for your opportunity based forecasts. To update the configuration to meet your business processes, visit the Forecasts Settings page in Salesforce Setup.

[Define Pipeline Forecast Types](#)

Use forecast types to specify how Salesforce calculates forecasts. Each forecast type presents projected sales from a different perspective.

[Rollup Methods for Pipeline Forecasts](#)

Learn about methods for rolling up opportunities into forecasts for your sales teams.

[Show, Hide, and Reorder Pipeline Forecast Columns](#)

Customize the display of most standard and custom forecast columns on the forecasts page. For example, you can position a custom Most Likely column to appear next to the Open Pipeline column.

[Include Other Data in Custom Columns in Pipeline Forecasts](#)

Make forecast decisions using all the data that matters to your business by adding custom columns to a forecast. Custom columns can show data that's imported and referenced, such as Stretch Quota or Internal Booking Target, or a calculated value, such as gap to quota. Having all the information in one place helps you create more precise forecasts without having to turn to other resources.

[Manage Opportunity Stage to Forecast Category Mappings for Pipeline Forecasts](#)

Forecasts rely on how picklist values map between the Stage field and the Forecast Category field on opportunities. For example, if you map the Negotiation/Review stage to the Best Case forecast category, the amounts of your opportunities in Negotiation/Review are included in your Best Case forecast amount. If the stage of an opportunity changes, the probability and forecast category also change.

[Customize Pipeline Forecast Categories](#)

A forecast category is the category within the sales cycle to which an opportunity is assigned based on its opportunity stage. The standard forecast categories are Pipeline, Best Case, Commit, Omitted (not included in forecasts), and Closed. Salesforce admins can add a Most Likely category in Lightning Experience and rename categories in both single category rollups and cumulative category rollup scenarios.

[Allow Point-in-Time Pipeline Forecast Submissions](#)

Forecast submissions are sales reps' or managers' best estimates of the revenue or quantities they expect to close during the forecast period. As management levels within the sales organization review forecast rollups, they compare the current forecast against the submitted forecast numbers and quota.

[Allow Manager Judgments in Pipeline Forecasts](#)

Allow forecast managers to indicate which of their subordinates' opportunities they have high confidence of closing during the current forecast period. To get the most benefit out of manager judgments, we recommend also enabling managers to make adjustments at the forecast rollup level.

Manager judgments are supported for forecast types based on opportunity, opportunity product, and line item schedule objects only.

[Set Up Historical Data for Pipeline Forecast Charts](#)

To give sales leaders the data they need when viewing forecasting charts, ensure that historical trending is on for Forecasting Item. Also verify that the retention period is set appropriately.

[Increase Global Pipeline and Forecast Visibility with Data 360](#)

Use Sales Cloud and Data 360 together to see all your revenue predictions and to track different types of income, such as sales, billing, and ad purchases. Compare your forecasts with actual results to make smart adjustments for more accurate forecasts, engage with the right customers to close deals, alter account strategies, and boost your pipeline to meet your sales goals.

See Also

[Salesforce Forecasting Implementation Guide](#)

Turn On Salesforce Forecasting and Define Forecast Settings

Starting in Winter '24, forecasting is automatically enabled with default pipeline forecasting settings are configured for you. In orgs created before Winter '24, you can manually enable forecasting and take advantage of the same default settings for your opportunity based forecasts. To update the configuration to meet your business processes, visit the Forecasts Settings page in Salesforce Setup.

REQUIRED EDITIONS

Forecasts Settings available in: Lightning Experience

Forecasts Hierarchy available in: both Salesforce Classic and Lightning Experience

Available in: **Professional**, **Performance**, and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To view the Forecasts Settings page:

View Setup and Configuration

AND

View All Forecasts OR Allow Forecasting OR
delegated forecast manager

To edit the Forecasts Settings page:

Customize Application

To customize the opportunity list in a forecast type:

Customize Application

AND

Manage Public List Views

USER PERMISSIONS NEEDED

To enable forecasts users:

Manage Internal Users

AND

Customize Application

Before you start, make sure that you're working in Lightning Experience.

1. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
2. If needed, enable forecasts.

These default for pipeline forecasts are set for you. You can adjust these settings to meet your business requirements.

Pipeline Forecast Type	A pipeline forecast type with the following parameters is created for you. Object: Opportunity Measure: Amount Date: Close date Hierarchy: User Role Filters: None Custom Columns: Gap to Quota, Pipeline Coverage You can modify the opportunity list, select the columns to show in the forecast summary, apply filters, and modify the custom columns for that type. Or, create your own types to meet your business needs. If your org existed before Winter '24, make sure that the default type is activated as part of your settings review.
Adjustments	Manager Adjustments
Forecast Rollups	Cumulative Category Rollups
Currency	Org Currency

Date Range	Forecast Period: Monthly Starting On: Current Month Extending for: 1 month
Show Quotas	Selected The forecasts page includes a quota column, attainment percentages, and progress bars. Be sure to enter your quota data in the Forecasts Quota page in setup.

3. To complete your forecast setup, [give access to the users who forecast](#) and add them to the [forecast hierarchy](#).

To get the most out of forecasts in Salesforce, set up forecast quotas, and review the other customizable options to fit your business. We also recommend [turning on historical trending](#) for the ForecastingItem, and setting the retention period to 13 months. Historical data gives sales leaders the data required to populate forecast charts and reports, and to show highlights about changes in forecast values in the last 7 days.

See Also

[View Other Users' Forecasts](#)

Define Pipeline Forecast Types

Use forecast types to specify how Salesforce calculates forecasts. Each forecast type presents projected sales from a different perspective.

[Pipeline Forecast Types](#)

Forecast types represent your sales teams' projected sales from a different perspective. Each type can be set up to use different data, measures, dates, and filters to gather the forecast information that is most relevant to your business.

[Configure and Activate Pipeline Forecast Types](#)

Let your sales team choose between forecast types to project sales from multiple perspectives.

[Group Pipeline Forecasts to Match Your Business](#)

Group forecasts into segments that make sense for your business. For example, define forecast groups that represent the industries your products and services serve or your company's business units. You can also group forecasts by product family.

[Considerations for Showing Opportunity Fields in Pipeline Forecasts](#)

When a rep selects a forecast in the forecasts grid, a list of opportunities that roll up to that forecast appears below the forecast summary. Refer to our guidelines when you're choosing the fields to show as columns in the opportunity list.

Schedule and Product Date Forecasts

Base forecasts on schedule and product dates to reflect your business model. Schedule and product date forecasts are available in Lightning Experience only.

Territory Forecasts

If your sales team uses Sales Territories, Salesforce Forecasting, and Lightning Experience, they can forecast by territory. Territory forecasts give your team a snapshot of how expected sales compare between territories. Want to know which territory has the most closed deals this month? Or which territory is lagging in software deals? Use territory forecasts to find out.

See Also

[Salesforce Forecasting Implementation Guide](#)

Pipeline Forecast Types

Forecast types represent your sales teams' projected sales from a different perspective. Each type can be set up to use different data, measures, dates, and filters to gather the forecast information that is most relevant to your business.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise** and **Unlimited** Editions with Sales Cloud

Custom measure forecasts available in: **Performance** and **Unlimited** Editions with Sales Cloud, and for an additional cost in **Enterprise** Edition

Each forecast type can be set up to use different data, including the object to base the forecast on, the field to roll up (measures), and how to group the forecast (date type). To refine the data that's included in the forecast, add filters.

 **Tip** A default forecast type is defined for you based on the Opportunity object. The default type measures on the Amount field, by close date, and is based on the user role hierarchy. You can modify the opportunity list, select the columns to show in the forecast summary, apply filters, and modify the custom columns for that type. Or, create your own types to meet your business needs.

Enabling multiple forecast types allows a different combination of the data shown for each forecast. Users can switch between active forecast types on the forecasts page. You can have up to four active forecast types at one time. If you require more active forecast types, contact Salesforce Customer Support.

 **Note** You can't activate legacy forecast types created before Summer '21. If a legacy forecast type is still needed, deactivate or delete the old type and recreate it.

Review the options for creating forecast types. Depending on how Salesforce is set up, not every option is available.

Object	Measure	Group	Date Type	Hierarchy
Opportunity	<ul style="list-style-type: none"> • Amount (revenue) • Quantity • Custom currency (revenue) or number (quantity) 	Custom picklist	<ul style="list-style-type: none"> • Close date • Custom date 	<ul style="list-style-type: none"> • Territory • User role
Opportunity Product (Used for product family grouping and required for product date forecasts)	<ul style="list-style-type: none"> • Total price (revenue) • Quantity • Custom currency (revenue) or number (quantity) 	<ul style="list-style-type: none"> • Custom picklist • Product family 	<ul style="list-style-type: none"> • Close date • Custom date • Product date* 	<ul style="list-style-type: none"> • Territory* • User role
Opportunity Split (Required for opportunity splits forecasts)	<ul style="list-style-type: none"> • Amount (used with revenue, overlay, and custom currency split types) • Custom currency (revenue) 	N/A	<ul style="list-style-type: none"> • Close date • Custom date 	<ul style="list-style-type: none"> • Territory • User role
Opportunity Product Split** (Required for opportunity product splits forecasts)	<ul style="list-style-type: none"> • Amount (used with revenue, overlay, and custom currency split types) • Custom currency (revenue) 	Product Family	<ul style="list-style-type: none"> • Close date • Custom date 	• User role
Opportunity Product Split*** (Required for opportunity product splits forecasts)	<ul style="list-style-type: none"> • Amount (any split type with Total Price) 	N/A	<ul style="list-style-type: none"> • Service date 	<ul style="list-style-type: none"> • Territory

Object	Measure	Group	Date Type	Hierarchy
Line Item Schedule (Used for product family grouping and required for schedule date forecasts)	<ul style="list-style-type: none"> Revenue Quantity Custom currency (revenue) or number (quantity) 	Product family	<ul style="list-style-type: none"> Schedule date 	<ul style="list-style-type: none"> Territory User role

*When forecasting by Opportunity Product (total price or quantity) for territory hierarchy, the Opportunity Product Date isn't supported. Opportunity Close Date is supported.

**Supported by product family only.

***Forecasts based on opportunity line item (OLI) splits, where each line item's revenue rolls up into the forecast period specified by its service date.

Custom Dates

If you have custom fields based on the Date type on the Opportunity object, you can forecast using those dates for forecasts based on the Opportunity, Opportunity Product, and Opportunity Splits objects. Custom dates on the Opportunity Product and Opportunity Splits objects aren't supported.

Custom Measures

If you have custom currency or number fields on the Opportunity, Opportunity Product, Opportunity Split, or Line Item Schedule object, you can forecast on the values in those fields.

- To forecast on revenue, use a custom currency field.
- To forecast on quantity, use a custom number field.

Expected Revenue

If the value of the Amount field and the actual revenue brought in by the opportunity often differ, the Expected Revenue field on opportunities is useful. If your sales team anticipates this difference, consider using the Expected Revenue field and forecasting on it.

- You can forecast on revenue but not quantity.
- You can forecast on the Expected Revenue field regardless of whether you use opportunity splits with it.
- Regardless of whether you use splits with the Expected Revenue field, you must enable team selling, opportunity splits, and a custom split type for it.

Forecast Filters

To include or exclude opportunity data from a forecast type, add a custom filter based on fields in the Opportunity object. For example, you can set up a custom filter for a forecast type that includes only renewal opportunities.

When creating or modifying custom filters, keep these considerations in mind.

- Filter definitions aren't editable after activating or reactivating the forecast type.
- Filter definitions support up to three conditions and use the AND operator only.
- Filters don't support using formula fields or custom multiselect picklist fields.
- When you're filtering on currency fields and you have a single currency enabled, the absolute value is used in the filter condition. If you have multiple currencies enabled, the corporate currency is used in the filter condition.
- Legacy forecast types that come ready-to-use with Forecasting don't support custom filters.

Forecast Groups with Custom Picklists

You can group forecasts into segments other than product families that make sense for your business. For example, define forecasts to group by industry or business unit. Keep these considerations in mind.

- Forecast groups are available for forecast types based on the Opportunity and Opportunity Product objects.
- Custom, single-selection picklist fields on the Opportunity, Opportunity Product, or Product objects are available as forecast groups. Make your group and group value selections as you define the forecast type.
- We recommend completing the picklist field on each opportunity record. To include items that don't have a value selected for the picklist, select **Not Categorized** when you select the group values for the forecast type.
- If a picklist selected as a forecast group in a forecast type is deactivated, forecasts continue to include opportunities that have a value selected for the picklist.
- Forecast groups using custom picklists aren't available in Salesforce Classic or in the Salesforce mobile app.

Opportunity Product Splits

If your sales team uses team selling and opportunity product splits, use an opportunity product splits revenue forecast. Keep these considerations in mind.

- You must have team selling and opportunity product splits enabled.
- Forecasts for opportunity product splits are available with product families only. To forecast on opportunity product splits without product families, use the opportunity split object instead.

Opportunity Revenue Splits

If your sales team uses team selling and opportunity splits, use an opportunity splits revenue forecast. Keep these considerations in mind.

- You must have team selling, opportunity splits, and the revenue split type enabled.
- In Salesforce Classic, an opportunity that contains only a single 100% revenue split shows “--” for the split percentage in the opportunity list.

Overlay Splits

Use overlay splits to track revenue from sales team members who help close opportunities but aren't directly responsible for them.

- You must have team selling, opportunity splits, and the overlay split type enabled.
- The overlay splits on a specific opportunity aren't required to total 100%.

Product Families

If your company groups its products and services into families and wants to forecast based on those families, keep these considerations in mind.

- If you're using Lightning Experience, you choose the product families to forecast on. The more product families you choose, the more rows appear in the forecasts grid. The forecasts grid shows up to 2,000 rows.
- The Forecasted Amount column in the opportunity list on the forecasts page shows the product family totals, not the overall opportunity totals that roll up into the forecast amounts. We recommend that you add this column to the opportunity list.
- Forecast users can view individual product family forecasts for users they have access to view.
- We recommend completing the Product Family field on each product record. Forecasts for products without a Product Family value appear in a forecast row called Products Not Categorized. If an opportunity lacks products, the opportunity amount or quantity also appears in this row.
- Product family forecast totals aren't available in Salesforce Classic. If users adjust their product family forecasts in Lightning Experience, not every total in the Salesforce Classic forecasts grid reflects the adjustments.
- In Salesforce Classic, a manager's own product family forecasts aren't available, so they can't be adjusted.
- You can set separate product family quotas for each sales rep but not a single quota for each sales rep.

Territories

If you use Sales Territories, you can forecast based on the territory hierarchy. Territory forecasts are available in Lightning Experience and the Salesforce mobile app for your active territory model only. When territory forecasts are enabled, the forecasts page shows this information.

- Forecast rollups based on the territories assigned to each opportunity
- Forecasts for the territories that the user is assigned to
- Territory forecasts shared to the user
- The opportunities included in territory forecasts, regardless of whether the opportunity owner is assigned to the territory

Territory forecasts are based on your territory hierarchy, not your user role hierarchy, as other forecast types are. Users switch from role-based forecasts to territory-based forecasts by selecting a territory forecast type as a tab on the forecasts page.

In territory forecasts, an opportunity is rolled up into one territory forecast only. If you use opportunity splits in a team selling scenario, each split on the opportunity only rolls up to one territory.

See Also

[Organize Products with Product Families](#)

Configure and Activate Pipeline Forecast Types

Let your sales team choose between forecast types to project sales from multiple perspectives.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional**, **Performance**, and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Custom measure forecasts available in: **Performance** Edition and in **Unlimited** Edition with the Sales Cloud

USER PERMISSIONS NEEDED

To create and manage a forecast type:

Customize Application

AND

View Setup and Configuration

To customize the opportunity list in a forecast type:

Customize Application

AND

Manage Public List Views

Forecast types start with selecting the object you want to forecast on. Before creating a forecast type, make sure that you're working in Lightning Experience. Also make sure that the object you want to use in the forecast type is set up correctly. Check your [field-level security settings](#), and make sure that the

opportunity Amount and Quantity fields, and any fields you want to forecast on are visible.

In addition, check the following based on the object you plan to use.

- To forecast on Opportunity Split, make sure that [opportunity splits](#) are enabled.
- To forecast on Opportunity Product Split, make sure that [opportunity product splits](#) are enabled.
- To forecast on Line Item Schedule, make sure that [product schedules](#) is enabled, and that the Service Date field on OpportunityLineItem or the Product Family field on Product2 is available.
- To group forecasts into unique segments, make sure that you have custom picklists defined or product families defined.

1. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
2. In the Available Forecasts Types section, click **Create a Forecast Type** and follow the onscreen setup flow to define and save the forecast type.
3. To complete the setup flow, click **Done**.

The new forecast type appears in the list of available types on the Forecasts Settings page. Your new type has an inactive status.

4. To make the new forecast type available on the forecasts page, return to the Forecasts Settings page and select **Activate** from the quick actions for the forecasts type.

You can have up to four active pipeline forecast types at one time. If you require more active forecast types, contact Salesforce Customer Support. To edit an active forecast, such as changing the custom columns, or choosing the columns to display, select the action you need from the quick actions list for the active forecast. Filter definitions aren't editable after activating or reactivating a forecast type.

If you select to group by product family, return to Forecasts Settings and select the families to use in the Manage Product Family Groupings section.



Warning Deactivating a forecast type deletes the related forecasting data. If the forecast type is reactivated, the filter definitions aren't editable.

See Also

[Pipeline Forecast Types](#)

Group Pipeline Forecasts to Match Your Business

Group forecasts into segments that make sense for your business. For example, define forecast groups that represent the industries your products and services serve or your company's business units. You can also group forecasts by product family.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To define picklists and edit product families: Customize Application

To create and manage a forecast type:
Customize Application

AND

View Setup and Configuration

Group Pipeline Forecasts by Custom Picklist

If your business model includes groups that sales managers use to forecast sales, use custom single-selection picklists to define a forecast group. Then, define forecast types that group forecast rollup totals by the picklist's values. Grouping forecasts using a custom picklist is available for forecast types created in Spring '24 or later that are based on the Opportunity and Opportunity Product objects.

1. From Object Manager, add a custom single-selection picklist to the Opportunity, Opportunity Product, or Product object. You can also use a preexisting custom single-selection picklist. Make sure the picklist is available on the page layouts that your sales reps and forecast managers use.
2. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
3. In the Available Forecast Types section, create a forecast type based on the Opportunity or Opportunity Product object. If you added the picklist to the Product object, create the forecast using the Opportunity object.
4. As you complete the forecast type setup flow, select the picklist to group by and select the values from the picklist to show in the forecast type.
You can select up to 50 values from the identified custom picklist to include in the forecast.
5. To see the group selection for each opportunity, add the picklist field as a column in the opportunity list for the forecast type.
6. Save your changes, and then activate the forecast type.

Group Pipeline Forecasts by Product Family

If your company groups its products and services into product families such as Hardware and Software, you can group forecasts using families instead of a custom picklist. Grouping forecasts by product family is available for forecasts based on the Opportunity Product, Line Item Schedule, and Opportunity Product Split objects.

The product families you select to use in forecasts apply to all forecast types that are grouped using product families. If you require separate groups for each forecast type, use custom picklists instead.

1. In Object Manager, define your company's product families in the **Product Family** field on the Product object.
2. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
3. Ensure that at least one forecast type that groups by product family is active.

4. In Forecasts Settings, in the Manage Product Family Groupings section, select the product families that you want to include in forecasts.
5. Save your changes.

See Also

- [Organize Products with Product Families](#)
- [Create a Custom Picklist Field](#)
- [Configure and Activate Pipeline Forecast Types](#)

Considerations for Showing Opportunity Fields in Pipeline Forecasts

When a rep selects a forecast in the forecasts grid, a list of opportunities that roll up to that forecast appears below the forecast summary. Refer to our guidelines when you're choosing the fields to show as columns in the opportunity list.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

- Select up to 15 standard and custom fields to appear as columns in the opportunity list for each enabled forecast type. Include the Opportunity Name field, which is required. We also recommend adding Forecast Category to the list.
- Although you can add a Text Area (Rich) field to the view in forecast settings, the field type isn't supported in the opportunity list in Lightning Experience.
- Your sales team sees the selected fields based on their field-level security settings. If you add an opportunity field to the opportunity list, and the field isn't visible to forecasts users, check the field-level security setting for the specific user profile and field. If the forecast is based on that field, the Forecasted Amount column shows the value of the field or the value of the field's split that contributes to the forecast, regardless of field-level security.
- When selecting fields, [consider the fields that are used in the forecast rollup](#). Depending on whether your forecast type uses revenue, quantity, or a custom measure, consider adding the Amount, Quantity, or custom field to the list.
- If you're forecasting on the Opportunity or Opportunity Product object, the Amount field appears by default. If you're forecasting on the Opportunity Product or Line Item Schedule object, we recommend adding the Forecasted Amount field. If you're forecasting on the Opportunity Split object, the Forecasted Amount and Split % fields appear by default. You can change the selected fields for each forecast type even after the forecast type has been activated. Depending on whether your forecast type uses the revenue or quantity measurement, consider adding Forecasted Amount, Amount, or Quantity to the opportunity list.

Schedule and Product Date Forecasts

Base forecasts on schedule and product dates to reflect your business model. Schedule and product date forecasts are available in Lightning Experience only.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

How Schedule Date Forecasts Differ from Close Date Forecasts

When you forecast by schedule date, Salesforce uses the values from a product schedule's Date field and its Revenue, Quantity, or custom measure field to calculate forecasts.

 **Example** A \$12,000 opportunity has a close date of June 30, 2018, with \$1,000 revenue scheduled monthly.

- If you forecast by close date, forecasts for the month of June include \$12,000 for the opportunity.
- If you forecast by schedule date, forecasts for the month of June include \$1,000 for the opportunity.

How Product Date Forecasts Differ from Close Date Forecasts

When you forecast by product date, Salesforce uses the values from each opportunity product's Date field and its Total Price, Quantity, or custom measure field to calculate forecasts.

 **Example** A \$10,000 opportunity has a close date of June 30, 2018 and two products: laptops for \$4,000 and desktops for \$6,000. The \$4,000 product date is June 30, 2018. The \$6,000 product date is May 31, 2018.

- If you forecast by close date, forecasts for the month of May don't include an amount for this opportunity. Forecasts for the month of June include \$10,000 for this opportunity.
- If you forecast by product date, forecasts for the month of May include \$6,000 for this opportunity. Forecasts for the month of June include \$4,000 for this opportunity.

Amounts on the Forecasts Page

When you forecast by schedule or product date, the Forecasted Amount column in the opportunity list shows the amounts that contribute to forecasts, not the overall opportunity amounts.

Forecasting Reports

When you forecast by schedule or product date, custom report types with Forecasting Items as the primary object show the schedule-date and product-date forecast values.

Territory Forecasts

If your sales team uses Sales Territories, Salesforce Forecasting, and Lightning Experience, they can forecast by territory. Territory forecasts give your team a snapshot of how expected sales compare between territories. Want to know which territory has the most closed deals this month? Or which territory is lagging in software deals? Use territory forecasts to find out.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

When territory forecasts are enabled, the forecasts page shows the user the following.

- Forecast rollups based on the territories assigned to each opportunity
- Forecasts for the territories that the user is assigned to
- Territory forecasts shared to the user
- The opportunities included in territory forecasts, regardless of whether the opportunity owner is assigned to the territory

Users can also drill down to:

- Child territories' forecasts.
- An individual rep's forecasts for a territory if the territory doesn't have a forecast manager.

Territory forecasts are based on your territory hierarchy, not your user role hierarchy, as other forecast types are. Users switch from role-based forecasts to territory-based forecasts by selecting a territory forecast type as a tab on the forecasts page.

In territory forecasts, an opportunity is rolled up into one territory forecast only. If you use opportunity splits in a team selling scenario, each split on the opportunity only rolls up to one territory.



Warning Deleting or archiving a territory model deletes the related forecast data. We recommend running the opportunity territory assignment filter and taking screenshots of the forecasts page. You can also export forecasting data, or create a [snapshot](#) before deleting or archiving a territory model. When you activate another territory model, you must add a territory forecast type for it.

Who Sees What in Territory Forecasts

- A territory's forecast manager can view the forecasts for that territory. If the territory has other users assigned, those users can't view that territory's forecasts. Those users' opportunities are rolled up into the territory's forecasts and aren't grouped by user.
- If a forecast manager is assigned, the territory's opportunities roll up into the territory forecast, not the individual users' forecasts. If no forecast manager is assigned, the opportunities are grouped based on the individual users within the territory.
- A "holdout" scenario occurs when a user owns an opportunity that's assigned to a territory but the user isn't assigned to the territory. For example, you own the Smith & Co. opportunity, and it's assigned to your California territory, but you're not assigned to the California territory. In this scenario, the opportunity list includes the opportunity, and the user appears in the forecasts grid but isn't searchable.
- Forecast managers can share their forecasts with any Salesforce user at their company. When sharing, they specify whether a coworker can make adjustments or only view the shared forecasts. Forecast managers can't share their summary view.
- Forecast users can see all their territory forecasts in the single-page summary view. The view shows forecasts for the top-level territories that users are assigned to in each branch of the territory hierarchy. Then users drill down to see their assigned child territories and the other child territories of the top-level territories. And if you're using product family territory forecasts, summary view makes it easy to see how multiple territories' forecasts roll up to a product family total.

For example, let's say your territory hierarchy has three branches: Canada, Mexico, and US. Canada and US have child territories. And every territory except Quebec has a forecast manager assigned, shown here in parentheses.

- Canada (Amy)
 - Ontario (Amy)
 - Quebec (No forecast manager. Dan and Kim are assigned as reps.)
- Mexico (Kim)
- US (Dan)
 - CA (Amy)
 - LA (Kim)
 - SAC (Amy)
 - SF (Dan)

With your territory hierarchy set up this way:

- Amy sees forecasts for Canada and CA.
- Dan sees forecasts for Quebec and US.
- Kim sees forecasts for Quebec, Mexico, and LA.

Then Amy and Dan can drill down to child territory forecasts. For example, Amy can get forecasts for Ontario and SAC. For Kim, no child territory forecasts are available.

See Also

[Sales Territories Concepts](#)

[Considerations for Managing Territory Pipeline Forecasts](#)

Rollup Methods for Pipeline Forecasts

Learn about methods for rolling up opportunities into forecasts for your sales teams.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

- Single forecast category rollups combine the opportunities within each forecast category into separate forecasts for each category.
- Cumulative forecast rollups combine opportunities from multiple forecast categories into cumulative forecast categories. This setting is the default.

Watch a video to learn how cumulative rollups work.

Watch the video: <https://play.vidyard.com/d3zroaKiuD2DTgReKysHp5>

 **Note** The examples in this topic use the four forecast categories that are enabled by default. You can show a Most Likely category in Lightning Experience, rename single category rollups, and rename cumulative rollups. When added, Most Likely appears in the forecasts grid between Commit and Best Case.

Rollup Method	Column Name on the Forecasts Page	Opportunities That Roll Up to It
Single Category	Pipeline	Pipeline
	Best Case*	Best Case
	Commit*	Commit
	Closed	Closed
Cumulative	Open Pipeline	<ul style="list-style-type: none">• Pipeline• Best Case• Commit
	Best Case Forecast	<ul style="list-style-type: none">• Best Case• Commit• Closed
	Commit Forecast	<ul style="list-style-type: none">• Commit

Rollup Method	Column Name on the Forecasts Page	Opportunities That Roll Up to It
		<ul style="list-style-type: none"> • Closed
	Closed Only	Closed

* If forecasts adjustments are enabled and configured to show in columns, these column names are My Best Case and My Commit, respectively.

Advantages of Cumulative Forecast Rollups

With single category rollups, each total and subtotal represents opportunities from only one of the forecast categories. With this type of rollup, if forecast users want to see the total that they're going to bring for the month or quarter, they add the Best Case, Commit, and Closed forecasts together.

Example: Single Category Rollups				
Forecast amounts	Closed	Commit	Best Case	Pipeline
	\$50	\$100	\$150	\$200
Opportunities	Closed	Commit	Best Case	Pipeline
	\$50	<ul style="list-style-type: none"> • \$50 • \$50 	<ul style="list-style-type: none"> • \$50 • \$50 • \$50 	<ul style="list-style-type: none"> • \$50 • \$50 • \$50 • \$50

With cumulative rollups, the forecast columns show cumulative amounts from the opportunities in the named forecast category and subsequent categories in your sales pipeline. This view makes it easy for sales team members to see the total numbers that they're likely to bring in without combining the category totals themselves.

For example, this table shows the cumulative forecast rollup amounts when there are four Pipeline, three Best Case, two Commit, and one Closed opportunity, each worth \$50.

Example: Cumulative Rollups				
Forecast amounts	Closed Only	Commit Forecast	Best Case Forecast	Open Pipeline
	\$50	\$150	\$300	\$450
Opportunities	Closed	Commit	Best Case	Pipeline

Example: Cumulative Rollups

	\$50	• \$50	• \$50	• \$50
		• \$50	• \$50	• \$50
			• \$50	• \$50
				• \$50

Select a Pipeline Forecast Rollup Method

Choose between cumulative rollup columns or single category columns. Single category rollups are selected by default, but you can change this setting as needed.

Select a Pipeline Forecast Rollup Method

Choose between cumulative rollup columns or single category columns. Single category rollups are selected by default, but you can change this setting as needed.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To view the Forecasts Settings page:

View Setup and Configuration

AND

View All Forecasts OR Allow Forecasting OR
delegated forecast manager

To edit the Forecasts Settings page:

Customize Application

 **Warning** Switching from one rollup method to another deletes adjustments for all active forecast types.

Before you start, make sure that you're working in Lightning Experience and that [Salesforce Forecasting is turned on](#).

1. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
2. In the Manage Forecast Rollups section, click **Edit**, and select how to organize forecast categories in rollups.
3. Save your changes.

Show, Hide, and Reorder Pipeline Forecast Columns

Customize the display of most standard and custom forecast columns on the forecasts page. For example, you can position a custom Most Likely column to appear next to the Open Pipeline column.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To view the Forecasts Settings page:

View Setup and Configuration

AND

View All Forecasts OR Allow Forecasting OR
delegated forecast manager

To create and manage a forecast type:

Customize Application

The time period is always the first column on the forecasts page. If quotas are enabled, the quota column is always the second column. The lock icon indicates that you can't reorder or hide these columns.

1. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
2. Under Available Forecast Types, select **Select Columns to Display** from the quick actions for a forecast type.
3. Select columns to appear and reorder them as needed. Then click **Done**.

Select columns to display

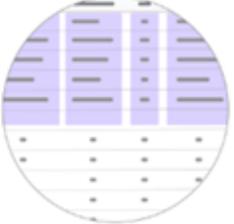
Select the columns to show in the summary view at the top of the Forecasts page. The time period column is always visible in the summary view.

Available Columns

- Best Case Forecast

Visible Columns

- Months
- Quota
- Closed Only
- Commit Forecast
- Open Pipeline



Done

See Also

[Add Custom Calculated Columns to Pipeline Forecasts](#)

[Considerations for Custom Calculated Columns in Pipeline Forecasts](#)

Include Other Data in Custom Columns in Pipeline Forecasts

Make forecast decisions using all the data that matters to your business by adding custom columns to a forecast. Custom columns can show data that's imported and referenced, such as Stretch Quota or Internal Booking Target, or a calculated value, such as gap to quota. Having all the information in one place helps you create more precise forecasts without having to turn to other resources.

Add up to 5 custom columns to a forecasts type that include any combination of columns that show custom calculations or reference data. The default forecast type includes Gap to Quota and Pipe Coverage columns by default.

[Add Custom Calculated Columns to Pipeline Forecasts](#)

To track metrics that help to generate more accurate and data-driven forecasts, add columns that show values calculated using a formula that you define.

[Add Custom Columns That Include External Data to Pipeline Forecasts](#)

Make forecast decisions with all the data that matters to your business, even if that data isn't maintained in Salesforce. Add external data, such as stretch quotas or internal booking target, and show it in a custom column on the forecasts page. Having all the information used to create forecasts in one place helps you create generate more precise forecasts without having to turn to other resources.

[Considerations for Custom Calculated Columns in Pipeline Forecasts](#)

Before you add custom calculated columns to your forecast types, review some considerations.

Managing External Data to Include in Pipeline Forecasts

Add external data, such as stretch quota or internal booking target to Salesforce so forecast managers have all the information they need when reviewing their sales projections. The data you add can be added as a column in the forecast summary and can be unique to each forecast type.

Add Custom Calculated Columns to Pipeline Forecasts

To track metrics that help to generate more accurate and data-driven forecasts, add columns that show values calculated using a formula that you define.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional**, **Performance**, and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To view the Forecasts Settings page:

View Setup and Configuration

AND

View All Forecasts OR Allow Forecasting OR
delegated forecast manager

To create and manage a forecast type:

Customize Application

Add up to 5 custom columns to a forecasts type that includes any combination of columns that show custom calculations or reference data. The default forecast type includes Gap to Quota and Pipe Coverage custom calculated columns by default.

1. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
2. Under Available Forecast Types, select **Manage Custom Columns** from the quick actions for a forecast type you want to add the column to.
3. Click **Add Custom Column**.
4. Select **Calculated** as the column type.
5. Enter a name and select the result type for your custom column. The name appears as the column header on the forecasts page. The result type is the data type of the value that you expect your formula to produce.
6. In the Formula field, enter a formula that represents the value you want your custom column to contain.

To refer to another column in your formula, use the API column name. For example, to refer to the Closed column in your formula, use FormulaAmount0. Referring to another custom column in the formula isn't supported. For a list of API column names, supported operators, and supported functions, see the Formula field in [ForecastingColumnDefinition](#).

7. Save your custom column, and then click **Done**.
8. To change the order of columns on the page, use **Select Columns to Display** on the quick actions menu for any forecast type.
9. To position the column in the correct order in the forecast summary, choose **Select Columns to Display** from the quick actions menu for the forecast type.

The column shows in the forecast summary on the forecasts page.

If a formula's value is null or invalid, the value is shown as -. To show - for 0 or negative values in your forecast, use the IF function in your formula to detect 0 or negative numbers.

See Also

- [Considerations for Custom Calculated Columns in Pipeline Forecasts](#)
- [Show, Hide, and Reorder Pipeline Forecast Columns](#)
- [Formula Field Limits and Restrictions](#)
- [Common Formula Errors](#)

Add Custom Columns That Include External Data to Pipeline Forecasts

Make forecast decisions with all the data that matters to your business, even if that data isn't maintained in Salesforce. Add external data, such as stretch quotas or internal booking target, and show it in a custom column on the forecasts page. Having all the information used to create forecasts in one place helps you generate more precise forecasts without having to turn to other resources.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, and Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To manage fields that store the forecast data to reference:

Manage Forecasting Custom Data

To view the Forecasts Settings page:

View Setup and Configuration

AND

View All Forecasts OR Allow Forecasting OR delegated forecast manager

To create and manage a forecast type:

Customize Application

Add up to 5 custom columns to a forecasts page that includes any combination of columns that show custom calculations or reference data.

Before adding the custom column to a forecast type, ensure that custom number or currency fields are available in the Forecasting Custom Data object.

1. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
2. Under Available Forecast Types, select **Manage Custom Columns** from the quick actions for the forecast type you want to add your own data to.
3. Click **Add Custom Column**.
4. Select **Reference Data** as the column type.
5. Select the custom field that has the data you want to show. Only custom currency and custom number fields in the Forecasting Custom Data object are available to select.
Ensure that the column name helps to identify the data available in the column and that the data type matches the type of data available in the field.
6. Save the custom column and click **Done** to return to the Forecast Settings page.
7. To position the column in the correct order in the forecast summary, choose **Select Columns to Display** from the quick actions menu for the forecast type.

See Also

[Managing External Data to Include in Pipeline Forecasts](#)

Considerations for Custom Calculated Columns in Pipeline Forecasts

Before you add custom calculated columns to your forecast types, review some considerations.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

- Each forecast type can include up to five custom columns, which includes custom calculated columns and columns that show external data.
- The default Opportunity Amount forecast type includes Gap to Quota and Pipe Coverage columns. These columns are shown if you add quota data to Salesforce and count as part of the 5 custom columns for that type.
- On the forecasts page, custom calculated columns don't show changes in the last 7 days and aren't included in rollups.
- You can't adjust custom calculated columns in forecasts.

If you have at least one custom calculated column in an active or inactive forecast type, you complete these actions until the column is removed.

- Switch from single category to cumulative rollups in Forecast Settings.
- Enable the Most Likely category.
- Disable Show Quotas (if your custom column's formula refers to a quota value).

See Also

[Add Custom Calculated Columns to Pipeline Forecasts](#)

Managing External Data to Include in Pipeline Forecasts

Add external data, such as stretch quota or internal booking target to Salesforce so forecast managers have all the information they need when reviewing their sales projections. The data you add can be added as a column in the forecast summary and can be unique to each forecast type.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Sales Cloud

Data Access and Availability

The data in a custom column is stored in custom number and custom currency fields added to the Forecasting Custom Data object. Users with access to import data and who have the Manage Forecasts Custom Data permission can load and manage data to those custom fields for themselves and their subordinates in the forecast hierarchy.

Users who also have the View All Forecasts permission can manage data for all users in the forecast hierarchy.

Data Preparation

Import data to the custom fields in the Forecasting Custom Data object using Data Loader. If you need more flexibility than what Data Loader provides, use Enterprise API. To use either method, ensure that API access is enabled and prepare a .csv file that contains these columns.

- User ID
- Forecast Type ID
- Period Start Date (yyyy-mm-dd or yyyy-mm-ddThh:mm:ss.sssZ; for example, 2012-03-01T08:00:00.00Z)
- A column each for the data you want to load

If you use territory forecasts, include a Territory ID column. If you use product family forecasts, include a Product Family column.

To help organize the .csv file, you can also include columns for Forecast Owner Name and Forecast Type Name, but those columns aren't required. Here's an example .csv file setup, with Stretch Quota as the reference data to load.

Forecast User Name	Forecast Owner User ID	Forecast Type Name	Forecast Type ID	Product Family	Stretch Quota	Period Start Date
Kevin Bailey	00599000000Hofh	OpportunityLineItemRevenue	0DbD00000001eQ9KAI	Hardware	20,000	2023-03-01
Kevin Bailey	00599000000Hofh	OpportunityLineItemRevenue	0DbD00000001eQ9KAI	Software	35,000	2023-04-01

Data Mapping

When you complete the import, map the columns in your .csv file to the ForecastingCustomData object as shown in this table.

Column Headers in CSV File	Forecasting Fields
User ID	ForecastingOwnerID
Forecast Type ID	ForecastingTypeID
Period Start Date	StartDate
Product Family (needed only when the forecast data source is Product Families)	ProductFamily
Territory ID (needed only for territory forecast types)	ForecastingTypeID
Reference data columns	The name of your custom number or currency field in the Forecasting Custom Data object

See Also

[Create Custom Columns](#)

[Data Loader](#)

[SOAP API Developer Guide: Data Loading and Integration](#)

Manage Opportunity Stage to Forecast Category Mappings for Pipeline Forecasts

Forecasts rely on how picklist values map between the Stage field and the Forecast Category field on opportunities. For example, if you map the Negotiation/Review stage to the Best Case forecast category, the amounts of your opportunities in Negotiation/Review are included in your Best Case forecast amount. If the stage of an opportunity changes, the probability and forecast category also change.

Here's an example mapping.

Stage	Probability	Forecast Category
Prospecting	10%	Pipeline
Qualification	10%	Pipeline
Needs Analysis	20%	Pipeline
Value Proposition	50%	Pipeline
Id Decision Makers	60%	Pipeline
Perception Analysis	70%	Best Case
Proposal/Price Quote	75%	Best Case
Negotiation/Review	90%	Commit
Closed Won	100%	Closed
Closed Lost	0%	Omitted (not included in forecasts)

Update the mappings in the Stage field on the Opportunity object.

1. From Object Manager, open the Opportunity object and select Fields & Relationships.
2. Click **Stage**. Each row in Opportunity Stages Picklist Values shows a stage and the forecast category that it's mapped to.
3. Click **Edit** to change a mapping.
4. Save your changes.

 **Note** Users can edit the Forecast Category field on opportunities that they own, overriding the default stage-to-category mapping. In Salesforce Classic, the stage determines the available forecast categories. In Lightning Experience, all forecast categories are available for all stages.

Customize Pipeline Forecast Categories

A forecast category is the category within the sales cycle to which an opportunity is assigned based on its opportunity stage. The standard forecast categories are Pipeline, Best Case, Commit, Omitted (not included in forecasts), and Closed. Salesforce admins can add a Most Likely category in Lightning Experience and rename categories in both single category rollups and cumulative category rollup scenarios.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Renaming forecast categories in cumulative rollups available in: Lightning Experience

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

Editions with the Sales Cloud

 **Note** You can't delete or deactivate standard forecast categories.

Rename Categories in Single Category Rollups

If you select single category rollups, update category names in the Opportunity object in Object Manager.

We strongly encourage you to update the category name only. Changing a forecast category's API name can have unintended results.

1. From Setup, open the Object Manager and access the Opportunity object.
2. Go to Fields & Relationships and select **Forecast Category**.
3. In the Forecast Category Picklist Values section, click **Edit** next to the category you want to rename.
4. Enter the updated name and save your changes.

Rename Categories in Cumulative Rollups

If you select cumulative category rollups, update category names on the Forecast Settings page in Salesforce Setup.

1. From Setup, in the Quick Find box, enter Forecasts Settings, and then select Forecasts Settings.
2. In the Manage Forecast Rollups section, click **Edit**.
3. Ensure that Cumulative category rollups is selected.
4. Enter new category names in the table and save your changes.

Add the Most Likely Forecast Category

To classify opportunities as most likely to close, add the Most Likely forecast category.

 **Note** Once you add the Most Likely category, you can't delete or deactivate it.

1. From Setup, open the Object Manager and access the Opportunity object.
2. Go to Fields & Relationships and select **Forecast Category**.
3. In the Forecast Category Picklist Values section, click **New**.
4. Add the label, API name, and select Most Likely as the Status Category.

Most Likely is now included as a Forecast Category picklist value on opportunities. After you map Most Likely to one or more opportunity stages, it appears as a column between Best Case and Commit on the forecasts page.

See Also

- [Manage Opportunity-Stage-to-Forecast-Category Mappings in Collaborative Forecasts](#)
- [Find Object Management Settings](#)

Allow Point-in-Time Pipeline Forecast Submissions

Forecast submissions are sales reps' or managers' best estimates of the revenue or quantities they expect to close during the forecast period. As management levels within the sales organization review forecast rollups, they compare the current forecast against the submitted forecast numbers and quota.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To enable forecast submissions: Customize Application

When enabled, forecast submissions are available on active forecast types that don't include product families or other forecast groups.

1. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
2. Turn on Forecast Submissions.
3. Save your changes.

Allow Manager Judgments in Pipeline Forecasts

Allow forecast managers to indicate which of their subordinates' opportunities they have high confidence of closing during the current forecast period. To get the most benefit out of manager judgments, we recommend also enabling managers to make adjustments at the forecast rollup level. Manager judgments are supported for forecast types based on opportunity, opportunity product, and line item schedule objects only.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To view the Forecasts Settings page: View Setup and Configuration

AND

View All Forecasts OR Allow Forecasting OR

USER PERMISSIONS NEEDED

	delegated forecast manager
To edit the Forecasts Settings page:	Customize Application
To enable forecasts users for judgments:	Manage Users AND Customize Application
To customize the opportunity list in a forecast type:	Customize Application AND Manage Public List Views

1. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
2. Edit the Enable Adjustments and Judgments section and select **Manager Judgments**.
3. To change the picklist values that are available in the Manager Judgment field in the forecasts opportunity list to meet your business needs, edit the values in the provided table. Ensure that the values you add match the behavior described for each value. The IN value is used to indicate opportunities that a forecast manager feels are definitely going to close and roll up as and are part of a forecast adjustment. The OUT value indicates opportunities that a forecast manager doesn't want to include in the forecast and are excluded from the roll up. If you change the judgment values, check whether they have translations and update them as needed. Any translation values are shown in the user's selected language on the forecasts page. For more information, see [Translation Workbench](#). The translated values aren't included on the Setup page.
4. Save your changes.
5. For each forecast type that you want to allow manager judgments in, edit the forecast type's opportunity list to include the Manager Judgment column. For user role hierarchy forecast types, ensure that the opportunity list also includes the Owner Full Name column. For territory-based forecast types, add the Territory Name column. To see the column in the Salesforce mobile app, make sure it's one of the first four columns in the opportunity list.
6. Ensure that each forecast manager has the Override Forecasts user permission in their profile. This permission is available in the standard profile by default.

If you no longer want forecast managers to apply judgment to opportunities in their forecasts, disable the option in Setup. Updating user permissions isn't required judgments. See [Manager Judgment Deletions in Pipeline Forecasts](#).

Set Up Historical Data for Pipeline Forecast Charts

To give sales leaders the data they need when viewing forecasting charts, ensure that historical trending is on for Forecasting Item. Also verify that the retention period is set appropriately.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To enable historical trending:

Customize Application

1. From Setup, in the Quick Find box, enter *Historical Trending*, and then select **Historical Trending**.
2. From the object list, select **Forecasting Item**.
3. For a complete chart experience, retain historical trending data for 13 months, which is the default setting. This retention time allows for a full year's worth of past forecasts in the historical trending chart.
4. If historical trending isn't enabled, select the option to enable it.
5. Save your changes.

Increase Global Pipeline and Forecast Visibility with Data 360

Use Sales Cloud and Data 360 together to see all your revenue predictions and to track different types of income, such as sales, billing, and ad purchases. Compare your forecasts with actual results to make smart adjustments for more accurate forecasts, engage with the right customers to close deals, alter account strategies, and boost your pipeline to meet your sales goals.

REQUIRED EDITIONS

Available in: Lightning Experience

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

To get the whole picture about your forecast and the pipeline that's there to fill it, gather and prepare data from these possible sources.

Data Type	Examples
Sales and service data from Salesforce	<ul style="list-style-type: none">• Leads• Opportunities• Accounts• Open service cases (if you use Service Cloud)
Revenue and marketing data from Salesforce	<ul style="list-style-type: none">• Past purchase activity (if you use Revenue Cloud)

Data Type	Examples
	<ul style="list-style-type: none"> Billing and subscriptions (if you use Revenue Cloud) Website engagement (if you use Marketing Cloud) <p>Depending on your Salesforce setup, some of this data can be available from external sources.</p>
Third-party data	<ul style="list-style-type: none"> Inventory and fulfillment status Consumption rates Conference attendance and webinar engagement Customer survey results Social media sentiment
Systems and assets data	<ul style="list-style-type: none"> Network information System performance Device information

Combining this data means you can create insights that help to predict your potential sales. These insights are just a few examples.

- Customer satisfaction. Use your past purchase data with your service case, consumption, and customer survey data to assess overall customer happiness with your products and services, which can influence their potential to buy more.
- Calculated run rate. Use your Salesforce opportunity data with your billing and shipping data to predict your revenue for the year.
- Likelihood to Close. Use your Salesforce opportunity data with your consumption rate, past purchases, inventory, and seasonal sales trends to make sure you're engaging with the customers most likely to close the deal.
- Propensity to buy. Use your Salesforce opportunity data with past purchase history, conference and webinar attendance, and web engagement data to determine a customer's interest, propensity, and when they're likely to make their next purchase.
- Seasonal Sales Trends. Use your past purchase data with your inventory data to determine whether the inventory on hand meets potential demands and whether enough pipeline exists to meet your forecast during a busy season.

Task 1: Configure Users for Data 360

To work with external data in Salesforce, ensure that Data 360 is set up and provisioned in your Salesforce org.

Assign Data Cloud permission sets to any users that need access to Data Cloud.

Task 2: Connect and Map Your Data Sources to Data 360

To bring your data together, connect your data sources in Data 360. Data sources are the places that hold your data. Those places can be Salesforce for lead and opportunity data or third-party sources such as Google Storage or Amazon S3 for conference attendance and webinar engagement. Make a list of where your external data comes from and who has access and credentials to that data.

How you connect your data to Data 360 depends on where the data is coming from. To make sure your data source can be connected to Data 360, review the available [Data Cloud connectors and integrations](#).

1. Connect and map your sales and service data.
 - a. [Set up a Salesforce connection in Data Cloud](#).
 - b. [Install a standard data bundle for Sales Cloud and for Service Cloud](#).
 - c. To begin the flow of data to Data 360, [create a data stream](#).

The standard data bundles automatically map Salesforce standard objects to

Data 360

standard data model objects (DMOs). See [Sales and Service Data Bundle Mappings](#).

2. Connect and map your third-party data sources.
 - a. Configure third-party data sources by using a [connector service](#) or a [pre-built connector or integration](#) in Data Cloud Setup.

You can also connect data using the [Bring Your Own Lake \(BYOL\) Data Federation](#) in

Data 360

- b. Create a data stream for each of the external data sources. See [Data Sources in Data Cloud](#).
 - c. For each external source, [map your data](#) to DMOs. Make sure you map all fields that are required for your business.

For data available in other clouds, explore the [connectors and connector services](#) available. If a connector or service isn't available, manually ingest the data and map your data accordingly.

Task 3: Unify Your Data into Profiles

Consolidate your data from all your sources into a comprehensive view of your customers and accounts. From that customer view, you can start to learn more about that customer's buying trends and how they fit into your forecast.

1. [Create an identity resolution ruleset](#).
2. [Add match rules](#).
3. Run the ruleset and then view unified profile results in [Profile Explorer](#).

Task 4: Analyze Data with Calculated Insights

With all your data now safely in Data 360, you're ready to build the insights that join your data together. For example, create insights that correlate past purchasing patterns from customers with open opportunities, or take a closer look at subscription and web engagement data to determine what upsell or cross-selling opportunities can boost your pipeline.

Each insight you create provides better visibility into your pipeline and forecast so you can make forecast adjustments and engage with the right customers to ensure key deals close on time. Knowing exactly where your forecast stands gives you time to update your account strategies to increase your pipeline to ensure you hit your forecast goal.

Sales leaders work together to decide which metrics and insights they need and help to identify what data is needed to arrive at that metric. For example, to see the total amount spent by a customer, which can influence future spending habits and your pipeline, you need the customer's past purchase data.

1. [Create the calculated insight.](#)
2. [Verify the insight in Data Explorer.](#)

To verify the calculation, run or schedule the SQL job.

See [Enhance Data in Data Cloud](#) in Trailhead to learn more about the types of insights available and how to build your insight expressions.

What's Next

Now that your data is connected together, you can bring the power of that data across Salesforce. Here are a few suggested next steps.

- Segment data into target customer sets. Based on what you find after unifying your data and looking closely at the insights it provides, you can segment your data. For example, create segments for high probability to close or greatest upsell opportunities. These segments can be used to build email campaigns or to create a report or dashboard for sales leaders that can be useful when forecasting.
- Enrich Sales Cloud records with insights. Provide your sales team access to the calculated insights data on account, contact, or lead records in Sales Cloud.
- Do more analysis with Tableau. Use Tableau to find useful and actionable insights that can drive business success and create a personalized experience for your customers. Data 360, Tableau, and Salesforce 360 apps work together to consolidate your data and create a single customer record.

Set Up Consumption Forecasting

Use this step-by-step guidance to start forecasting your consumption-based businesses. Make sure you enable Salesforce Forecasting and Data 360 in the same Salesforce org.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited**, and in **Einstein 1 Sales Edition** with Sales Cloud

 **Note** Data 360 usage affects the consumption of credits. See [Data Cloud Billable Usage Types](#).

Consumption Forecasting Limitations

Learn about the limitations of Consumption Forecasting before setting it up for your users.

Consumption Forecasting Best Practices

Review key guidelines to get the most out of your consumption-based forecasts.

Give Users Access to Consumption Forecasting

Give your users access to the Consumption Forecasting feature by assigning a permission set license and permission set to them. With this license, users can view and interact with consumption-based forecast types.

Configure Data 360 for Consumption Forecasting

To set up Consumption Forecasting, enable and configure Data 360 so you can leverage the data effectively. Enable Data 360 in the same Salesforce org.

Enable Data Governance Permissions for Consumption Forecasting Objects

To use Data 360 Data Governance features for Consumption Forecasting, you need to grant access to the impacted objects according to an access policy.

Assign the Forecast Manager Role

The forecasts hierarchy determines how forecasts roll up within your Salesforce org and who can view and adjust them. The forecast hierarchy is based on the user role hierarchy.

Deploy the Forecasting Data Kit

To configure a consumption forecast type, import the standard objects required for forecasting from your Salesforce org to Data 360. Deploying the Forecasting data kit creates the data lake and data model objects for those standard objects.

Create DLOs for Your Standard Objects

If you can't deploy the Forecasting data kit, you can manually configure data streams and DMO mappings for the standard objects.

Create DMOs for Consumption-Based Data

The consumption-based data includes details of real usage and estimates of future usage of each product or service that you want to forecast.

Set Relationships Among DMOs

Set the relationships among the DMOs. These relationships help you determine forecast rollups in the Choose Forecasting Dimensions section while creating a consumption forecast type.

Create a Consumption-Based Forecast Type

You configure a consumption-based forecast type by selecting the data source for your forecast, setting up forecast rollups, choosing columns to display, and selecting the date type for forecast calculations. After you complete the setup, the forecast type appears as a tab on the forecasts page, where your teams can view and forecast revenues.

Consumption Forecasting Limitations

Learn about the limitations of Consumption Forecasting before setting it up for your users.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited**, and in **Einstein 1 Sales Edition** with Sales Cloud

- You can't move consumption forecast metadata between orgs, such as from sandbox to production, using change sets or Metadata API.
- Sales reps see only up to 2000 rows when all dimensions are expanded in the forecast grid.
- Data in the forecast grid for level 2 and 3 dimensions are grouped by the unique identifier of the selected data model objects (DMOs), not by the selected dimension field. The dimension field is used only for display purposes.
- Manager and seller overrides in Consumption Forecasting is enabled by default and you can't disable it.
- Consumption Forecasting isn't supported in Government Cloud Plus. To avoid issues, don't turn this feature on in Government Cloud Plus orgs. For more information, contact your Salesforce account executive.
- Consumption Forecasting doesn't support multiple currencies and Advanced Currency Management settings.
- Consumption Forecasting doesn't support these features:
 - Allow Forecast Submissions
 - Enable Adjustments and Judgments
 - Manage Forecast Rollups
 - Territory Hierarchy

Consumption Forecasting Best Practices

Review key guidelines to get the most out of your consumption-based forecasts.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited**, and in **Einstein 1 Sales Edition** with Sales Cloud

Performance Considerations

- If you have more than 14 million records for standard and custom objects, you incur higher data credit costs and pages load more slowly.
- More frequent parallel page visits can lead to higher costs and latency.
- In deep user hierarchies, higher-level users access a lot more data, which can result in varied runtime

- and performance.
- Map your sales stages to forecast categories. To increase your forecast accuracy, adjust close probability based on historical data.
 - Cold cache can also affect performance.
 - To minimize the amount of data that's accessed, select minimal forecasting periods, such as 3 or 6 months, rather than longer durations like 12, 18, or 24 months.

Data Volume and Object Management

- To improve forecasting performance, partition measure objects by engagement category and include an event date field.
- To avoid unnecessary data loading, create multiple Data Lake Objects (DLOs) or Data Model Objects (DMOs) for large forecasts. We recommend that you base DLOs on specific products and use one DMO per forecast type.
- Source each DMO from either a CRM data stream or a non-CRM data stream.
- To prevent data errors and ambiguity, avoid combining CRM and non-CRM data streams within the same DMO.
- To consolidate daily or weekly data into one entry per month, group raw data with Data 360 transforms, which reduces data volumes.
- To further optimize data volume, combine multiple measures into one entry where possible.
- To maintain a lean data footprint, keep only the data you need on main DMOs and regularly store older data in different DMOs.
- To optimize data handling in Data Cloud One setup, use separate data spaces for different functions.

Give Users Access to Consumption Forecasting

Give your users access to the Consumption Forecasting feature by assigning a permission set license and permission set to them. With this license, users can view and interact with consumption-based forecast types.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited**, and in **Einstein 1 Sales Edition** with Sales Cloud

1. From Setup, in the Quick Find box, find and select **Users**.
2. Click the user that you want to assign the permission set to, and then click **Edit**.
3. Enable **Allow Forecasting** and click **Save**.
4. In the Permission Set License Assignments related list, select **Edit Assignments**.
5. Enable **Salesforce Forecasting** and click **Save**.
6. In the Permission Set Assignments related list, select **Edit Assignments** and then add **Forecast on Any Business Model**.
7. Save your changes.

Configure Data 360 for Consumption Forecasting

To set up Consumption Forecasting, enable and configure Data 360 so you can leverage the data effectively. Enable Data 360 in the same Salesforce org.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited**, and in **Einstein 1 Sales Edition** with Sales Cloud

Set Up a Data 360 Admin User

Before turning on Data 360 for Consumption Forecasting, you need to set up an admin user. See [Set Up a Data Cloud Admin User](#).

Turn On Data 360

In Setup, enable Data 360 to access your forecasting data in Consumption Forecasting. See [Turn On Data Cloud](#).

Enable Data Governance Permissions for Consumption Forecasting Objects

To use Data 360 Data Governance features for Consumption Forecasting, you need to grant access to the impacted objects according to an access policy.

REQUIRED EDITIONS

You can select from either attribute-based access control (ABAC) or role-based access control (RBAC). This allows you to have more granular control over your users' access to data. Follow instructions in [Grant Access to Data Cloud Objects](#) to assign these objects to an available policy.

Available in: Lightning Experience

Available in: **Enterprise, Unlimited**, and in **Einstein 1 Sales Edition** with Sales Cloud

Associated Data 360 Objects

Object Type	Name
Data Lake Objects (DLOs)	FrcstCustmzAdjustment
	FrcstCustmzOwnerAdjustment
	Period

Object Type	Name
	User
	UserRole
Data Model Objects (DMOs)	Business Period
	Forecast Item Manager Version Amount
	Forecast Item Owner Version Amount
	User
	User Role

- Note** To use Data Governance features, grant permissions to the listed objects according to [Grant Access to Data Cloud Objects](#). If you have more than one data space, you must grant access to objects in each data space. Object names in non default data spaces follow the convention of <DataSpace Prefix>_<Object Name>.
- Note** Data 360 governance features are enabled by default for new orgs. Review [Data Governance Considerations](#) to learn about data spaces, permission sets, and access policies.
- Note** Data 360 governance features are enabled by default for new orgs, but you must create policies to grant data access. Create an Allow All policy if granular control isn't needed. In existing orgs, Data 360 includes a day zero Allow All policy out of the box to preserve access based on current permission sets and data space mappings. Review [Data Governance Considerations](#) to learn about data spaces, permission sets, and access policies.
- Note** Data masking policies and behaviors can be impacted by custom org configuration, customization, and existing policies. Learn more in [Data Governance Considerations](#).
- Note** Custom org configurations, customizations, and existing policies can impact data masking policies and behavior. Learn more in [Data Governance Considerations](#).

For more details, see

[Data Governance in Data Cloud](#)

Assign the Forecast Manager Role

The forecasts hierarchy determines how forecasts roll up within your Salesforce org and who can view and adjust them. The forecast hierarchy is based on the user role hierarchy.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited**, and in **Einstein 1 Sales Edition** with Sales Cloud

To make sure everyone can see their forecasts:

1. Set up your user role hierarchy.
2. Assign a forecast manager to the top level of the forecast hierarchy.
3. Verify that each manager with subordinates is designated as a forecast manager.

Deploy the Forecasting Data Kit

To configure a consumption forecast type, import the standard objects required for forecasting from your Salesforce org to Data 360. Deploying the Forecasting data kit creates the data lake and data model objects for those standard objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited**, and in **Einstein 1 Sales Edition** with Sales Cloud

In Data Cloud One setup, select the companion org you want to use for consumption forecasting while deploying the Forecasting data kit.

1. From the App Launcher, find and open **Data Cloud**.
2. In Data 360 go to the Data Streams tab and click **New**.
3. Select the Salesforce CRM connected data source and click **Next**.
4. Select your connected org.
If only one Salesforce org is connected to Data 360, it's selected by default.
5. Select Data Bundles, and then select the Forecasting data bundle, and click **Next**.
6. Select the data space you want to use for forecasting and click **Next**.
The installed objects and fields are shown. Don't remove the data objects, fields, or mappings.
Consumption forecasting relies on the standard installation to show the forecasts correctly.
7. Click **Deploy**.
The data kit deploys six data streams. The Data Streams tab shows the progress. When the data streams show an Active status, you're ready to continue.

Create DLOs for Your Standard Objects

If you can't deploy the Forecasting data kit, you can manually configure data streams and DMO mappings for the standard objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited**, and in **Einstein 1 Sales Edition** with Sales Cloud

In Data 360, create data streams to begin the flow of data from the standard objects to Data 360. You also create a data lake object (DLO) while you create a data stream.

Create data streams and DLOs for these objects.

Standard DLOs

Objects	Data Stream and DLO Names
Account	Account
User	User
UserRole	UserRole
Period	Period
FrcstCustmzAdjustment	FrcstCustmzAdjustment
FrcstCustmzOwnerAdjustment	FrcstCustmzOwnerAdjustment

See [Create a Salesforce CRM Data Stream](#).

! **Important** In case of the FrcstCustmzOwnerAdjustment object, the Forecasting Customized Owner Adjustment ID field has more than 40 characters. Rename it to Forecasting Custmz Owner Adjustment ID to bring the character count down. Otherwise, you encounter an error.

Map DLOs with DMOs

After you create DLOs for your objects, create data model objects (DMOs) for each DLO and map them respectively. Use the same names of the DLOs to name the DMOs. See [Map Data Model Objects](#).

Map your User and UserRole standard DLOs to the corresponding DMOs that are prefixed with `ssot` to avoid an error message stating that the DMO already exists. Make sure that the fields in the DLOs are mapped to the appropriate fields in the corresponding DMOs as mentioned in these tables.

User

DLO field labels (api names)	map to the dmo field labels (API Names)
Full Name (Name__c)	Full Name (FullName__c)
User ID (Id__c)	User Id (Id__c)
Role ID (UserRoleID__c)	User Role (RoleId__c)

DLO field labels (api names)	map to the dmo field labels (API Names)
Photo (SmallPhotoUrl__c)	Small Photo Url (SmallPhotoUrl__c)

UserRole

DLO field labels (api names)	map to the dmo field labels (API Names)
Name (Name__c)	Role Name (Name__c)
Role ID (Id__c)	Role Id (Id__c)
Parent Role ID (ParentRoleId__c)	Parent Role (ParentRoleId__c)
User ID (ForecastUserId__c)	Forecast User (ForecastUserId__c)

Create DMOs for Consumption-Based Data

The consumption-based data includes details of real usage and estimates of future usage of each product or service that you want to forecast.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited**, and in **Einstein 1 Sales Edition** with Sales Cloud

You need two DMOs, one for tracking the consumption lifecycle of a product or service line item used by customers and another for tracking customer usage data and other consumption details. For example, to forecast consumption for your computing storage business, create DMOs with the details and fields provided in these tables. See [Create a Custom Data Model Object](#).

Product or Service DMO

Details	Values
Object Label	StorageService
Object API Name	StorageService
Object Category	Other

Field Label	Data Types
OrganizationId	Text
Id	Text (Primary Key)
Name	Text
Account Lookup	Text

Field Label	Data Types
Owner	Text
ContractValue	<p>Number or Currency</p> <p>The data type of this field is the same as that of the field on which you want to apply custom adjustments.</p>

Consumption Data DMO

Details	Values
Object Label	StorageUsage
Object API Name	StorageUsage
Object Category	Other

Field Label	Data Types
OrganizationId	Text
Id	Text (Primary Key)
Storage Service Lookup	Text
Date	DateTime
MeterAmount	Number
Expected	Number
Predicted	Number

-  **Note** In your consumption data DMO, make sure that you at least have one field of the DateTime data type and one field of the Number or Currency data type.

Create and Map DLOs with Consumption-Based DMOs

Create DLOs to begin the flow of the consumption-based data from your data sources. You can create a custom object, use a preexisting object within Salesforce CRM, leverage Amazon S3, or choose other options to establish these DLOs.

You need two DLOs, one for the product or service DMO and another for the consumption details DMO. For the computing storage business example mentioned above, use the information provided in these tables to map DLOs with the respective DMOs. We recommend that you name the fields in DLOs the same as the field names in DMOs for easy mapping. See [Map Data Model Objects](#).

StorageService

DMO Fields	Map to the Field That Contains...
Id (Primary Key)	Unique IDs.
Name	Names of services.
Account	Account IDs of services. The account IDs must match the IDs in the Account object.
Owner	Owners (user IDs) of services. The user IDs must match the IDs in the User object.
OrganizationId	Use the 18-character organization ID. To find it, open Developer Console and run this query in Query Editor: <code>SELECT Id, Name FROM Organization</code>

StorageUsage

DMO Fields	Map to the Field That Contains...
Id (Primary Key)	Unique Ids.
Usecase	Service IDs. The service IDs must match the IDs in the service DMO.
MeterDate	The date and time of the consumption.
MeterAmount	The amount of the consumption for each use case.
Expected	Data of expected consumption for each use case.
Predicted	Data of predicted consumption for each use case.
OrganizationId	Use the 18-character organization ID. To find it, open Developer Console and run this query in Query Editor:

DMO Fields	Map to the Field That Contains...
	<code>SELECT Id, Name FROM Organization</code>

 **Note** The unique ID of any data imported from an external source must be exactly 15 characters.

Set Relationships Among DMOs

Set the relationships among the DMOs. These relationships help you determine forecast rollups in the Choose Forecasting Dimensions section while creating a consumption forecast type.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited**, and in **Einstein 1 Sales Edition** with Sales Cloud

This table illustrates relationships for the computing storage business example.

DMO Relationships

Object	Field	Cardinality	Related Object	Related Field	Details
StoragesService	Account	N:1	Account	Account Id	An account can have multiple products or services (StorageService).
StorageUsage	StorageService	N:1	StorageService	Id	A product or service can have multiple consumptions.

1. Go to the Data Model tab.
2. Click the DMO in which you want to set the relationship and click **Relationships**.
3. Click **New** and then click **New Relationships**.
4. Set relationships as specified in the table.

Create a Consumption-Based Forecast Type

You configure a consumption-based forecast type by selecting the data source for your forecast, setting up forecast rollups, choosing columns to display, and selecting the date type for forecast calculations. After you complete the setup, the forecast type appears as a tab on the forecasts page, where your teams can view and forecast revenues.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited**, and in **Einstein 1 Sales Edition** with Sales Cloud

-  **Note** Before you configure a consumption forecast type, make sure you configure the required permissions and set up Data 360.

1. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
2. In the Available Consumption Forecast Types section, click **Add a Forecast Type**.
3. Fill in the details in each section and save your changes.
4. To complete the setup flow, click **Save & Close**.

The new forecast type appears in the list of Available Consumption Forecast Types on the Forecasts Settings page. Your new type has an inactive status.



Tip To activate the forecast type immediately, [click Save & Activate](#).

5. To make the new forecast type available on the forecasts page, return to the Forecasts Settings page and select **Activate** from the quick actions for the forecasts type. You can have up to four active forecast types at one time. To edit an active forecast, such as choosing the columns to display, or changing forecasts roll-up, click **Edit** from the quick actions list for the active forecast.



Warning Deactivating a forecast type deletes the related forecasting data.

Define Data Model Relationships for Your Forecast

To determine what to show as rows and columns in a consumption forecast type, identify the data model relationships that you defined in Data 360. Define the parent-child relationships between data model objects (DMOs) and identify their lookup fields. Defining these relationships and their lookup fields ensures that your forecast rolls up accurately.

Determine How to Roll Up Forecasts

Keep your sales team informed about what's happening at every level and let them see forecast rollups across your business.

Add Columns to a Forecast Type

To show forecast measures on the forecasts page, add columns to the grid. You can add up to nine columns, including the quota column.

Allow Users to Adjust Forecast Values

Allow forecast users to adjust their own forecast values in any one of the measure columns.

Enable Custom Adjustments

Let forecast users configure adjustments based on the total value for upcoming periods. To enable custom adjustments on a measure column, you must first enable adjustments on that measure column.

Define Data Model Relationships for Your Forecast

To determine what to show as rows and columns in a consumption forecast type, identify the data model

relationships that you defined in Data 360. Define the parent-child relationships between data model objects (DMOs) and identify their lookup fields. Defining these relationships and their lookup fields ensures that your forecast rolls up accurately.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited**, and in **Einstein 1 Sales Edition** with the Sales Cloud

Identify the DMOs that represent your business dimensions, like accounts and products. Identify the DMO that contains your measure data, like actual or predicted revenue. Indicate which DMO stores the record ownership data you want to show.

For example, to forecast consumption for your computing storage business, set the parent-child relationships between DMOs as specified in this table.

UI Field	Value	Select the field that contains...
Parent DMO	Account DMO	The parent object in the hierarchy. An account can have multiple products or services.
Child DMO	StorageService	The service whose usage you want to forecast. This is the child of the Account DMO.
Parent Lookup Field	Account_Lookup	Foreign key that establishes the relationship between the StorageService DMO and the Account DMO.
Measure DMO	StorageUsage	Contains the daily usage data and metrics for the StorageService DMO.
Child Lookup Field	StorageService_Lookup	Foreign key that establishes the relationship between the StorageUsage DMO and the StorageService DMO.
Record Ownership DMO	Account DMO	The object that needs to be considered for record ownership and filtering the right data for that user.
Record Ownership Field	Account_ownerid	The field on the object where user ID of the record owner is stored.

1. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
2. In the Available Consumption Forecast Types section, click **Add a Forecast Type** or open the forecast type in which you want to define DMO relationships.
3. Open the Identify Where You Want to Use Your Data in the Forecast section and set the relationships based on your business use case.
4. Click **Save & Close**.

Determine How to Roll Up Forecasts

Keep your sales team informed about what's happening at every level and let them see forecast rollups across your business.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited**, and in **Einstein 1 Sales Edition** with Sales Cloud

Configure your forecast types to automatically roll up forecasts to the highest level in your sales organization based on user role hierarchy. You can set up to three levels of hierarchy in forecast rollups, allowing your sales team to analyze forecasts by each service or product, account, and user.

At level 1, the Users dimension is selected by default and you can't change it. At level 2 and 3, you can select the dimensions based on which you want to roll up forecasts.

For example, to roll up the forecasts of consumption revenue from computing storage services to accounts and users, set dimensions as specified in this table.

levels	DMO	Select the field that contains...
Level 1	Accounts	User IDs
Level 2	Accounts	Account names
Level 3	StorageService	Service names

1. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
2. In the Available Consumption Forecast Types section, click **Add a Forecast Type** or open the forecast type in which you want to set forecast rollup dimensions.
3. Open the Define How Your Data Rolls Up to a Business Dimension section and set the dimensions based on your business use case.
4. Click **Save & Close**.

Add Columns to a Forecast Type

To show forecast measures on the forecasts page, add columns to the grid. You can add up to nine columns, including the quota column.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited**, and in **Einstein 1 Sales Edition** with Sales Cloud

You can add two types of columns: measure and quota. Use measure columns to show forecast values of data type Number or Currency. Use quota to show your team's quotas along with other measures.

The quota column is optional, and to show it, enable Show Quotas on the Forecast Settings page and define quotas to your team. See [Setting Up Quotas in Salesforce Forecasting](#)

 **Important** Add the quota column while creating a forecast type. Otherwise, you can't add it later.

1. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
2. In the Available Consumption Forecast Types section, click **Add a Forecast Type** or open the forecast type in which you want to add columns.
3. Open the Define What You Want to Measure section and click **Add Column**.
4. Fill in the details and click **Save** to return to the Define Columns to Display section
5. To position the column in the correct order in the forecast type, click **Manage Column**.
6. Click **Save & Close**.

Allow Users to Adjust Forecast Values

Allow forecast users to adjust their own forecast values in any one of the measure columns.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited**, and in **Einstein 1 Sales Edition** with Sales Cloud

1. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
2. In the Available Consumption Forecast Types section, click **Add a Forecast Type** or open the forecast type in which you want to enable adjustments.
3. In the Define What You Want to Measure section, open the measure column for which you want to enable adjustments.
4. Select **Allow user adjustments**.
5. Click **Save**, and **Save & Close**.



Warning Disabling user adjustments deletes all adjusted values in the column and the details of the total value on which the custom adjustments are based.

Enable Custom Adjustments

Let forecast users configure adjustments based on the total value for upcoming periods. To enable

custom adjustments on a measure column, you must first enable adjustments on that measure column.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited**, and in **Einstein 1 Sales Edition** with Sales Cloud

1. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
2. In the Available Consumption Forecast Types section, click **Add a Forecast Type** or open the forecast type in which you want to enable custom adjustments.
3. In the Define What You Want to Measure section, open the measure column for which you want to enable custom adjustments.
4. Select **Allow user adjustments** and then select **Allow custom adjustments based on the total value**.
5. Select the DMO and field that contains the total value.
6. Click **Save**, and **Save & Close**.



Warning Disabling custom adjustments deletes the total value details on which custom adjustments are based.

Get the Most from Salesforce Forecasting

To help users get the most from the forecasting information that they see, customize the forecasts page layout, allow for adjustments to forecasts, setup quotas, and more.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Get Forecast Guidance from Agentforce

Set up the Get Forecast Guidance standard agent action so that sales managers can quickly receive insights on their team's performance, calculate a sales rep's gap-to-quota for Commit and Most Likely, and analyze opportunities for any risks.

Select a Forecast Currency

If your company uses multiple currencies, select whether to use your corporate currency in forecasts, or to use each forecast manager's personal currency.

Define a Default Forecast Date Range

The forecasts grid shows forecasts for individual months or quarters and a range of months or quarters, depending on your settings. A one month forecast period is set for you, but you can change the range as needed.

Allow Forecast Adjustments

Help your sales team produce the most accurate forecast possible and allow managers or forecast

users to adjust rollup values.

Set Up Forecast Quotas

Set up quotas so that users can see quotas and quota attainment information with their forecasts.

Build Custom Forecasts Pages That Work for Your Business

Using Lightning App Builder, create custom forecasts pages that include all the information your sales leaders require to drive accurate forecasts that support your unique business needs. Build pages that contain standard and custom components that fit your unique sales process.

Get Forecast Guidance from Agentforce

Set up the Get Forecast Guidance standard agent action so that sales managers can quickly receive insights on their team's performance, calculate a sales rep's gap-to-quota for Commit and Most Likely, and analyze opportunities for any risks.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Sales add-on

Set Up Forecast Guidance Agent Action

Use generative AI to give sales managers clear insight into how their sales reps are performing. When users ask an agent how a specific sales rep is doing, the Get Forecast Guidance action calculates how that rep is tracking to meet their quota and identifies any risky deals.

Defining the Forecast Guidance You Receive from an Agent

The Get Forecast Guidance agent action that sales managers can use to quickly view their sales rep's forecasts is powered by a flow. Users with access can modify the flow in Flow Builder to control and better define the forecast insights they receive from the action. Define the formulas used, the number of opportunities shown, and the criteria for what makes an opportunity risky, in a way that brings the most value to sellers and managers.

Set Up Forecast Guidance Agent Action

Use generative AI to give sales managers clear insight into how their sales reps are performing. When users ask an agent how a specific sales rep is doing, the Get Forecast Guidance action calculates how that rep is tracking to meet their quota and identifies any risky deals.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Sales add-on

USER PERMISSIONS NEEDED

To set up Get Forecast Guidance:

Manage Agentforce Default Agent

OR

Customize Application

OR

Modify Metadata



Note Users must have Salesforce Forecasting set up to use the Get Forecast Guidance action. See [Set Up Salesforce Forecasting](#). If you were previously using the Forecast Guidance User permission, remove it from any custom permission sets.

1. [Set Up Agents](#).
2. Add the Forecast Sales Revenue topic, which includes the Get Forecast Guidance action, to your agent. See [Add a Topic to Your Agent](#).
3. From Setup, enter *Permission Sets* in the Quick Find box, and then select **Permission Sets**.
4. Click **Assign Permission Sets**.
5. Select the **Run Flows** user permission set.
6. Click **Manage Assignments** and then **Add Assignments**. Assign the permission set to users and click **Assign**.

See Also

[Set Up Agents](#)

[Agent Action: Get Forecast Guidance](#)

Defining the Forecast Guidance You Receive from an Agent

The Get Forecast Guidance agent action that sales managers can use to quickly view their sales rep's forecasts is powered by a flow. Users with access can modify the flow in Flow Builder to control and better define the forecast insights they receive from the action. Define the formulas used, the number of opportunities shown, and the criteria for what makes an opportunity risky, in a way that brings the most value to sellers and managers.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Sales add-on

The Get Forecast Guidance flow is initiated when a user utterance associated with the Get Forecast Guidance action is sent to an agent. The flow then checks for specific forecast settings and preferences, computes the gap-to-quota for Commit and Most Likely, and pulls opportunities in both categories to assess if any are at risk.

Constants

Given the size and complexity of the flow, we recommend modifying only the constant elements found in the flow. Constants store a fixed value to be used throughout a flow. Review the constants present in the Get Forecast Guidance flow and update values as needed to best align with how you want to receive forecast guidance.

API Name	What It Stores	Default Value
OpportunityScoreThreshold	The opportunity score threshold used to determine whether an opportunity is at risk. To use a different threshold, change 33 to the value you want to use.	33
EndOfPeriodThreshold	The ending time period within a forecasting period that qualifies an opportunity as risky based on the close date, as a percentage. To customize the end of the period, change 0.25 to the decimal value you want to use.	0.25
FutureActivitiesDateRange	The number of days beyond today's date to use to determine which activities to consider for each opportunity at risk. To customize, change 90 to the value you want to use.	90
OpenServiceCasesThreshold	The number of open service cases used to determine whether an opportunity is at risk. To use a different threshold, change 0 to the value you want to use.	0
RiskFactorCountThreshold	The number of risk factors each opportunity can have before the opportunity is considered at risk. To use a different threshold, change 3 to the value you want to use.	3
ContactCountThreshold	The minimum number of contacts that is used to determine whether an opportunity is at risk. To use a different threshold, change 2 to the value you want to use.	2
AtRiskOpportunitiesToShowCount	The number of at risk opportunities to show in output. To include a different number, change 5 to the value you want to use.	5

Gap-to-Quota Calculations

Different formulas are used throughout the Get Forecast Guidance flow to calculate and determine whether a sales rep meets their quota for Commit and Most Likely. These formulas can be modified

directly in the formula resource to best align with your business standards.

API Name	What It Calculates	Default Formula
DaysUntilEndOfPeriodAndOppCloseDateForCommitFormula	The difference between the end date of period from GetCurrentPeriod and the close date of the current opportunity in Commit.	{!GetCurrentPeriod.EndDate} - {!IterateOverOpportunitiesInCommit.CloseDate}
DaysUntilEndOfPeriodAndOppCloseDateForMostLikelyFormula	The difference between the end date of period from GetCurrentperiod and the close date of the current opportunity in most likely.	{!GetCurrentperiod.EndDate} - {!IterateOverOpportunitiesInMostLikely.CloseDate}
GapToCommitFormula	The amount of the gap between the target user's quota and the target user's Commit forecast.	{!GetForecastingQuota.QuotaAmount} - IF(ISNULL({!GetForecastingItemForCommit.ForecastAmount}), 0,{!GetForecastingItemForCommit.ForecastAmount})
ConvertedGapToCommitFormula	The GapToCommit value in the running user's preferred currency.	CURRENCYRATE({!GetForecastingUserPreference.ForecastingViewCurrency}) * {!GapToCommitFormula}
GapToMostLikelyFormula	The amount of the gap between the target user's quota and the target user's Most Likely forecast.	{!GetForecastingQuota.QuotaAmount} - IF(ISNULL({!GetForecastingItemForMostLikely.ForecastAmount}), 0,{!GetForecastingItemForMostLikely.ForecastAmount})
ConvertedGapToMostLikelyFormula	The GapToMostLikely value in the running user's preferred currency.	CURRENCYRATE({!GetForecastingUserPreference.ForecastingViewCurrency}) * {!GapToMostLikelyFormula}
PeriodTypeDurationRiskFormula	The number of days in the last EndOfPeriodThreshold percentage of the current period of the forecast context when an opportunity is considered to be at risk. To change the percentage of days that's considered risky, change the value in	CASE({!GetCurrentPeriod.Type}, "Week", 7, "Month", 30, "Quarter", 90, "Year", 365, 30) * EndOfPeriodThreshold

API Name	What It Calculates	Default Formula
	EndOfPeriodThreshold.	
RiskCriteriaPastEventDateRangeFormula	The date that's PastActivitiesDateRange days before the current date.	{!\$Flow.CurrentDate} - {!PastActivitiesDateRange}
RiskCriteriaFutureEventDateRangeFormula	The date that's FutureActivitiesDateRange days after the current date.	{!\$Flow.CurrentDate} + {!FutureActivitiesDateRange}

Agent Response

The forecast guidance you receive from an agent is generated from the forecastGuidance variable in the Get Forecast Guidance flow. The forecastGuidance variable pulls text from the various text templates included throughout the flow and uses those texts to populate the rich text response in the Agentforce side panel. To alter the language used in an agent's response, change the variable value in the element using forecastGuidance.

Select a Forecast Currency

If your company uses multiple currencies, select whether to use your corporate currency in forecasts, or to use each forecast manager's personal currency.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To view the Forecasts Settings page:

View Setup and Configuration

AND

View All Forecasts OR Allow Forecasting OR delegated forecast manager

To edit the Forecasts Settings page:

Customize Application

Before you start, make sure that you're working in Lightning Experience and that [Salesforce Forecasting is turned on](#). Then review the information about [using multiple currencies](#).

1. Review the information in [Multiple Currencies in Forecasts](#).

2. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
3. In the Select a Default Currency section, next to Forecast Currency, choose an option.
4. Save your changes.

[Considerations for Multiple Currencies in Salesforce Forecasting](#)

If your company uses forecasts and multiple currencies, your Salesforce admin chooses a forecast currency and enables forecast types. The forecast currency is your corporate currency or each forecast owner's personal currency.

See Also

[Adjustments in Pipeline Forecasts](#)

Considerations for Multiple Currencies in Salesforce Forecasting

If your company uses forecasts and multiple currencies, your Salesforce admin chooses a forecast currency and enables forecast types. The forecast currency is your corporate currency or each forecast owner's personal currency.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional**, **Performance**, and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

- Dated exchange rates aren't used in forecasting.
- When you use forecasts, you select a display currency, which can be any currency that's enabled in Salesforce. To change the currency, select a different currency from the gear (Lightning Experience) or the dropdown list (Salesforce Classic) in the upper right of the forecasts page.
- If you use revenue-based pipeline forecasts, when currency rates change, opportunities and adjustments roll up with the changed value along with values in the forecast table.
- Rate changes impact all forecast periods (historical, current, and future).
- Deactivating a currency that's set as a user's personal currency resets the user's currency to the corporate currency.
- To edit your personal currency settings, edit your personal information.
- If you add a custom filter on a currency field as part of your forecast type definition, the corporate currency at the time the filter was created is used.
- The processing indicator () appears as changed values roll up (Salesforce Classic only).

See Also

[Considerations for Enabling Multiple Currencies](#)

[Adjustments in Pipeline Forecasts](#)

[Salesforce Forecasting Elements](#)

[View Forecasts from Different Perspectives](#)

Define a Default Forecast Date Range

The forecasts grid shows forecasts for individual months or quarters and a range of months or quarters, depending on your settings. A one month forecast period is set for you, but you can change the range as needed.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To view the Forecasts Settings page:

View Setup and Configuration

AND

View All Forecasts OR Allow Forecasting OR
delegated forecast manager

To edit the Forecasts Settings page:

Customize Application



Warning If you change the time period from monthly to quarterly or quarterly to monthly, or you change the standard fiscal year, all adjustments, manager judgments, and quotas are purged. If you enable custom fiscal years, creating the first custom fiscal year deletes any quotas and adjustments in the corresponding and subsequent standard fiscal years. These changes trigger a forecast recalculation that can take significant time, depending on the quantity of your data.

You must define default forecast date ranges separately for pipeline and consumption forecasts. For consumption forecasts, you have additional display options:

- When you show forecasts by month or period, you can show or hide quarterly totals.
- When you show forecasts by quarter, you can show or hide yearly totals.

If you use custom fiscal years, your custom periods or quarters are shown. Users can forecast up to 15 months, 15 fiscal periods, or 8 quarters in the future or past. If your forecast range includes the current month, period, or quarter, the forecasts page shows the current month, period, or quarter by default. If not, the first month, period, or quarter of the range is selected.

The forecast date range becomes the default for all forecast users. Users can use this default, or they can set a different date range display for their own forecasts. After users change their individual date range displays, Salesforce admins can't override them. However, when changing the period display from monthly to quarterly or quarterly to monthly, the change is reflected in all users' forecasts.

Before you start, make sure that you're working in Lightning Experience and that [forecasting is turned on](#).

1. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
2. In the Choose a Default Date Range section, click **Edit**.
3. Select a period, when to start, and the number of periods to show.
We show a preview of your date range.
4. Save your changes.

See Also

[Change Your Forecast Date Range on the Forecasts Page](#)
[Monthly and Quarterly Pipeline Forecasts](#)

Allow Forecast Adjustments

Help your sales team produce the most accurate forecast possible and allow managers or forecast users to adjust rollup values.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To view the Forecasts Settings page:

View Setup and Configuration

AND

View All Forecasts OR Allow Forecasting OR
delegated forecast manager

To edit the Forecasts Settings page:

Customize Application

To enable forecasts users for adjustments:

Manage Users

AND

Customize Application

To customize the opportunity list in a forecast type:

Customize Application

AND

Manage Public List Views

Before you start, make sure that you're working in Lightning Experience.

Enable Forecast Adjustments

Allow forecast users who anticipate differences between the current forecast values and future sales results to adjust the forecast rollup values in their forecasts. You specify whether forecast managers can adjust subordinates' and child territory forecasts, whether forecast users can adjust their own forecasts, or both. If multiple forecast types are active, each forecast type maintains separate adjusted amounts.

1. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
2. In the Enable Adjustments and Judgments section, select who can make forecast adjustments:
 - To let forecast managers adjust the forecasts of their immediate subordinates and child territories, select **Manager adjustments**. This setting is on by default.
 - To let all forecast users adjust their own forecasts, including the territory forecasts that they own, select **Owner adjustments**.
3. Select to show adjustments when you're hovering over adjustable forecast category cells in the forecast summary or show as separate columns for each adjustable forecast category. This setting applies only to pipeline forecasts.

Selecting to show adjustments as columns adds columns for each adjustable forecast category on the forecasts page. For each adjustable forecast category, up to three columns are shown.

 - A column with the original forecast value before any adjustments
 - If owner adjustments are enabled, a column with the forecast user's direct reports' adjustments
 - A column with the forecast user's own adjustments

Any notes about an adjustment are viewable when you hover over the column. If you change how to show adjustments, no adjustment data is lost.
4. Save your changes.
5. Ensure that each user who adjusts forecasts has the Override Forecasts user permission in their profile. This permission is available in the standard profile by default.

Rename Adjustment Columns

If you select to show adjustments as columns on the forecasts page, you can change the default column names to fit your sales model and business practices. For example, rename the My Commit column to Call or Call Number to indicate that it's your best estimate about the forecast.

Adjustment columns apply to pipeline forecasts only.

1. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
2. Edit the Enable Adjustments and Judgments section. Ensure at least one adjustment option is selected, adjustments are shown as columns, and that those settings are saved.
3. After the adjustment settings are saved, see the table and update the column names for each adjustable category.

Whether you selected Manager Adjustments or Owner Adjustments determines which columns are available to rename. Ensure that the column names you add match the category and the behavior described. If the browser window is resized, column names are truncated. We recommend using short names.
4. Save your changes.

 **Important** The changes you make in the table update adjustment column names only. For instructions to change category names, see [Customize Salesforce Forecasting Categories](#).

Disable Forecast Adjustments and Manager Judgments

If you no longer want forecast managers and users to adjust forecasts, or forecast managers to apply judgment to opportunities in a forecast, disable the options in Setup. Updating user permissions isn't required to disable either option.

 **Warning** Disabling forecast adjustments removes existing adjustments for all forecast types. Before disabling these features, see [Adjustment Deletions in Pipeline Forecasts](#).

1. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
2. Edit the Enable Adjustments and Judgments section.
3. Deselect the options you no longer want to allow.
4. Save your changes.

See Also

[Salesforce Forecasting Implementation Guide](#)

[Manage Opportunity Stage to Forecast Category Mappings for Pipeline Forecasts](#)

Set Up Forecast Quotas

Set up quotas so that users can see quotas and quota attainment information with their forecasts.

REQUIRED EDITIONS

Quotas and quota management via API available in: both Salesforce Classic and Lightning Experience

Quota management via Salesforce setup available in: Lightning Experience

Available in: **Professional**, **Performance**, and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

A quota is the monthly or quarterly sales goal that's assigned to a user or territory. A manager's quota equals the sales that the manager and team are expected to generate together. The quota rollup is done manually by users and managers. Quotas can use revenue, quantity, or custom measure data. If multiple types of forecasts are enabled, each forecast type maintains separate quota information.

[Show Quotas in Forecasts](#)

Let your team see sales quotas and quota attainment percentages on the forecasts page.

[Define Forecasts Quotas in Salesforce Setup](#)

Easily manage sales quotas without Data Loader or the API, and let your team see quotas on the forecasts page.

[Forecast Quotas from External Sources](#)

Data Loader provides a simple point-and-click method for adding, inspecting, and editing quota data in Salesforce. APIs provide more flexibility but require you to write code.

See Also

[Salesforce Forecasting Implementation Guide](#)

Show Quotas in Forecasts

Let your team see sales quotas and quota attainment percentages on the forecasts page.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional**, **Performance**, and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To view the Forecasts Settings page:

View Setup and Configuration

AND

View All Forecasts OR Allow Forecasting OR
delegated forecast manager

To edit the Forecasts Settings page:

Customize Application

Before you start, make sure that you're working in Lightning Experience and that [Salesforce Forecasting is turned on](#).

1. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
2. In the Show Quotas section, select **Show quotas**.
3. Save your changes.



Warning If you disable forecasting, quotas are disabled. If you delete or deactivate a forecast type, the related quotas are purged.

See Also

[Define Forecasts Quotas in Salesforce Setup](#)

[Forecast Quotas from External Sources](#)

Define Forecasts Quotas in Salesforce Setup

Easily manage sales quotas without Data Loader or the API, and let your team see quotas on the forecasts page.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional**, **Performance**, and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To view the Forecasts Settings page:

View Setup and Configuration

AND

View All Forecasts OR Allow Forecasting OR
delegated forecast manager

To manage quotas of all users in the forecast hierarchy:

Manage Quotas

AND

View All Forecasts

1. Make sure that [quotas are enabled](#).
2. From Setup, in the Quick Find box, enter *Quotas*, and then click **Forecasts Quotas**.
3. Select the period, forecast type, and product family (if relevant) or forecast group value of the quotas you want to add or update, and then click **Show Quotas**.
You can define quotas for all active forecast types, and inactive forecast types created after Summer '21. If a deactivate legacy forecast type created before Summer '21 is still needed, delete the old type and recreate it in Forecasts Settings.
4. Search for and select the users, roles, or territories whose quotas you want to manage, and then click **Edit Selected Rows**. You can also click the pencil icon to edit quota and currency fields.
5. Enter quotas, and then save your changes.

See Also

[Forecast Quotas from External Sources](#)

Forecast Quotas from External Sources

Data Loader provides a simple point-and-click method for adding, inspecting, and editing quota data in Salesforce. APIs provide more flexibility but require you to write code.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Available in: **Professional** Edition with the API Enabled permission

Data Access and Availability

The data for quotas is stored in the ForecastingQuota object. Users who have access to import data and who have the Manage Quotas permission can update quota data for users below them in the forecast hierarchy. Users who have access to import data and also have the Manage Quotas and View All Forecast permissions can load data for all users in the forecast hierarchy.

Data Preparation

Import quota data to the Forecasting Quota object using Data Loader. If you need more flexibility than what Data Loader provides, use Enterprise API. To use either method, ensure that API access is enabled and prepare a .csv file that contains these columns.

- User ID
- Forecast Type ID
- Quota Amount or Quota Quantity (depending on how you forecast)
- Currency Code
- Period Start Date (yyyy-mm-dd or yyyy-mm-ddThh:mm:ss.sssZ; for example, 2012-03-01T08:00:00.00Z)

If you use territory forecasts, include a Territory ID column. If you use product family forecasts, include a column for product family.

To help organize the .csv file, you can also include columns for Forecast Owner Name and Forecast Type Name, but those columns aren't required. Here's an example .csv file setup using Quota Amount and the additional columns added for organization purposes.

User Name	User ID	Forecast Type Name	Forecast Type ID	Quota Amount	Currency Code	Start Date
Kevin Bailey	00599000000Hofh	OpportunityRevenue	0DbD00000001eQBKAY	250000	USD	2012-03-01
Kevin Bailey	00599000000Hofh	OpportunityRevenue	0DbD00000001eQBKAY	250000	USD	2012-04-01
Kevin Bailey	00599000000Hofh	OpportunityRevenue	0DbD00000001eQBKAY	250000	USD	2012-05-01

Data Mapping

When you complete the import, map the columns in your .csv file to the ForecastingQuota object as shown in this table.

Column Headers in CSV File	ForecastingQuota Fields
User ID	QuotaOwnerID
Quota Amount	QuotaAmount
Quota Quantity	QuotaQuantity
Currency Code	CurrencyIsoCode
Start Date	StartDate
Product Family (needed only when the forecast data source is Product Families)	ProductFamily
Forecast Type ID	ForecastingTypeID
Territory ID	Territory2ID

Additional Considerations for Loading Quota Data

As a best practice, load quota data in the quota owner's [personal currency](#). You can still upload quota data using the API even if **Show Quotas** is disabled. If your Data Loader time zone setting is ahead of quota owners' time zones, the month can be off by one. To avoid this problem, use a date greater than or equal to the third day of each month when inserting quotas.

See Also

- [Define Forecasts Quotas in Salesforce Setup](#)
- [Why do date fields import incorrectly when I use the Data Loader?](#)
- [Show Quotas in Forecasts](#)

Build Custom Forecasts Pages That Work for Your Business

Using Lightning App Builder, create custom forecasts pages that include all the information your sales leaders require to drive accurate forecasts that support your unique business needs. Build pages that contain standard and custom components that fit your unique sales process.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional**, **Performance**, and **Developer** editions and in **Enterprise** and **Unlimited** editions with the Sales Cloud

USER PERMISSIONS NEEDED

To use Salesforce Forecasting: View All Forecasts OR Allow Forecasting OR Delegated forecast manager status

To create pages in Lightning App Builder: Customize Application

To view pages in Lightning App Builder: View Setup and Configuration

Custom forecasts pages are available for desktop only.

1. Make sure that Salesforce Forecasting is enabled.
2. To navigate to Lightning App Builder, from the forecasts page, select Or access Lightning App Builder in Setup. From Setup, in the Quick Find box, enter *App Builder*, and then select **Lightning App Builder**. Click **New**, and then select **Forecasts Page**.
3. Add the Forecasts Header component, which viewers of the page use to select what data shows in other forecast-related parts of the page. We recommend that each forecasts page contains a header.
4. Add the standard and custom components that you want to include on the page. For the best experience, we recommend adding the Forecast Summary component to show the actual forecast data for each period and the Forecast Opportunity List component to show the opportunities that contribute to the forecast. If Einstein Forecasting is enabled, Einstein predictions show in a slide-out panel when users select a cell in the Einstein Prediction column on the forecasts page. No additional components are necessary to show Einstein Forecasts predictions.
5. For each component you add to the page, select the component and configure its individual properties.
6. To view and edit the page properties and to add a page description, click the empty area of the canvas and enter the information about your page.
7. Save the page.
8. Activate the page for the org, user profile, or an app.

See Also

[Activate and Assign Custom Forecasts Pages](#)

[Considerations for Custom Forecasts Pages](#)

[Lightning App Builder](#)

Activate and Assign Custom Forecasts Pages

After building a custom forecasts page using Lightning App Builder, activate the page and assign it so sales leaders can see and use it. The page you built doesn't appear until it's activated.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional**, **Performance**, and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To use Salesforce Forecasting:	View All Forecasts OR Allow Forecasting OR Delegated forecast manager status
To create pages in Lightning App Builder:	Customize Application
To view pages in Lightning App Builder:	View Setup and Configuration

1. Build a forecasts page or open one in Lightning App Builder.
2. Save the page and click **Activation**.
3. Select how you want to activate the page and follow the prompts to complete the activation.
 - Set the page as the default for all users.
 - Make the page the default home page for specific Lightning apps.
 - Assign the page to a combination of Lightning apps and user profiles.
4. Save the activation settings.

As your sales process or needs change, make updates to activated pages or change the activation and assignments. Updates are reflected for users the next time they view the forecasts page.

See Also

- [Considerations for Custom Forecasts Pages](#)
[Lightning App Builder](#)

Considerations for Custom Forecasts Pages

Keep in mind important considerations and guidelines when building custom forecasts pages using Lightning App Builder.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional**, **Performance**, and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

- If a custom page isn't active for a user's profile or your company, a default forecasts page is used and contains the forecasts components: Forecasts Header, Forecasts Summary, and Forecasts Opportunity List.
- Use the default template for the forecasts page type, or create your own compatible template to change the layout.
- To work correctly, each forecasts page requires a Forecasts Header component, which includes the selections for data range and other settings. For the best experience, include the Forecasts Summary and Forecasts Opportunity List components.
- To avoid unnecessary scrolling when the forecasts page loads, the focus is directed to the Forecasts Summary component. Place that component near the top of the page.
- If you include the Tab and Accordion components on your page, the components nested in those tabs

- don't respond to selections made in the Forecasts Header on the page. Tab and Accordion components work best for components that aren't dependent on forecasting.
- The forecasts page type supports custom Lightning Web Components and Aura components.
 - Custom components added to a forecast page can respond to data published from the Forecasts Header, Forecasts Summary, and Forecasts Opportunity List components. However, the forecasts components themselves aren't able to respond to data published from a custom component.

See Also

[Build Custom Forecasts Pages That Work for Your Business](#)

[Developer Guide: Create a Custom Lightning Page Template Component](#)

Considerations for Disabling Salesforce Forecasting Features

Before you disable any forecasting features, find out how data is affected.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

Disabling certain functionality can result in purged quota and adjustment data, so consider exporting your data before disabling anything. When you complete your setting changes, you can import the data back into Salesforce. Exceptions:

- If you change your time period from monthly to quarterly or from quarterly to monthly, you can't import your quota or adjustments data back into Salesforce. The existing values don't align with your new periods.
- If you've enabled territory forecasts and you change any territory data, you can't import your quota or adjustments data back into Salesforce. The existing values don't align with the new territory data.

If you...	These items are purged...
Turn off forecasts	Adjustments (your forecast hierarchy stays in place)
Deactivate a forecast type	Quotas and adjustments for that forecast type. For the best reporting experience, manually remove manager judgments for opportunities included in the forecast type.
Change adjustment settings	Adjustments
Change the monthly period to quarterly periods, or the quarterly period to monthly periods	Quotas, adjustments, and forecast submission history

If you...	These items are purged...
Change the rollup type	Adjustments and forecast submission history
Remove the Allow Forecasting permission from a user	Removes all forecasting data for the user, including historical trending data for Forecasting Item

To disable forecasts, contact Salesforce.

When adjustments are purged from forecasts, the underlying data on which the forecasts are based isn't affected.

See Also

[Turn On Salesforce Forecasting and Define Forecast Settings](#)

Forecast Period Row Generation in Salesforce Forecasting

Review how forecast period rows are generated based on fiscal year, default settings, and forecastable items per user.

REQUIRED EDITIONS

Available in: All editions with Sales Cloud

When forecasting is enabled, for each fiscal year that includes forecastable items, 17 period rows are generated, with 1 row for:

- Each month of the year (12 rows total)
- Each quarter of the year (4 rows total)
- For the entire year (1 row total)

The default date range and forecastable items for a user determine which fiscal years forecast periods are generated for.

Default Date Range

The date range that's set in the Choose a Default Date Range section of the Forecast Settings page specifies which forecast periods are shown by default on the forecasts page. To make sure that all forecast periods within the specified range are available, forecast periods are generated for each fiscal year in the maximum range.

Each Forecast User

Period rows are generated between the earliest fiscal year that a user has a forecastable item and the latest fiscal year, up to 10 years in the future from the current period.

In some cases forecast period rows are generated for only the year that a forecastable item is created in.

- A forecastable item is created beyond the current range of forecast periods available. For example, if your current periods go out to 2028, and you create a forecastable item in 2030, period rows are created for 2030, but not for 2029. If the dimensions for your forecast change, such as a user changes roles in the hierarchy or your fiscal year changes, periods for the user are recalculated and the periods for year 2029 are generated at the time.
- A forecastable item is created in the past. For example, if you have preexisting periods from 2020 to 2025, and you create a forecastable item in 2017, forecast periods for the fiscal year 2017 are created, but not for 2018 and 2019. A change in forecasting dimensions doesn't create periods for 2018 and 2019 in this case.

Project Sales with Accurate Forecasts

Using Salesforce for forecasting makes it easy for teams to project sales.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Watch a series of videos about using Salesforce to forecast and predict sales.  [Forecast with Confidence Using Salesforce](#)

[Forecast Your Opportunity Pipeline](#)

Sales teams including reps, forecast managers, and other sales leaders use the Forecasts page and its rich set of features to analyze and verify whether their forecast is on track, and to a call about their sales target.

[Forecast Your Consumption Revenue](#)

Use Consumption Forecasts to view and predict revenue for a consumption-based business within a specific timeframe. The forecasts page consists of various forecast types, each providing a consolidated view. These forecasts display totals and subtotals of consumption amounts, organized by forecast rollup and time period. Forecasts can include adjustments made by forecast managers to their associates' forecasts and by associates to their own forecasts.

[Change Your Forecast Date Range on the Forecasts Page](#)

Your Salesforce admin sets up a default forecast date range display. For example, your default can be three months into the future. Use this range, or change the date range that's shown for your own forecast.

[Share Forecasts with Stakeholders](#)

Increase visibility into your forecast and ensure stakeholders can view, adjust, submit, and report on projected sales. For example, a sales manager can share her forecasts with Sales Ops for reporting purposes, or with another sales manager while she's out of the office.

Guidelines for Refreshing Forecasts

Certain actions can change forecasts. For example, while you're viewing the forecasts page, your subordinates can edit related opportunities and adjust the forecasts of their own subordinates. And you can adjust one of your subordinates' forecasts from your own page. To see these changes, refresh the forecasts page.

Forecast Your Opportunity Pipeline

Sales teams including reps, forecast managers, and other sales leaders use the Forecasts page and its rich set of features to analyze and verify whether their forecast is on track, and to a call about their sales target.

Pipeline Forecasting Best Practices

Review key guidelines to get the most out of your opportunity-based forecasts.

Managing Pipeline Forecasts

Get an all-in-one view and place to manage your sales team's expected revenue in the Forecasts tab.

Pipeline Forecasting Charts

Use built-in charts to visualize the state of your forecasts and better assist sales reps in meeting their sales targets. With forecast charts, see the changes to the current period's forecasts across forecast types and measure how this period's forecasts compares to past periods, without having to manually crunch the numbers.

Adjustments in Pipeline Forecasts

A forecast adjustment indicates an assessment about the sales value that a forecast manager or sales rep feels confident of closing during of the forecast period. Adjusting Best Case and Commit forecasts values is a way to accurately gauge where a sales team is on their path to hitting its sales numbers. An adjustment doesn't change the underlying gross rollup and doesn't appear in reports. It just adds a layer of detail to a forecast.

Manager Judgments in Pipeline Forecasts

As a forecast manager, you assess your forecasts during each period and adjust the forecast as you receive new information and circumstances change. To create the most accurate forecast possible, apply your judgment about whether you consider an opportunity part of the forecast total. Applying your judgment as a forecast manager provides visibility into which deals you have the highest confidence to close and a more accurate picture of your forecast to managers above you in the hierarchy.

Capturing Pipeline Forecasts at a Point in Time

Forecast submissions are your best estimate of the revenue or quantities that you expect to close during the forecast period. Typically required weekly, the submission takes a snapshot of your forecast at the time you make the submission. As management levels review forecast rollups, they compare the current forecast against the submitted forecast numbers and quota, and know that the forecast is up to date. Any differences better inform the forecast for the entire sales team and the business.

Pipeline Forecasting Best Practices

Review key guidelines to get the most out of your opportunity-based forecasts.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional**, **Performance**, and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

General Guidelines

- Track important details at the opportunity level.
- Measure everything related to potential deals—activities such as emails, meetings, and outreach—to determine their contributions to revenue.
- Create actionable tasks with next steps and completion dates pertaining to opportunities.
- Map your sales stages to forecast categories. To increase your forecast accuracy, adjust close probability based on historical data.
- When adjusting forecasts, have conversations with your subordinates so that they understand your expectations.
- Because opportunities can change frequently, revisit forecast adjustments weekly to avoid out-of-date adjustments.
- To ensure that everyone can access the forecasts they need, designate each sales manager with subordinates as a forecast manager in your role-based forecast hierarchy. Also assign a territory manager to each territory for which you want rolled-up forecasts.
- Customize your forecast category names so they match your business process and terminology.

Navigating Forecast Information

- Forecast users can jump to the forecasts of users and territories that they have access to view. Begin typing a name in the search (Lightning Experience) or “Jump to” (Salesforce Classic) box, and then select the name. If you’ve enabled territory forecasts, type three or more letters to see results for users and territories.
- To expand a row on the forecasts page, click it.
- Navigation links with the names of forecast managers appear at the top of the page as you drill down through the forecast hierarchy. Click these links to quickly move through the hierarchy.

Viewing Forecast Information

- Keep your window sized to 1,024 pixels or greater.
- To view forecast amounts in the forecast summary grid without decimal places, select **Show Rounded Amounts** from the Display Settings. Full amounts that include the decimal places are shown in the opportunity list header when you select the forecast cell. Decimal places are also included when you’re viewing adjustment and change details. Showing rounded amounts can help maximize screen space.
- In Lightning Experience, if multiple forecast types are enabled, you can select which forecasts you want to view as tabs using the Edit Tab Selections option from the gear icon. In Salesforce Classic, select the forecast from the upper-right dropdown list on the forecasts page.

- Column width in the forecast grid and the opportunity list is adjustable.
- In Lightning Experience, a timestamp shows the date and time when the forecasts page was refreshed. In-progress data updates aren't indicated.
- In Lightning Experience, rows that have only zero values, including rows with only zero or no quota, are shown by default. To hide all-zero rows except for rollups of subordinates and child territories, deselect **Show Rows with All Zero Values** in the Display Options on the forecasts page. In Salesforce Classic, this option is available only for product family forecasts.
- If a coworker has shared forecasts with you, select the coworker's name from the My Shared Forecasts list to access the shared forecasts.
- Analyze trends and check performance using forecast reports.
- Create dashboards for metrics of all activities related to potential sales.

Collaboration

If you're a forecast manager, share opportunity and forecast information with your team and bring attention to important details.

- In Salesforce Classic, if Chatter is enabled, hover over a subordinate's name, and click **Chat Now** to display Chatter options, such as Follow or Send a message.
- In Lightning Experience, share your forecasts page with any Salesforce user at your company. Your coworker sees the same view that you see. When you share, specify whether the coworker can adjust forecasts or only view them.

See Also

- [Share Forecasts with Stakeholders](#)
- [Pipeline Forecasts Reports](#)

Managing Pipeline Forecasts

Get an all-in-one view and place to manage your sales team's expected revenue in the Forecasts tab.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

Watch a video overview about working with the main components on the forecasts page.

Watch the video: <https://play.vidyard.com/yLWN3UVNufsPN3VSYBJ6vW>

[View Other Users' Forecasts](#)

Your position in the forecast hierarchy determines whose forecasts you can see. By default you see your forecast, which is made up of the reps and other forecast managers below you in the hierarchy. You can select other users below you in the hierarchy to view their forecasts. You cannot select people

above you in the hierarchy.

View Forecasts from Different Perspectives

If your Salesforce admin activates multiple forecast types, select the forecasts that are relevant to you as tabs on the forecast page. Then, you can quickly access each tab to review your forecast from different perspectives.

Review Recent Changes in Forecast Value

To help you identify recent changes in value to a forecast, changes within the last 7 days are highlighted in the forecast summary. As a sales leader, you don't want to be caught unaware of changes in your team's forecast. Choose to show week-over-week changes for each forecast category so that you can adjust your sales and forecasting strategies accordingly.

Review Pipeline Forecasts Against Forecast Quotas

A forecast quota is the monthly or quarterly sales goal that's assigned to a sales team member or territory. A manager's quota equals the amount that the manager and team are expected to generate together. The quota rollup is done manually by users and managers, and revenue or quantity data can be used. If you have multiple types of forecasts enabled, each type maintains separate quota information.

Opportunity Details in Pipeline Forecasts

Review key guidelines for viewing the opportunity details on the forecasts page.

Partner Portal User Opportunities in Pipeline Forecasts

Partner portal users are external to your Salesforce org but sell your products and services through indirect sales channels. Your partner portal users use a portal to log in to Salesforce. Partners can create opportunities, and users can assign opportunities to them.

Managing Common Pipeline Forecast Types

Forecasts types specify how Salesforce calculates forecasts and projects sales from a different perspective. Learn about managing these common pipeline forecast types.

Considerations for Managing Territory Pipeline Forecasts

Before changing your active territory model, review how territory forecast data and performance can be affected.

View Other Users' Forecasts

Your position in the forecast hierarchy determines whose forecasts you can see. By default you see your forecast, which is made up of the reps and other forecast managers below you in the hierarchy. You can select other users below you in the hierarchy to view their forecasts. You cannot select people above you in the hierarchy.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud



People designated as forecast managers can view the forecasts and opportunities of users, including partner portal users, below them in the forecast hierarchy. Forecast managers can also adjust the forecasts of direct reports and child territories. Only managers who adjust and people above them in the hierarchy can view the adjustment.

-  **Note** If a role in the forecast hierarchy has no forecast manager, that role and all its subordinate roles aren't included in your forecasts.

Not everyone can view the charts that display your team's forecast hierarchy. If you have questions about your forecast hierarchy, see your Salesforce admin or forecast manager.

See Also

- [Adjustments in Pipeline Forecasts](#)
[Pipeline Forecasting Best Practices](#)

View Forecasts from Different Perspectives

If your Salesforce admin activates multiple forecast types, select the forecasts that are relevant to you as tabs on the forecast page. Then, you can quickly access each tab to review your forecast from different perspectives.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

1. On the forecasts page, in Lightning Experience, click the gear icon, and then select **Edit Tab Selections**.
2. Select the forecasts that you want to view as tabs and arrange them in the order you want them to appear.
3. Save your changes.

Forecast types that your admin activates after you make your selections are added to your forecasts page and indicated as new. You can choose to remove them from your list of selected tabs.

-  **Tip** For forecasts that are grouped using product families or a custom pick list, use the **Grouped By** field in the forecast header to select to show forecast rollups by team or other value first.

The Salesforce mobile app shows only the forecasts you select to show as tabs and shows only types that don't contain a forecast group.

To change which forecast is shown in Salesforce Classic, click  next to the forecast type name.

See Also

- [Salesforce Forecasting Elements](#)
- [Revenue and Quantity Pipeline Forecasts](#)
- [Considerations for Multiple Currencies in Salesforce Forecasting](#)
- [Adjustments in Pipeline Forecasts](#)

Review Recent Changes in Forecast Value

To help you identify recent changes in value to a forecast, changes within the last 7 days are highlighted in the forecast summary. As a sales leader, you don't want to be caught unaware of changes in your team's forecast. Choose to show week-over-week changes for each forecast category so that you can adjust your sales and forecasting strategies accordingly.

REQUIRED EDITIONS

Available in: Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To use Salesforce Forecasting:

[View All Forecasts](#)

OR

[Allow Forecasting](#)

OR

[Delegated forecast manager status](#)

To access role-based forecasts in Lightning Experience:

[View Roles and Role Hierarchy](#)

To adjust forecasts:

[Override Forecasts](#)

 **Important** To see forecast changes, work with your Salesforce admin to ensure that historical trending is enabled for forecasting items.

When the historical trending data is ready, on the forecasts page, the forecast rollup values shown in the forecast summary that have changed in the last 7 days are highlighted with red and green arrows. Hovering over the field shows the changes and when the value was last updated.

1. After the historical trending data is ready, go to the Forecasts page.
2. From the gear icon, select Show Changes in the Last 7 days.
The forecast rollup values that have changed in the last 7 days are highlighted with green up arrows  for increases in values, and red down arrows  for decreases in values.
3. To see the details about what's changed, hover over the forecast value.



Value increased by \$100K

\$254,997.13 to **\$354,997.13**

Updated on April 13, 2023

Review Pipeline Forecasts Against Forecast Quotas

A forecast quota is the monthly or quarterly sales goal that's assigned to a sales team member or territory. A manager's quota equals the amount that the manager and team are expected to generate together. The quota rollup is done manually by users and managers, and revenue or quantity data can be used. If you have multiple types of forecasts enabled, each type maintains separate quota information.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

A manager's quota equals the amount that the manager and team are expected to generate together. The quota rollup is done manually by users and managers, and revenue or quantity data can be used. If you have multiple types of forecasts enabled, each type maintains separate quota information.

Quota data appears in these locations on the forecasts page.

- A column that contains quotas for a specific period. If your forecast includes product families or forecast groups, this column includes quotas for each product family or group
- A row that contains the percentages attained for a specific period in a specific forecast rollup.

Watch a brief video about how quotas and quota attainments work on the forecasts page.

Watch the video: <https://play.vidyard.com/gCvCRAbp1mD2TrxQ6egSm8>

Show and Hide Quotas in Pipeline Forecasts

If your Salesforce admin has set up quotas, you can show or hide quota data so that your forecasts page shows you the information that you need. The quota information can be revenue or quantity, depending on the type of forecast that you're using. If multiple forecast types are available, each type maintains separate quota information.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To show and hide quotas on the forecasts page:

View All Forecasts

OR

Allow Forecasting

OR

Delegated forecast manager status

To access role-based forecasts in Lightning Experience:

View Roles and Role Hierarchy

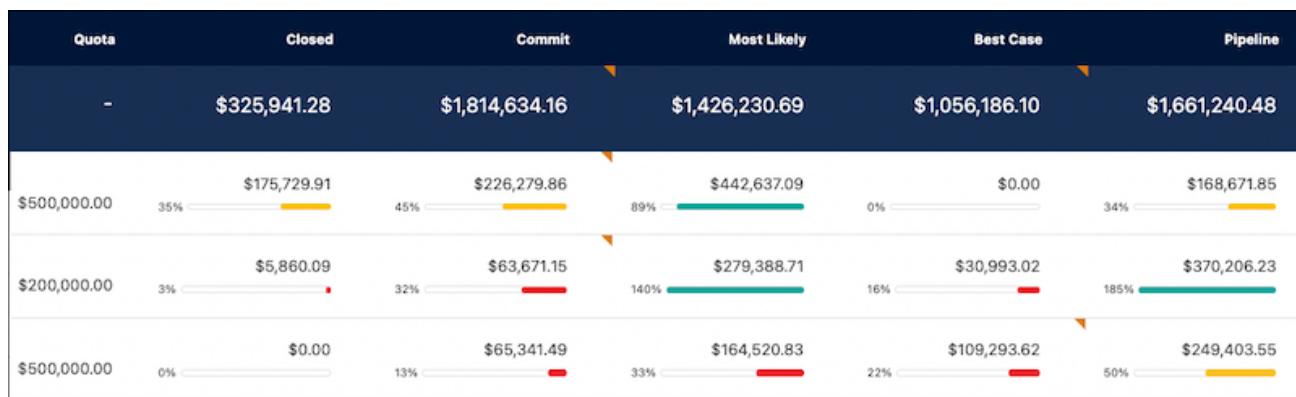
Quota data appears in these locations on the forecasts page.

- A column that contains quotas for a specific period. If your forecast includes product families or forecast groups, this column includes quotas for each product family or group
- A row that contains the percentages attained for a specific period in a specific forecast rollup.

Quota attainment progress bars use these colors:

- Grey: 0%
- Red: From 1% through 33%
- Orange: From 34% through 66%
- Green: 67% and above

1. Do one of the following.
 - a. If you're using Lightning Experience, click the gear in the upper right of the forecasts page.
 - b. If you're using Salesforce Classic, click **Display Options**.
2. To show your quota for each period, select **Show Quota Column**.
3. To show your quota attainment for a specific rollup in a selected period, select **Show Quota % Attainment**. The percentage and progress bar shown below each forecast indicates the proportion of the user's quota that the forecast represents.



- In product family forecasts, sales managers can't see their own quotas and quota attainment for individual product families. Only their total quota appears in the rollup table. For example, if three sales reps have combined quota amounts of \$75,000 and their forecast manager has an individual quota of \$30,000, the manager's quota is \$105,000.
- In forecast types based on opportunity revenue or quantity, the quota value shown in the month or quarter row is the quota input for that month or quarter. For example, if a manager's quota is input as \$500 for February, \$500 is shown as the quota for February. The quota value in the Total row is the sum of the month and quarter values.
- In forecast types based on opportunity with user role or territory with product family, and in the My Territory summary view, the quota value shown in the month or quarter row is the sum value. For example, if a manager's quota is \$500 for February, and their single subordinate's quota for February is \$500, the quota shown for February is \$1000. The quota value in the Total row is the sum of all month or quarter values.
- You can edit direct subordinates' quotas only ("Manage Quotas" permission required)—not your own.
- In territory forecasts, quotas can be assigned to the forecast manager if one is defined. If the territory doesn't have a forecast manager, quotas can be assigned to a user who is a member of the territory.

Opportunity Details in Pipeline Forecasts

Review key guidelines for viewing the opportunity details on the forecasts page.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

- From the forecasts page, select a forecast value. The opportunities related to that cell appear in the opportunity at the bottom of the page.
- If your sales team forecasts on product families, you can view your own or a subordinate's opportunities for each product family that's forecast on.
- In Lightning Experience only:
 - When you return to the opportunity list after switching the view, leaving the page, or logging out,

- the most recent sort appears. If the forecast view that you switched to doesn't include the column that you sorted on, the default sort is shown.
- Use quick actions to edit, delete, and change the owner of opportunities without leaving the forecasts page.
 - Use inline editing to edit multiple opportunities without leaving the forecasts page. The pencil icon  indicates editable fields. A lock icon  indicates noneditable fields.
 - If you also use Pipeline Inspection, select the details in the opportunity row to see opportunity metrics, insights about a deal's likelihood to close, and insights about the opportunity or its account. You also see any changes to the Amount, Close Date, Forecast Category, Probability, and Stage for individual open and in progress opportunities. Closed opportunities don't include any visual indication of changes.
 - If you have Einstein Forecasting, select a value in the Einstein Prediction column to see more details about what's contributing to the predicted value.
 - In Salesforce Classic only:
 - An opportunity that contains only a single 100% revenue split shows “--” for the split percentage in the opportunity list.
 - To view the split details for an opportunity, hover over the split percentage for the opportunity and click . The Opportunity Splits details appear, showing splits that roll up to the selected forecast cell in bold. Splits on the opportunity that don't roll up to the selected forecast cell appear in gray. Opportunities that contain only a single 100% split for the opportunity owner don't display split details.



See Also

[Partner Portal User Opportunities in Pipeline Forecasts](#)

Partner Portal User Opportunities in Pipeline Forecasts

Partner portal users are external to your Salesforce org but sell your products and services through indirect sales channels. Your partner portal users use a portal to log in to Salesforce. Partners can create opportunities, and users can assign opportunities to them.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

Opportunities that a partner portal user creates can roll up to the forecast of the account owner. The account owner must be the person's forecast manager in the role-based forecast hierarchy for the opportunities to roll up into the forecast. For example: If Anne adds opportunities in her portal, Gordon sees those opportunities in his forecast. Because Gordon is Anne's forecast manager, he can adjust forecasts based on her opportunities and see how she's tracking against her quota.

- Gordon Johnson owns a partner account that's called Acme.

- Gordon has an Acme contact named Anne Smith.
- Anne is a partner portal user.
- Anne reports to Gordon in the forecast hierarchy.

See Also

[Opportunity Details in Pipeline Forecasts](#)

[Create a Partner Portal](#)

Managing Common Pipeline Forecast Types

Forecasts types specify how Salesforce calculates forecasts and projects sales from a different perspective. Learn about managing these common pipeline forecast types.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no opportunity splits forecasts), **Performance**, and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

[Monthly and Quarterly Pipeline Forecasts](#)

In the Forecasts page, the summary shows forecasts for individual months or quarters and a range of months or quarters, depending on the settings your Salesforce admin defines. Your admin can also enable custom periods.

[Revenue and Quantity Pipeline Forecasts](#)

Calculate forecasts on revenue or quantity.

[Custom Measure Pipeline Forecasts](#)

Project sales to best reflect how you do business, using a custom currency or custom number field as the measure in a forecast type.

[Overlay Splits Forecasts](#)

Track revenue from sales team members who help close opportunities but aren't directly responsible for them.

Monthly and Quarterly Pipeline Forecasts

In the Forecasts page, the summary shows forecasts for individual months or quarters and a range of months or quarters, depending on the settings your Salesforce admin defines. Your admin can also enable custom periods.

Depending on your settings your admin defined, you can forecast up to 15 months, 15 fiscal periods, or 8 quarters in the future or past. If your forecast range includes the current month, period, or quarter, the forecasts page shows the current month, period, or quarter. Otherwise, the first month, period, or quarter of the range is selected. Regardless of whether your company uses monthly or quarterly forecasts, forecast managers can use quotas and adjust their subordinates' forecasts. Quota and adjustment periods are based on the period settings.

The forecast date range becomes the default for all forecast users. Users can keep this default or select a different date range for their own forecasts. After users change their individual forecast date range, admins can't override them. However, when an admin changes the *period* display from monthly to quarterly or quarterly to monthly, the change is reflected in all users' forecasts.

See Also

[Change Your Forecast Date Range on the Forecasts Page](#)

[Define a Default Forecast Date Range](#)

Revenue and Quantity Pipeline Forecasts

Calculate forecasts on revenue or quantity.

For example:

- A sales manager wants to forecast using revenue because the sales vice president sets quota amounts based on the U.S. dollar.
- A sales rep wants to forecast using quantity because of an incentive to sell 10,000 units of a promotional product.

To forecast revenue and quantity for the same data source, such as the Opportunity object, your Salesforce admin can create a forecast type for each, and you can switch between them on the forecasts page.

For details about what data each forecast type is based on, see [Pipeline Forecast Types](#).

See Also

[View Forecasts from Different Perspectives](#)

[Considerations for Multiple Currencies in Salesforce Forecasting](#)

[Adjustments in Pipeline Forecasts](#)

Custom Measure Pipeline Forecasts

Project sales to best reflect how you do business, using a custom currency or custom number field as the measure in a forecast type.

REQUIRED EDITIONS

Available in: Lightning Experience in **Performance** and **Unlimited** Editions with Sales Cloud, and for an additional cost in **Enterprise** Edition

A measure is used to calculate forecasts. Measures are based on number (quantity) or currency (revenue) fields from the object being that information is gathered from for a forecast. By default, and depending on the object you use, you can calculate forecasts based on revenue using the standard Amount, Revenue, or Total Price fields or by quantity using the Quantity field. Depending on the object you select for a forecast type, one or more of these fields are available to select as the measure for that

type.

If you have a specific business model that requires the forecast calculations to happen using values from a custom currency or number field that you use to capture revenue or quantity. Depending on the object used for forecasts, this custom field is then available and selected as the measure in a forecast type.

Use these field types to define a custom field that is available as a custom measure in a forecast type.

- **Currency:** Use a custom currency field to forecast on revenue. For example, create a custom currency field to capture Monthly Recurring Revenue or Annual Contract Value to create forecasts on those values. A custom currency field as a custom measure is available if you base forecasts on Opportunity, Opportunity Product, Opportunity Split, or Line Item Schedule objects.
- **Number:** Use a custom number field to forecast on quantity. For example, create a custom number field to capture the number of Net New Subscriptions to create forecasts on those values. A custom number field as a custom measure is available if you base forecasts on the Opportunity, Opportunity Product, or Line Item Schedule objects.

When using a custom measure, be sure to select the field that you're using as a measure as one of the fields available as a column in the opportunity list on the forecast page. If users don't have access to the custom field used for the measure, they can still see the forecasts based on the measure. They can't see the values for the custom field in the opportunity list.

Notes About Salesforce Classic

In Salesforce Classic, you can forecast on custom currency fields via an opportunity split, if the custom field is enabled for opportunity splits. The opportunity owner automatically receives a 100% split for the field. So, if your company doesn't plan to use splits with the field, the rollup is the same as if no splits existed.

See Also

- [Create Custom Fields](#)
- [Pipeline Forecast Types](#)

Overlay Splits Forecasts

Track revenue from sales team members who help close opportunities but aren't directly responsible for them.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

As a sales manager, use revenue splits for crediting team members who are directly responsible for opportunities. To provide more flexibility with how you assign credit for opportunities, you can use

overlay splits. Overlay splits help you and other team members allocate credit to overlay sales roles for working on opportunities. Overlay splits can add up to any percentage of the opportunity amount, sometimes exceeding 100%. For example, your sales team can include sales engineers, product specialists, or partners who help close deals but aren't directly responsible for them.

When you forecast on overlay splits, forecast amounts roll up through the role hierarchy based on the opportunity's Amount field and the overlay team member's split percentage.

Let's say a sales rep, Allison, has an opportunity that includes an overlay split of 50% for sales engineer Owen, who's working with Allison on the deal. For Allison, the opportunity Amount field rolls up into her opportunity revenue forecast.

Allison's manager Bryce can view the overlay forecast along with all the other opportunities that his sales engineer team is working on. Bryce can see that Allison is receiving a 100% credit for her deal, which contributes to Allison's open pipeline total and Bryce's open pipeline total. If Bryce thinks the deal could close for a higher amount, he can adjust the commit or best case forecast amount.

Months	Closed Only	Commit Forecast	Best Case Forecast	Open Pipeline
Total: 3 Months	USD 2,496,600.00	USD 17,333,760.88	USD 23,419,440.88	USD 56,075,028.50
October FY 2017	USD 255,000.00	USD 3,971,440.17	USD 10,005,440.17	USD 23,377,890.17
Alan Wong	USD 245,000.00	USD 3,355,000.00	USD 3,795,000.00	USD 12,762,250.00
Allison Wh...	USD 0.00	USD 0.00	USD 0.00	USD 191,000.00
Brent Bassi	USD 0.00	USD 606,440.17	USD 650,440.17	USD 650,440.17
Noah Lark...	USD 0.00	USD 0.00	USD 5,550,000.00	USD 8,569,700.00

Showing Opportunities for: Brice Knell's Team • October FY 2017 • All Forecast Categories						
Opportunity Name	Account Name	Forecasted Amount	Split	Close Date	Stage	Probability (%)
ABC - 10 Laptops	ABC Labs	USD 5,000.00	100.00%	10/13/2017	Needs Analysis	100%
ABC Labs - 9 Spider 2 ...	ABC Labs	USD 3,650,000.00	100.00%	10/25/2017	Needs Analysis	20%
Acme - 600 Desktops	Acme Inc.	USD 445,115.17	100.00%	10/06/2017	Negotiation/Review	90%
Acme - Premium Supp...	Acme Inc.	USD 250,000.00	100.00%	10/13/2017	Negotiation/Review	90%

Considerations for Managing Territory Pipeline Forecasts

Before changing your active territory model, review how territory forecast data and performance can be affected.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

 **Note** This information applies to Sales Territories and not to previous versions of Territory Management.

Data Impact

When You...	Salesforce Deletes...
Remove a user from a territory, and the user is the territory's forecast manager	<ul style="list-style-type: none"> The territory's quotas Manager judgments made by the forecast manager on opportunities in the child forecast Manager judgments made on the deactivated user's opportunities in the territory where the forecast manager was removed Owner adjustments to the territory's forecasts Adjustments made by another manager to the forecast manager's forecasts for the territory Adjustments made by the forecast manager to subordinates' forecasts <p>The user is no longer the territory's forecast manager. Forecasts for the territory are available, but their values change. Quotas in territories without a forecast manager can be reassigned to another member of the territory.</p>
Remove a forecast-enabled user from a territory that has no forecast manager assigned	<ul style="list-style-type: none"> The user's quotas for the territory Owner adjustments to the territory's forecasts, where the user is the owner Manager adjustments to the user's forecasts for the territory <p>Quotas in territories without a forecast manager can be reassigned to another member of the territory.</p>
Delete a territory that has no child territories	<ul style="list-style-type: none"> The territory's forecasts Quotas for all users on the territory Manager judgments on the opportunities in the territory's forecast Manager adjustments to the territory's forecasts Owner adjustments to the territory's forecasts
Reassign a child territory to a different parent territory	<ul style="list-style-type: none"> Manager adjustments to the territory's forecasts Manager judgments on the opportunities in the territory's forecasts Owner adjustments to the territory's forecasts

When You...	Salesforce Deletes...
Assign a forecast manager to a territory that hasn't previously had one assigned	<ul style="list-style-type: none"> The territory's quotas Owner adjustments to the territory's forecasts Manager adjustments to the territory's forecasts <p>Quotas assigned to users in the territory can be reassigned to the forecast manager.</p>
Change a territory's forecast manager assignment	<ul style="list-style-type: none"> The territory's quotas Manager judgments on the opportunities made by the former forecast manager to subordinates' forecasts Owner adjustments made to the territory's forecasts Adjustments made by the former forecast manager to subordinates' forecasts Adjustments made by another forecast manager to the territory's forecasts
Deactivate a user, or change the user's license to one of the Chatter user licenses, and the user is a territory's forecast manager	<ul style="list-style-type: none"> The territory's quotas Manager judgments made by the territory manager Manager judgments on opportunities owned by deactivated forecast users Owner adjustments to the territory's forecasts Adjustments made by another manager to the forecast manager's forecasts for the territory Adjustments made by the forecast manager to subordinates' forecasts <p>The user is no longer the territory's forecast manager. Forecasts for the territory are available, but their values change.</p>
Archive a territory model	Forecasts, quotas, and adjustments for all territories in the model
Disable Sales Territories	Forecasts, quotas, and adjustments for all territories

Performance Impact

- The number of territories assigned to a user or forecast manager can impact performance. We recommend that you test thoroughly for performance issues, and if you observe any, reduce the number of territories per user or forecast manager.

Pipeline Forecasting Charts

Use built-in charts to visualize the state of your forecasts and better assist sales reps in meeting their

sales targets. With forecast charts, see the changes to the current period's forecasts across forecast types and measure how this period's forecasts compares to past periods, without having to manually crunch the numbers.

Reviewing Week-to-Week Forecast Changes

Review how forecasts have changed throughout the current period with the Weekly Changes chart.

The chart includes key metrics and a visual representation of changes as the period has progressed.

The information that's available to you in the chart depends on enabled features and how long forecast data is retained.

Finding Trends Across Forecast Periods

Evaluate how this forecast period compares to the forecasts at the same point in past periods in the Monthly or Quarterly Trends chart. Understanding your team's trends helps to gauge whether the team is tracking to hit their sales goals based on performance in previous periods. The information that's available to you in the chart depends on enabled features and how long forecast data is retained.

Reviewing Week-to-Week Forecast Changes

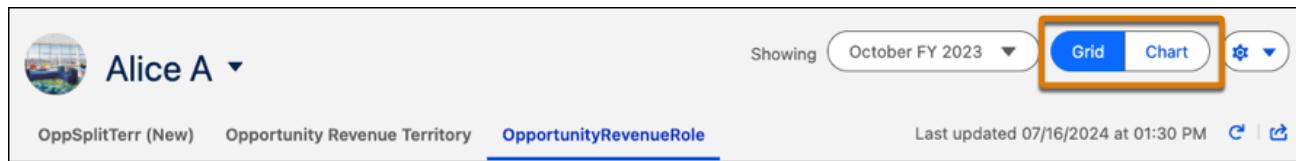
Review how forecasts have changed throughout the current period with the Weekly Changes chart. The chart includes key metrics and a visual representation of changes as the period has progressed. The information that's available to you in the chart depends on enabled features and how long forecast data is retained.

REQUIRED EDITIONS

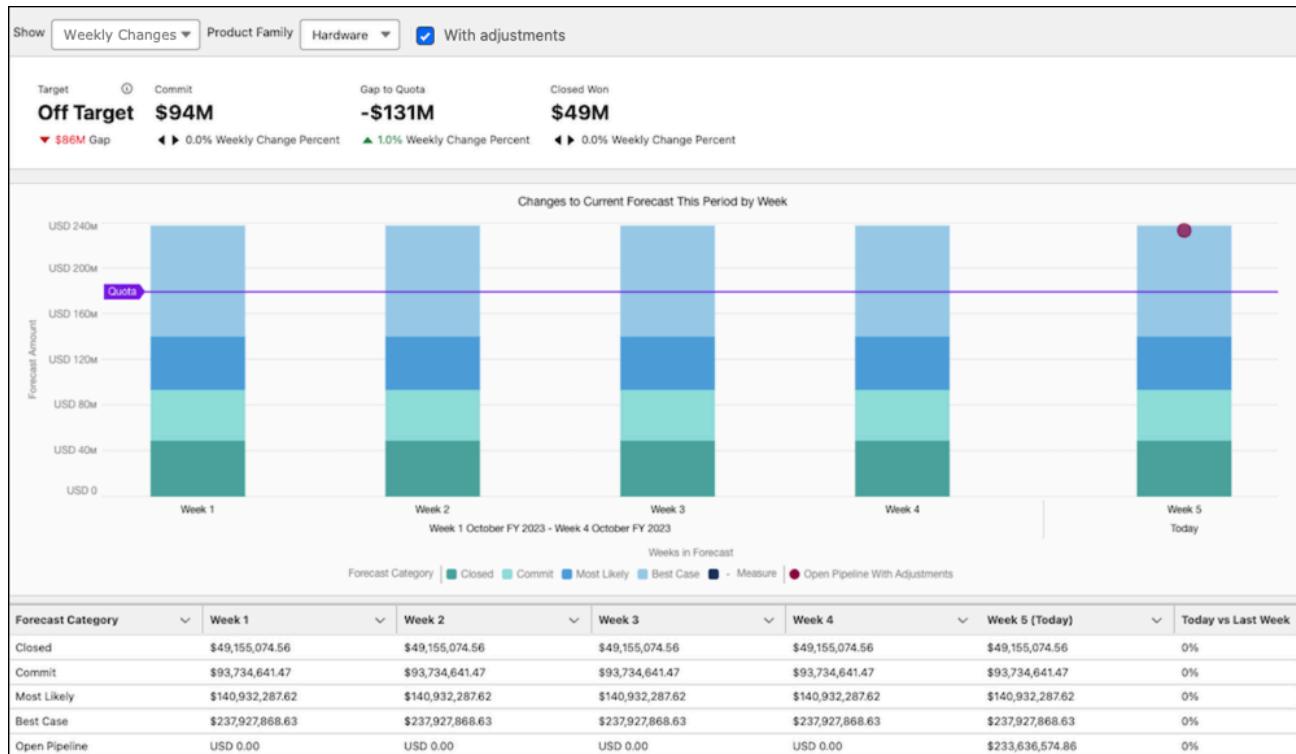
Available in: Lightning Experience

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

To review charts for a forecast, toggle to the Chart view on the forecasts page.



You have access to charts for your forecasts across all forecast types and any of your subordinates. Here's a Weekly Changes chart example where quota and cumulative category rollups are enabled. Depending on your system setup, your chart can look different.



Metrics indicate key information as of today. Each metric also includes the percent change from the same time last week.

Metric	Description
Target	Commit compared to quota. If the commit value is greater than quota, the user is on target to meet or exceed their quota for the period.
Commit	Total commit value. In cumulative category rollups, this value includes opportunities in the Commit and Closed forecast categories.
Gap to Quota	Quota minus Closed Won, which indicates how much is needed to meet quota.
Closed Won	Total value of opportunities that have been won and are now closed.
Pipe Coverage	Open pipeline divided by quota.

If quota data isn't available, the metrics that require quota aren't shown. If Einstein Forecasting is enabled and its data requirements are met, additional AI-generated metrics about forecast predictions are shown.

Bar Chart Segments

Each time segment shows opportunities grouped by their forecast category. If you use single category rollups, open pipeline is represented as a bar segment. For cumulative category rollups, the open pipeline is shown as a dot on the chart. Hover over each segment for details about the changes

compared to the previous week.

Date	7/24/24
Forecast Category	
Best Case Forecast	
Amount Without Adjustments	\$12,228.83
Weekly Change	\$0.00
Weekly Change Percent	0%
Monthly Change	\$0.00
Monthly Change Percent	0%

Metric	Description
Forecast Amount	The total forecast for the category including any adjustments made. The weekly and monthly changes including adjustments are included below the value. This value is shown when viewing the chart with adjustments.
Amount Without Adjustments	The total forecast for the category without adjustments. The weekly and monthly changes without adjustments are indicated below this value. This value is shown when viewing the chart without adjustments.
Weekly Change and Weekly Percent	The percentage difference compared to the same time last week. For example, if you're viewing changes 2 days from the end of the week, the comparison is made to when there were 2 days from the end of last week.
Monthly Change	The percentage difference compared to the same time last month, based on time remaining in the month. For example, if there are currently 20 days remaining in the current month, the comparison is made to the day when there were 20 days remaining in the previous month. For example, July has 31 days, while June has 30. Therefore, July 11 is compared to June 10.

If Einstein Forecasting is enabled and its data requirements are met, the chart includes AI-driven predicted values for future weeks through the end of the period.

Summary Table

To review the forecast changes side by side, see the table that shows when viewing the chart. The table includes the data for each category by time segment and includes the weekly or monthly change percentage of today's forecast compared to the same time last week or month. To jump to the corresponding data in the table, click the bar segment in the chart.

See Also

- [Finding Trends Across Forecast Periods](#)
- [Build a Smarter Pipeline with Einstein Forecasting](#)

Finding Trends Across Forecast Periods

Evaluate how this forecast period compares to the forecasts at the same point in past periods in the Monthly or Quarterly Trends chart. Understanding your team's trends helps to gauge whether the team is tracking to hit their sales goals based on performance in previous periods. The information that's available to you in the chart depends on enabled features and how long forecast data is retained.

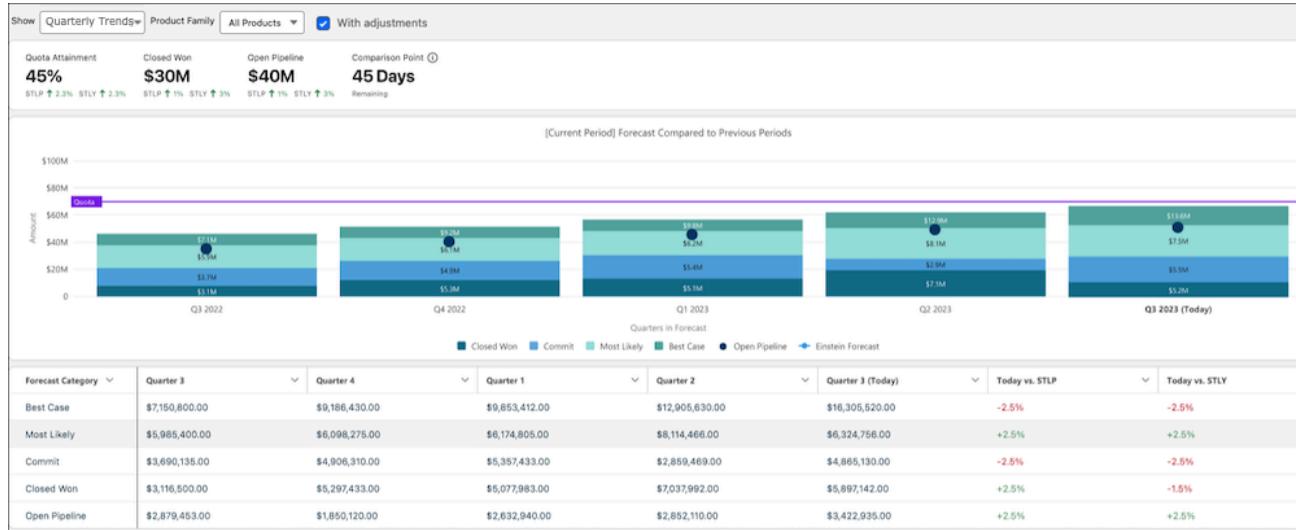
REQUIRED EDITIONS

Available in: Lightning Experience

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

To review charts for a forecast, toggle to the Chart view on the forecasts page.

You have access to charts for your forecasts across all forecast types and any of your subordinates. Here's a Trends chart example where quota and cumulative category rollups are enabled. Depending on your system setup, your chart can look different.



Each bar in the chart represents the same point in time in a previous period (month or quarter). In this example, the Today bar marks 45 days before the end of the current quarter. Other bars show the forecast when 45 days remained in each previous quarter.

Metrics are shown to provide key information as of today. Where applicable, metrics also show the comparison to the last period and the same time last year.

Metric	Description
Quota Attainment	Closed Won divided by quota.
Closed Won	Total value of opportunities that have been won and are now closed.
Open Pipeline	Opportunities that haven't closed.
Comparison Point	The number of days remaining in the current period. This number is the point in the period that is used to compare the current period to the previous periods.

If quota data isn't available, the metrics that require quota aren't shown.

Bar Chart Segments

For quarterly forecast periods, the chart includes five bars (one for each historical period over the last year, and one for today). For monthly forecasts, the chart includes 13 bars (12 bars for each historical month, and 1 bar for today). If you're new to Salesforce, or only recently enabled historical trending, your chart contains data only for the periods that it has data for.

Each forecast period segment shows opportunities grouped by the forecast category, including indicators for open pipeline and quota targets. Hover over each segment in a past period for details about how that period compares to today's forecast.

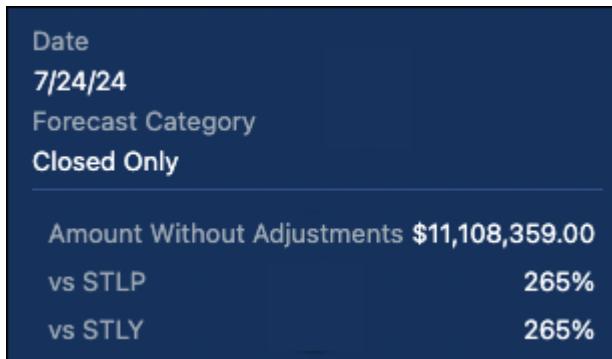


Values are calculated as follows.

Metric	Description
Forecast Amount	The total forecast for the category, including adjustments. This value is shown when viewing the chart with adjustments.
Amount Without Adjustments	The total forecast for the category without adjustments. This value is shown when viewing the chart without adjustments.
vs Today	The difference in value between the forecast value for the period and the

Metric	Description
	value today.

Hover over each segment in the Today bar for details about how today's forecast compares to the same time last period and last year.



Values are calculated as follows.

Metric	Description
Forecast Amount	The total forecast for the category, including adjustments. This value is shown when viewing the chart with adjustments.
Amount Without Adjustments	The total forecast for the category without adjustments. This value is shown when viewing the chart without adjustments.
vs STLP	The percentage difference from the same time last period, based on time remaining in the period. For example, if there are 20 days remaining in the current period, the comparison is made to the day when there were 20 days remaining in the previous period. If the current period has more days than the last period, the same time last period is the first day of the previous period. For example, 85 days are left in Q4, which has 90 days. But Q3 had 80 days. In this case, the same time last period is calculated using the first day of Q3.
vs STLY	The percentage difference from the same time last year, based on the number of days remaining in the period. For example, if 85 days are left in Q3 2023, the comparison is made to the day when 85 days were left in Q3 2022.

Summary Table

To review the forecast trends side by side, see the table that shows when viewing the chart. The table shows the data for each category by time segment and includes the percentage change of today's forecast compared to the same time last period and the same time last year. To jump to the corresponding data in the table, click the bar segment in the chart.

See Also

[Reviewing Week-to-Week Forecast Changes](#)

Adjustments in Pipeline Forecasts

A forecast adjustment indicates an assessment about the sales value that a forecast manager or sales rep feels confident of closing during of the forecast period. Adjusting Best Case and Commit forecasts values is a way to accurately gauge where a sales team is on their path to hitting its sales numbers. An adjustment doesn't change the underlying gross rollup and doesn't appear in reports. It just adds a layer of detail to a forecast.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

For more accuracy and clarity, managers can indicate which opportunities are part of their committed, adjusted forecast by applying their own judgment to the opportunities in the forecast. See [Manager Judgments in Forecasts](#) for details.

Your Salesforce admin can enable forecast managers to adjust subordinates' and child territory forecasts, enable all forecast users to adjust their own forecasts (including territory forecasts they own), or both.

Depending on your system settings, forecast managers can:

- Adjust their own Best Case and Commit forecasts and the forecasts of subordinates one level below them in the forecast hierarchy. The Salesforce mobile app supports owner adjustments only.
- Adjust forecasts that don't include adjustments and forecasts that include adjustments made by someone else on their opportunity team.
- View adjustments that subordinates make at every level below them in the forecast hierarchy. Adjustments made to their subordinates' forecasts roll up into their own forecasts. For example, let's say you're a sales manager who adjusted the forecast of one of your sales reps down from \$2,000 to \$1,500. Your vice president, who's your forecast manager, sees \$1,500 when viewing your forecast, along with an icon indicating that the forecast contains an adjustment. The vice president can decide to adjust it back to \$2,000.

Any adjustments that the managers make to subordinates' forecasts from their own forecast page don't appear on the subordinate's forecasts page. Instead, the managers see that subordinate's forecasts and any adjustments that the subordinates made to their own forecasts or forecasts of their subordinates.

For example, let's say you're a vice president of sales. On your own forecasts page, you see a July Best Case forecast of \$1,250 (including a \$50 adjustment that you made) for one of your first-level subordinates, a sales manager. However, when you view the sales manager's forecasts page, the July Best Case forecast is \$1,200, because it doesn't include your adjustment. If a manager and a subordinate adjust the same forecast, only the manager's adjustment rolls up the forecast hierarchy.

-  **Note** While you're viewing a forecasts page, your subordinates can be adjusting their own forecasts or editing related opportunities. Or you can adjust one of your subordinates' forecasts from your own page. All these events change forecasts. To view the most recent forecasts, click **Refresh**. In Lightning Experience, a timestamp shows the date and time when the forecasts page was refreshed. In-progress data updates aren't indicated.

Adjustment Details

Your Salesforce admin can configure adjustments to show only in a window when you hover over a forecast cell, or to break out adjustment amounts into separate columns.

If Salesforce is configured to show adjustments when hovering over the cell, you see one forecast value per row for each category shown in the forecast summary. That value represents the last adjusted value for that category. If the cell includes a  icon, the forecast value includes an adjustment. Hover over the cell to review these details.

- The original forecast value before any adjustments were made.
- The adjusted value from your team (seen by forecast managers only).
- Your total Closed + IN judgments, if manager judgments are enabled (seen by forecast managers only)
- Any notes that you entered about adjustments that you made.

If Salesforce is configured to break out adjustments into separate columns, expand an adjustable forecast category to see the following forecast values.

- The original forecast value before any adjustments were made.
- Your team's adjustments (if owner adjustments are enabled and you're a forecast manager).

If a value in any column includes an adjustment, the cell includes a  icon. Your adjustments are shown in the My <category> column, for example, My Commit. To see these details, hover over the cell.

- Your total Closed + IN judgments, if manager judgments are enabled (seen by forecast managers only)
- Any notes that you entered about adjustments that you made.

To see the details about team adjustments, go to your direct report's forecast view.

-  **Note** If there are changes in the last 7 days, you can also see the details about those changes when hovering over the cell. However, the  icon doesn't indicate those types of changes.

Adjustments and Multiple Active Forecast Types

If multiple forecast types are active, each forecast type maintains separate adjustments. For example, if opportunity revenue and quantity forecasts are enabled, you can adjust forecasts for each type. However, adjustments made in the opportunity revenue-based forecast aren't shown as adjustments in any other forecast type. So if you adjust an opportunity revenue forecast from \$100,000 to \$90,000, and then switch your forecast view, you don't see an equivalent adjustment value in the opportunity quantity

forecast. If you change the forecast view back to the opportunity revenue forecast, you see your adjustment of \$90,000.

Adjustments and Product Family Forecasts

If you use product family forecasts, you can't adjust your own product family forecasts in Salesforce Classic. If users adjust their product family forecasts in Lightning Experience, not every total in the Salesforce Classic forecasts grid reflects the adjustments.

Adjustments When Opportunities Move Between Forecast Categories

When an opportunity moves from one forecast category to another, such as from Pipeline to Best Case, the unadjusted raw forecasts change for each of those rollups. However, forecasts with adjustments don't change in the summary on the forecasts page. To account for changes in the stage of opportunities, update or remove your adjustments to each forecast rollup.

[Make Adjustments to Pipeline Forecasts](#)

Adjusting overstated or understated Best Case, Most Likely, or Commit forecast values gives you a more accurate picture of the path to hitting your forecast or quotas. Updating the rollup values on the forecasts page doesn't change the underlying amounts or quantities in the opportunities that make up the forecast.

[Adjustment Deletions in Pipeline Forecasts](#)

Review the scenarios that cause manager judgments and forecast adjustments to be deleted.

[Who Can Adjust Pipeline Forecasts](#)

Forecast adjustments at the rollup level provide an assessment about the tpta; sales that the forecast owner feels confident to close during the forecast period. Your system settings and your place in the forecast hierarchy determines if you can view and make adjustments.

See Also

[Make Adjustments to Pipeline Forecasts](#)

[Adjustment Deletions in Pipeline Forecasts](#)

[Apply Manager Judgment to Opportunities in Pipeline Forecast](#)

Make Adjustments to Pipeline Forecasts

Adjusting overstated or understated Best Case, Most Likely, or Commit forecast values gives you a more accurate picture of the path to hitting your forecast or quotas. Updating the rollup values on the forecasts page doesn't change the underlying amounts or quantities in the opportunities that make up the forecast.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional, Performance, and Developer Editions** and in **Enterprise and Unlimited Editions** with the Sales Cloud

USER PERMISSIONS NEEDED

To use Salesforce Forecasting:

View All Forecasts

OR

Allow Forecasting

OR

Delegated forecast manager status

To access role-based forecasts in Lightning Experience:

View Roles and Role Hierarchy

To adjust forecasts:

Override Forecasts

Your Salesforce admin can choose to allow only managers to adjust subordinates and child territory forecasts, or allow all forecasts users to adjust their own forecasts and territory forecasts. The Salesforce mobile app supports owner adjustments only. You can't adjust data in a custom forecast column added to a forecast type.

1. On the forecasts page in the desktop site, hover over the forecast that you want to adjust, and then click  . If Salesforce is configured to show adjustments as columns, make your own adjustments in the My Commit, My Best Case, or My Most Likely columns.
In the Salesforce mobile app, on the Forecasts screen, tap  . You can also start by tapping the forecast that you want to adjust, and then tap .
2. Enter the adjusted value and notes about why you made the adjustment.
Each blank line (carriage return) in your note text counts as 2 characters. For example, if you copied and pasted text from another editor, the paragraphs can cause you to reach the character limit earlier than anticipated.
3. Save your changes.

An  icon appears in the cell to show that you adjusted the forecast.

Quota	Closed	Commit	Most Likely	Best Case	Pipeline
-	\$325,941.28	\$1,814,634.16	\$1,426,230.69	\$1,056,186.10	\$1,661,240.48
\$500,000.00	\$175,729.91 35%	\$226,279.86 45%	\$442,637.09 89%	\$0.00 0%	\$168,671.85 34%
\$200,000.00	\$5,860.09 3%	\$63,671.15 32%	\$279,388.71 140%	\$30,993.02 16%	\$370,206.23 185%
\$500,000.00	\$0.00 0%	\$65,341.49 13%	\$164,520.83 33%	\$109,293.62 22%	\$249,403.55 50%

To remove an adjustment you made (desktop site only), click  , and then click **Remove**.

In Salesforce Classic, adjustments are indicated with the following icons:

Icon in Salesforce Classic	Definition
	You adjusted the forecast. You see this indicator only on your forecasts page.
	One of your subordinates adjusted the forecast. You see this indicator on your forecasts page and your subordinates' forecasts pages.
	You and one or more subordinates adjusted the forecast. You see this indicator only on your forecasts page, because when you drill down to a subordinate's page, you see the page as that user sees it.
	Save your adjustment.
	Undo your adjustment, and restore the previous value of the forecast. Hover over the button to see a tooltip that tells you if the previous value includes an adjustment.
	The adjustment includes a note.
	Remove your adjustment, and restore the previous value, which can include someone else's adjustment.

See Also

- [Adjustments in Pipeline Forecasts](#)
- [Adjustment Deletions in Pipeline Forecasts](#)
- [View Forecasts from Different Perspectives](#)

Adjustment Deletions in Pipeline Forecasts

Review the scenarios that cause manager judgments and forecast adjustments to be deleted.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience in **Professional**, **Performance**, and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Changing some forecasting and custom fiscal year settings can delete forecast adjustments, but underlying data isn't affected. Adjustments are deleted when your admin does any of the following.

- Disables forecasts.
- Disables manager adjustments. Only adjustments made by forecast managers to their subordinates' and child territory forecasts are deleted.
- Disables owner adjustments. Only adjustments made by forecast users to their own forecasts,

- including territory forecasts they own, are deleted.
- Changes your forecast period setting from quarterly to monthly or from monthly to quarterly.
 - Disables a forecast type. Only adjustments for that forecast type are deleted.
 - Changes the start month of your fiscal year when the forecast period is set to quarterly. Quotas and adjustments are deleted.
 - Deletes a product family. Quotas and adjustments are deleted for the product family.
 - Switches from cumulative forecast rollups to individual forecast category rollups or from individual to cumulative rollups.
 - Creates a custom fiscal year for the first time. All adjustments and quotas for the corresponding and following standard fiscal years are deleted.
 - Deletes a custom fiscal period or quarter. Forecast adjustments and quotas for that period or quarter are also deleted.

For role-based forecast types, adjustments are also deleted when:

- You're no longer a forecast manager. Only adjustments that you made to subordinates' forecasts are deleted.
- You're removed from a role that's set as a forecast manager in the forecast hierarchy. Only adjustments that you made to subordinates' forecasts are deleted.
- You're deactivated as a user.

See Also

[Adjustments in Pipeline Forecasts](#)

[Considerations for Managing Territory Pipeline Forecasts](#)

[Make Adjustments to Pipeline Forecasts](#)

Who Can Adjust Pipeline Forecasts

Forecast adjustments at the rollup level provide an assessment about the tpta; sales that the forecast owner feels confident to close during the forecast period. Your system settings and your place in the forecast hierarchy determines if you can view and make adjustments.

REQUIRED EDITIONS

Adjustments available in: both Salesforce Classic and Lightning Experience in **Professional**, **Performance**, and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Role-Based Forecasts

Review who can view your forecast and adjust your forecast total. The details in this table apply to role-based forecasts only.

User	Can they view your forecasts?	Can they adjust your role-based forecasts?
Your manager's manager	Yes	No
Your manager	Yes	Yes. Managers adjust forecasts from their own forecasts pages.
You	Yes	Yes, if enabled by your admin. You can adjust forecast totals only, not the subtotal for My Opportunities.
Your subordinate in the role-based hierarchy	No	No
The subordinate of your subordinate in the role-based hierarchy	No	No
Anyone you shared your forecasts with	Yes	Yes, if you selected View and Edit as the access level.

Review whose forecasts you can view and adjust. The details in this table apply to role-based forecasts only.

User	Can you view role-based forecasts?	Can you adjust role-based forecasts
Your manager's manager	No	No
Your manager	No	No
You	Yes	Yes, if enabled by your Salesforce admin
Your subordinate in the role-based hierarchy	Yes. However, if you select a direct subordinate's forecast, you see the same view as that subordinate, so your adjustments aren't visible.	Yes. You can adjust these forecasts from your own forecasts page.
The subordinate of your	Yes. You see	No. Your direct reports can adjust their own direct reports'

User	Can you view role-based forecasts?	Can you adjust role-based forecasts
subordinate in the role-based hierarchy	the same view that the subordinate sees.	forecasts.
Anyone who has shared their forecasts with you	Yes. You see the same view that the sharer sees.	Yes, if they selected View and Edit as the access level.

Territory Forecasts

Review who can view your territory forecast and adjust the territory's forecast total. The details in this table apply for territory forecasts only.

User	Can they view the territory's forecasts?	Can they adjust the territory's forecasts?
Parent Territory's forecast manager	Yes	Yes
Another territory's forecast manager	Yes, if the territory is above the territory in the hierarchy	Yes, if the user is the forecast manager for the territory.
Anyone you shared your forecasts with	Yes, the user sees the same view that the sharer sees	Yes, if you selected View and Edit as the access level when you shared the forecast.

Review whose forecasts you can view and adjust. The details in this table apply to territory forecasts only.

Are you assigned as the territory's forecast manager?	Can you view the territory's forecasts?	Can you adjust the territory's forecasts?
Yes	Yes	Yes, if owner adjustments are enabled.
No, but I'm assigned as another territory's forecast manager.	Yes, if the territory you're assigned to as forecast manager is above this territory in the hierarchy.	Yes, if: <ul style="list-style-type: none"> The territory you're assigned to as forecast manager is above this territory in the hierarchy.

Are you assigned as the territory's forecast manager?	Can you view the territory's forecasts?	Can you adjust the territory's forecasts?
		<ul style="list-style-type: none"> Manager adjustments are enabled.
No, I'm not assigned as forecast manager for any territory.	Only if: <ul style="list-style-type: none"> The territory has no forecast manager assigned. You're assigned to the territory. 	Only if: <ul style="list-style-type: none"> The territory has no forecast manager assigned. You're assigned to the territory. Owner adjustments are enabled.
Shared forecast from another Territory forecast manager	Yes, the user sees the same view that the sharer sees	Yes, if they selected View and Edit as the access level when you shared the forecast.

Manager Judgments in Pipeline Forecasts

As a forecast manager, you assess your forecasts during each period and adjust the forecast as you receive new information and circumstances change. To create the most accurate forecast possible, apply your judgment about whether you consider an opportunity part of the forecast total. Applying your judgment as a forecast manager provides visibility into which deals you have the highest confidence to close and a more accurate picture of your forecast to managers above you in the hierarchy.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

Forecast managers can apply judgment to opportunities that their direct reports own. When reviewing the Commit forecast category rollup value, the total of the opportunities indicated as part of the forecast is shown.

- In single category rollups, the IN total is the total of any committed opportunities judged as IN that roll up through the forecast manager's hierarchy.
- In cumulative category rollups, the IN value also includes Closed Won opportunities, because committed and closed won opportunities roll up into the Commit Forecast column. Judgment totals are available for the current forecast period.

Opportunity Split Forecast Types

The forecast manager's judgment applies to their percentage of the opportunity and rolls up through the forecast hierarchy. If manager judgments differ on an opportunity that's split, higher-level managers in the hierarchy see Mixed in the rolled-up forecast. Mixed indicates that management owners aren't aligned on whether the opportunity is considered part of the forecast. Mixed also shows when only some forecast managers in the split relationship have applied judgment, but not all.

Multiple Active Forecast types

The forecast manager's judgment applies at the opportunity level. If a forecast manager uses multiple forecast types when reviewing and working with their forecasts, their judgment for an opportunity applies to each type.

Product Family Forecasts

For forecast types based on product family, the judged total is available on the overall product family row and not at the forecast period row.

When Opportunities Move Between Forecast Categories

If an opportunity moves from one category to another, the judgment moves with it, assuming the forecast manager doesn't also change.

[Apply Manager Judgment to Opportunities in Pipeline Forecast](#)

To create the most accurate forecast possible, apply your judgment as a forecast manager about whether you consider a subordinate's opportunity part of your forecast. Then you have the details about the total value of the opportunities when you review and adjust the total Commit forecast.

[Manager Judgment Deletions in Pipeline Forecasts](#)

Review the scenarios that cause manager judgments to be deleted from opportunities in a pipeline forecast.

[Who Can Apply Manager Judgments in Pipeline Forecasts](#)

Forecast judgments at the opportunity level provide an assessment about the opportunities that the forecast owner feels confident to close during the forecast period. Your system settings and your place in the forecast hierarchy determines if you can view and make judgments.

See Also

[Who Can Adjust Pipeline Forecasts](#)

[Apply Manager Judgment to Opportunities in Pipeline Forecast](#)

[Apply Manager Judgment to Opportunities in Pipeline Forecast](#)

To create the most accurate forecast possible, apply your judgment as a forecast manager about whether you consider a subordinate's opportunity part of your forecast. Then you have the details about the total

value of the opportunities when you review and adjust the total Commit forecast.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional**, **Performance**, and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To use Salesforce Forecasting:

View All Forecasts

OR

Allow Forecasting

OR

Delegated forecast manager status

To access role-based forecasts in Lightning Experience:

View Roles and Role Hierarchy

To apply judgments and adjust forecasts:

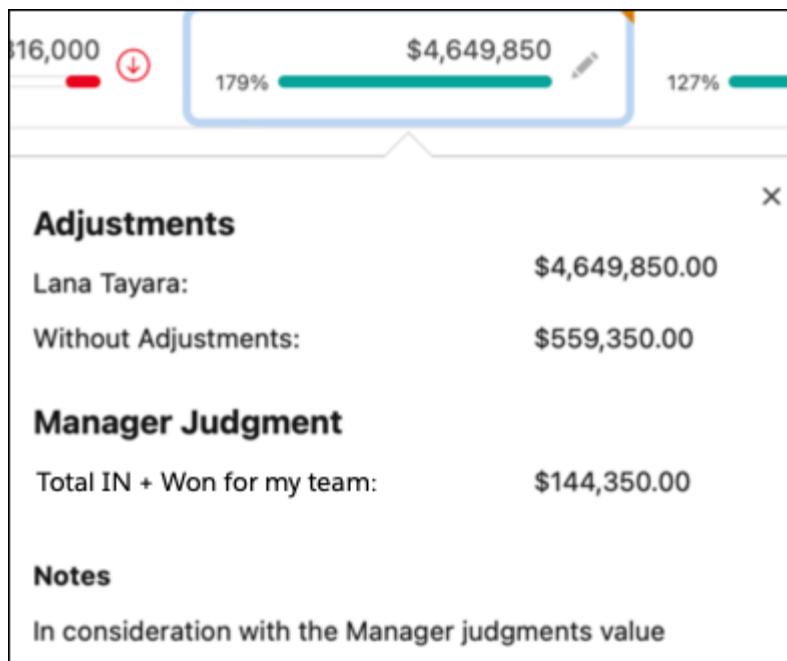
Override Forecasts

 **Note** Applying manager judgments is supported in the desktop site only.

As a forecast manager, you can apply judgment to opportunities that your subordinates own. You can't apply judgments to opportunities that you own that are part of your forecast.

1. On the forecasts page, select the forecast value that you want to review.
The opportunities that roll up to that forecast are shown in the opportunities list.
2. In the Manager Judgment field, indicate whether the opportunity is included or excluded from the forecast
3. Save your changes.

The total of the opportunities that have closed and opportunities judged as included, or "in," the forecast are shown when hovering over the Commit forecast. To see the details, hover over the  icon.



If Salesforce is configured to show adjustment details in columns, hover over the My Commit forecast to see the manager's judgment Total IN value.

See Also

[Who Can Adjust Pipeline Forecasts](#)

Manager Judgment Deletions in Pipeline Forecasts

Review the scenarios that cause manager judgments to be deleted from opportunities in a pipeline forecast.

REQUIRED EDITIONS

Available in: **Professional**, **Performance**, and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Manager judgments are deleted in role-based forecast types when any of these changes happen.

- An opportunity is deleted.
- The opportunity owner changes to someone who reports to a different forecast manager. If the new opportunity owner reports to the same forecast manager, the forecast manager's judgment is retained.
- The opportunity owner is no longer enabled to use forecasts in Salesforce.
- The user role of opportunity owner changes, and the owner no longer reports to the forecast manager.
- The forecast manager changes, even if the manager is assigned to the same user role.
- The forecast manager no longer has access to forecasts in Salesforce. All judgments that the forecast manager made are deleted. Any judgments on opportunities that forecast manager owned are also deleted.

For information about how territory-based forecasts are affected, see [Considerations for Managing Territory Forecasts](#).

Who Can Apply Manager Judgments in Pipeline Forecasts

Forecast judgments at the opportunity level provide an assessment about the opportunities that the forecast owner feels confident to close during the forecast period. Your system settings and your place in the forecast hierarchy determines if you can view and make judgments.

REQUIRED EDITIONS

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Role-Based Forecasts

Review who can view your forecast and who can view and apply judgments to opportunities in your forecast. The details in this table apply to role-based forecasts only.

User	Can they view your forecasts?	Can they view and apply judgment to opportunities in your forecast
Your manager's manager	Yes	View only
Your manager	Yes	Yes
You	Yes	No
Your subordinate in the role-based hierarchy	No	No
The subordinate of your subordinate in the role-based hierarchy	No	No
Anyone you shared your forecasts with	Yes	Yes, if you selected View and Edit as the access level when you shared the forecast. If you granted view-only access, then the shared user can only view judgments.

Review whose forecasts you can view and whose forecasts you can view and apply judgments to. The details in this table apply to role-based forecasts only.

User	Can you view role-based forecasts?	Can you view and apply judgment in the forecast?
Your manager's manager	No	No

User	Can you view role-based forecasts?	Can you view and apply judgment in the forecast?
Your manager	No	No
You	Yes	No
Your subordinate in the role-based hierarchy	Yes. However, if you select a direct subordinate's forecast, you see the same view as the subordinate, so your judgments aren't visible.	Yes
The subordinate of your subordinate in the role-based hierarchy	Yes. You see the same view that the subordinate sees.	View only
Anyone who has shared their forecasts with you	Yes. You see the same view that the sharer sees.	Yes, if they selected View and Edit as the access level when they shared the forecast. If they granted view-only access, then you can only view judgments.

Territory Forecasts

Review who can view your territory forecast and who can view and apply judgments to opportunities in your territory. The details in this table apply for territory forecasts only.

User	Can they view the territory's forecasts?	Can they view and apply judgment in the territory's forecast?
Parent Territory's forecast manager	Yes	Yes
Another territory's forecast manager	Yes, if the territory is above the territory in the hierarchy.	View only if the user is the forecast manager and the territory is above your territory in the hierarchy.
Anyone you shared your forecasts with	Yes, the user sees the same view that the sharer sees.	Yes, if you selected View and Edit as the access level when you shared the forecast and the shared user is a forecast manager. If you granted view-

User	Can they view the territory's forecasts?	Can they view and apply judgment in the territory's forecast?
		only access, then the shared user can only view judgments

Review whose forecasts you can view and whose forecasts you view and apply judgments to. The details in this table apply to territory forecasts only.

Are you assigned as the territory's forecast manager?	Can you view the territory's forecasts?	Can you view and apply judgment to opportunities in the territory's forecast?
Yes	Yes	Yes, if the opportunity owner is part of the immediate child territory.
No, but I'm assigned as another territory's forecast manager.	Yes, if the territory you're assigned to as forecast manager is above this territory in the hierarchy.	Yes, if the assigned territory is the parent territory
No, I'm not assigned as forecast manager for any territory.	Only if: <ul style="list-style-type: none"> • The territory has no forecast manager assigned. • You're assigned to the territory. 	No
Shared forecast from another Territory forecast manager	Yes, the user sees the same view that the sharer sees.	Yes, if the user selected View and Edit as the access level when they shared the forecast, and the shared user is a forecast manager. If they granted view-only access, then the shared user can only view judgments.

Capturing Pipeline Forecasts at a Point in Time

Forecast submissions are your best estimate of the revenue or quantities that you expect to close during the forecast period. Typically required weekly, the submission takes a snapshot of your forecast at the time you make the submission. As management levels review forecast rollups, they compare the current forecast against the submitted forecast numbers and quota, and know that the forecast is up to date. Any differences better inform the forecast for the entire sales team and the business.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional**, **Performance**, and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

On the forecasts page, use the icons in the forecast summary for each period to submit forecasts and to review past forecast submissions.

Icon	Description
	Indicates that a forecast for the period hasn't been submitted in the past 7 days.
	Indicates that a forecast for the period has been submitted in the past 7 days. Forecast managers can review but not change forecast submissions from their direct reports.

Forecast Your Consumption Revenue

Use Consumption Forecasts to view and predict revenue for a consumption-based business within a specific timeframe. The forecasts page consists of various forecast types, each providing a consolidated view. These forecasts display totals and subtotals of consumption amounts, organized by forecast rollup and time period. Forecasts can include adjustments made by forecast managers to their associates' forecasts and by associates to their own forecasts.

REQUIRED EDITIONS

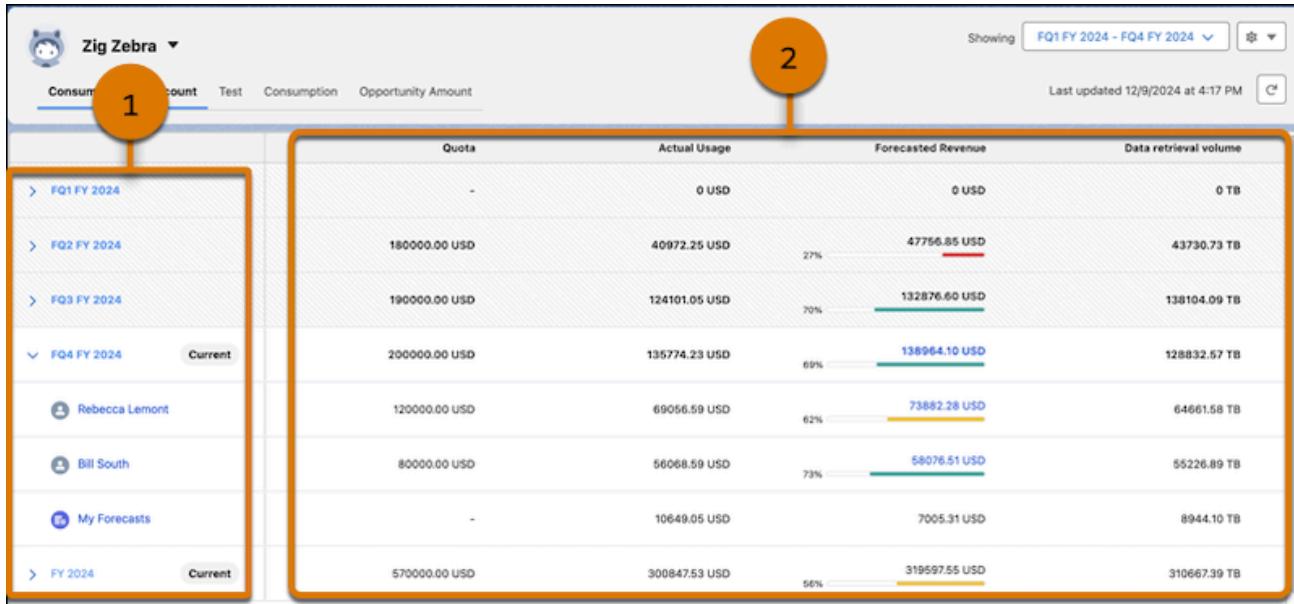
Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and in **Einstein 1 Sales Edition** with Sales Cloud

Consumption Forecasts uses the forecast hierarchy to roll up consumption data into forecasts for your teams. The organization of forecasts in each forecast type varies based on user roles: forecast manager and associate.

Forecast Manager View

This image illustrates the forecast manager's view with forecast projections for the quarters in the current year.



- The quarters in the current year are shown (1). Expand each quarter to see the names of immediate subordinates (associates) and a link to the associate view if the manager owns any accounts. To view an associate's forecasts, select their name. If the associate has their own subordinates, the view remains the same. Otherwise, the associate view is shown.
- The forecast measures for each quarter are shown in these columns (2).

Associate View

This image illustrates the associate's view with forecast projections for products or services in an account for the quarters in the current year.



- On the left side, a list of accounts that the associate owns is shown (1). Expand the account to show the products or services that fall under the account.
- The forecast projections for each quarter in the year are shown in these columns (2).

Adjust Forecasts

Forecast managers can adjust forecast totals for themselves and their immediate associates.

Associates can adjust their own forecasts and those of subsequent products or services, depending on the defined ownership.

Increase or Decrease Forecasts for Upcoming Periods

Increase or decrease forecasts by a percentage based on the forecast value you want to adjust for the selected upcoming periods, starting from the next period.

Adjust Forecasts Based On Total Value

Configure adjustments to automatically adjust forecasts by a percentage of the total value for the selected upcoming periods.

Adjust Forecasts

Forecast managers can adjust forecast totals for themselves and their immediate associates. Associates can adjust their own forecasts and those of subsequent products or services, depending on the defined ownership.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited**, and in **Einstein 1 Sales Edition** with Sales Cloud

Your adjustments roll up in the hierarchy and become visible to managers.

1. On the forecasts page, hover over the forecast value you want to adjust, and then click .
2. Enter the adjusted value and notes about why you made the adjustment.
3. Save your changes.

An  icon appears in the cell to show that you adjusted the forecast. When you hover over it, a window appears to show the adjustment details.

To adjust multiple forecasts at the same time, double-click each forecast value to edit it, and then click **Save**.

To revert an adjustment you made, hover over it, click , and then click **Revert**.

Increase or Decrease Forecasts for Upcoming Periods

Increase or decrease forecasts by a percentage based on the forecast value you want to adjust for the selected upcoming periods, starting from the next period.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited**, and in **Einstein 1 Sales Edition** with Sales Cloud

For example, configure adjustments to automatically increase forecasts by 5% on the forecast value over the next 6 months.

 **Note** The automatic adjustment of forecasts starts from the next period. For example, if you configure the adjustment in March to apply over the next 3 months, it begins in April and continues through June.

1. On the forecasts page, hover over the forecast value you want to adjust, and then click .
2. In Adjustment Type, select **Increase or Decrease**.
3. Select the number of periods for which you want to adjust the forecast value.

4. Enter the percentage by which you want to increase or decrease and add notes about why you made the adjustment.
5. Save your changes.

Adjust Forecasts Based On Total Value

Configure adjustments to automatically adjust forecasts by a percentage of the total value for the selected upcoming periods.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and in **Einstein 1 Sales Edition** with Sales Cloud

For example, configure adjustments to automatically adjust forecasts by 5% on the total value over the next 6 months.

1. On the forecasts page, hover over the forecast value you want to adjust, and then click .
2. In Adjustment Type, select **Custom**.
3. Select the number of periods for which you want to apply adjustments.
4. In each period, enter the percentage by which you want to calculate the adjustment, and add notes about why you made the adjustment.
5. Save your changes.

Change Your Forecast Date Range on the Forecasts Page

Your Salesforce admin sets up a default forecast date range display. For example, your default can be three months into the future. Use this range, or change the date range that's shown for your own forecast.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional**, **Performance**, and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To use Salesforce Forecasting:

View All Forecasts

OR

Allow Forecasting

USER PERMISSIONS NEEDED

OR

Delegated forecast manager status

To access role-based forecasts in Lightning Experience:

View Roles and Role Hierarchy

The range that you select is relative to the current month or quarter. For example, in January, you select January as your beginning month and April as the ending month. In February, the date range becomes February to May, and so on. Your date range selection remains until you choose another one.

1. Click the **Forecasts** tab.
2. If you're using Lightning Experience, select the **Showing** dropdown. If you're using Salesforce Classic, click **Change** in the rollup table.
3. Select a beginning and ending period.
4. Save your changes.

See Also

[Monthly and Quarterly Pipeline Forecasts](#)

Share Forecasts with Stakeholders

Increase visibility into your forecast and ensure stakeholders can view, adjust, submit, and report on projected sales. For example, a sales manager can share her forecasts with Sales Ops for reporting purposes, or with another sales manager while she's out of the office.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To use Salesforce Forecasting:

View All Forecasts

OR

Allow Forecasting

OR

Delegated forecast manager status

USER PERMISSIONS NEEDED

To access role-based forecasts in Lightning Experience:

View Roles and Role Hierarchy

To share forecasts:

Forecast manager in the role-based or territory-based hierarchy

Forecast managers can share their forecasts page with other Salesforce users at their company who have access to forecasts, and who have read access to their user in Salesforce. For example, if Jane shares her forecast data with Tom, Tom must have at least read access to Jane's user record to view the forecast data.

You can't share forecasts with portal users, Chatter users, or groups, or share territory forecasts.

1. On the forecasts page, click .
2. Choose the coworker you want to grant access to your forecast.
3. Select whether the user can only view your forecast or whether they can view and edit. Users given View and Edit access can adjust your forecast while it's shared. You can change your selection later.
4. Save your changes.

To view a forecast that's shared with you, choose a coworker from the My Shared Forecasts list on the forecasts page. If the rollup includes opportunities that you don't have access to, you can see the opportunities in the opportunity list on the forecasts page, but you can't view the opportunities' detail pages. If the forecast uses a custom field that you don't have access to, you can see the forecast amounts, but not the amounts for the specific custom field.

To stop sharing your forecast, click , select **Edit**, and remove the coworker's name. Be sure to save your changes.

Guidelines for Refreshing Forecasts

Certain actions can change forecasts. For example, while you're viewing the forecasts page, your subordinates can edit related opportunities and adjust the forecasts of their own subordinates. And you can adjust one of your subordinates' forecasts from your own page. To see these changes, refresh the forecasts page.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional**, **Performance**, and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

In Salesforce Classic, when an opportunity update or forecast adjustment occurs for a forecast that you selected in a rollup table, we let you know. To view the changes in either Salesforce Classic or Lightning Experience, click **Refresh**.

- If the selected forecast has adjustments in process (your own or your subordinate's), you see a processing indicator (L) next to the forecast.
- If any of the selected forecast's related opportunities have been updated, you see the processing indicator (L) in the header of the opportunities list.
- A Processing Changes message appears in the opportunities list header.

In Lightning Experience, a timestamp shows the date and time when you refreshed. In-progress updates aren't indicated.

See Also

- [Adjustments in Pipeline Forecasts](#)
[Adjustment Deletions in Pipeline Forecasts](#)

Report on Forecasts

Unlock details about forecasts and forecasts trends when you create custom report types for forecasts. For example, help managers and other stakeholders see the accuracy of planned forecasts versus adjusted and closed forecasts.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

[Pipeline Forecasts Reports](#)

Review guidelines for how to get the most from reports about forecasts.

See Also

- [Preparing Sales Leaders to Report on Forecasts](#)
[Creating a Forecasting Custom Report Type](#)

Pipeline Forecasts Reports

Review guidelines for how to get the most from reports about forecasts.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

- To determine whether forecasting reports are available, go to the Reports tab, and then click **New Report**. Select the folder in which your Salesforce admin has placed the forecasting report types. For

- example, many admins store Forecasting Items and Forecasting Quotas reports in a Forecasts folder. If you don't see the fields or report type names described in this table, check with your admin.
- If a report that uses a specific forecast type doesn't run, that forecast type was likely deleted. Check with your admin.
 - Reports contain the latest information at the time when you run the report. If changes are in progress while the report is running, you can see a difference between your reports and the forecasts page.
 - The data available to you in a report depends on what you have access to and can view in Salesforce Forecasting. For example, forecast managers can view adjustments, but someone who's not a forecast manager running a similar report doesn't see the adjusted forecasts in reports. A forecast can consist of a rollup of many users' forecasts, so examine report results closely when using summary fields.

Report Element	How to See It
A forecast summary from a specific user's perspective.	Create a Forecasting Item report, and add a filter using Owner: Full Name. Filter by the person's name.
A forecast summary from a specific territory's perspective.	<p>Create a Forecasting Item or Forecasting Quotas report, and add a filter using Territory: Label. Filter by the territory's name.</p> <p>Forecasting Item and Forecasting Quotas reports don't include territory-based forecasts in either of these situations.</p> <ul style="list-style-type: none"> You select the My direct reports' forecasting items or My direct reports' forecasting quotas filter. Both role-based and territory-based forecast types are enabled, and you select the All forecasting items or All forecasting quotas filter.
The sum of a person's revenue opportunities, without adjustments.	Include Owner Only Amount in your Forecasting Item report. For example, if you own two opportunities, each worth \$10,000, the Owner Only Amount is \$20,000. To view the same information for quantity (for role-based forecasts only), add Owner Only Quantity to the report.
The sum of a person's owned revenue opportunities and the person's subordinates' opportunities, without adjustments. Subordinates include everyone reporting up to a person in the forecast hierarchy. This amount is visible only on reports.	Include Amount Without Adjustments in your Forecasting Item report. For example, if the sum of the amount of all opportunities that you own is \$20,000, and the sum of the amount of your subordinates' opportunities is \$55,000, the Amount Without Adjustments is \$75,000. To view the same information for quantity (for role-based forecasts only), add Quantity Without Adjustments to the report.
The forecast number as seen by the forecast owner. This number is the sum of the owner's revenue opportunities and the owner's	Include Amount Without Manager Adjustments in your Forecasting Item report. For example, Anne has an Amount Without Adjustments of \$75,000, made up of \$20,000 of her own opportunities and \$55,000 of opportunities owned by Ben,

Report Element	How to See It
subordinates' opportunities, including adjustments made by the forecast owner on the owner's or subordinates' forecasts. It doesn't include adjustments made by forecast managers above the owner in the forecast hierarchy.	her subordinate. She adjusts Ben's amount to \$65,000 for a total of \$85,000. If you adjust Anne's number from \$85,000 to \$100,000, you see \$85,000 in Amount Without Manager Adjustments because that's the amount Anne sees. Anne can't see your adjustments because you're her manager. To see the amount that includes your adjustment to \$100,000, look at Forecast Amount. To view the same information for quantity (for role-based forecasts only), add Quantity Without Manager Adjustments to the report.
The revenue forecast from the forecast manager's perspective and the sum of the owner's and subordinates' opportunities, including all forecast adjustments.	Include Forecast Amount in your Forecasting Item report. For example, you're a forecast manager and have another forecast manager reporting to you who has an Amount Without Manager Adjustment totaling \$85,000. If you adjust the forecast to \$100,000, the Forecast Amount is \$100,000. To view the same information for quantity (for role-based forecasts only), add Forecast Quantity to the report.
Whose forecasts have adjustments made to them.	Include Has Adjustment in your Forecasting Item report. For example, if you make a manager adjustment to one of your subordinate's forecasts, this checkbox is selected. If your subordinate adjusts one of their subordinate's forecasts, this checkbox is selected. However, unless you have the View All Data permission, if your forecast manager adjusts your forecast, this checkbox remains deselected. You don't have access to your forecast manager's adjustment information. Also add Has Owner Adjustment. If forecast users adjust their own forecasts, this checkbox is selected.
Quota detail for your forecasts.	Create a Forecasting Quotas report. For example, depending on how your Salesforce admin set up the report type, you can include fields, such as the full name of the quota owner and territory. Then you can filter by your own name to see quotas that you created and their related accounts, owners, and territories.
How forecasts today compare with earlier forecasts.	Create a Forecast with Historical Trending report, and then compare the value of the Forecast Amount field at the beginning of the month with its value at the end of the month, sorted by owner. To create the report, switch to Salesforce Classic. You can run the report in Lightning Experience and Salesforce Classic.
Results for your direct reports only.	When creating a forecasting report, choose My Direct Reports' <item name> from the Show Me (Lightning Experience) or

Report Element	How to See It
	Show (Salesforce Classic) menu. The report shows results only for role-based forecast types.
Which type of forecast the results are from.	Refer to the Forecasting Type: API Name field in the report results. This field is included in the default page layout for Forecasting Item and Forecasting Quota reports.

See Also

[Preparing Sales Leaders to Report on Forecasts](#)

[Creating a Forecasting Custom Report Type](#)

Salesforce Forecasting: What's Different or Not Available in the Salesforce Mobile App

Not every Lightning Experience feature is in the Salesforce mobile app. Find out what's different.

- You can adjust your own forecasts but not your subordinates' forecasts.
- Removing adjustments isn't supported, but you can edit your own adjustments.
- Changing the forecasting currency isn't supported.
- Selecting whether to show or hide quota information isn't supported.
- Custom forecasts page layouts that you use in desktop aren't available.
- If you have Pipeline Inspection enabled, deal-level insights in the forecasts opportunity list aren't available.
- Opportunity Product Split forecast types aren't available. Review those forecasts in desktop.
- Submitting your forecast isn't support. Submit your forecasts in desktop.

Salesforce Forecasting Elements

If you're using forecasting features in Salesforce, learn about the elements that comprise a forecast.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional, Performance, and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

- **Adjustment**—An adjustment indicates a judgment about the final figure a forecast's opportunities are expected to bring in at the close of the forecast period. Forecast managers and sales reps can make adjustments. Some forecast managers adjust their own or a subordinate's forecast. For example, they know that certain reps tend to be too optimistic or too conservative when assigning values to opportunities. If sales reps think that forecasts are understated or overstated, they can adjust their own forecasts. Forecast managers can adjust forecasts that don't include adjustments and forecasts

that include adjustments made by someone else on their opportunity team. An adjustment doesn't change the underlying gross rollup. It adds a layer of detail. If multiple forecast types are active, each type maintains separate adjustments.

To provide additional clarity about the adjusted amount, forecast managers can apply their judgment about whether a direct subordinate's opportunities are considered in or out of the adjusted forecast total.

Forecast managers can adjust their own Commit and Best Case forecasts and the forecasts of subordinates one level below them in the forecast hierarchy. They can view adjustments that subordinates make at every level below them in the forecast hierarchy. Adjustments made to their subordinates' forecasts roll up into their own forecasts. Adjustments can include an explanatory note. Adjustment notes don't appear in reports.

Any Salesforce user with whom a forecast manager has shared forecasts and granted View and Edit access can adjust the shared forecasts.

- Amount Without Adjustments (Report Element)—The sum of a person's owned revenue opportunities and the person's subordinates' opportunities without adjustments. Subordinates include everyone reporting up to a person in the forecast hierarchy.
- Amount Without Manager Adjustments (Report Element)—The forecast number as seen by the forecast owner. This amount is the sum of the owner's revenue opportunities and the owner's subordinates' opportunities. The amount includes adjustments made by the forecast owner on the owner's or subordinates' forecasts. The amount doesn't include adjustments made by forecast managers above the owner in the forecast hierarchy.
- Corporate Currency—The currency in which your corporate headquarters reports revenue and the basis for all currency conversions.
- Custom Calculated Column—A forecast column that has a value based on a formula that your Salesforce admin creates.
- Custom Filter—A rule that defines the conditions for filtering opportunity forecast data. With custom filters, you can include or exclude different types of data in your forecasts. An admin applies custom filters when creating a forecast type.
- Forecast—An expression of expected sales based on the gross rollup of a set of opportunities. The forecasts on the forecasts page are totals and subtotals of the opportunities in the four standard forecast categories: Pipeline, Best Case, Commit, and Closed. Salesforce admins can show a Most Likely category in Lightning Experience, rename single category rollups, and rename cumulative category rollups. Depending on how Salesforce is set up, these forecasts can reflect opportunities from one or multiple forecast categories.

In the forecasts grid, forecasts are organized by forecast rollup, time period, and optionally by product family and territory. Forecasts can include adjustments made by forecast managers to their immediate subordinates' forecasts and adjustments made by users to their own forecasts.

Users can view forecasts and related opportunities by forecast category for everyone below them in the forecast hierarchy or for just one person. For example, view the July Best Case forecast for sales managers reporting to you, all the sales reps who report to any one of your managers, or just one individual.

- Forecast Amount (Report Element)—The revenue forecast from the forecast manager's perspective and the sum of the owners' and subordinates' opportunities, including all forecast adjustments.
- Forecast Category—The category within the sales cycle to which an opportunity is assigned based on its opportunity stage. The standard forecast categories are Pipeline, Best Case, Commit, Omitted (not

- included in forecasts), and Closed. Salesforce admins can show a Most Likely category in Lightning Experience, rename single category rollups, and rename cumulative category rollups.
- Forecast Currency—A company’s corporate currency or each forecast owner’s personal currency.
 - Forecast Date Range—The date range that a user shows in their forecasts. Depending on the settings the Salesforce admin selects, the range can include months or quarters.
 - Forecast Date Type—The type of date that forecasts are based on: close date, product date, or schedule date.
 - Forecast Display Currency—The currency that a user selects in which to show forecasts. Users make the selection directly from the forecasts page. The selection must be one of your company’s enabled currencies.
 - Forecast Hierarchy—A nested, expandable list of forecast users or territories that determine how forecasts roll up within a company and who can view and adjust them. The role-based forecast hierarchy is based on the user role hierarchy and specifies which users are forecast managers. The territory-based forecast hierarchy is based on the territory hierarchy and shows which territories have forecast managers assigned. When forecasting is enabled, a forecast hierarchy is generated based on the role hierarchy, but Salesforce admins can add or remove managers, sales reps, or other users. To make territory forecasts available to users, admins assign forecast managers to territories in the territory hierarchy.
 - Forecast Owner—A forecast user who owns opportunities or is a forecast manager in the forecast hierarchy. Forecast managers can have their own opportunities.
 - Forecast Quantity (Report Element)—The quantity forecast from the forecast manager’s perspective and the sum of the owner’s and subordinates’ opportunities, including all forecast adjustments.
 - Forecast Sharing—Forecast managers can share their forecasts page with any Salesforce user at their company. When sharing, managers specify whether coworkers can adjust their forecasts or only view them.
 - Forecast Type—Forecasts are configured to use specific types of data from standard opportunity fields, opportunity products, opportunity splits, overlay splits, territories, product schedules, or custom currency, number, and date fields. Quantity measure isn’t available for splits forecast types. Up to four forecast types can be active at a time. For details about what data each forecast type is based on, see [Pipeline Forecast Types](#).
 - Forecasted Amount—The Forecasted Amount column in the opportunity list shows the actual values that contribute to the forecast amounts, not the overall opportunity totals. The Forecasted Amount applies to splits and product family forecast types, and for product and schedule date forecasts.
 - Forecasts Grid—The top portion of the forecasts page. The opportunities list at the bottom of the forecasts page corresponds dynamically with selections on the forecasts grid.
 - Gross Rollup—An expression of expected sales based on the gross value of a set of opportunities. A forecast always includes a gross rollup and can also include adjustments.
 - Manager Judgment—An indication at the opportunity level about whether an opportunity is in or out of the forecast.
 - Opportunities—The sales and pending deals that a sales team wants to track.
 - Opportunity Product—A line item in an opportunity’s Products related list. Product date forecasts are based on the product’s Date field and its Total Price, Quantity, or custom measure field.
 - Opportunity Splits—Sharing credit across an opportunity team. If your company forecasts on opportunity splits, users can see the split information on the forecasts page.
 - Opportunity Stage—The current stage of an opportunity, such as Prospect or Proposal. Opportunity

- stage values correlate with forecast category values to determine how the opportunity contributes to a forecast.
- Owner Only Amount (Report Element)—The sum of a person's revenue opportunities without adjustments.
 - Owner Only Quantity (Report Element)—The sum of a person's quantity opportunities without adjustments.
 - Personal Currency—A user's own display currency that's different from the corporate currency. This currency must be an active currency in Salesforce.
 - Product Family—A way to categorize your company's products. For example, if a company sells hardware and software, the Salesforce admin creates two product families: Hardware and Software.
 - Product Schedule—The payment and delivery cycles for products that are paid for or delivered over time. Schedule date forecasts are based on a schedule's Date field and its Revenue, Quantity, or custom measure field.
 - Quantity Without Adjustments (Report Element)—The sum of a person's owned quantity opportunities and the person's subordinates' opportunities without adjustments. Subordinates include everyone reporting up to a person in the forecast hierarchy.
 - Quantity Without Manager Adjustments (Report Element)—The forecast number as seen by the forecast owner. This number is the sum of the owner's quantity opportunities and subordinates' opportunities, including adjustments made on the subordinates' forecasts. It doesn't include adjustments made by forecast managers above the owner in the forecast hierarchy.
 - Quota—The monthly or quarterly sales goal that's assigned to a user or territory. A manager's quota equals the sales that the manager and team are expected to generate together. The quota rollup is done manually by users and managers. Quotas can use revenue, quantity, or custom measure data. If multiple forecast types are active, each type maintains separate quota information. Each territory quota is associated with a territory and a user.
 - Revenue—The total expected revenue from the opportunities in a given category.
 - Subordinate—A forecast user or territory below another forecast user or territory in the forecast hierarchy. Users can view all their subordinates' forecasts. If adjustments are enabled, users can view all their subordinates' adjustment information and adjust the forecasts of subordinates one level below them in the hierarchy. Forecasts and adjustments roll up into the forecasts on the forecasts page.

Sales Territories

Manage and maintain your company's sales territories. Create territory types, build a model, and then add and test your account assignment rules. When you're satisfied with your model, activate it, then assign accounts, leads, and users. Roll out your model to your team, and then run reports to assess its impact and make adjustments as needed.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Sales Territories Concepts

Determine whether planning and managing territories in Salesforce can help your teams optimize account coverage and align with leadership goals.

Enable Features for Sales Territories

Prepare your sales teams to access the records assigned to their territories and communicate among teammates.

Set Up Territory Types and Territories

Organize all the elements of your company's territory management plan, including a territory hierarchy, account, lead, and user assignments, and territory forecasts. Keep your model in the planning state as you perform key tasks that involve defining your territory model.

Setting Up and Managing Territory Assignments

Automate territory assignments for accounts using rules that you define. Rules can apply to parent territories and their child territories. Or assign accounts and leads manually directly in account and lead detail pages.

Running Reports on Territories

Keep sales management and stakeholders informed about territory assignments for users, accounts, leads, and opportunities. Run reports using the custom report types that you create for Sales Territories.

Maintain Sales Territories

Archive or delete territory models. If you established another means for sharing files throughout your sales team, you can disable Sales Territories.

Manage Territories with Sales Territories

If you manage, administer, or belong to a sales territory, explore your territory model to understand the organizational structure for your team's sales efforts.

Things to Know About Sales Territories

Review allocations and discover how account assignment rules work.

Sales Territories Concepts

Determine whether planning and managing territories in Salesforce can help your teams optimize account coverage and align with leadership goals.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Planning and Managing Territories

Establish territory models that give your sales teams the best coverage. Design models on a map by using Territory Planning, available as an add-on product. Then put your models into action by using Sales Territories. Continuous model optimizations help your company make the most of staffing,

leadership, and economic changes.

Territory Type

Territory types help you organize your territories by key characteristics important to your company. Every territory you create has a territory type. Territory types are used for organizing and creating territories only. They don't appear on territory model hierarchies.

Territory Type Priority

Specifying and managing territory type priority information helps you choose the appropriate territory type for territories you create or edit. You create your own priority scheme. For example, *001* can indicate that a territory type is the highest priority or the lowest. Make sure that your scheme can scale as you add more territory types.

Territory

Territories organize groups of accounts, leads, and the Salesforce users who work with them. Territories are created based on territory types.

Territory Model

A territory model represents a complete territory management system for your company. Modeling lets you create and preview multiple territory structures and different account, lead, and user assignments before you activate the model that works best.

Territory Hierarchy

The territory hierarchy shows a model's territory structure and serves as its main interaction point. Start from the hierarchy to create, edit, and delete territories; run assignment rules for territories, and navigate to territory detail pages for more information. From the hierarchy, you can also assign territories to opportunities, run assignment rules at the model level, and activate or archive the model. The forecasts hierarchy for territory forecasts is based on your territory hierarchy in the active territory model.

Territory Model State

Territory model state indicates whether a territory is in the planning stage, in active use, or archived. You can have only one active territory model at a time. But you can create and maintain multiple models in planning or archived state to use for extra modeling or reference. Some states reflect a territory model's lifecycle and others indicate errors in processing when states are changed.

How Do Permissions for Territories Affect Feature and Data Access?

Anticipate how permissions for Sales Territories affect administration and provide access to records and data.

Territory Management 2.0 Data Model

Learn about the objects and relationships that represent Sales Territories.

See Also

[Enterprise Territory Management Implementation Guide](#)

Planning and Managing Territories

Establish territory models that give your sales teams the best coverage. Design models on a map by using Territory Planning, available as an add-on product. Then put your models into action by using Sales Territories. Continuous model optimizations help your company make the most of staffing, leadership,

and economic changes.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Bird's-Eye View of Planning and Managing Territories

Design territory models that align with leadership goals, promote equitable opportunities, and motivate sales teams by using Territory Planning. Then fine-tune account access and reflect leadership changes based on the hierarchy that you establish with Sales Territories.

Designing Territory Models

Plan territory models on a map using Territory Planning, an add-on product that optimizes sales coverage and aligns teams with leadership goals. Assign records and users to territories based on rules and criteria that you establish. Or automate assignments using other methods that meet your requirements for distributing work equitably.

Managing Territories

Keep sales reps focused on their individual areas of responsibility using territory models that you design in Territory Planning and then publish to Sales Territories. The model that you activate limits your reps' access to only their assigned accounts, leads, and opportunities.

Optimizing Your Territory Model Continuously

Account for staffing, leadership, and economic changes while you ensure the best coverage for your company's accounts, leads, and opportunities. Optimize your model by fine-tuning assignment rules, redistributing work with consideration for skill levels and tenure, or balancing territories, all in Territory Planning. Publish your optimized model to Sales Territories, and then activate it when you're ready.

Bird's-Eye View of Planning and Managing Territories

Design territory models that align with leadership goals, promote equitable opportunities, and motivate sales teams by using Territory Planning. Then fine-tune account access and reflect leadership changes based on the hierarchy that you establish with Sales Territories.



A small icon showing a map with a highlighted area.	A small icon showing a gear and a checkmark.	A small icon showing a map with a highlighted area.
Discover Territories Planning and Managing Territories Trailhead: Territory Management	Set Up Features Enterprise Territory Management Implementation Guide Enable Features for Sales	Design a Territory Model Creating Alignments Designing Strategic Territories Video: Top-Down Planning

Basics	Territories	
<p><i>Trailhead: Salesforce Maps Territory Planning</i></p> <p><i>Video: Understand Data Flow</i></p> <p><i>Trailhead: Plan Your Territories the Salesforce Way</i></p> <p><i>Resource Center: Sales Territory Mapping: How to Design and Optimize Your Plan</i></p>	<p><i>Implementing Salesforce Maps Territory Planning</i></p>	
		
Assign Work to Your Team	Activate Your Territory Model	Fine-Tune Territories
<p>Create Rules to Assign Accounts to Territories</p> <p>Add Assignment Rules to Territories</p> <p><i>Trailhead: Assign Accounts, Rules, and Users to Territories</i></p> <p>Assigning Units Based on Rules and Criteria</p> <p><i>Video: Leverage Assignment Rules</i></p> <p><i>Video: Optimize Territories</i></p>	<p><i>Video: Publish from Territory Planning to Enterprise Territory Management</i></p> <p><i>Publish Alignments to Enterprise Territory Management</i></p> <p><i>Preview Territory Assignments for Accounts</i></p> <p><i>Activate a Territory Model</i></p>	<p><i>Manage Territories with Sales Territories</i></p> <p><i>Keeping Territories Running Smoothly</i></p>

Designing Territory Models

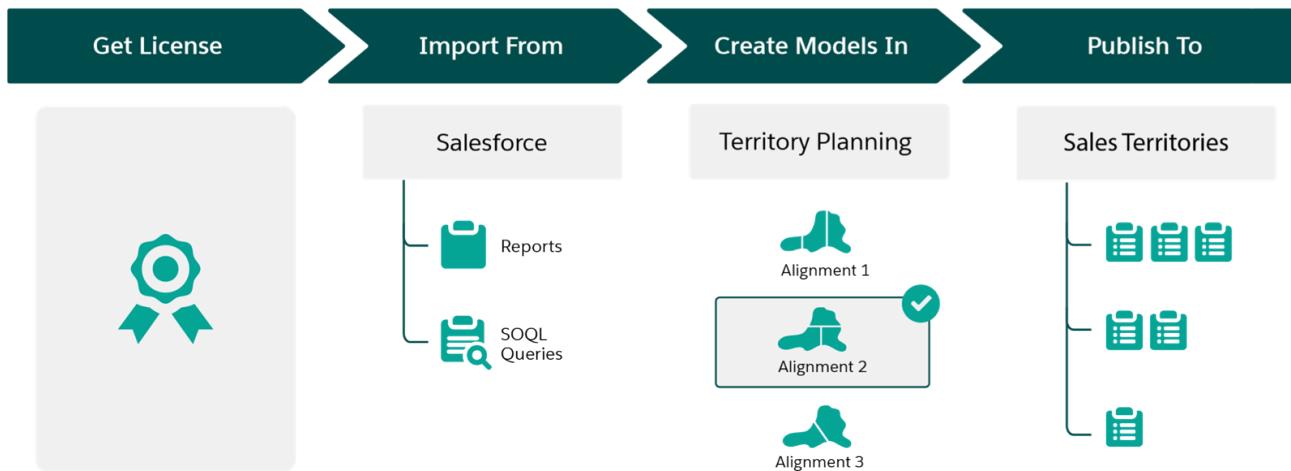
Plan territory models on a map using Territory Planning, an add-on product that optimizes sales coverage and aligns teams with leadership goals. Assign records and users to territories based on rules and criteria that you establish. Or automate assignments using other methods that meet your requirements for distributing work equitably.

REQUIRED EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Get an idea of what's involved in planning and managing territories when you pair Territory Planning with Sales Territories. After you get your Territory Planning license, design a territory model and then publish it to Sales Territories. Here's how.



High-Level Flow	How It Helps Your Business
Get a license for Territory Planning	<p>Plan strategic territories aligned with leadership goals on a map with consideration to:</p> <ul style="list-style-type: none"> • Geographic location • Equitable distributions of work based on rep performance • Visualizations for identifying boundaries, trends, and business patterns • Economic conditions, leadership changes, and product offerings <p>If you don't have a license, discuss your options with your Salesforce account executive.</p>
Import data from Salesforce	<p>Create models that include accounts, leads, and opportunities from Salesforce based on your datasets from Territory Planning. Reports and queries gather the Salesforce data that you specify for your planning efforts.</p> <p>Import supplemental data from other sources using CSV files that contain metrics, product details, or other relevant business data that helps you plan with intention.</p>
Create models in Territory Planning	<p>Visualize how your optimized models:</p> <ul style="list-style-type: none"> • Appear on a map • Compare with your other modeling scenarios • Result in balanced and equitable assignments

High-Level Flow	How It Helps Your Business
	<ul style="list-style-type: none"> Contribute to your business' sales goals <p>Import supplemental data into your scenarios from CSV files that contain any relevant business data that helps with your analysis.</p>
Publish models to Sales Territories	<p>Apply your model throughout your sales hierarchy. That way, you:</p> <ul style="list-style-type: none"> Ensure that each rep accesses and focuses on only their individual areas of responsibility Fine-tune assignments using rules that you run periodically Align your sales teams with your company's leadership goals

Managing Territories

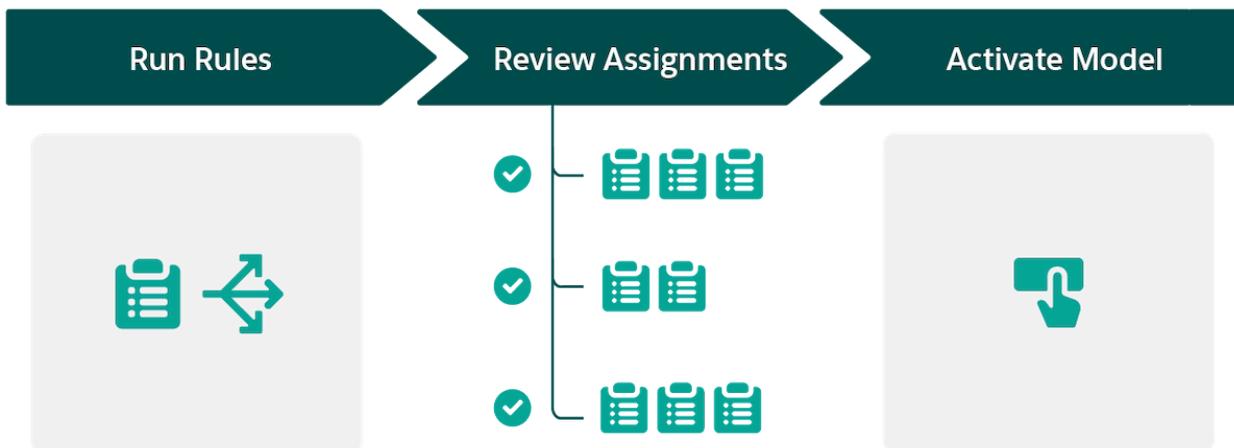
Keep sales reps focused on their individual areas of responsibility using territory models that you design in Territory Planning and then publish to Sales Territories. The model that you activate limits your reps' access to only their assigned accounts, leads, and opportunities.

REQUIRED EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Get an idea of what's involved in planning and managing territories when you pair Territory Planning, an add-on product, with Sales Territories. After you design and publish your territory model to Sales Territories, run assignment rules, review assignments, and then activate your territory model. Here's how.



High-Level Flow	How It Helps Your Business
Run assignment rules	Apply assignments to records based on rules and criteria that you define in Territory Planning.
Review assignments	Verify that your account, lead, opportunity, and user assignments appear the way you expect. Then fine-tune any assignments that require your attention.
Activate your territory model	Apply your assignments throughout your territory hierarchy. Activating your model: <ul style="list-style-type: none"> Enforces the principle of least privilege and restricts your reps' access to only their assigned accounts, leads, and opportunities Gives anyone above your reps in the territory hierarchy access to those records

Optimizing Your Territory Model Continuously

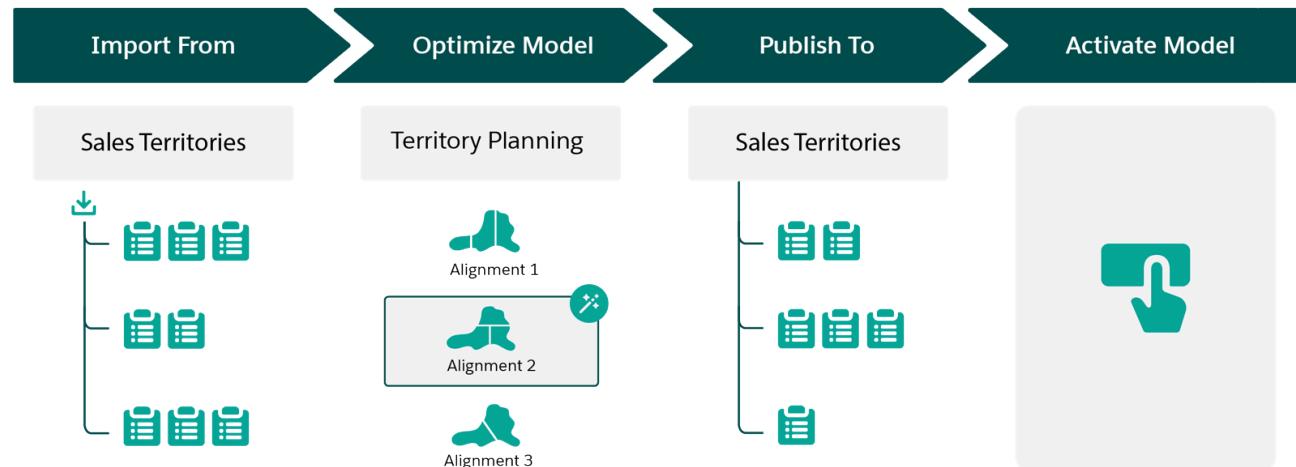
Account for staffing, leadership, and economic changes while you ensure the best coverage for your company's accounts, leads, and opportunities. Optimize your model by fine-tuning assignment rules, redistributing work with consideration for skill levels and tenure, or balancing territories, all in Territory Planning. Publish your optimized model to Sales Territories, and then activate it when you're ready.

REQUIRED EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Get an idea of what's involved in planning and managing territories when you pair Territory Planning, an add-on product, with Sales Territories. When economic changes and compelling events impact your sales teams, optimize your territory model on a map in Territory Planning. Then publish your optimized model to Sales Territories where you activate it. Here's how.



High-Level Flow	How It Helps Your Business
Import model data from Sales Territories	Work with your established territory model and refine it based on your changing needs.
Optimize territory models in Territory Planning	Reflect changes that affect your sales teams in your updated model.
Publish the optimized model to Sales Territories	Run assignment rules, review your updated assignments, and make any adjustments before you activate your optimized territory model.
Activate your territory model	Apply the changes from your updated territory model.

Territory Type

Territory types help you organize your territories by key characteristics important to your company. Every territory you create has a territory type. Territory types are used for organizing and creating territories only. They don't appear on territory model hierarchies.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

For example, you can create a territory type called *Universal Telco Named Accounts*, then from that type, create territories that include named accounts. Or you can create a territory type called *US Geographic*, and from that type create territories based on states or regions.

When you create a territory type, make sure that the label and description clearly indicate what kinds of territories belong to that type.

See Also

[Territory Type Priority](#)

Territory Type Priority

Specifying and managing territory type priority information helps you choose the appropriate territory type for territories you create or edit. You create your own priority scheme. For example, *001* can indicate

that a territory type is the highest priority or the lowest. Make sure that your scheme can scale as you add more territory types.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

When you create a territory, you select a territory type from the **Territory Type** lookup field. From the lookup, you can view the territory type's assigned priority.

 **Example** Your organization uses territory type priority to reflect your sales strategy for the year. Your organization expects more opportunities within the US east coast than the US west coast in the coming year, so the East Coast territory type is assigned priority *001* and the West Coast territory type is assigned *005*. These priority assignments help those creating territory records make the right territory type choice. At mid-year, you project unexpected growth opportunities in the Great Lakes region, so you create a territory type called Great Lakes and assign it priority *003* to reflect the change in your sales strategy.

See Also

[Territory Type](#)

Territory

Territories organize groups of accounts, leads, and the Salesforce users who work with them. Territories are created based on territory types.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

The territory record shows assigned users, manually assigned records, the forecast manager, and rules that assign accounts automatically. A territory can have both parent and child territories. Depending on how your organization assigns records, a record can be assigned to more than one territory.

Territory Model

A territory model represents a complete territory management system for your company. Modeling lets you create and preview multiple territory structures and different account, lead, and user assignments before you activate the model that works best.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Each territory model features a graphical hierarchy. The hierarchy shows your model's territory structure (including parent and child territories) and lets you create, edit, and delete territories and view their detail pages. Your Salesforce edition determines [the number of territory models](#) that you can create and modify at a time. Only one model can be active at any time. Activate the model you want to use to finalize its account, lead, and user assignments.

Territory Hierarchy

The territory hierarchy shows a model's territory structure and serves as its main interaction point. Start from the hierarchy to create, edit, and delete territories; run assignment rules for territories, and navigate to territory detail pages for more information. From the hierarchy, you can also assign territories to opportunities, run assignment rules at the model level, and activate or archive the model. The forecasts hierarchy for territory forecasts is based on your territory hierarchy in the active territory model.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud



The name and state of the territory model appear at the top node of the hierarchy (1). Parent and child territories are nested beneath the model name. If a territory has a forecast manager assigned, the manager's name appears here (2). Create or edit child territories, or run their assignment rules (3).

Run the filter that assigns territories to opportunities (4). Run assignment rules for all territories in the model (5). Hover to learn when rules were last run (6). Set the model's state to *Active* or *Archive* (7). Toggle to a sorted list view and back to tree view (8).

Territory Model State

Territory model state indicates whether a territory is in the planning stage, in active use, or archived. You can have only one active territory model at a time. But you can create and maintain multiple models in planning or archived state to use for extra modeling or reference. Some states reflect a territory model's lifecycle and others indicate errors in processing when states are changed.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

The Manage Territories permission:

- Provides users access to territories in planning and archived state and to the list of accounts and leads assigned to territories in planning and archived state.
- Doesn't provide access to the accounts and leads assigned to territories in planning and archived state. Only the name and ID fields appear in the list. To run territory planning reports, users must get access to accounts and leads via a method other than the permission.

Lifecycle State	Definition
Planning	<p>The default state for every new territory model you create. The Planning state lets you preview a model's territory hierarchy before deploying it.</p>
Active	<p>The state of a territory model after you activate it and all processing is complete. Only one model in your Salesforce organization can be active at a time.</p> <p>A model in Active state lets users view model details, including hierarchies, territories, and all assigned accounts and users. Users assigned to territories within an active model can access and modify accounts and leads that they're assigned to within that model. And territory forecasts are based on your active territory model.</p>
Archived	<p>The state of a territory model after you archive it and all processing is complete. An archived model lets admins view hierarchy and rule assignments as they were configured when the model was active. Only the active model can be archived, and archived models can't be reactivated.</p> <p>When you archive a territory model or delete a territory on an active model, the Territory field is reset to a blank value on opportunity records with those territories assigned.</p> <p>And when you archive a territory model, Salesforce deletes your territory forecasts, forecast types, quotas, and adjustments. Before you archive a territory model, consider running the opportunity territory assignment filter and then taking screenshots of the forecasts page. You can also create a snapshot.</p>

Error State	Definition
Activation Failed	An error occurred during activation. Check your email for more information from Salesforce.

Error State	Definition
Archiving Failed	An error occurred during activation. Check your email for more information from Salesforce.

How Do Permissions for Territories Affect Feature and Data Access?

Anticipate how permissions for Sales Territories affect administration and provide access to records and data.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Make sure that user permissions provide the appropriate level of access for users. For example, if you want Sales Operations managers and selected Sales managers to be able to manage territories, assign the Manage Territories permission to them. Anyone who also creates account assignment rules needs the View All Records permission on Accounts.



Note Sales Territories operations that require Manage Territories also require View Setup and Configuration for accessing Setup. View Setup and Configuration isn't required for performing those operations via API.

Responsibility	Required permissions, roles, or ownership
Administer specific territories and their descendants	Administer Territory Operations Also requires configuration for the TerritoryAdminAssignment standard object through Salesforce API version 63 and later.
<ul style="list-style-type: none"> • Create territory models and all related records (such as territory types) • View and manage territory models in all states: Planning, Active, and Archived • Activate, archive, delete, or clone territory models • View territory information on territory-assigned accounts and 	Manage Territories

Responsibility	Required permissions, roles, or ownership
leads for territories in models in <i>all</i> states (Planning, Active, and Archived)	
<ul style="list-style-type: none"> • Create or edit account assignment rules 	View All Records on Accounts AND Manage Territories AND View Setup and Configuration OR Customize Application The fields available for account assignment rules depend on account field-level security settings. For example, a user has permissions to create account assignment rules, but their profile prevents them from viewing Annual Revenue on accounts. They can't create account assignment rules that include that field.
<ul style="list-style-type: none"> • View the Salesforce Setup tree, including territories settings • View the territory model in Active state, including its related records (such as territory types and assignment rules) and other elements (such as the territory hierarchy) • View the names of all accounts and leads assigned to territories in the Active territory model • View territory information on territory-assigned accounts and leads for territories in models in the Active state only 	View Setup and Configuration
View data for models in Planning and Archived states on reports that include territories, assigned records, or rules	Manage Territories
Manually assign a territory to an opportunity	Manual assignment capabilities depend on a few factors. See Requirements for Assigning Opportunities to Territories Manually .

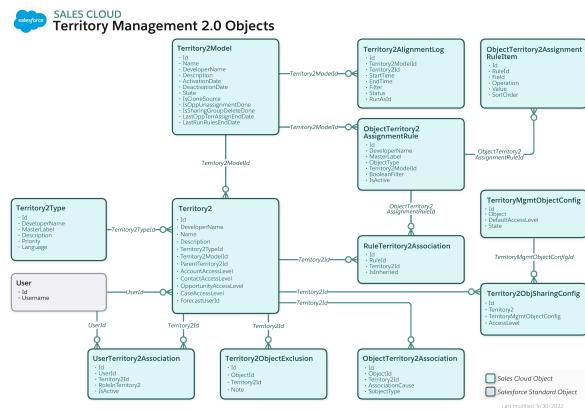
Territory Management 2.0 Data Model

Learn about the objects and relationships that represent Sales Territories.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud



View the [Territory Management 2.0 data model](#) on the Salesforce Architect page.

Enable Features for Sales Territories

Prepare your sales teams to access the records assigned to their territories and communicate among teammates.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Enable Sales Territories

Start the process for managing territories and distributing work to your reps.

Define Default User Access for Territory Records

Specify the default settings for how users can access and modify records associated with the sales territories you set up.

Enable Filter-Based Opportunity Territory Assignment

Automate assignment of territories to opportunities when you enable and configure filter-based opportunity territory assignment.

Collaborate on Territory Models

Set up your team to communicate about model development using Chatter Feed Tracking for territory models. Your team can post and respond to comments, attach files, and get notifications when model states change or key fields are updated.

See Also

[Sales Territories Concepts](#)

Enable Sales Territories

Start the process for managing territories and distributing work to your reps.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To enable Sales Territories: Customize Application

1. From Setup, enter *Territories* in the Quick Find box, and then select **Territory Settings**.
2. Click **Enable Sales Territories**.

See Also

[Define Default User Access for Territory Records](#)

[Enable Filter-Based Opportunity Territory Assignment](#)

Define Default User Access for Territory Records

Specify the default settings for how users can access and modify records associated with the sales territories you set up.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To create a territory model: [View Setup and Configuration](#)

USER PERMISSIONS NEEDED

AND

Manage Territories

To change settings on the Territory Settings page: Customize Application

Standard record access settings apply to accounts, leads, and opportunities. If you use *Private* default internal access for contacts or cases, you can set access for those records.

You can also choose the access level that users get to the opportunities assigned to their territories' child territories. For example, set the access level to view and edit to let users edit the opportunities assigned to their territories' child territories.

You can change the access provided by default settings when you create or edit a territory. The territory's access level is inherited by the parent territories above it in the territory hierarchy. For example, San Francisco (view opportunities) is a child territory of California (view and edit opportunities). A user assigned to California has view access to San Francisco opportunities, but not view and edit.

1. From Setup, enter *Territories* in the Quick Find box, and then select the territory settings.
2. Select the default access levels you want for accounts, leads, and opportunities.
3. If applicable, select the default access levels for contacts and cases.
4. Click **Save**.

See Also

[How Do Permissions for Territories Affect Feature and Data Access?](#)

[About Organization-Wide Sharing Defaults](#)

[Setting Your Organization-Wide Sharing Defaults](#)

Enable Filter-Based Opportunity Territory Assignment

Automate assignment of territories to opportunities when you enable and configure filter-based opportunity territory assignment.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To enable filter-based opportunity territory assignment: Customize Application

1. From Setup, enter *Territories* in the Quick Find box, and then select the territory settings.
2. Enable Filter-Based Opportunity Territory Assignment.
3. If your organization is using the Apex code Salesforce provides, first create the class and then return to this Settings page and enter the class name: *OppTerrAssignDefaultLogicFilter*. If you opt to use your own code for the Apex class, come back and enter the name of the class that you create.
4. Select how you want to run the filter-based opportunity territory assignment job.
You can choose to run the job when opportunities are created or by using multithreading. We recommend enabling multithreading only if you're assigning opportunity or opportunity product splits.
5. Save your settings.

See Also

[Developer Guide: OpportunityTerritory2AssignmentFilter Global Interface](#)

Collaborate on Territory Models

Set up your team to communicate about model development using Chatter Feed Tracking for territory models. Your team can post and respond to comments, attach files, and get notifications when model states change or key fields are updated.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To enable Chatter Field Tracking:	Customize Application
To share a Chatter post on a territory model record:	View Setup and Configuration
AND	
Manage Territories	

After you enable and configure Chatter Feed Tracking, anyone with access to a territory model record can use Chatter to collaborate on that model. Users who follow the record get updates in their own Chatter feeds when tracked fields are updated.

1. Make sure that Chatter has been enabled.
 2. From Setup, enter *Feed Tracking* in the Quick Find box, then select **Feed Tracking**.
 3. Select the Territory Model object. Enable Feed Tracking, then select the territory model fields you want to track.
 4. Click **Save**.
- The Chatter feed appears at the top of your organization's territory model records.

5. Make sure to tell others who maintain territory models that they can now use Chatter to follow and collaborate on territory models directly from model records.

See Also

- [How Do Permissions for Territories Affect Feature and Data Access?](#)
- [Customize Chatter Feed Tracking](#)
- [Salesforce Chatter](#)

Set Up Territory Types and Territories

Organize all the elements of your company's territory management plan, including a territory hierarchy, account, lead, and user assignments, and territory forecasts. Keep your model in the planning state as you perform key tasks that involve defining your territory model.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To build a territory model:

View Setup and Configuration

AND

Manage Territories

1. [Create Territory Types](#)

Categorize and define individual territories. Creating territory types is the first step in building your territory model in Salesforce.

2. [Create a Territory Model Record](#)

Connect territories to account, lead, and user assignments. When you create a territory model record, Salesforce creates a territory hierarchy for it.

3. [Create Territories](#)

Build your company's territory model when you create territories that appear on the model's hierarchy in Sales Territories.

4. [Assign Forecast Managers to Territories](#)

Show rolled-up forecasts for a territory when you assign a forecast manager to the territory. Without a forecast manager assigned, a territory's forecasts are based on the individual users assigned to the territory.

5. [Customize Territory Labels](#)

Reflect your business practices when you customize Sales Territories labels that appear in Salesforce. For example, change the Territory field on opportunities to District.

See Also

[How Do Permissions for Territories Affect Feature and Data Access?](#)

Create Territory Types

Categorize and define individual territories. Creating territory types is the first step in building your territory model in Salesforce.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To create a territory type:

View Setup and Configuration

AND

Manage Territories

Examples of territory types you can create include *Named Accounts*, *Direct Accounts*, and *Overlay Sales*.

1. From Setup, enter *Territory Types* in the **Quick Find** box, then select **Territory Types**.
2. Click **New Territory Type**.
3. Enter a label and a description. In your description, make sure that you clearly indicate what kinds of territories belong to that type.
4. Specify a territory type priority.
5. Click **Save**.

See Also

[How Do Permissions for Territories Affect Feature and Data Access?](#)

[Territory Type Priority](#)

Create a Territory Model Record

Connect territories to account, lead, and user assignments. When you create a territory model record, Salesforce creates a territory hierarchy for it.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To create a territory model record:

[View Setup and Configuration](#)

AND

[Manage Territories](#)

Your Salesforce edition determines the number of territory models you can create in production and sandbox orgs. This limit includes models created by cloning.

Edition	Number of Models in Production	Number of Models in Sandbox
Developer	4	4
Enterprise	2	2
Performance	4	4
Unlimited	4	4

1. From Setup, enter *Territory Models* in the **Quick Find** box, then select **Territory Models**.
2. Click **New Territory Model**.
3. Define the label and description fields.
4. Click **Save**.

See Also

[How Do Permissions for Territories Affect Feature and Data Access?](#)

[Allocations and Considerations for Territories](#)

Create Territories

Build your company's territory model when you create territories that appear on the model's hierarchy in Sales Territories.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To create territories:

View Setup and Configuration

AND

Manage Territories

1. On the Territory Models page in Setup, click **View Hierarchy** next to the territory model where you want to create the territory.
2. To show the model's territory hierarchy, including any territories, select **Tree View**.
3. To create a top-level territory, hover over the territory model name and click **Create Territory**. To create a child territory from an existing territory, hover over the territory name and click **Create Territory**.
4. On the New Territory page, define the territory: give it a meaningful label, and choose its territory type. If the territory requires different user access for accounts, leads, and opportunities than the default user access for those records, define the territory's user access levels.
Access levels depend on a territory's parent in the territory hierarchy. For example, San Francisco (view opportunities) is a child territory of California (view and edit opportunities). A team member assigned to California gets view access to San Francisco opportunities, but not view and edit.
5. Save your changes.

See Also

[How Do Permissions for Territories Affect Feature and Data Access?](#)

Assign Forecast Managers to Territories

Show rolled-up forecasts for a territory when you assign a forecast manager to the territory. Without a forecast manager assigned, a territory's forecasts are based on the individual users assigned to the territory.

REQUIRED EDITIONS

USER PERMISSIONS NEEDED

To assign a forecast manager to a territory:

View Setup and Configuration

AND

Manage Territories

Assigning forecast managers to territories is a separate process from [assigning forecast managers in the user role hierarchy for other forecast types](#). To use role-based forecasts and territory-based forecasts simultaneously, make sure that you complete both processes.

Before you assign a forecast manager to a territory, make sure that the following are true.

- Your territory page layout includes the Forecast Manager field.
- The user you want to assign as a forecast manager is forecast-enabled.
- The user you want to assign as a forecast manager is assigned to the territory.

1. From Setup, in the Quick Find box, enter *Territory Models*, and then select **Territory Models**.
2. Click **View Hierarchy** next to your active territory model.
3. Click **Edit** next to the territory you want to assign a forecast manager.
4. In the Forecast Manager field, enter the user you want to assign as the forecast manager.
5. Save your changes.
6. Repeat these steps for each territory that requires a forecast manager.



Note The number of territories assigned to a forecast manager can impact performance. We recommend that you test thoroughly for performance issues, and if you observe any, reduce the number of territories per forecast manager.

See Also

[How Do Permissions for Territories Affect Feature and Data Access?](#)

Customize Territory Labels

Reflect your business practices when you customize Sales Territories labels that appear in Salesforce. For example, change the Territory field on opportunities to District.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To customize Sales Territories labels: Customize Application

1. From Setup, enter *Rename Tabs and Labels* in the Quick Find box, and then select **Rename Tabs and Labels**.
2. Click **Edit** next to Territories.
3. In the Singular and Plural fields, enter your custom labels. These labels replace instances of Territory and Territories on end-user pages. For example, the Assigned Territories related list on accounts becomes Assigned Districts.
4. Click **Next**.
5. In the Territory Label fields, enter your custom labels. These labels replace instances of Territory Label in the report builder and output and in the Object Manager field settings for territories. For example, Territory Label becomes District Label.
6. Save your changes.

Setting Up and Managing Territory Assignments

Automate territory assignments for accounts using rules that you define. Rules can apply to parent territories and their child territories. Or assign accounts and leads manually directly in account and lead detail pages.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

[Managing Users and Roles Within Territories](#)

Control access to accounts and leads when you assign users or roles to territories. And determine your reps' compensation based on the dates that they serve in their assigned territories using reports.

[Create Rules to Assign Accounts to Territories](#)

Automate assignments of new and updated accounts to territories using rules that you create and run. Rules identify characteristics you use to define that territory, and tell Sales Territories to assign accounts with those characteristics to that territory. Accounts are assigned to territories according to your rules on account creation or update only if your territory model is in Active state.

[Assign Accounts Directly to Territory Records](#)

Control territory assignments for accounts that possess unique characteristics and therefore can't be assigned by rules.

[Preview Territory Assignments for Accounts](#)

Validate account assignments before you activate a territory model when you run assignment rules for models in Planning state. Also verify your manual assignments.

[Assign Accounts and Leads to Territories Manually](#)

Ensure coverage for accounts and leads when you assign them territories directly in account and lead detail pages.

[Add Assignment Rules to Territories](#)

Automate record assignments to territories directly from the territory record. Available rules come from the territory model the territory belongs to.

[Assigning Opportunities to Territories Manually](#)

Allocate opportunities to specific territories in Salesforce and enforce the principle of least privilege for the reps and managers within them when you use Sales Territories.

[Run the Opportunity Territory Assignment Filter](#)

Assign territories to opportunities based on the filter logic in the Apex class.

[Clone Territory Models](#)

Test territory characteristics using copies of territory models in Planning, Active, or Archived states. Cloned models include the original's territories, assignment rules, users, manually assigned accounts, but not leads. When cloning is complete, new models are in Planning state.

[Activate a Territory Model](#)

When you're satisfied with the structure of your territory model and its territory account assignments, you're ready to activate it with Sales Territories. Remember that you can also maintain models in Planning and Archived states for further modeling and reference.

Configure Territory Permissions and Access for Salesforce Admins and Users

Ensure that the right users can access the right territory model elements, records, and record elements in Sales Territories.

Run Assignment Rules for a Territory

Run account assignment rules for any territory that has rules defined and belongs to a territory model in Planning or Active state. When you run rules from Setup, accounts are assigned to territories according to your rules if your territory model is in Active or Planning state.

Find Out Which Territories an Assignment Rule Applies To

Identify which territories a single account assignment rule applies to.

View and Manage Assignment Rules at the Territory Model Level

View and manage account assignment rules at a high level. Start from the territory model record to create, edit, or view rules for the model's territories. From the model-level list of rules, you can view rule criteria, or open a rule record to find out which territories it's assigned to.

Activating Assignment Rules and Applying Them to Descendant Territories

The ability to apply an assignment rule to descendant territories is available at the territory level only. You can't apply assignment rules to descendants at the territory model level. The only option you get is to apply a rule to descendant territories if you access the rule's record from an individual territory.

Managing Users and Roles Within Territories

Control access to accounts and leads when you assign users or roles to territories. And determine your reps' compensation based on the dates that they serve in their assigned territories using reports.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Specify Teammates Who Can Administer Territories

Designate team members who can administer specific territories and their descendants within Sales Territories.

Assign Users to Territories

Give users access to records within the territories where they sell your company's products and services. Assigned users get access to records after you change the model's state from Planning to Active.

Define a Picklist for Territory User Roles

Specify which roles apply to users assigned to territories. Roles appear in the Role in Territory picklist for territory models in Active and Planning states.

Assign Territory Roles to Users

Assign territory roles to identify the roles of users within territories.

Identify Users in Territories Assigned to Accounts

Find out who has access to accounts directly in account detail pages.

Identify Territory Users by Territory Role

Track user functions within territories by creating territory roles and assigning them to territory users as needed. For example, create roles such as Territory Owner, Sales Manager, Product Specialist, or Sales Representative. Users can even have different roles in different territories.

Show Your Reps Other Users Assigned to Their Leads' Territories

Increase the chances of your sales reps engaging prospects when they work with teammates on leads. Set up leads so that ones assigned to territories through Sales Territories show any teammates also assigned to those territories.

Track Historical User Assignments in Territories

Determine compensation for reps based on user assignment start and end dates within territories by using a custom report type that you set up. This historical data gives sales managers more insight to accurately conduct sales planning, compensate reps fairly, and review performance analysis.

Specify Teammates Who Can Administer Territories

Designate team members who can administer specific territories and their descendants within Sales Territories.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To designate users who can administer territories: Customize Application

1. From Setup, enter *Profiles* in the Quick Find box, and then select the **Profiles**.
2. Click **Edit** next to a profile.
3. Select **Administer territory operations**.
4. Save your work.

Ask your Salesforce developer to designate team members who can administer specific territories and their descendants. Refer your developer to [TerritoryAdminAssignment](#).

Assign Users to Territories

Give users access to records within the territories where they sell your company's products and services. Assigned users get access to records after you change the model's state from Planning to Active.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To assign users to territories:

Manage Territories

The number of users assigned to territories can impact performance. If you assign more than 300 users to territories, test thoroughly for performance issues. To improve performance, reduce the number of users per territory.

1. From the territory model hierarchy, open the territory where you want to assign users.
2. On the territory's detail page, in the Assigned Users related list, click **Manage Users**.
3. On the Assign Users page, select or search for the user you want to add.
4. Click **Save**.

See Also

[How Do Permissions for Territories Affect Feature and Data Access?](#)

Define a Picklist for Territory User Roles

Specify which roles apply to users assigned to territories. Roles appear in the Role in Territory picklist for territory models in Active and Planning states.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To define picklists:

Customize Application

1. From the object management settings for user territory associations, go to the fields area.
2. Click **Role in Territory**, and then click **New**.
3. Enter your picklist values and click **Save**.

The values you entered are now available for selection from the **Role in Territory** picklist on the territory's Users Assigned edit page.

Keep in mind that those values aren't available for translations, because Translation Workbench

doesn't support translating picklist values and fields in user territory associations.

Assign Territory Roles to Users

Assign territory roles to identify the roles of users within territories.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To assign territory roles to users:

View Setup and Configuration

AND

Manage Territories

1. Make sure that you've created a [Role in Territory picklist](#) so you have some roles to select for users.
2. Open the record of the territory where you want to assign territory roles.
3. In the Assigned Users list, click **Edit** next to the name of a user to whom you're assigning a territory role.
4. From the **Role in Territory** picklist, select the user's territory role.
5. Click **Save**.

See Also

[How Do Permissions for Territories Affect Feature and Data Access?](#)

Identify Users in Territories Assigned to Accounts

Find out who has access to accounts directly in account detail pages.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To view users in territories from Active, Planning, or Archived territory models that are assigned to an account:

View Setup and Configuration

AND

Manage Territories

To view users in territories in the Active territory model that are assigned to an account:

View Setup and Configuration

1. Open the account that has territories assigned.

2. Identify the users from the Users in Assigned Territories related list.

The **Modified Date** field in this related list tells the last time when the user territory association record was modified. In some cases, it indicates when the user was assigned to the territory.



Example Six sales reps are assigned to the East Coast territory. Because XYZ Publishing is also assigned to the East Coast territory, those reps in the territory appear in the Users in Assigned Territories related list on the XYZ Publishing account.

See Also

[How Do Permissions for Territories Affect Feature and Data Access?](#)

Identify Territory Users by Territory Role

Track user functions within territories by creating territory roles and assigning them to territory users as needed. For example, create roles such as Territory Owner, Sales Manager, Product Specialist, or Sales Representative. Users can even have different roles in different territories.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

See Also

[Assign Forecast Managers to Territories](#)
[Add or Edit Picklist Values](#)
[Define a Picklist for Territory User Roles](#)
[Assign Territory Roles to Users](#)

Show Your Reps Other Users Assigned to Their Leads' Territories

Increase the chances of your sales reps engaging prospects when they work with teammates on leads. Set up leads so that ones assigned to territories through Sales Territories show any teammates also assigned to those territories.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To create territories:

[View Setup and Configuration](#)

AND

[Manage Territories](#)

1. From the object manager settings for leads, open page layouts.
2. Add the related list **Users in Assigned Territories** to the page layout.

The image consists of three vertically stacked screenshots from the Salesforce Setup interface, specifically the 'Object Manager' for the 'Lead' object.

- Screenshot 1:** Shows the 'Page Layouts' tab selected in the left sidebar. A modal window is open over the main content area, titled 'Layout Properties'. It contains a 'Related Lists' section with a 'Quick Find' field and several buttons: 'Activity History', 'Data Integration ...', 'Notes & Attachments', 'Approval History', 'Files', 'Open Activities', 'Assigned Territories', 'Groups', 'Social Personas', 'Content Deliveries', 'HTML Email Status', and 'Social Posts'. The button labeled 'Users in Assigned...' is highlighted with a yellow box.
- Screenshot 2:** Shows the 'Related Lists' section of the 'Page Layouts' tab. A modal window is open, identical to the one in Screenshot 1, with the 'Users in Assigned...' button highlighted.
- Screenshot 3:** Shows the 'Related Lists' section of the 'Page Layouts' tab. A modal window is open, identical to the ones above, but the 'Users in Assigned Territories' list is now visible and highlighted with a yellow box. It displays a table with columns: Full Name, Email, Role in Territory, Territory, and Territory Model. One row is shown: 'Sarah Sample' with email 'sarah.sample@company.com'.

3. Save your changes.

Users assigned to the same territory as the lead appear directly on the lead record.

The screenshot shows the Salesforce Lead page for 'Rusty Biscuits'. At the top, there's a navigation bar with 'Follow', 'Convert', 'Edit', and 'New Case' buttons. Below the header, the lead's information is displayed: Title (Dough Handler), Company (Biscuits Engravy), Phone ((800) 555-1212), and Email (rbiscuits@buscuitsengravy.com). A status bar at the top indicates a progression from 'Contacted' to 'Nurturing', 'Unqualified', 'Converted', and finally 'Mark Status as Complete'. The main area is divided into sections: 'Activity' (with buttons for 'Log a Call', 'New Task', 'Email', and 'New Event'), 'Details' (Chatter and News), and 'Related' (Users in Assigned Territories). The 'Related' section is highlighted with an orange border and lists three users: Quan Jin, Arnie Naik, and Patrick Alonso, each with their email, role, and territory assigned.

Track Historical User Assignments in Territories

Determine compensation for reps based on user assignment start and end dates within territories by using a custom report type that you set up. This historical data gives sales managers more insight to accurately conduct sales planning, compensate reps fairly, and review performance analysis.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To assign territory roles to users:

[View Setup and Configuration](#)

AND

[Manage Territories](#)

1. In Territory Settings, select the option that starts the process for recording assignment activity in your active model.

Account Territory Assignment

To avoid performance issues during account inserts, turn assignment rules off. When your account insert job is finished, turn assignment rules back on.

Assignment Rules Run territory assignment rules during account inserts

Assignment History

Start the process that records assignment activity in your active territory model.

Record user assignment activity

2. Create a custom report type using the primary object Territory Models. Add object relationships for Territories and User Territory Association Logs.

User Assignments in Territory Models

Custom Report Type Definition [Edit](#) [Delete](#) [Clone](#)

Report Type Label	User Assignments in Territory Models	Report Type Category	Territory Management
Report Type Name	Territory_Models_with_User_History	Deployment Status	Deployed
Description	Shows active assignment dates in each territory	Created By	Admin User, 11/21/2022, 12:59 PM
		Modified By	Admin User, 11/29/2022, 11:05 AM

Object Relationships [Edit](#) [Object Relationships Help](#)

Territory Models (A)

- └─ with at least one related record from **Territories (B)**
- └─ with at least one related record from **User Territory Association Logs (C)**

The Venn diagram shows three overlapping circles labeled A, B, and C. Circle A is blue, circle B is orange, and circle C is green. The intersection of all three circles is shaded grey. Below the diagram is a grid with three columns labeled A, B, and C, each containing a set of colored bars corresponding to the overlaps: blue for A, orange for B, green for C, and grey for the intersection of all three.

Fields Available for Reports [Edit Layout](#)

Source

- Territory Models
- Territories
- User Territory Association Logs

Report: User Assignments in Territory Models

User Assignment Dates for Territories

	Label	Territory Label	Full Name	Start Date	End Date
1	Global Model	Africa	Dale Henson	11/21/2022, 10:51 AM	-
2	Global Model	Africa	Hank Scurry	11/21/2022, 10:51 AM	-
3	Global Model	Asia	Alexis Martinson	11/21/2022, 10:51 AM	11/29/2022, 9:03 PM
4	Global Model	Asia	Pia Yamaguchi	11/21/2022, 10:51 AM	11/29/2022, 9:03 PM
5	Global Model	Europe	Rusty Seravat	11/21/2022, 10:51 AM	11/29/2022, 9:04 PM
6	Global Model	North America	Dale Henson	11/21/2022, 10:51 AM	-
7	Global Model	North America	Erica Acire	11/21/2022, 10:51 AM	-
8	Global Model	SouthAmerica	Naomi Ross	11/21/2022, 10:51 AM	11/29/2022, 9:05 PM
9	Global Model	SouthAmerica	Moella Ponce de León	11/21/2022, 10:51 AM	11/29/2022, 9:05 PM

Using the custom report type, sales managers can run a report that includes columns such as Territory Label, Full Name, Start Date, and End Date.

See Also

[Create a Custom Report Type](#)

Create Rules to Assign Accounts to Territories

Automate assignments of new and updated accounts to territories using rules that you create and run. Rules identify characteristics you use to define that territory, and tell Sales Territories to assign accounts with those characteristics to that territory. Accounts are assigned to territories according to your rules on account creation or update only if your territory model is in Active state.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To create or edit assignment rules:

View All Records on Accounts AND Manage Territories

AND

View Setup and Configuration OR Customize Application



Tip Don't assign a rule to a territory if that rule is a child of another rule that's already assigned to the territory. To find out what rules apply to a territory, open the territory's record detail page and look at the Assignment Rules Assigned to this Territory related list. If a rule has **Apply to Child Territories** selected, do not assign the rule separately to child territories.

1. From the territory model hierarchy, open the territory where you want to create a rule.
2. On the detail page, in the Assignment Rules Defined in this Territory related list, click **New**.
3. On the rule edit page, enter a name for the new rule and define selection criteria.
If your org has enabled state and country picklists, territory assignment rules using states as a criteria must use **contains** matching instead of **equals** matching.

Keep in mind that ZIP/postal codes are alphanumeric fields, not number fields, so in a comparison, 9 is "higher" than 80000, for example.

4. If you want the rule to also apply to the current territory's descendants, select **Apply to child territories**.
5. If you want the rule to run when a user creates or updates an account, select the **Active** checkbox.
For account updates, these conditions are required for the territory rules to run.
 - If the account is updated in Salesforce, **Evaluate this account against territory rules on save** is selected and the rule is assigned to a territory in the active territory model.
 - If the account is updated via API, **AssignmentRuleHeader** is specified.

For account inserts, **Run territory assignment rules during account inserts** in Territory Settings is selected.

6. Click **Save** to save the rule and return to the territory detail page.



Example Rules can work together within territories and child territories. For example, you create a territory called Western States, with child territories Washington, Oregon, and California. From the Western States territory record, you create a rule that assigns accounts in Washington, Oregon, and California to that territory. You apply that rule to child territories and then, from the California territory record, you create a rule that assigns accounts in California to the California territory. For any child territories for the California territory, you don't have to specify the state in the criteria if you mark the California territory rule as inheritable to child territories. Instead, you can use more specific criteria, such as ZIP code or industry.

See Also

- [How Do Permissions for Territories Affect Feature and Data Access?](#)
- [Run Assignment Rules for a Territory](#)
- [How Account Assignment Rules Work](#)
- [Activating Assignment Rules and Applying Them to Descendant Territories](#)

Assign Accounts Directly to Territory Records

Control territory assignments for accounts that possess unique characteristics and therefore can't be assigned by rules.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To assign accounts manually within your territories:

[View Setup and Configuration](#)

AND

[Manage Territories](#)

-
1. From the territory model hierarchy, open the territory where you want to assign one or more accounts.
 2. On the territory's detail page, in the Manually Assigned Accounts related list, click **Add Accounts** to see a list of your accounts. You can adjust the list view.
 3. In the **Available** related list, select the checkbox for each account you want to assign. To view more records, click **More** beneath the list.
Each selected account appears in the Selected related list.

4. Click **Assign**.

See Also

[How Do Permissions for Territories Affect Feature and Data Access?](#)

Preview Territory Assignments for Accounts

Validate account assignments before you activate a territory model when you run assignment rules for models in Planning state. Also verify your manual assignments.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To run rules:

Manage Territories AND View Setup and Configuration

OR

Customize Application

To preview territory model assignments:

Manage Territories

AND

View Setup and Configuration

To protect data quality, you can't modify a territory until you receive the email confirming that the rules have been run successfully. If rules do not run successfully, follow instructions provided in the email for troubleshooting specific issues.

1. Open the record for the territory model whose assigned accounts you want to preview and click **View Hierarchy**.
2. Verify that the model is in **Planning** state.
3. Click **Run Assignment Rules**.
4. Select whether to include all accounts or a subset of accounts. Running rules for all accounts can take a long time. To run rules for fewer accounts, select a last-modified date range, other filter criteria (an account field, operator, and value), or both. Reference fields and picklist values aren't available.
When rules are finished running, we send an email to let you know.
5. From the territory model hierarchy, open each territory and its affected assignment rules. Also open territories that have manual account assignments.

6. On the territory detail page, click **View Accounts** to see the accounts assigned to the territory. (Accounts assigned to the territory's child territories aren't shown.) The **Method** column indicates how each account was assigned: by a rule or manually.

If you change the rules for a territory, run rules again to view those changes. In this case, consider running rules on that territory only. To do so, navigate to the territory's detail page, scroll to the Assignment Rules Defined in this Territory related list, and click **Run Rules**.

The Manage Territories permission:

- Provides users access to territories in planning and archived state and to the list of accounts assigned to territories in planning and archived state.
- Doesn't provide access to the accounts assigned to territories in planning and archived state. Only the account name and ID fields appear in the list. To run territory planning reports, users must get access to accounts via a method other than the permission.

See Also

[How Do Permissions for Territories Affect Feature and Data Access?](#)

Assign Accounts and Leads to Territories Manually

Ensure coverage for accounts and leads when you assign them territories directly in account and lead detail pages.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To assign territories manually within accounts and leads:

View Setup and Configuration

AND

Manage Territories

To view territories from Active, Planning, or Archived territory models that are assigned:

View Setup and Configuration

AND

Manage Territories

USER PERMISSIONS NEEDED

To view territories assigned from the **Active** territory model that are assigned:

[View Setup and Configuration](#)

1. Open the account or lead that you want to assign territories to.
2. On the Assigned Territories related list, click **Assign Territories**.
3. Select the territory model that contains the territories you want to associate. In Lightning Experience, only the active territory model is available.
4. Select each territory you want to assign.
5. Save your work.

See Also

[How Do Permissions for Territories Affect Feature and Data Access?](#)

Add Assignment Rules to Territories

Automate record assignments to territories directly from the territory record. Available rules come from the territory model the territory belongs to.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To assign rules to a territory:

[View Setup and Configuration](#)

AND

[Manage Territories](#)

1. Open the territory you want to assign rules to.
2. On the territory's detail page, in the **Assignment Rules Assigned to This Territory** related list, click **Assign Rules** to see a list of rules available in the model.
3. In the **Available** related list, hover over the names of available rules to view the details of their criteria. Select the checkbox for as many as 15 rules that you want to assign to the territory. To view more rules, click **More** beneath the list.
Each selected rule appears in the **Selected** related list.
4. Apply selected rules to child territories as appropriate.
5. Click **Assign**.

See Also

How Do Permissions for Territories Affect Feature and Data Access?

Assigning Opportunities to Territories Manually

Allocate opportunities to specific territories in Salesforce and enforce the principle of least privilege for the reps and managers within them when you use Sales Territories.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Requirements for Assigning Opportunities to Territories Manually

Set your expectations for when you assign opportunities to territories manually through Sales Territories. Assignment options depend on your access to those opportunities' parent records and your Salesforce user interface.

Assign Opportunities to Territories Manually

Distribute opportunities to the territories of your choice. Sales Territories ensures that the intended reps can work their deals and territory managers can access their rep's opportunities.

Requirements for Assigning Opportunities to Territories Manually

Set your expectations for when you assign opportunities to territories manually through Sales Territories. Assignment options depend on your access to those opportunities' parent records and your Salesforce user interface.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

For...	It's important to know that...
Anyone who updates assignments	<p>These stakeholders can edit the Territory field on opportunities.</p> <ul style="list-style-type: none">• Opportunity owners with access to their opportunities' accounts• Anyone above opportunity owners in the role hierarchy• Salesforce admins
Access for parent	When you manually assign opportunities to territories, only users assigned to

For...	It's important to know that...
territories	those territories get edit access. Respective parent territories get read-only access.
Lightning Experience users	Assigning opportunities to any territory in the active model requires full access to accounts. Otherwise, stakeholders can assign opportunities to only the accounts' assigned territories.
Salesforce Classic users	Stakeholders can assign opportunities to any territory in the active model, even without full access to accounts.

Assign Opportunities to Territories Manually

Distribute opportunities to the territories of your choice. Sales Territories ensures that the intended reps can work their deals and territory managers can access their rep's opportunities.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To assign opportunities to any territory in the active model in Lightning Experience: Full access to the opportunities' parent accounts

To assign opportunities to any territory in the active model in Salesforce Classic: View access or higher to the opportunities' parent accounts

1. Open or create an opportunity.
2. In the Territory field, select the territory that you want to assign.
3. Save your changes.

See Also

[How Do Permissions for Territories Affect Feature and Data Access?](#)

[Requirements for Assigning Opportunities to Territories Manually](#)

Run the Opportunity Territory Assignment Filter

Assign territories to opportunities based on the filter logic in the Apex class.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To run the opportunity territory assignment filter:

Manage Territories AND View Setup and Configuration

OR

Customize Application

1. From Setup, enter *Territories* in the Quick Find box, and then select the territory settings.

2. Verify these settings.

- Filter-based opportunity territory assignment is enabled.
- An Apex class is specified.

Only Salesforce admins, opportunity owners, and users above the opportunity owners in the role hierarchy can manage filter logic exclusion by selecting or deselecting **Exclude from the territory assignment filter logic** on opportunities.

3. From Setup, enter *Territory Models* in the Quick Find box, then select **Territory Models**.

4. View the active territory model's hierarchy.

5. Click **Run Opportunity Filter**, and then select options for the opportunities and date ranges to include.

6. Run the opportunity filter.

When the job is complete, you receive an email.

See Also

[How Do Permissions for Territories Affect Feature and Data Access?](#)

Clone Territory Models

Test territory characteristics using copies of territory models in Planning, Active, or Archived states.

Cloned models include the original's territories, assignment rules, users, manually assigned accounts, but not leads. When cloning is complete, new models are in Planning state.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To clone a territory model:

View Setup and Configuration

AND

Manage Territories

If you're cloning a territory model with assignment rules, make sure that any picklist values referenced in the assignment rules are valid. Deleted or replaced picklist values referenced by assignment rules can cause the cloning process to fail.

Keep in mind that cloned models don't include leads.

1. Open the territory model you want to clone.
2. Click **Clone**.
3. Define the label and description fields.
4. Click **Save**.

The model state changes to **Cloning** while Salesforce processes your request. Cloning can take some time, depending on the size and complexity of your model.

During the process, triggers defined against the Territory2Model, Territory2, or UserTerritory2Association objects do not fire.

When the process is complete, we send you an email to let you know.

See Also

[How Do Permissions for Territories Affect Feature and Data Access?](#)

[Allocations and Considerations for Territories](#)

Activate a Territory Model

When you're satisfied with the structure of your territory model and its territory account assignments, you're ready to activate it with Sales Territories. Remember that you can also maintain models in Planning and Archived states for further modeling and reference.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To activate a territory model:

View Setup and Configuration

AND

Manage Territories

One model can be in the **Active** state at one time. You can activate a model if it's in the **Planning** state. After activating a model, you can't reset it to **Planning**, but you can set it to **Archived**. If you use territory forecasts, ensure that opportunity revenue rolls up based on the newly activated territory hierarchy. To do so, consider running the opportunity territory assignment filter or assigning territories to opportunities manually or via the API.

1. Preview account assignments before activating the model.
2. Open the record for the territory model you want to activate and click **View Hierarchy**.
3. Click **Activate**.

The model state changes to **Activating** while Salesforce processes your request. Activation can take some time, depending on the size and complexity of your model. When the process is done, we send you an email to let you know.

See Also

[How Do Permissions for Territories Affect Feature and Data Access?](#)

[Territory Model State](#)

Configure Territory Permissions and Access for Salesforce Admins and Users

Ensure that the right users can access the right territory model elements, records, and record elements in Sales Territories.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To assign user permissions:

Manage Users

To create, edit, and delete page layouts:

Customize Application

1. Make sure that you understand how permissions affect territory model and record access in Sales Territories.
2. Assign user permissions as needed.
3. Add the Assigned Territories related list to your account and lead page layouts. This list lets Salesforce

admins manually assign accounts and leads to territories, and it lets users identify which territories are assigned to their accounts. Make sure that the related list includes the standard and custom fields (if any) that admins and users need.

4. Add the Users in Assigned Territories related list to your account and lead page layouts. This list lets administrators and users see all users assigned to the territories that are assigned to an account or lead, according to their permissions. Make sure that the related list includes any standard and custom fields that administrators and users need.
5. Add the **Territory** field to your Opportunity page layouts. This field lets administrators and sales managers manually assign a territory to an opportunity from a list of the territories assigned to the opportunity's account. Add the **Territory Name** and **Territory Description** fields to Opportunity list views and reports so that users can identify assigned territories there.
6. Add any custom buttons, links, or actions you've created to territory page layouts.

See Also

[How Do Permissions for Territories Affect Feature and Data Access?](#)

[User Profiles Overview](#)

[Permission Sets Overview](#)

[Enhanced Page Layout Editor User Interface Elements](#)

[Assign Forecast Managers to Territories](#)

Run Assignment Rules for a Territory

Run account assignment rules for any territory that has rules defined and belongs to a territory model in Planning or Active state. When you run rules from Setup, accounts are assigned to territories according to your rules if your territory model is in Active or Planning state.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To run rules within your territories:

Manage Territories

AND

View Setup and Configuration OR Customize Application

-
1. Open the hierarchy for the territory model that the territory model belongs to.
 2. In the tree view or list view, find the territory you want to run rules for.
 3. Click **Run Rules**. If you want to view the territory record's details, including its assigned rules, *before* you run its rules, open the record. Then click **Run Rules** in the Assignment Rules Assigned to This

Territory related list.

- Select whether to include all accounts or a subset of accounts. Reference fields and picklist values aren't available.

If you run rules for...	Keep in mind that...
All accounts	Running rules can take a long time.
A subset of accounts	<p>It's best to select a last-modified date range, other filter criteria (an account field, operator, and value) or both.</p> <p>If you select criteria using custom checkbox and time fields, make sure to set:</p> <ul style="list-style-type: none"> Checkboxes to <code>1</code> for checked or <code>0</code> for unchecked Time formats to HH:mm:ss.SSS

When rules are finished running, we send an email to let you know.

See Also

[How Do Permissions for Territories Affect Feature and Data Access?](#)

Find Out Which Territories an Assignment Rule Applies To

Identify which territories a single account assignment rule applies to.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To view assignment rule details:

View Setup and Configuration

AND

Manage Territories

-
- From Setup, enter *Territory Models* in the **Quick Find** box, then select **Territory Models** to view a list of your organization's territory models.
 - Find the model in which the rule operates and click **View Rules** to see a list of all the rules associated to the model and its territories.
 - Click the rule name and look for the territories it applies to in the Assigned Territories related list.

See Also

[How Do Permissions for Territories Affect Feature and Data Access?](#)

View and Manage Assignment Rules at the Territory Model Level

View and manage account assignment rules at a high level. Start from the territory model record to create, edit, or view rules for the model's territories. From the model-level list of rules, you can view rule criteria, or open a rule record to find out which territories it's assigned to.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To create and run territory assignment rules:

Manage Territories AND View Setup and Configuration

OR

Customize Application

1. From Setup, enter *Territory Models* in the **Quick Find** box, then select **Territory Models**.
2. Click **View Rules** next to the territory model whose rules you want to manage.
3. On the Assignment Rules list view, create a rule, open a rule record for complete details, or view criteria when you hover over rule names.

See Also

[How Do Permissions for Territories Affect Feature and Data Access?](#)

[Find Out Which Territories an Assignment Rule Applies To](#)

Activating Assignment Rules and Applying Them to Descendant Territories

The ability to apply an assignment rule to descendant territories is available at the territory level only. You can't apply assignment rules to descendants at the territory model level. The only option you get is to apply a rule to descendant territories if you access the rule's record from an individual territory.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the

Sales Cloud

With this restriction in mind, make sure that you create or edit a rule record from the appropriate place. Starting from the territory record gives you the most options. Make sure that you activate all assignment rules you want to use: inactive rules *do not* affect assignments for associated territories or any descendant territories they have been applied to.

-  **Example** You have a territory model called US, and its hierarchy has two territories: Eastern States and Western States. The Eastern States territory has an assigned rule called Eastern States Accounts. If you open the record for the territory model, US, then click **View Rules** and from there click **Edit** to edit the Eastern States Accounts rule record, the final step lets you activate the rule. If you start from the Eastern States territory record, then click **Edit** next to the Eastern States Accounts rule record, in addition to the step where you activate or deactivate the rule, you see another step that lets you apply the rule to the Eastern States territory's descendants.

Running Reports on Territories

Keep sales management and stakeholders informed about territory assignments for users, accounts, leads, and opportunities. Run reports using the custom report types that you create for Sales Territories.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

[Preparing Sales Management for Territory Reporting](#)

Unlock details about assignments for territories, accounts, opportunities, leads, and users when you create custom report types for Sales Territories. And help managers and other stakeholders identify territories without assignments or assignment rules.

[Identify Accounts Assigned to Territories](#)

Manage account assignments to sales territories when you report on which accounts include territory assignments. See which accounts belong to which territories.

[Identify Territories Without Assigned Accounts](#)

Manage account assignments to sales territories by reporting on which territory models' territories don't include assigned accounts.

[Identify Users Not Assigned to Territories](#)

Manage user assignments to sales territories by reporting on users not assigned to territories.

[Identify Territories with Assigned Users](#)

Manage user assignments to sales territories when you run reports that show which territory models' territories include users assigned. See which assigned users belong to which territories.

[Report on Summarizable Account Fields by Territory](#)

Gauge territory size by reporting on summarizable account data, such as annual revenue or number of employees.

Preparing Sales Management for Territory Reporting

Unlock details about assignments for territories, accounts, opportunities, leads, and users when you create custom report types for Sales Territories. And help managers and other stakeholders identify territories without assignments or assignment rules.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Determine which custom report types can help your sales teams gain insight into the performance of their territories. Then from Setup, create those custom report types.

For Territories

Report Type	A (Primary Object)	B (Related Object)	C (Related Object) and Details
Territories with assigned accounts	Territory Models	Territories	Territory-Assigned Records
Territories without assigned accounts	Territory Models	Territories	<p>Territory-Assigned Records</p> <p>Select “B” records may or may not have related “C” records.</p>
Territories with assigned users	Territory Models	Territories	Users
Territories without assigned users	Territory Models	Territories	<p>Users</p> <p>Select “B” records may or may not have related “C” records.</p>

For Territory Assignment Rules

Report Type	A (Primary Object)	B (Related Object)	C (Related Object)	D (Related Object) and Details
Territories with assignment rules	Territory Models	Territories	Object Territory Assignment Rules	Object Territory Assignment Rule Items
Territories without assignment rules	Territory Models	Territories	Object Territory Assignment Rules	Object Territory Assignment Rule Items Select “B” records may or may not have related “C” records.

For Accounts

Report Type	A (Primary Object)	B (Related Object) and Details
Account activities in territories	Accounts	Activities Select “A” records may or may not have related “B” records. Filter report by My Territories’ Opportunities or My Territory Team’s Opportunities.
Accounts assigned to territories	Accounts	Territories
Accounts not assigned to territories	Accounts	Territories Select “A” records may or may not have related “B” records.

For Opportunities and Leads

Report Type	A (Primary Object) and Details	B (Related Object)
Opportunities assigned to territories	Opportunities	None

Report Type	A (Primary Object) and Details	B (Related Object)
	Filter report by Territory Name does not equal null.	
Opportunities not assigned to territories	Opportunities Filter report by Territory Name equals null.	None
Leads assigned to territories	Leads	Territories

For Users

Report Type	A (Primary Object)	B (Related Object) and Details
Users assigned to territories	Users	Territories
Users not assigned to territories	Users	Territories Select “A” records may or may not have related “B” records.

See Also

[Create a Custom Report Type](#)

[Pipeline Forecasts Reports](#)

Identify Accounts Assigned to Territories

Manage account assignments to sales territories when you report on which accounts include territory assignments. See which accounts belong to which territories.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

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	

1. Make sure that you have a custom report type that links the Accounts and Territories objects. Specify that the Accounts object *must* have related Territory records, and make all fields on these objects available for reporting.
 2. Click the **Reports** tab, and then click **New Report**.
 3. From the Territory Management category, select the custom report type created for this report, and then click **Continue** (Lightning Experience) or **Create** (Salesforce Classic).
 4. Make sure that the Accounts field *Account Name* and the Territories field *Label* appear on the report. If they do not, add them.
 5. (Optional) Filter the report results. To show data from territory models in *Active state only*, configure the filter options to show *Territory Model: Label equals <name of active territory model>*. From the Show Me (Lightning Experience) or Show (Salesforce Classic) field, to filter by account ownership, select *My accounts, My team's accounts, or My territory teams' accounts*. To filter by user territory assignment, select *My territories' accounts*.
- !** **Important** If you later activate a different territory model, make sure that you update the territory model name variable in this report.
6. Add any other fields you find useful for this report.
 7. Save the report and run it.

Identify Territories Without Assigned Accounts

Manage account assignments to sales territories by reporting on which territory models' territories don't include assigned accounts.

REQUIRED EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To run reports:	Run Reports
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USER PERMISSIONS NEEDED

To schedule reports:	Schedule Reports
To create, edit, and delete reports:	Create and Customize Reports
	AND
	Report Builder

1. If you're using Lightning Experience, click **New Report (Salesforce Classic)**, or switch to Salesforce Classic.
2. Make sure that you have a custom report type that links the Territory Models, Territories, and Territory-Assigned Records objects. Specify that the Territories object *may or may not* have related Territory-Assigned records, and make all fields on these objects available for reporting.
3. Click the **Reports** tab, and then click **New Report**.
4. From the Territory Management category, select the custom report type created for this report.
5. Click **Create**.
6. Make sure that the Territory fields *Label* and *Territory Model : Label* appear on the report. If they do not, add them.
7. From the **Filters** dropdown list, select *Cross Filter*. Configure the filter options to show *Territories without Territory-Assigned Records*, and then click **OK**. Configure the filter options to show *Object equals Account*.
8. To show data from territory models in Active state *only*, from the **Filters** dropdown list, select *Field Filter*. Configure the filter options to show *State equals Active*, and then click **OK**.
9. Add any other fields you find useful for this report.
10. Save the report and run it.

Identify Users Not Assigned to Territories

Manage user assignments to sales territories by reporting on users not assigned to territories.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To run reports:	Run Reports
To schedule reports:	Schedule Reports

USER PERMISSIONS NEEDED

To create, edit, and delete reports:

Create and Customize Reports

AND

Report Builder

1. Make sure that you have a custom report type that links the Users and Territories objects. Specify that the Users object *may or may not* have related Territories records, and make all fields on these objects available for reporting.
2. Click the **Reports** tab, and then click **New Report**.
3. From the Territory Management category, select the custom report type created for this report, and then click **Continue** (Lightning Experience) or **Create** (Salesforce Classic).
4. Make sure that the Users field *Full Name* and the Territories field *Label* appear on the report. If they do not, add them.
5. Configure a cross filter to show *Users without Territories*.
6. To show data from territory models in *Active state only*, configure the filter options to show *Territory Model: Label equals <name of active territory model>*.
Important If you later activate a different territory model, make sure that you update the territory model name variable in this report.
7. Add any other fields you find useful for this report.
8. Save the report and run it.

Identify Territories with Assigned Users

Manage user assignments to sales territories when you run reports that show which territory models' territories include users assigned. See which assigned users belong to which territories.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To run reports:

Run Reports

To schedule reports:

Schedule Reports

To create, edit, and delete reports:

Create and Customize Reports

USER PERMISSIONS NEEDED

AND

Report Builder

1. Make sure that you have a custom report type that links the Territory Models, Territories, and Users objects. Specify that the Territory object *must* have related Users records, and make all fields on these objects available for reporting.
2. Click the **Reports** tab, and then click **New Report**.
3. From the Territory Management category, select the custom report type created for this report, and then click **Continue** (Lightning Experience) or **Create** (Salesforce Classic).
4. Make sure that the Territory fields *Label* and *Territory Model: Label* and the Users field *Full Name* appear on the report. If they do not, add them.
5. To show data from territory models in *Active* state *only*, configure the filter options to show *State equals Active*.
6. Add any other fields you find useful for this report.
7. Save the report and run it.
8. To show each territory with the users assigned to it, summarize information by Territory object field *Label*.

Report on Summarizable Account Fields by Territory

Gauge territory size by reporting on summarizable account data, such as annual revenue or number of employees.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

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

1. Make sure that you have a custom report type that links the Accounts and Territories objects. Specify

that the Accounts object *must have* at least one Territory object record, and make all fields on these objects available for reporting.

2. Click the **Reports** tab, and then click **New Report**.
3. From the Territory Management category, select the custom report type created for this report, and then click **Continue** (Lightning Experience) or **Create** (Salesforce Classic).
4. If you're using Salesforce Classic, select *Matrix Format* for the report.
5. Create a row grouping by using the *Label* field from the Territories field list.
6. Create a row grouping by using the *Account Name* field from the Accounts field list.
7. From the Accounts field list, add summarizable fields, such as *Annual Revenue* and *Employees*, to show those totals, and then summarize by *Sum*.
8. (Optional) Filter the report results. From the Show Me (Lightning Experience) or Show (Salesforce Classic) field, to filter by account ownership, select *My accounts*, *My team's accounts*, or *My territory teams' accounts*. To filter by user territory assignment, select *My territories' accounts*.
9. Add any other fields you find useful for this report.
10. Run the report and make sure it shows the data and the arrangement that you want.
11. Save the report.

Maintain Sales Territories

Archive or delete territory models. If you established another means for sharing files throughout your sales team, you can disable Sales Territories.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

[Archive a Territory Model](#)

Archiving a territory model deactivates it, but the model remains in your territory model list. From this list, you can reference the model's associated assignment rules and the resulting account-to-territory assignments generated by the rules. You can archive a model only if it's in the Active state. After archiving a model, you can't return it to the Active state or the Planning state.

[Delete a Territory Model](#)

Delete a territory model if your team no longer actively uses the model for territory management or reference. You can't delete an active territory. The model must be in Planning or Archived state.

[Disable Sales Territories](#)

Determine and establish other means for sharing records throughout your sales organization before you disable Sales Territories.

See Also

[Considerations for Managing Territory Pipeline Forecasts](#)

Archive a Territory Model

Archiving a territory model deactivates it, but the model remains in your territory model list. From this list, you can reference the model's associated assignment rules and the resulting account-to-territory assignments generated by the rules. You can archive a model only if it's in the Active state. After archiving a model, you can't return it to the Active state or the Planning state.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To archive a territory model:

Manage Territories AND View Setup and Configuration

 **Warning** When you archive a territory model, Salesforce deletes your territory forecasts, forecast types, quotas, and adjustments. After you activate another territory model, you must re-create territory forecast types for it. Before you archive a territory model, consider these options.

- Run the opportunity territory assignment filter, and then take screenshots of the forecasts page.
- Create a [snapshot](#). The snapshot is not deleted as part of the archiving process.
- Export your forecasting records, including forecasting items, facts, quotas, and adjustments.

When you archive a territory model, Salesforce also deletes data related to sharing and group associations by territory. To retain this data, export the related records before you archive the territory model. While it's not required, we recommend that you update the territories on opportunity splits and opportunity product splits after you archive the model and activate a new one. Perform this update with the [filter-based opportunity territory assignment tool](#), or reassign territories manually or by using Data Loader.

If you've enabled deferred [group membership calculation](#), we recommend suspending it to avoid issues with group membership cleanup during territory model archival. You can re-enable deferred group membership calculation after archival is completed.

1. From Setup, enter *Territory Models* in the **Quick Find** box, then select **Territory Models**.
2. Open your active territory model.
3. Click **Archive**, and then click **Archive Territory Model** to confirm.

The model state changes to **Archiving** while Salesforce processes your request. When processing is complete, the model state changes to **Archived**, and you receive a confirmation via email. This process can take some time, depending on the size and complexity of your organization.

See Also

How Do Permissions for Territories Affect Feature and Data Access?

Delete a Territory Model

Delete a territory model if your team no longer actively uses the model for territory management or reference. You can't delete an active territory. The model must be in Planning or Archived state.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To delete a territory model:

Manage Territories AND View Setup and Configuration

Deleting a territory model also deletes all its associated territories and account assignments. You can't cancel the process or restore a deleted model. The process can take several hours, so we send you an email when it's complete.

Before you delete a territory model, reassign opportunity splits and opportunity product splits to territories in an active territory model, or remove territory associations. To perform the territory reassignment, we recommend using the [filter-based opportunity territory assignment tool](#). You can also reassign territories manually or by using Data Loader.

1. From Setup, enter *Territory Models* in the **Quick Find** box, then select **Territory Models**.
2. Find the model in the list. Check the value in the **State** column to make sure that the model is in the **Planning** or **Archived** state.
3. Click **Del**.
4. Later, check your email for confirmation that the deletion process is complete.

See Also

[How Do Permissions for Territories Affect Feature and Data Access?](#)

Disable Sales Territories

Determine and establish other means for sharing records throughout your sales organization before you disable Sales Territories.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To disable Sales Territories:

Customize Application

! **Important** If you disable Sales Territories, your users lose record access that's based on territory assignments, and your organization no longer has access to territory management data, including territory forecasts. If you re-enable Sales Territories, you can lose data that had previously been available through the feature.

1. If you haven't already, [archive your active territory model](#) before disabling Sales Territories.
2. From Setup, enter *Territories* in the Quick Find box, and then select the territory settings.
3. Click **Disable Sales Territories**.

Manage Territories with Sales Territories

If you manage, administer, or belong to a sales territory, explore your territory model to understand the organizational structure for your team's sales efforts.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

[Explore Your Company's Territory Model](#)

A territory model includes a hierarchy and a list view of parent and child territories. Drill down to get important details on individual territories, including assigned accounts.

[Identify an Account's Sales Territories](#)

Find out which sales territory an account belongs to.

[View a List of the Accounts or Opportunities in Your Territories](#)

Identify which accounts or opportunities are assigned to the territories you cover when you create a list view.

[Report on the Accounts and Opportunities in Your Territories](#)

Create and run reports that show you which accounts and opportunities are assigned to the territories you cover.

Explore Your Company's Territory Model

A territory model includes a hierarchy and a list view of parent and child territories. Drill down to get

important details on individual territories, including assigned accounts.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To view an active territory model: View Setup and Configuration

1. From Setup, enter *Territory Models* in the **Quick Find** box, then select **Territory Models**. The list view displays your org's active territory model. Click the model's label if you want to view its detail page. Along with other details, this page tells you the last time account assignment rules were run to realign the territory.
2. From the list view, click the model's **View Hierarchy** link.
3. Click **Tree View** to expand and explore the hierarchy tree.
4. Within the hierarchy, click a territory label to view its detail page, where you can identify its territory type, assigned users and their access levels, assignment rules, and forecast manager.
5. From the top of the page, navigate back to the model's territory hierarchy and check out its other territories.

See Also

[How Do Permissions for Territories Affect Feature and Data Access?](#)

[Territory Hierarchy](#)

Identify an Account's Sales Territories

Find out which sales territory an account belongs to.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To identify an account's sales territory: Read on accounts

1. Open the account record.
2. View the account's territories on the Assigned Territories related list.

See Also

[View a List of the Accounts or Opportunities in Your Territories](#)

View a List of the Accounts or Opportunities in Your Territories

Identify which accounts or opportunities are assigned to the territories you cover when you create a list view.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS NEEDED

To view territories in all your organization's territory models: Manage Territories AND View Setup and Configuration

To view territories in your organization's *Active* territory model: View Setup and Configuration

To view accounts: Read on Accounts

To view opportunities: Read on Opportunities

The My Territories filter shows accounts and opportunities that belong to the territories you're assigned to. The My Territory Team's filter shows accounts and opportunities for territories you're assigned to and their descendant territories.

1. On the Accounts or Opportunities tab, begin creating a list view.
2. Give the view a name, and then specify *My territories'* or *My territory team's* in the filter criteria. Add other filters if you need them.
3. Choose other fields you want to filter on, then select any other fields you want the list view to show.
4. Save your changes.

See Also

[How Do Permissions for Territories Affect Feature and Data Access?](#)

[Create or Clone a List View in Lightning Experience](#)

[Create a Custom List View in Salesforce Classic](#)

Report on the Accounts and Opportunities in Your Territories

Create and run reports that show you which accounts and opportunities are assigned to the territories you cover.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

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	

The My Territories filter shows accounts and opportunities that belong to the territories you're assigned to. The My Territory Team's filter shows accounts and opportunities for territories you're assigned to and their descendant territories.

1. On the Reports tab, click **New Report**.
2. Choose an account or opportunity report type, and then click **Continue** (Lightning Experience) or **Create** (Salesforce Classic).
3. In the Show Me (Lightning Experience) or Show (Salesforce Classic) field, select a filter criterion that begins with *My territories'* or *My territory team's*. You can also select these filter criteria when you run account and opportunity reports.
4. Finish creating your report, and then save your changes.

Things to Know About Sales Territories

Review allocations and discover how account assignment rules work.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Allocations and Considerations for Territories

Plan your territories with consideration to available allocations and potential performance impact during assignment and rules processing in Sales Territories.

[Sales Territories: What's Different or Not Available in the Salesforce Mobile App](#)

Not every Lightning Experience feature is in the Salesforce mobile app. Find out what's different.

How Account Assignment Rules Work

Before you create and use account assignment rules, make sure that you review how they work.

Allocations and Considerations for Territories

Plan your territories with consideration to available allocations and potential performance impact during assignment and rules processing in Sales Territories.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Allocations for Territory Models and Territories

Allocations for each territory model include up to 1,000 territories. But if you require more, Salesforce Customer Support can increase your allocations depending on your Salesforce edition.

Salesforce Edition	Allocated Territory Models	Maximum Territories per Model
Developer	4	1,000
Enterprise	2	
Performance	4	99,999
Unlimited	4	

Requests for more than 20,000 territories per model are subject to approval.

Allocations for Assignment Rules and User Assignments

Territory Component	Allocation
Assignment rules for each territory	15
Assigned users for each territory	1,950

Performance Considerations

To avoid performance problems, consider managing these conditions.

Condition	Ways to Optimize Performance
Individual team members assigned to high volumes of territories	<p>If your sales team includes reps assigned to high volumes of territories, it's possible to notice slow performance during assignment and rules processing. If you encounter problems, consider these options.</p> <ul style="list-style-type: none"> Reduce team member assignments to fewer territories. Or assign team members to higher levels in the territory hierarchy, which can reduce the volume of their assigned territories. Defer group membership calculations during assignment and rules processing.
High-volume user assignments to territories	<p>While you can assign up to 1,950 users to a territory, these high-volume assignments can affect performance. Consider limiting user assignments to 300 per territory.</p>

See Also

[Defer Group Membership Calculations](#)

Sales Territories: What's Different or Not Available in the Salesforce Mobile App

Not every Lightning Experience feature is in the Salesforce mobile app. Find out what's different.

- The Assigned Territories related list on accounts and leads is read only, even for users with the Manage Territories permission.

How Account Assignment Rules Work

Before you create and use account assignment rules, make sure that you review how they work.

REQUIRED EDITIONS

Available in: Salesforce Classic for some features and Lightning Experience for all features

Available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

- A territory can have inherited account assignment rules, meaning that the rules were created somewhere higher in the territory hierarchy and also impact the given territory.
- A territory can have locally defined account assignment rules, meaning that the rule was associated at the given territory.
- If a territory doesn't have any inherited or locally defined account assignment rules, then it only contains accounts that were associated manually.
- If an account matches all inherited and locally defined account assignment rules for multiple territories on the same branch of the hierarchy, the account is assigned to the lowest matching

territory.

- If a territory has multiple locally defined account assignment rules, an account is assigned to the territory only if it matches all locally defined account assignment rules on the territory.
- When referring to picklist values in your account assignment rules, specify the API name instead of its corresponding value. That way, your account assignment rules reflect any updates to picklist values. For example, you refer to the picklist API name Agriculture_Sales. You change its corresponding value from Agriculture Sales to Agriculture. Account assignment rules now reflect Agriculture.



Example

- Territory A has four rules marked “Apply to child territories” and is a parent of territory B.
 - Territory B has three rules not marked “Apply to child territories” and is a parent of territory C.
 - Territory C has two rules.

If you assign an account that matches all of territory A’s and territory C’s rules but only one of territory B’s rules, the account is assigned to territory C. However, if territory B’s rules are marked ‘Apply to child territories,’ the account is assigned only to territory A.

Opportunity Teams and Opportunity Splits

Create opportunity teams to make it easier to collaborate and track progress on deals. Use opportunity splits and opportunity product splits to share revenue from a Closed Won opportunity among team members.

[Collaborate on Deals with Opportunity Teams](#)

When you collaborate on deals with colleagues, use opportunity teams to track progress and improve success. Roles on a team can include an executive sponsor, a dedicated support agent, and a project manager, for example. Team members can be internal users or partner users. If your Salesforce admin has enabled opportunity splits, you can split credit for opportunities or opportunity products among members of an opportunity team.

[Share Revenue by Using Opportunity Splits and Opportunity Product Splits](#)

Share revenue from opportunities and give team members credit for helping to close deals. Team members can roll their individual sales credits into quota and pipeline reports for the entire team.

[Administer Opportunity Teams](#)

Help your sales teams collaborate and win more deals by enabling opportunity teams and customizing the team layout.

[Administer Opportunity Splits and Opportunity Product Splits](#)

Make it easy for your sales reps to collaborate and share opportunity revenue by enabling opportunity splits and opportunity product splits and customizing them for your business processes.

[Territories on Opportunity Splits and Opportunity Product Splits](#)

As sales teams collaborate on deals, make it easier to give credit to more team members and territories for helping to close deals. To see how territories contribute to overall sales, allow sales teams to assign opportunity splits and opportunity product splits to territories.

[Set Up Audit History for Splits and Opportunity Teams](#)

Help your sales teams track changes to opportunity splits, opportunity product splits, and opportunity teams by enabling Audit History.

Collaborate on Deals with Opportunity Teams

When you collaborate on deals with colleagues, use opportunity teams to track progress and improve success. Roles on a team can include an executive sponsor, a dedicated support agent, and a project manager, for example. Team members can be internal users or partner users. If your Salesforce admin has enabled opportunity splits, you can split credit for opportunities or opportunity products among members of an opportunity team.

Add Teams to Your Opportunities

If your Salesforce admin has enabled opportunity teams, the Opportunity Team related list appears on each opportunity. You can add, edit, or remove team members.

Set Up a Default Opportunity Team

Set up a default opportunity team of coworkers you typically work with on opportunities, with a role for each member and special access to your opportunities. If you don't see the Opportunity Team related list, ask your Salesforce admin to enable opportunity teams.

Use Reports to Track and Maintain Opportunity Teams

Track opportunity team progress by creating reports and using filters. Update team member information by exporting report data and using Data Loader.

Considerations and Guidelines for Using Opportunity Teams

Review considerations and guidelines for using opportunity team list views, managing access to private records via opportunity teams, and adding portal users to teams.

Add Teams to Your Opportunities

If your Salesforce admin has enabled opportunity teams, the Opportunity Team related list appears on each opportunity. You can add, edit, or remove team members.

REQUIRED EDITIONS

Available in: Lightning Experience, Salesforce Classic, and the new Salesforce mobile app

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

USER PERMISSIONS NEEDED

To add, edit, or remove opportunity team members:

Read on users

AND

Edit on opportunities

USER PERMISSIONS NEEDED

AND

Opportunity owner or above the owner in the role hierarchy

If you don't see the Opportunity Team related list, ask your Salesforce admin to enable opportunity teams.

1. Edit the opportunity team.
 - a. Add, Edit, or Remove Team Members

In Salesforce Classic, use the **Delete All** button on the related list. If the team member you want to remove has a split percentage greater than 0, first reassigned the split.

To remove the opportunity's owner from splits calculations, assign a split percentage of 0, or transfer the opportunity to another user.

- b. Give a Team Member Access to the Opportunity

To see each team member's access, click the **Team Member Access** action. A member's access level can be read and write or read-only, but it's at least equal to the default opportunity sharing access.

The **Team Member Access** action isn't available in the Salesforce mobile app. For example, a member can be the account manager or an executive sponsor.

To edit information about a team member, go to the user's detail page. If the user is inactive, you can edit split-related fields.

- c. Specify a Member's Role on the Opportunity

Changes that you make to an opportunity team don't affect your default opportunity team or the teams on your other opportunities.

2. Add your default opportunity team—users you normally work with on opportunities.

Add your default team to all your opportunities automatically or to one opportunity at a time.

3. Instead of an opportunity team, add the account team for the related account.

Account teams and opportunity teams share available team member roles.

See Also

[Set Up a Default Opportunity Team](#)

[Share Revenue by Using Opportunity Splits and Opportunity Product Splits](#)

Set Up a Default Opportunity Team

Set up a default opportunity team of coworkers you typically work with on opportunities, with a role for

each member and special access to your opportunities. If you don't see the Opportunity Team related list, ask your Salesforce admin to enable opportunity teams.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

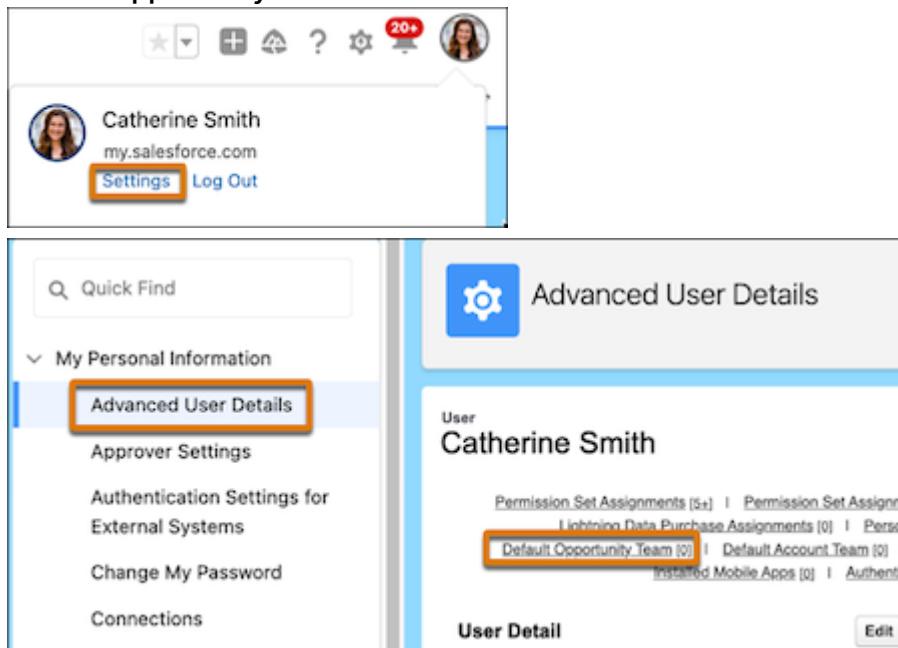
Available in: **Enterprise, Performance, Unlimited, and Developer Editions**

USER PERMISSIONS NEEDED

To set up or edit a default opportunity team:	Opportunity owner or above the owner in the role hierarchy
To add the opportunity owner's default opportunity team to an opportunity:	Opportunity owner or above the owner in the role hierarchy

-  **Note** If you don't see the Default Opportunity Team option in your Advanced User Details page, ask your Salesforce admin to enable opportunity teams.

1. In your personal settings, go to **Advanced User Details** and find Default Opportunity Team. Click **Default Opportunity Team** and then Add.



The screenshot shows the 'Advanced User Details' page for a user named Catherine Smith. On the left, there is a sidebar with a 'My Personal Information' section containing links like 'Advanced User Details' (which is highlighted with an orange box), 'Approver Settings', 'Authentication Settings for External Systems', 'Change My Password', and 'Connections'. The main content area shows Catherine Smith's details, including her name, email (my.salesforce.com), and a 'Default Opportunity Team' section. This section also has a link 'Default Opportunity Team (0)' which is highlighted with an orange box. At the bottom right of the main content area is an 'Edit' button.

2. Add coworkers, selecting each user's access to the opportunity and role on the team.
3. If you want, select options for adding the team to open opportunities automatically.
To add your default team to opportunities from now on, select **Automatically add my default opportunity team to opportunities that I create or open opportunities that are transferred to me**.
To add your default team to all your open opportunities immediately, select **Update open opportunity teams with these members**.
If you don't add your default team to opportunities automatically, you can add it individually by clicking **Add Default Team** on the Opportunity Team related list. **Add Default Team** adds the default

team of the opportunity owner, not of the user who clicks the button.

4. Click **Save**.

See Also

[Administer Opportunity Teams](#)

[Add Teams to Your Opportunities](#)

Use Reports to Track and Maintain Opportunity Teams

Track opportunity team progress by creating reports and using filters. Update team member information by exporting report data and using Data Loader.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

USER PERMISSIONS NEEDED

To create, edit, and delete reports in private folders:

Create and Customize Reports

To create, edit, and delete reports in public and private folders:

Report Builder

OR

Report Builder (Lightning Experience)

1. Create a report of type Opportunities with Opportunity Teams.
2. The report preview includes the Opportunity Owner field. To use the report to view or update information on other team members, add the UserId field.
The report includes all users with a UserId value on the Opportunity Team Member object. Each user has a UserId value for each team.
3. Save and run the report.
4. Filter the report.
 - a. To track your teams' progress, filter the report by the opportunity teams that you're a member of.
 - b. To update information for a team member across opportunity teams, use a filter and Data Loader.
For example, let's say that Jessica Adams left your company, so you want to remove her from all opportunity teams. Filter the report by Jessica Adams, and find all the UserId values for the teams she's a member of. Export the report data and update it as needed, and then configure Data Loader to update records with those UserId values.

See Also

[Set Up Audit History for Splits and Opportunity Teams](#)

Considerations and Guidelines for Using Opportunity Teams

Review considerations and guidelines for using opportunity team list views, managing access to private records via opportunity teams, and adding portal users to teams.

REQUIRED EDITIONS

Available in: Lightning Experience, Salesforce Classic, and the new Salesforce mobile app

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

Opportunity Teams in List Views

When you create or edit a custom list view for opportunities, the available filters include the following.

- My opportunity teams - This filter shows opportunity teams that you belong to, whether owned by you or others.
- My team's opportunities - This filter shows opportunities owned by your direct and indirect reports, based on role hierarchy.

Private Accounts and Opportunities

- Your Salesforce admin can set the organization-wide default access for accounts and opportunities to Private. In that case, if you give team members access to an individual opportunity, those users gain read-only access to accounts on the opportunity. Conversely, if you remove a user's access to an individual account, the user is removed from opportunity teams related to the account.
- You can't create opportunity teams for opportunities with the Private field selected.

Opportunity Owners

- Opportunity owners always have full access to their opportunities.
- If an opportunity owner is added to an opportunity team with read-only or read/write access, full access will be restored to the owned opportunities asynchronously.

Ownership Changes

- When an opportunity is closed and the owner of the opportunity's parent account changes, opportunity team shares are deleted unless opportunity splits are enabled.

Portal Users

- High-volume portal users can't be added to teams.

See Also

- [Administer Opportunity Teams](#)
- [Add Teams to Your Opportunities](#)

Share Revenue by Using Opportunity Splits and Opportunity Product Splits

Share revenue from opportunities and give team members credit for helping to close deals. Team members can roll their individual sales credits into quota and pipeline reports for the entire team.

Opportunity Splits are available in: Lightning Experience and Salesforce Classic

Opportunity Product Splits are available in Lightning Experience

Available in: **Performance** and **Developer** Editions and **Enterprise** and **Unlimited** Editions with the Sales Cloud

User Permissions Needed

To create or edit splits for opportunity team members:

Edit on opportunities

AND

Owner of opportunity record or above the owner in the role hierarchy

You can add opportunity splits on the Opportunity Splits related list. Or, you can add both opportunity splits and product splits on the Opportunity Splits tab on an opportunity record.

! **Important** If you don't see the Opportunity Splits related list, ask your Salesforce admin to enable opportunity splits. If you don't see the Opportunity Splits tab on the opportunity record, ask your admin to add the Opportunity Splits component to the opportunity record page.

Add Opportunity Splits in the Opportunity Splits Related List

Credit team members who are directly responsible for opportunity revenue using opportunity splits. Revenue splits and other split types that your admin creates that total 100% of the opportunity amount. The owner is assigned 100% by default.

1. In the Opportunity Splits related list on an opportunity, click **Edit Opportunity Splits**.
2. Complete the fields.
3. Save your changes.

Opportunities > Acme - 1,200 Widgets Opportunity Splits							Edit Opportunity Splits
7 items • Sorted by Amount • Updated a few seconds ago							
Team Member	Opportunity Split Type	Percent (%)	Amount	Note			
1 Admin User	Revenue	75.88%	\$6,449.80				
2 Jen Standard	Revenue	24.12%	\$2,050.20				
3 Admin User	Overlay	81.20%	\$6,902.00				
4 Jen Standard	Overlay	2.90%	\$246.50				
5 Admin User	Revenue - Custom	50.00%	\$0.00				
6 Jen Standard	Revenue - Custom	50.00%	\$0.00				
7 Admin User	Revenue - Expected Revenue	100.00%	\$5,950.00				

Add Opportunity Splits and Opportunity Product Splits in the Opportunity Splits Tab

Credit supporting team members using opportunity product splits. Product splits can total any percentage of the product amount, including percentages over 100% if defined by your Salesforce admin.

1. In the Opportunity Splits tab on an opportunity, click **Edit Opportunity Splits** or **Edit Product Splits**.
2. Complete the fields.
3. Save your changes.

Opportunity Sunshine Rentals A&B					
Account Name	Close Date	Amount	Opportunity Owner		
Sunshine Rentals	4/21/2023	USD 5,000,000.00	Sally Rodriguez		
<hr/>					
Revenue	Overlay	Revenue - Custom	Overlay - Custom		
<hr/>					
Revenue Overview					
<div style="display: flex; justify-content: space-around;"> Sally Rodriguez Kenny Campos </div> <div style="display: flex; justify-content: space-between; width: 100%;"> \$0 \$500k \$1M \$1.5M \$2M \$2.5M \$3M \$3.5M \$4M \$4.5M \$5M </div> <div style="background-color: #333; height: 10px; width: 60%; margin-top: 5px;"></div> <div style="background-color: #0070C0; height: 10px; width: 40%; margin-top: 5px;"></div>					
<hr/>					
Splits By Product					
Product Name	Total Price	Team Member	Percent (%)	Amount	Note
Beach Cooler (Pallet)	USD 4,000,000.00	Sally Rodriguez	50%	USD 2,000,000.00	
		Kenny Campos	50%	USD 2,000,000.00	
Beach Umbrellas (Shipping C)	USD 1,000,000.00	Sally Rodriguez	100%	USD 1,000,000.00	

! **Important** If you can't add team members while editing splits, add them in the Opportunity Team

related list on the opportunity. To request the option to add members while editing splits, ask your admin.

Guidelines and Considerations for Using Opportunity Splits and Opportunity Product Splits

Use opportunity product splits to coordinate multiple products' and team members' contributions to a deal without leaving your opportunity record. Learn about key guidelines and considerations when working with splits.

Guidelines and Considerations for Using Opportunity Splits and Opportunity Product Splits

Use opportunity product splits to coordinate multiple products' and team members' contributions to a deal without leaving your opportunity record. Learn about key guidelines and considerations when working with splits.

Opportunity Splits are available in: Lightning Experience and Salesforce Classic

Opportunity Product Splits are available in Lightning Experience

Available in: **Performance** and **Developer** Editions and **Enterprise** and **Unlimited** Editions with Sales Cloud

User Permissions Needed

To create or edit opportunity splits and opportunity product splits for opportunity team members:

Edit on opportunities

AND

Owner of opportunity record or above the owner in the role hierarchy

Opportunity Splits

- Your admin can create custom fields on opportunity splits to help you track splits that you create for team members.
- The split on the Opportunity Amount field includes one revenue split and one overlay split type. If you want more split types, ask your admin to create them. Your admin specifies which types of splits always total 100%. Look for “must total 100%” in the description of the split.
- If you don't see splits on a field, ask your admin to check your field-level security limits.
- To remove a team member from a split, click **Del** next to the team member's name.
- To edit rich text fields or multiselect picklists, go to each team member's opportunity split detail page. Your admin can't include those kinds of fields in the Edit All Opportunity Splits window.
- When you enter a monetary amount that requires a split percentage with more than two decimal places, the amount is automatically rounded to two places.

- When an opportunity has overlay splits, changing the opportunity owner without keeping the opportunity team gives the new owner the sum of the previous owner's split percentage. The new owner also gets the previous owner's split percentage for the overlay split.
- You can't insert or edit certain fields on opportunity splits of a certain opportunity split type, if product split records are set up on the opportunity for that split type. You also can't delete any opportunity splits belonging to a split type that has product splits included on the opportunity.
- Opportunity splits don't roll up to sales territories.
- In the Salesforce mobile app, the Split Amount field isn't available, and other opportunity splits fields are read-only.

Opportunity Product Splits

- When an opportunity is transferred to a new owner, the opportunity team can be transferred along with the associated product splits.
- When you delete all the products on an opportunity and the amount becomes 0, we roll up the changes to opportunity splits. The owner is assigned a 100% split and team members are assigned a 0% split.
- When you delete all the product splits on an opportunity, we roll up the changes to opportunity splits. The owner is assigned a 100% split and team members are assigned a 0% split. On opportunities with opportunity splits only, when the opportunity amount value is changed to 0, the case is different. Opportunity splits maintain the original percentages.
- You can't define product splits on an opportunity for products with both positive and negative amounts if the rollup values in the Percentage field on the related opportunity split record will be outside of the allowed range of 0% to 100%. For example, Sally has an opportunity with two products. She wants to add a product split on Product 2 for her team member Bob. Bob gets 50% of Product 2, which has a negative amount. Sally's split on the same product is updated to 50%. This split scenario isn't valid because the opportunity splits for the two reps are outside of the allowed range of 0-100%.

	Split Percent	Unit Price/Quantity	Amount
Opportunity			\$ 60.00
Opportunity Split by Rep			
Sally	133%		\$ 80.00
Bob	-33%		\$ -20.00
Opportunity Product 1		\$ 100.00	
Sally's Product Split	100%		\$ 100.00
Opportunity Product 2		\$ -40.00	
Sally's Product Split	50%		\$ -20.00
Bob's Product Split	50%		\$ -20.00

- When product splits are rolled up to the opportunity splits level, the amounts are limited to two decimal places. While the totals can be more precise with more decimal places, the values sometimes don't add up to the exact value. For example, an opportunity with two products shows slightly different amounts based on the product split percentages.

	Percent	Unit Price/Quantity	Amount	
Opportunity			\$ 1011.10	
Opportunity Split Owner	99.27%		\$ 1003.72	
Opportunity Team Member 1	0.73%		\$ 7.38	<i>Show in Opportunity Splits</i>
Opportunity Product 1		Unit Price = \$10.00 Qty = 100	\$ 1000.00	
Opportunity Product Split Owner	100.00%		\$ 1000.00	
Opportunity Product 2		Unit Price = \$10.00 Qty = 1.11	\$ 11.10	
Opportunity Product Split Owner	33.33%		\$ 3.70	
Opportunity Team Member 1	66.67%		\$ 7.40	<i>Show in Product Splits</i>

- When you use product splits on revenue split types, you can't have more than 200 products on an opportunity.

Territories on Opportunity Splits and Opportunity Product Splits

- Assigning a split to a territory doesn't change the opportunity owner or territory. The current owner and territory still own the opportunity.

- All splits of one split type for a team member, including the opportunity owner, must have a unique territory.
- The Split Archived Territory Name, Split Territory ID, Split Territory Name, and Split Territory Description fields are available in the Opportunity and Product Split Report and the Opportunity and Product Split Schedule Report.
- To distinguish between split territories and opportunity territories in reports, the Territory, Territory Description fields are named Opportunity Territory and Opportunity Territory Description in these reports.
 - Opportunity and Product Split
 - Opportunity and Product Split Schedule
 - Lead Lifetime
 - Opportunities with Partners
 - Opportunities with Competitors
 - Opportunities with Contact Roles
 - Opportunities with Opportunity Teams
 - Opportunity History
- To see whether splits are associated with archived territory models, add the Archived Territory Name field to the Opportunity and Product Split and Opportunity and Product Split Schedule reports.

Administer Opportunity Teams

Help your sales teams collaborate and win more deals by enabling opportunity teams and customizing the team layout.

Facilitate Team Selling by Enabling Opportunity Teams

Help your reps collaborate on deals by enabling opportunity teams.

Customize Opportunity Team Roles

Every opportunity team member has a role in the opportunity, such as account manager or sales rep. To track the roles that team members fill in your company, customize opportunity team roles.

Maintain Your Users' Opportunity Teams

Add, remove, or replace multiple opportunity team members at a time. Update member roles and access.

Disable Opportunity Teams

If you're not using team selling and you don't want to retain opportunity team data, you can disable opportunity teams.

Considerations for Customizing Opportunity Teams

If you customize opportunity teams, review considerations related to custom fields, team member information, and validation rule and Apex trigger support.

Opportunity Team Fields

Opportunity team data is stored in standard fields. A user's page layout determines which fields are visible, and a user's access to the account determines which fields are editable.

See Also

[Add Teams to Your Opportunities](#)

[Set Up a Default Opportunity Team](#)

Facilitate Team Selling by Enabling Opportunity Teams

Help your reps collaborate on deals by enabling opportunity teams.

REQUIRED EDITIONS

Available in: Lightning Experience, Salesforce Classic, and the new Salesforce mobile app

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

USER PERMISSIONS NEEDED

To enable team selling (opportunity teams): Customize Application

1. In Setup, use the Quick Find box to find **Opportunity Team Settings**.
2. Select **Enable Team Selling**.
3. Select the opportunity page layouts where you want to include the Opportunity Team Member related list. You can also include the related list in page layouts that users have personalized.
4. Save your settings.

See Also

[Maintain Your Users' Opportunity Teams](#)

[Administer Opportunity Splits and Opportunity Product Splits](#)

[Set Up Audit History for Splits and Opportunity Teams](#)

Customize Opportunity Team Roles

Every opportunity team member has a role in the opportunity, such as account manager or sales rep. To track the roles that team members fill in your company, customize opportunity team roles.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

USER PERMISSIONS NEEDED

To set up team roles: Customize Application

Warning

- Leave the role of opportunity owner unchanged. It's required for opportunity splits.

- Opportunity teams share roles with account teams. If you remove an opportunity team role, that role is no longer listed as an account team role.

To edit team roles, first enable opportunity teams.

1. In Setup, use the Quick Find box to find **Team Roles**.
2. Edit the picklist values for team roles to follow your business process.
3. Save your changes.
4. To update a changed picklist value globally, in Setup, use the Quick Find box to find **Replace Team Role**.

See Also

[Facilitate Team Selling by Enabling Opportunity Teams](#)
[Maintain Your Users' Opportunity Teams](#)

Maintain Your Users' Opportunity Teams

Add, remove, or replace multiple opportunity team members at a time. Update member roles and access.

Available in: Lightning Experience and Salesforce Classic

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

User Permissions Needed

To update multiple opportunity team members, roles, and access in one operation:	Use Team Reassignment Wizards
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If a team member you want to remove has a split greater than 0%, first reassigned the split.

1. In Setup, use the Quick Find box to find **Mass Reassign Opportunity Teams**.
2. Specify your changes by following the steps.
 - a. Select the appropriate account access for new or changed team members. Then complete any custom fields included in the opportunity team page layout.
 - b. To remove an opportunity's owner from splits calculations, assign a split of 0%, or transfer the opportunity to another user.
- Suppose that you remove a team member assigned to a revenue split or other opportunity split that must total 100%. The member's percentage is transferred to the opportunity owner.
3. Review the number of changed records, and then click **Done**.

See Also

[Add Teams to Your Opportunities](#)

Disable Opportunity Teams

If you're not using team selling and you don't want to retain opportunity team data, you can disable opportunity teams.

Available in: Lightning Experience and Salesforce Classic

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

User Permissions Needed

To disable opportunity teams:

Customize Application

Before disabling opportunity teams, do the following.

- Disable opportunity splits.
- Delete all custom fields, custom buttons and links, page layouts, validation rules, Apex triggers, and workflow rules that you've added to opportunity teams.
- Delete all custom reports that include opportunity team information.
- Uninstall Apex packages that use opportunity teams.
- Remove team members referenced in your Apex code.



Warning Disabling opportunity teams is an irreversible process, permanently removing all teams from opportunities, deleting all default opportunity teams, and removing the Opportunity Team related list from all page layouts.

1. In Setup, use the Quick Find box to find **Opportunity Team Settings**.
2. Select **Disable Team Selling**.

See Also

[Disable Opportunity Splits](#)

Considerations for Customizing Opportunity Teams

If you customize opportunity teams, review considerations related to custom fields, team member information, and validation rule and Apex trigger support.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

Custom Fields and Picklists

Maximum Custom Fields	You can create up to 50 custom fields for an opportunity team.
Custom Field Visibility	When editing team members, users see custom fields, even if you don't add the fields to the Add Opportunity Team Members multiline page layout.
Deleting Custom Fields	If you delete a custom field, filters based on the custom field are also deleted. The results of assignment or escalation rules that rely on the custom field's data can change.
Default Values in Custom Fields	If you include a default value for a custom field, the field appears blank to Lightning Experience users while they're adding opportunity team members. If users don't enter a value, the default value appears on the record after they save.
Custom Picklists	Mass Reassign Opportunity Teams doesn't support custom picklists.

Team Member Information Display

Displaying Team Member Information on a Parent Page	To display opportunity team member information on a parent page, link the team member and the parent. For example, to display team member information on the related account detail page, add a custom lookup field to the multiline editor. Label it <i>Account to the Opportunity Team</i> . Then set this field to the parent account for each opportunity team member.
Lookups to Team Members Not Supported	You can't create a lookup from an object, such as an account, to an opportunity team member.
Sorting in Related List	You can customize the sort order of the related list in the Opportunity Team Member page layout. However, if a user sorts the related list by a different column, the list keeps that sort order even after the page is refreshed.

Validation Rule, Flow, and Apex Trigger Support

Lightning Experience Support	Validation rules, flows, and Apex triggers are applied when Lightning Experience users add their default team to an opportunity using the Add action on the related list. However, they're not applied when Lightning Experience users select the personal settings option to add their default team to opportunities automatically.
Salesforce Classic	Validation rules, flows, and Apex triggers aren't applied when Salesforce

Support	Classic users add default opportunity teams via any method.
Ownership Change	When an opportunity team member is removed during an opportunity ownership change, Apex triggers are bypassed.

See Also

- [Customize Opportunity Team Roles](#)
- [Maintain Your Users' Opportunity Teams](#)

Opportunity Team Fields

Opportunity team data is stored in standard fields. A user's page layout determines which fields are visible, and a user's access to the account determines which fields are editable.

REQUIRED EDITIONS

Available in: Lightning Experience, Salesforce Classic, and the new Salesforce mobile app

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

Field	Description
Opportunity Access	A team member's level of access to an opportunity. The access level can be Read/Write or Read Only, but it can't be less than the default opportunity sharing access.
Team Role	The role that a team member plays for the opportunity, such as account manager.
User	A user listed as part of the team.

See Also

- [Administer Opportunity Teams](#)

Administer Opportunity Splits and Opportunity Product Splits

Make it easy for your sales reps to collaborate and share opportunity revenue by enabling opportunity splits and opportunity product splits and customizing them for your business processes.

[Set Up Opportunity Splits and Opportunity Product Splits](#)

Prepare to enable opportunity splits by meeting prerequisites. After enabling splits, you can create custom split types to optimize splits for your sales processes. You can also set up opportunity product splits for your opportunity split types.

[Add Opportunity Product Splits](#)

To give team members credit for products they support in closing deals, add opportunity product splits to opportunity split types.

Deactivate or Delete Opportunity Split Types

Deactivating a split type removes it from the Salesforce interface while saving the underlying data, so that you can reactivate it later. You can have a maximum of eight active split types. If your users need another split type, you can deactivate a split type to reallocate one. *Deleting* a split type permanently removes all related data, reducing your storage needs.

Disable Opportunity Splits

If you're not using opportunity splits and you don't want to retain the data, you can disable the feature.

Set Up Opportunity Splits and Opportunity Product Splits

Prepare to enable opportunity splits by meeting prerequisites. After enabling splits, you can create custom split types to optimize splits for your sales processes. You can also set up opportunity product splits for your opportunity split types.

1. Get Ready to Enable Opportunity Splits

Before enabling opportunity splits check for mass operations in progress, inactive currencies, and automated process users related to opportunities.

2. Enable Opportunity Splits

After meeting prerequisites, enable opportunity splits in Setup.

3. Edit Splits Layouts

Choose the fields for sales reps to use when managing opportunity splits and opportunity product splits.

4. Customize Opportunity Split Types

Revenue and overlay splits are supported on currency fields and summary fields that rollup to a currency field on opportunities by default. To reflect reps' quotas and optimize support for sales operations, create up to six custom opportunity split types. Specify whether each custom type must always total 100%.

See Also

[Add Opportunity Product Splits](#)

[Set Up Audit History for Splits and Opportunity Teams](#)

[Deactivate or Delete Opportunity Split Types](#)

[Disable Opportunity Splits](#)

Get Ready to Enable Opportunity Splits

Before enabling opportunity splits check for mass operations in progress, inactive currencies, and automated process users related to opportunities.

Available in: Lightning Experience and Salesforce Classic

Available in: **Performance** and **Developer** Editions and **Enterprise** and **Unlimited** Editions with the Sales Cloud

User Permissions Needed

To enable opportunity splits:	Modify All Data
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1. Check for mass operations in progress, and make sure that all mass operations are finished. While splits are being enabled, a script temporarily disables validation rules, Apex triggers, and workflows for opportunity team records; mass reassignment of opportunity team members; and mass transfer of accounts and opportunities.
If you enable opportunity splits while you're running a mass operation, such as Mass Transfer or Mass Reassign Team Member, enablement of splits can fail.
2. Resolve inactive currencies. If inactive currencies were active in the past, those currencies are probably still used on some opportunity records. When inactive currency is used on opportunities, the splits enablement process fails. To prevent failure, do one of the following.
While splits enablement is in progress, temporarily make inactive currencies active. Delete the opportunities with the inactive currency. This solution works best when you have only a few opportunities with an inactive currency that you don't need for reporting or historical purposes.
3. Handle automated process users related to opportunities. Opportunities owned by users created during automatic processes such as Apex triggers, workflows, and Marketing Cloud Account Engagement integration block opportunity splits enablement.
To prevent the process from failing, transfer ownership of their opportunities to active users. Also, if you have few process users and you don't need their opportunities for reporting or historical purposes, delete all of their opportunities.
4. Consider enabling opportunity splits at the end of the workday so that the process runs overnight. The process sets up a split on every opportunity, and, depending on the number of opportunity records, it can take several hours. You can still work with Salesforce while the process is ongoing.

See Also

[Facilitate Team Selling by Enabling Opportunity Teams](#)

[User Interface Settings](#)

[Profiles](#)

[Permission Sets](#)

Enable Opportunity Splits

After meeting prerequisites, enable opportunity splits in Setup.

Available in: Lightning Experience and Salesforce Classic

Available in: **Performance** and **Developer** Editions and **Enterprise** and **Unlimited** Editions with the Sales Cloud

User Permissions Needed

To enable opportunity splits:	Modify All Data
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Before enabling opportunity splits, make sure to follow the steps in [Get Ready to Enable Opportunity](#)

Splits.

1. In Setup, go to Opportunity Team Settings and enable Team Selling.
2. Next, use the Quick Find box to locate Opportunity Splits Settings.
3. To tailor opportunity splits to your business process, you can make these customizations.
 - Rename or deactivate the default revenue and overlay splits, which are based on the Opportunity Amount field.
 - Define another currency field for splits, and specify whether splits on that field must total 100%. To do so, click + **Add a new split type**.
4. Click **Save**.
5. Help users create splits faster by selecting **Let users add members to opportunity teams while editing splits**. Otherwise, owners must add coworkers to an opportunity team before adding them to a split.
6. Select the opportunity page layouts where you want to include the Opportunity Splits related list. You can also include the related list in page layouts that users have personalized.
7. To start splits enablement, click **Save**.
We send an email with the status throughout the process, and notify you when splits are enabled.
8. After you enable splits, set up the Opportunity Splits component on your opportunity record page so your sales teams can view and work with opportunity splits and opportunity product splits. See [Create and Configure Lightning Experience Record Pages](#) in Salesforce Help.

The opportunity owner records added during splits enablement use more data storage.

If the opportunity owner isn't on the opportunity team, the opportunity owner is added to the team during the splits enablement. The owner is assigned 100% of the split amount. Users can adjust the amount on splits that they create.

See Also

- [Monitor Data and Storage Resources](#)
- [Add Opportunity Product Splits](#)
- [Set Up Audit History for Splits and Opportunity Teams](#)

Edit Splits Layouts

Choose the fields for sales reps to use when managing opportunity splits and opportunity product splits.

Available in: Lightning Experience and Salesforce Classic

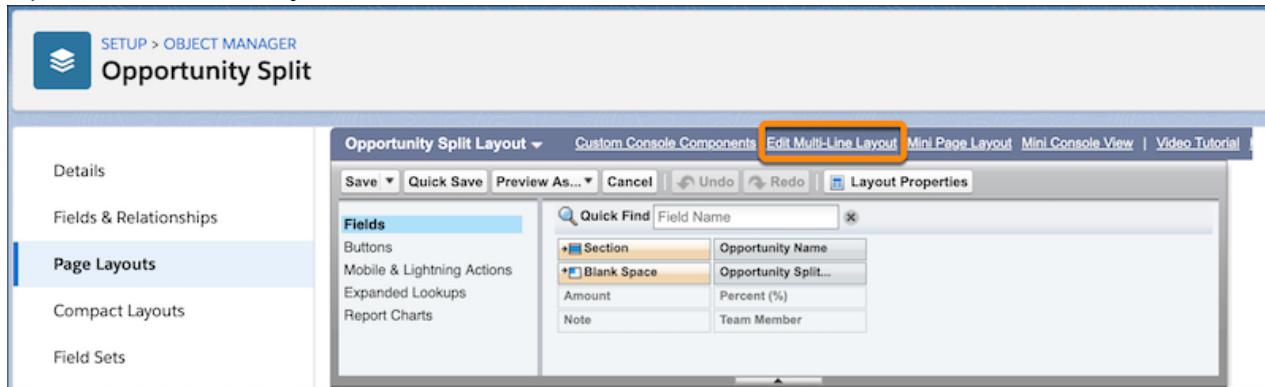
Available in: **Performance** and **Developer** Editions and **Enterprise** and **Unlimited** Editions with the Sales Cloud

User Permissions Needed

To edit multiline layouts and page layouts:	Customize Application
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1. In the Object Manager, use the Quick Find box to find **Opportunity Split** or **Opportunity Product Split**. Complete these steps for each object.

2. Click **Page Layouts**, and then select a layout to edit.
3. Open the Multi-Line Layout editor.



4. In the editor, select fields for sales reps to use when managing splits.

Important The multi-line layout for Opportunity Split and Opportunity Product Split doesn't support rich text fields, multi-select picklists, time, or formula fields. Users can edit those fields on each team member's splits pages. In Lightning Experience, considerations for editing inline in a list view also apply to editing splits in the multi-line view.

5. Save your work.

See Also

[Considerations for Inline Editing in a List View in Lightning Experience](#)

Customize Opportunity Split Types

Revenue and overlay splits are supported on currency fields and summary fields that rollup to a currency field on opportunities by default. To reflect reps' quotas and optimize support for sales operations, create up to six custom opportunity split types. Specify whether each custom type must always total 100%.

Available in: Lightning Experience and Salesforce Classic

Available in: **Performance** and **Developer** Editions and **Enterprise** and **Unlimited** Editions with the Sales Cloud

User Permissions Needed

To create custom split types for opportunities:

Customize Application

AND

Modify All Data

Split on Opportunity Amount is the default currency field. You can create opportunity splits for any other standard currency field, roll-up summary fields, or custom currency fields, but not formula currency fields.

1. In Setup, use the Quick Find box to find **Opportunity Splits Settings**.
2. Click **Edit Split Types**.
3. Click **+ Add a new split type** and define the settings.
4. Save your changes.

Custom opportunity split types are enabled through a background process. You're notified by email when the process is finished. We recommend asking your users not to edit opportunity splits in the meantime.

See Also

- [Administer Opportunity Splits and Opportunity Product Splits](#)
[Add Opportunity Product Splits](#)

Add Opportunity Product Splits

To give team members credit for products they support in closing deals, add opportunity product splits to opportunity split types.

Available in: Lightning Experience

Available in: **Performance** and **Developer** Editions and **Enterprise** and **Unlimited** Editions with the Sales Cloud

User Permissions Needed

To create or edit splits for opportunity team members:

Edit on opportunities

AND

Owner of opportunity record or above the owner in the role hierarchy

Before adding opportunity product splits, make sure to [enable opportunity splits](#).

1. In Setup, on the Opportunity Splits page, under Split Types Setup, click **Edit Split Types**.
2. In the opportunity split type to which you want to enable product splits, select **Include Product Split** and then **Save**.

Important Opportunity product splits must be based on one of the following field combinations. Make sure field-level security is off for the fields you choose.

 - The Total Price field on Opportunity Line Item that rolls up to the Opportunity Amount field
 - A custom currency field on Opportunity Line Item that rolls up to a custom rollup summary field on Opportunity
3. After the confirmation message appears, click **Save**.
4. Show product splits on your opportunity record page so that your sales reps can view and work with them. To add the Opportunity Splits component to your opportunity record page, see [Create and Configure Lightning Experience Record Pages](#).

When you launch the Edit Product Splits page, a 100% split is created for each product on the opportunity for all 100% validated split types.

See Also

- [Get Ready to Enable Opportunity Splits](#)
- [Administer Opportunity Splits and Opportunity Product Splits](#)
- [Create and Configure Lightning Experience Record Pages](#)
- [Set Up Audit History for Splits and Opportunity Teams](#)

Deactivate or Delete Opportunity Split Types

Deactivating a split type removes it from the Salesforce interface while saving the underlying data, so that you can reactivate it later. You can have a maximum of eight active split types. If your users need another split type, you can deactivate a split type to reallocate one. *Deleting* a split type permanently removes all related data, reducing your storage needs.

Available in: Lightning Experience and Salesforce Classic

Available in: **Performance** and **Developer** Editions and **Enterprise** and **Unlimited** Editions with the Sales Cloud

User Permissions Needed

To deactivate or delete a split type:	Customize Application
---------------------------------------	-----------------------

1. In Setup, use the Quick Find box to find **Opportunity Splits Settings**. Click **Edit Split Types**.
2. To deactivate a split type, deselect the split type you want to deactivate and then save.
3. To delete a split type, click  and then save.
You can't delete the default split types.
If your Salesforce org contains many opportunities, deleting a split type can take several hours.

See Also

- [Disable Opportunity Splits](#)

Disable Opportunity Splits

If you're not using opportunity splits and you don't want to retain the data, you can disable the feature.

Available in: Lightning Experience and Salesforce Classic

Available in: **Performance** and **Developer** Editions and **Enterprise** and **Unlimited** Editions with the Sales Cloud

User Permissions Needed

To disable opportunity splits:	Customize Application
--------------------------------	-----------------------

 **Warning** Disabling opportunity splits is an irreversible process, resulting in the following changes.

- Opportunity splits and opportunity product splits on all opportunities are permanently deleted.
- Opportunity and product split reports are permanently deleted.
- Custom reports that were built using opportunity split and opportunity product split report templates still appear on the Reports tab, but you can't access these reports.
- Opportunity split and opportunity product split forecast types and their related forecasting data is deleted.

1. From Setup, use the Quick Find box to find **Opportunity Splits Settings**.
2. Disable opportunity splits, confirming that you want to delete all splits data.

See Also

[Deactivate or Delete Opportunity Split Types](#)

Territories on Opportunity Splits and Opportunity Product Splits

As sales teams collaborate on deals, make it easier to give credit to more team members and territories for helping to close deals. To see how territories contribute to overall sales, allow sales teams to assign opportunity splits and opportunity product splits to territories.

[Considerations for Managing Territory Assignments for Splits](#)

Review important considerations before setting up and configuring the capability for sales teams to assign opportunity splits and opportunity product splits to territories.

[Set Up Territory Assignments for Opportunity Splits and Opportunity Product Splits](#)

Prepare your sales teams to see how territories contribute to overall sales by assigning opportunity splits and opportunity product splits to territories.

Considerations for Managing Territory Assignments for Splits

Review important considerations before setting up and configuring the capability for sales teams to assign opportunity splits and opportunity product splits to territories.

Opportunity Splits are available in: Lightning Experience and Salesforce Classic

Opportunity Product Splits are available in Lightning Experience

Available in: **Performance** and **Developer** Editions and **Enterprise** and **Unlimited** Editions with Sales Cloud

Setup

- When you turn on **View all opportunities associated with the territory's child territory**, regardless of who owns the opportunity, users in a parent territory have access to the opportunity when the territory

is specified on the opportunity split or opportunity product split.

- When you turn on **Use the opportunity's territory as the default split territory when the default revenue type split is created for the opportunity owner**, anytime the default opportunity owner split is created for a revenue type, that split inherits the territory of the parent opportunity.

If you use an Apex script to auto-create splits for team members on opportunities, check your script to determine whether you need to update it before you turn on this setting. For example, if your Apex code is written to insert team member revenue type splits with nonzero percentages, your code can fail for opportunities with assigned territories. The reason is that when a team member revenue type split is inserted with a nonzero percentage, we take that percentage from an opportunity owner split in the same territory. If a split doesn't exist in the same territory for the opportunity owner, the insert of the team member split fails.

Update your Apex logic to account for this new behavior by inserting the team member split with the same territory as the territory associated with the default opportunity owner split. First, insert the team member's split at 0%. Then do a bulk update of that split and the opportunity owner's split to update all splits to the percentages that you want.

Territory Models and Territories

- When you archive a territory model, users without the ManageTerritories permission can't access the territories in that model.
- Split records retain the association with the territories in an archived territory model. While this association doesn't cause errors, we recommend reassigning the records to territories in an active territory model.
- You can't delete territory models that have territories with associated opportunity splits or opportunity product splits. Remove the territory associations before you delete the territory models, or reassign the splits to other active territories.
- To delete an archived territory model, remove the territory associations or reassign the splits to a territory in an active territory model.
- You can reassign split records to different territories several ways.
 - Use the [filter-based opportunity territory assignment tool](#) that's available in Territory Settings in Setup (recommended).
 - Users can manually reassign the territories.
 - Use Data Loader to import updated records.

Fields and Reports

- The default field label in the multi-line layout on the opportunity split and opportunity product split object is Territory.
- To see reports of splits by territory, use the Split Archived Territory Name, Split Territory ID, Split Territory Name, and Split Territory Description fields on the Opportunity and Product Split Report and the Opportunity and Product Split Schedule Report.
- To see whether splits are associated with archived territory models, add the Archived Territory Name field to the Opportunity and Product Split and Opportunity and Product Split Schedule Reports.

Set Up Territory Assignments for Opportunity Splits and Opportunity Product Splits

Prepare your sales teams to see how territories contribute to overall sales by assigning opportunity splits and opportunity product splits to territories.

REQUIRED EDITIONS

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

USER PERMISSIONS NEEDED

To enable Sales Territories:	Customize Application
To configure territory types, territory models, and territories:	View Setup and Configuration
AND	
	Manage Territories
To enable Opportunity Splits and Opportunity Product Splits:	Modify All Data
To add fields to Opportunity Splits and Opportunity Product Splits page layouts:	Modify All Data

To set up splits to include territory assignments, complete these setup steps.

1. [Enable sales territories and related features.](#)
2. [Configure territory types, configure territory models, and set up your territories.](#)
3. [Turn on Opportunity Splits.](#)
4. [Set up Opportunity Product Splits.](#)
5. Finally, so your users can assign territories to splits, add the Split Territory field on the Opportunity Split and Opportunity Product Split multi-line page layouts.

 **Note** To assign territories to splits, you must have an active territory model with territories.

Set Up Audit History for Splits and Opportunity Teams

Help your sales teams track changes to opportunity splits, opportunity product splits, and opportunity teams by enabling Audit History.

Available in: Lightning Experience

Available in: **Performance and Developer Editions and Enterprise and Unlimited Editions with the Sales Cloud**

User Permissions Needed	
To enable Audit History:	Modify All Data

Before you set up Audit History, make sure opportunity splits and opportunity teams are enabled. Field History Tracking provides the logs for records created and deleted, and is enabled by default.

1. To include updates to splits and team members, select the fields you want to track in Field History Tracking. In Object Manager, go to **Fields & Relationships** in Opportunity Team, Opportunity Split, and Opportunity Product Split and select **Set History Tracking**. Select your fields and save.
2. To show Audit History on your opportunity record page so that your sales team can view changes, create an Audit History tab in Lightning App Builder.
3. Then add the Audit History component to your Audit History tab.

Considerations for Managing Audit History

Learn how changes to opportunity splits, opportunity product splits, and opportunity team members are logged and shown in Audit History.

See Also

[Add and Customize Tabs on Lightning Pages Using the Lightning App Builder](#)

[Create and Configure Lightning Experience Record Pages](#)

[Enable Opportunity Splits](#)

[Facilitate Team Selling by Enabling Opportunity Teams](#)

Considerations for Managing Audit History

Learn how changes to opportunity splits, opportunity product splits, and opportunity team members are logged and shown in Audit History.

Available in: Lightning Experience
Available in: Performance and Developer Editions and Enterprise and Unlimited Editions with the Sales Cloud

- When you directly delete opportunity split, opportunity product split, and opportunity team member records, the records are logged in the OpportunityRelatedDeleteLog object.
- When you delete split records or opportunity team member records, the records in the object history are also deleted.
- When you delete a split type, the related split records are deleted and the deleted records aren't logged.
- Deactivated split types still show history data.

See Also

[Set Up Audit History for Splits and Opportunity Teams](#)

[Developer Guide: OpportunityRelatedDeleteLog Object Reference](#)

[Developer Guide: EntityHistory Object Reference](#)

Manage Multiple Currencies

Give your sales team the ability to use multiple currencies in opportunities, forecasts, quotes, reports, and other data.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To view currencies: View Setup and Configuration

To change currencies: Customize Application

1. [Enable multiple currencies.](#)
2. To designate a corporate currency, from Setup, enter *Manage Currencies* in the **Quick Find** box, then select **Manage Currencies**, and then click **Change Corporate**.
3. To activate more currencies, click **New** in the Active Currencies related list.
4. To use dated exchange rates, enable advanced currency management.
5. Set conversion rates for new currencies. If you enable advanced currency management, see [Editing Dated Exchange Rates](#).

Companies can use multiple currencies in opportunities, forecasts, reports, quotes, and other currency fields. The administrator sets the corporate currency, which reflects the currency of the corporate headquarters. The administrator also maintains the list of active currencies and their conversion rates relative to the corporate currency. The active currencies represent the countries in which the company does business. Only active currencies can be used in currency amount fields.

Each user has a personal currency, which is used as the default currency in quotas, opportunities, quotes, and reports. Users can also create opportunities and enter amounts using other active currencies.

All standard and custom object records with currency fields have a field that specifies the currency to use for all amount fields in that record. Click **Edit** to display this editable **Currency** field on a record. For example, you can set the **Account Currency** to US dollars so that the **Annual Revenue** shows in dollars for one of your American accounts. All currency amounts are displayed in the default currency of the record. Administrators can choose whether to also display, in parentheses, the user's personal currency if it's different from the currency of the record. When you change the default currency of a record, currency amounts aren't converted. They display the new currency code.

 **Note** If your org uses [advanced currency management](#), the opportunity close date determines which conversion rate to use when displaying currency amounts.

Amounts in reports are shown in their original currencies, but can be displayed in any active currency.

You can change the currency used for report totals by selecting a currency from **Show | Currencies**. The default value is your personal currency. For any amount, you can choose to display the Converted column—for example, **Annual Revenue Converted**—which shows amounts in the currency you select.

Custom formula fields aren't tied to any particular currency. If the result of a formula field is a currency amount, it displays in the currency of the associated record. This rule is also true for cross-object formulas that reference merge fields with different currencies, and formulas in workflow rules and approval processes. However, workflow rules and approval processes that use filters instead of formulas convert all currency values to the corporate currency.

If currency fields are referenced in Apex, you can't disable multiple currencies for your organization. For example, if Apex code references the **Account Currency** field (represented as `CurrencyIsoCode` in the code), you can't disable multiple currencies.

[Enable Multiple Currencies](#)

To use multiple currencies, turn on the feature.

[Considerations for Enabling Multiple Currencies](#)

Enabling multiple currencies introduces permanent changes in your org. Before proceeding, be aware of these implications to ensure a smooth transition.

[Activate and Deactivate Currencies](#)

For orgs with multiple currencies, specify which currencies are supported by activating or deactivating currencies.

[About Advanced Currency Management](#)

Advanced currency management allows you to manage dated exchange rates within opportunities using Salesforce. Dated exchange rates allow you to map a conversion rate to a specific date range.

[Edit Dated Exchange Rates](#)

Add, view, change, or delete dated exchange rates.

See Also

[Administrator setup guide: Using Multiple Currencies](#)

[Enable Multiple Currencies](#)

Enable Multiple Currencies

To use multiple currencies, turn on the feature.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Group, Starter, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com Editions**

To enable multiple currencies:

1. Familiarize yourself with the [implications of enabling multiple currencies](#).
2. In Setup, enter *Company Information* in the **Quick Find** box, then select **Company Information** and click **Edit**. Ensure that your selected currency locale is the default currency that you want to use for current and future records. Enable **Activate Multiple Currencies**, and then save your changes.

See Also

[Considerations for Enabling Multiple Currencies](#)

[Manage Multiple Currencies](#)

[About Advanced Currency Management](#)

Considerations for Enabling Multiple Currencies

Enabling multiple currencies introduces permanent changes in your org. Before proceeding, be aware of these implications to ensure a smooth transition.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Group, Starter, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com Editions**

- After you enable multiple currencies for your Salesforce org, you can't disable it.
- If you enable multiple currencies, [field-to-field filters](#) in reports don't support currency fields, like amount.
- Upon enablement, existing records are stamped with a default currency code that you provide in your enablement request. For example, if your org contains records using USD and EUR, switch them all to the same default currency before enablement. Support for this type of conversion is also available as a Salesforce paid implementation service.
- Standard and custom objects, such as Account, Lead, Case, Opportunities, Opportunity Products, Opportunity Product Schedules, and Campaign Opportunities, have currency fields that support multiple currencies. Reports related to these objects and fields also support multiple currencies. By default, page layouts for these objects have multi-currency-compatible fields in which you can specify the currency for the record. Typically, these fields are available only when creating a record or editing an existing record. The selected currency is used for the primary amount field.
- When you create and test a package, the temporary build org has only USD configured. Using a currency code other than USD for testing results in an error
- After enablement, the number of decimal places defined in a custom currency field is ignored. Instead set decimal places per currency through Manage Currencies in Setup.
- After enablement, the primary currency displays as usual and, optionally, a secondary currency amount appears in parentheses. The primary currency is typically the default corporate currency, unless it's overridden at the record level. The amount shown in parentheses is the user's personal default currency, calculated based on the conversion rate settings defined in your org. The conversion rate first calculates from the corporate currency to the records currency, then calculates again based on the logged in users default currency. To control whether the converted currency amount appears,

enable or disable parenthetical currency conversion from the Manage Currencies page.

- In reports, the primary currency reflects either the default corporate currency or the currency selected for the record. The secondary currency reflects the personal default currency of the user running the report, or the currency specified in the report criteria.
- Users can specify a personal default currency on their personal information page. If parenthetical currency conversion is enabled, the personal default currency displays as the secondary currency amount (converted amount). Changing the personal default currency updates the converted amount in real time.
- After a currency is added to an org's list of supported currencies, it can't be deleted from the administrator's list of currencies, even when it's deactivated. The presence of inactive currencies in the administrator's list is a cosmetic issue that doesn't affect end users. A deactivated currency isn't visible to end users, but remains visible to administrators. Salesforce recommends that you keep this issue in mind during testing and use only those currencies that you eventually plan to use in your organ.
- After enablement, all currency fields display the ISO code of the currency before the amount. For example, \$100 displays as USD 100.



Note If you have only one currency in your multi-currency org, you can set a preference to display currency symbols instead of ISO codes. To display currency symbols, search Setup for *User Interface*, and then select **Show currency symbols instead of ISO codes** in the Currency Display Settings section of the User Interface settings page. If you later enable more currencies in your organization, ISO codes display, and this preference is no longer available. This preference applies only in the standard Salesforce user interface. When you [activate multiple currencies](#), you specify the number of decimal places to display. However, when Show currency symbols instead of ISO codes is enabled, the specified decimal places for multiple currencies are ignored.

- By default, all converted amounts in your org rely on the current conversion rates defined for your org. Conversion rates must be set and updated manually. Changing the exchange rate automatically updates converted amounts on all records, including on closed opportunities. You can opt to use dated exchange rates by using [advanced currency management](#) to track historical exchange rates. Advanced currency management allows you to maintain a list of exchange rates by date range. Converted currency amounts on opportunities display based on the specified Close Date, regardless of the opportunity stage. If the Close Date changes to a different exchange rate period, changing the Close Date impacts converted amounts.



Note Dated exchange rates aren't used in forecasting, currency fields in other objects, or currency fields in other types of reports.

See Also

[Administrator setup guide: Using Multiple Currencies](#)

[Enable Multiple Currencies](#)

[Manage Multiple Currencies](#)

[About Advanced Currency Management](#)

Activate and Deactivate Currencies

For orgs with multiple currencies, specify which currencies are supported by activating or deactivating

currencies.

REQUIRED EDITIONS

Available in both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To view currencies: View Setup and Configuration

To change currencies: Customize Application

- Active currencies represent countries in which your org does business. Only active currencies can be entered in opportunities, forecasts, and other items. Once you activate a currency, you can never permanently delete it.
- Inactive currencies are currencies that your org no longer uses. You can have existing records that use inactive currencies, but you can't enter new amounts that use inactive currencies.

To activate new currencies:

1. From Setup, enter *Manage Currencies* in the **Quick Find** box, then select **Manage Currencies**.
2. Click **New** in the Active Currencies related list.
3. Select a currency. Currencies are alphabetized using their ISO currency code.
4. Enter the conversion rate relative to your corporate currency.
5. Specify the number of decimal places to display for amounts in this currency.
6. Click **Save**.

To activate a currency from the list of inactive currencies, click **Activate** next to the currency.

To deactivate a currency, click **Deactivate** next to the currency. You can't deactivate the corporate currency. Deactivating a currency does not alter amounts in items that use that currency. However, you can no longer enter new amounts using the inactive currency.

 **Note** Deactivating a currency that is set as a user's personal currency automatically resets the user's currency to the corporate currency.

See Also

- [Managing Multiple Currencies](#)
- [Editing Conversion Rates](#)
- [About Advanced Currency Management](#)
- [Administrator setup guide: Using Multiple Currencies](#)

About Advanced Currency Management

Advanced currency management allows you to manage dated exchange rates within opportunities using

Salesforce. Dated exchange rates allow you to map a conversion rate to a specific date range.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To enable advanced currency management:	Customize Application
To view currencies:	View Setup and Configuration
To change currencies:	Customize Application

For example, the exchange rate on January 1 was 1 USD to 1.39 AUD, but on February 1, it changed to 1 USD to 1.42 AUD. Your opportunities that closed between January 1 and February 1 use the first exchange rate (1 = 1.39), while opportunities that closed after February 1 used the second exchange rate (1 = 1.42).

Dated exchange rates are defined using a start date and a conversion rate. Each rate is in effect until either the end of time or the day before the next start date for that currency. The time between one start date and the next start date is called the exchange rate date range. These ranges can be as small as a day and as large as all time.

To enable or disable advanced currency management, see [Enabling or Disabling Advanced Currency Management](#).

When advanced currency management is first enabled, your existing exchange rates automatically become the first set of dated exchange rates. These rates are valid for all time, until you define another set of exchange rates.

If you disable advanced currency management, all currency conversions use the static conversion rate. See [Edit Conversion Rates](#).

Advanced Currency Management Considerations

- Dated exchange rates are used for opportunities, opportunity products, opportunity product schedules, campaign opportunity fields, opportunity splits, and reports related to these objects and fields. Dated exchange rates are not used in forecasting, currency fields in other objects, or currency fields in other types of reports. Dated exchange rates are also not used when calculating formula fields with a formula return type of “Currency.”
- Salesforce orgs with advanced currency management support roll-up summary fields between two advanced currency management objects. For example, roll-up summary fields are supported from an opportunity line item object to its opportunity object, because both are advanced currency management enabled. However, if you enable advanced currency management, you can’t create roll-up summary fields that calculate currency on the opportunity object rolling up to the account object.

You also can't filter on the opportunity currency field on the account object. All existing currency-related roll-up summary fields on the opportunity object that summarize objects that don't support dated exchange rates are disabled and their values are no longer calculated. If your org enables advanced currency management, delete any currency roll-up summary fields using opportunities and accounts or opportunities and custom objects.

- Campaign opportunity fields use dated exchange rates when calculating the amount in the campaign currency. However, they don't use dated exchange rates when converting those amounts to the user currency.
- Cross-object formulas always use the static conversion rate for currency conversion.
- If advanced currency management is enabled, you can't bind Visualforce pages that use `<apex:inputField>` or `<apex:outputField>` components to currency fields that support advanced currency management.

[Enable or Disable Advanced Currency Management](#)

Turn on advanced currency management.

See Also

[Manage Multiple Currencies](#)

[Activate and Deactivate Currencies](#)

[Administrator setup guide: Using Multiple Currencies](#)

Enable or Disable Advanced Currency Management

Turn on advanced currency management.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To enable advanced currency management: [Customize Application](#)

Enable multiple currencies for your org. For more information, see [Manage Multiple Currencies](#).

1. From Setup, enter *Manage Currencies* in the **Quick Find** box, then select **Manage Currencies**.
2. Click **Enable**.
3. When prompted, select **Yes, I want to enable Advanced Currency Management** and click **Enable**.

When you first enable advanced currency management, your existing exchange rates automatically become the first set of dated exchange rates. These rates are valid for all time, until you define another set of exchange rates.

To disable advanced currency management, navigate to the Manage Currencies page, then click **Disable**. When prompted, select **Yes, I want to disable Advanced Currency Management** and click **Disable**.

If you disable advanced currency management, all currency conversions use the static conversion rate. See [Edit Conversion Rates](#).

When advanced currency management is enabled, Visualforce `<apex:inputField>` and `<apex:outputField>` components cannot display currency fields.

See Also

[About Advanced Currency Management](#)

Edit Dated Exchange Rates

Add, view, change, or delete dated exchange rates.

REQUIRED EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To view currencies: View Setup and Configuration

To change currencies: Customize Application

To add new dated exchange rates:

1. From Setup, enter *Manage Currencies* in the **Quick Find** box, then select **Manage Currencies**.
2. Click **Manage Dated Exchange Rates**.
3. Click **New Exchange Rates**.
4. Enter the date that the exchange rates go into effect.
5. Enter the exchange rates. The exchange rates default to the current exchange rate. If you do not want to set a new exchange rate for a currency, delete the exchange rate (leave the field blank).
6. Click **Save** to save the new dated exchange rates.

To view existing dated exchange rates, select the date range you want to view either by entering the date and clicking **Go!**, or by selecting **Previous Range** or **Next Range**.

To delete a dated exchange rate for a particular currency, click the name of the currency you want to edit, then click **Del** for the date range you want to delete. If the date range you want is not displayed, enter it in the **Show all rates with start dates between** fields and click **Go!**.

To edit your dated exchange rates for a particular currency, click **Edit** for the date range you want to edit. If the date range you want is not displayed, enter it in the **Show all rates with start dates between** fields and click **Go!**. Edit the exchange rate, setting it to the new value for the date range, and click **Save**.

See Also

[About Advanced Currency Management](#)

- [Manage Multiple Currencies](#)
- [Activate and Deactivate Currencies](#)
- [Administrator setup guide: Using Multiple Currencies](#)

Guide Users with Path

Boost productivity and help reps gather complete data. Create paths to guide your users through steps of a business process, such as working an opportunity from a fresh lead to a successfully closed deal. At each step of a path, you can highlight key fields and include customized guidance for success.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To administer Path:

Modify All Data

OR

Customize Application

Path is available for the following objects:

- Accounts (business accounts and person accounts)
- Assets
- Campaigns
- Cases
- Contacts
- Contracts
- Fulfillment order
- Leads
- Opportunities
- Orders
- Product service campaigns
- Product service campaign items
- Quotes
- Service appointments
- Service contracts
- Work orders
- Work order line items
- Custom objects

Path is supported on Lightning record pages in the Salesforce mobile app.

1. [Enable Path](#)

To start creating paths, first enable Path in Setup.

2. [Create a Path](#)

Create one path for each available combination of object, picklist, and record type for supported objects. And help your teams celebrate their successes by tossing virtual confetti when reps reach designated path steps.

3. [Finalize the Path](#)

Choose the final path step, following the order of the picklist values that the path is based on. Then, add the path to the related record pages.

4. [Considerations and Guidelines for Creating Paths](#)

Before creating paths for your users, review the considerations and guidelines for paths.

5. [Considerations and Guidelines for Creating Paths on Leads, Opportunities, and Accounts](#)

Review these considerations and guidelines for paths on the Lead, Opportunity, and Account objects.

See Also

[Enable Path](#)

Enable Path

To start creating paths, first enable Path in Setup.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To enable Path:

Modify All Data

OR

Customize Application

1. From Setup, in the Quick Find box, enter *Path Settings* and select it.
2. Click **Enable**.
3. To let users decide whether the path remembers its previous state, select **Remember User's Path Preferences**. If this option isn't selected, the path's guidance details are hidden whenever the page that the path is on loads.

See Also

[Create a Path](#)

Create a Path

Create one path for each available combination of object, picklist, and record type for supported objects. And help your teams celebrate their successes by tossing virtual confetti when reps reach designated path steps.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To create a path:

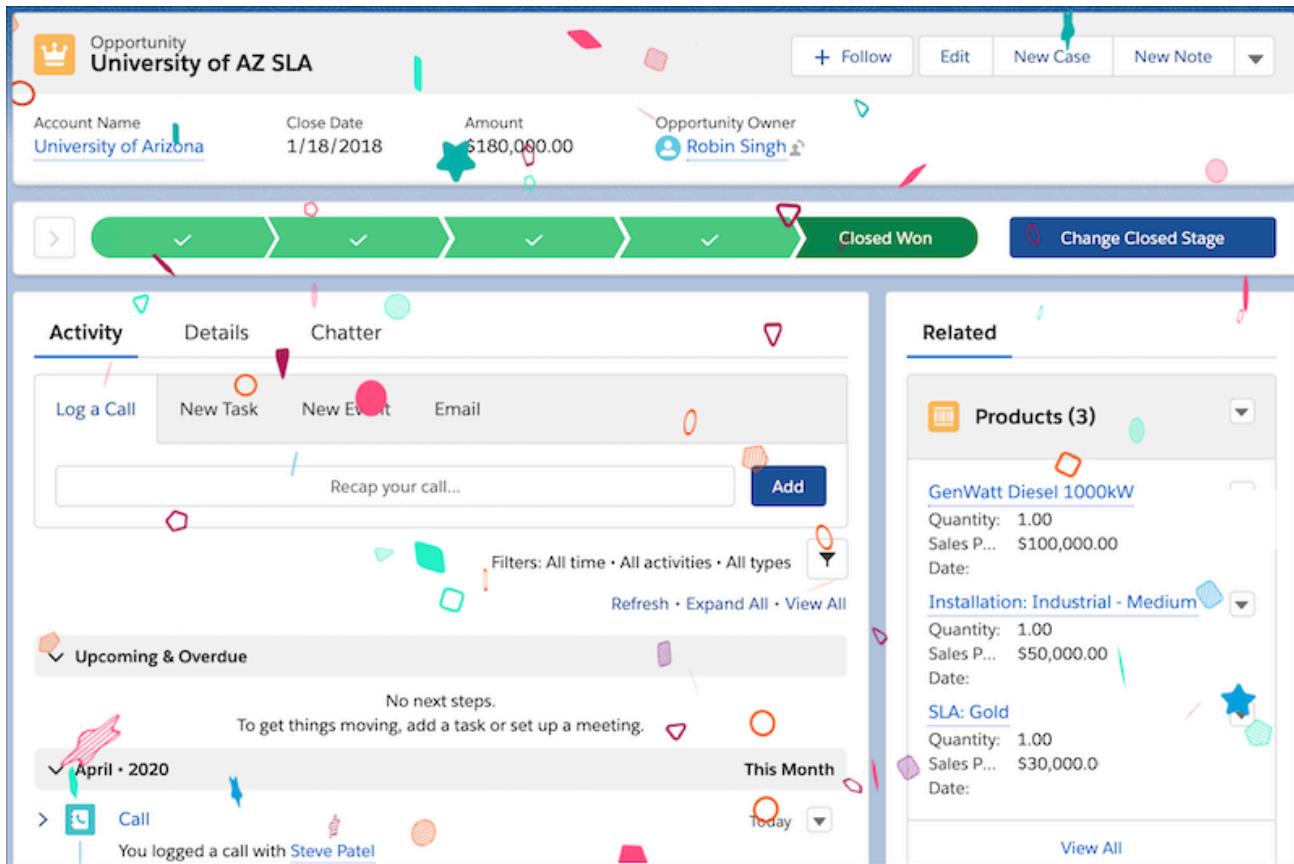
Modify All Data

OR

Customize Application

The screenshot shows the Opportunity page for 'Dickenson Mobile Generators'. At the top, there's a navigation bar with 'Follow', 'Edit', 'New Case', 'New Note', and a dropdown menu. Below the header, the opportunity details are listed: Account Name (Dickenson PLC), Close Date (1/18/2020), Amount (\$130,000.00), and Opportunity Owner (Robin Singh). A progress bar at the top indicates the path stages: Qualification (highlighted with a yellow circle labeled '1'), Needs Analysis, Proposal, Negotiation, and Closed. A blue button 'Mark Stage as Complete' is visible. On the left, a sidebar lists 'Key Fields': Account Name (Dickenson PLC), Amount (\$130,000.00), Close Date (1/18/2020), Forecast Category (Pipeline), and Next Step (Send quote by the end of the week). To the right of the fields, there's an 'Edit' button and a 'Guidance for Success' section (highlighted with a yellow circle labeled '3') containing the text: 'Qualify the service and confirm budget' and a bulleted list: '• What's their service need?', '• What problem are they trying to solve?', '• How does solving these problems help them?', '• Why is the timing good for them?', '• What's their budget?', and '• What other solutions are they considering?'. A blue button 'Mark Stage as Complete' is also present here.

Steps for each path (1) are based on picklist values that you select when you create the path. At each step, show up to five key fields to help users focus on the most important information (2). And help users succeed with guidance, such as tips, links, and company policy information (3).



Help users celebrate their successes by tossing virtual confetti when reps reach path steps such as Closed Won.

1. From Setup, in the Quick Find box, enter *Path Settings* and select it.
2. Select **New Path**.
3. In step 1 of creating a path, enter basic information about the path: a unique path name, the object to base the path on, the record type, and the picklist to base the path on.
- Note** Paths are supported for many standard picklists and for custom picklists. If paths exist for all available record types for the object, create another record type, and then return to Path Settings to create a path.
4. Click **Next**.
5. In step 2 of creating a path, select key fields for each step on the path and enter success guidance.
 - a. For each step on the path, select up to five key fields.
 - b. For each step on the path, enter up to 1,000 characters of guidance.
6. Click **Next**.
7. In step 3 of creating a path, activate the path and enable confetti celebration animations.
 - a. Decide whether to activate the path immediately. To activate the path later, return to Path Settings.
 - b. Select picklist values and a frequency for triggering the celebration animation.

For frequency, if average users reach celebration values more often, set celebrations to occur less often. For example, let's say you have a Renewal Business path where reps can close a lot of opportunities every day. Trigger the animation on random closed opportunities by selecting **Rarely** or **Sometimes**. But, for a New Business path where opportunities are hard won, select a frequency

of Always.

8. Click **Finish**.

For most objects, the order of path steps is based on the order of the values in the picklist that the path is based on. The last step represents a closed stage or status. For example, in the last step of an opportunity path based on the Stage field, by default, users select Closed Won or Closed Lost.

On some objects and fields, you can customize the field value represented by the last step of the path.

See Also

[Finalize the Path](#)

Finalize the Path

Choose the final path step, following the order of the picklist values that the path is based on. Then, add the path to the related record pages.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To customize the last step of a path:

Modify All Data

OR

Customize Application

Configure the Last Path Step

- From the Object Manager, go to the management settings for the object that your path is based on and select **Fields and Relationships**.
- Select the field your path is based on.
- Find the list of picklist values for the field. For each picklist value that represents completion of the path, verify that the field attribute indicates a closed or completed status.
For most objects, the last step represents a closed stage or status. The field attributes indicating closed or completed status vary by object and field. Here are some examples.

Object	Field	Action
Opportunity	Stage	Select a Type of Closed/Won or Closed/Lost.

Object	Field	Action
Case	Status	Select the Closed option.
Work Order or Work Order Line Item	Status	Select a Status Category of Canceled, Cannot Complete, Completed, or Closed.

4. Click **Save**.

Add the Path to the Lightning Record Page

1. Go to a record for the object your path is based on.
2. From Setup, select **Edit Page**.
3. In the search box, enter *Path*.
4. Drag the Path component onto the record page.
5. Click **Save**.
6. To activate the page, click **Activate**, and then click **Close**.

See Also

- [Considerations and Guidelines for Creating Paths](#)
[Create and Configure Lightning Experience Record Pages](#)

Considerations and Guidelines for Creating Paths

Before creating paths for your users, review the considerations and guidelines for paths.

REQUIRED EDITIONS

Available in: Lightning Experience

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

Packages, Key Fields, and Guidance for Success

- When you configure key fields and success guidance in a path, kanban views configured for the same object, record type, and picklist also show the information.
- Each object can have one path per record type. There is no limit to the number of paths that you can create per org.
- If your org has a large combination of objects, record types, and picklists, path creation can take a couple of minutes.
- To translate Guidance for Success content, use the Path Step Rich Text component in Translation Workbench.
- You can't include images in path packages.

- You can't package custom values in standard picklist fields on paths.
- Path appears for records where the running user has permission to view the record, record type, and all fields used in the path.

Celebrations (Confetti Animations)

- When you configure celebrations in a path, the confetti animation is also triggered in kanban views configured for the same object, record type, and picklist.
- Celebrations don't work on the lead status Converted.
- Celebrations don't support field values with a comma in the API name. Delete the comma from the API name or re-create the value. A comma in the *label* for a field value is OK.

Editing and Validation

- The record type and owner fields aren't editable in the Key Fields panel. To transfer ownership, users must use the Details tab. To change the record type, they must use the Change Record Type action.
- If a path exists for a record type that you delete, the path is also deleted.
- You can't use the page layout to require different fields in different steps. However, you can set up validation rules based on a path step.
- Validation messages appear as page-level messages even if you configure the rules to show them near the fields.
- If the Opportunity Stage field is in use in field dependencies, all Stage values are shown when selecting the last stage Closed, instead of showing only Closed/Won and Closed/Lost options.
- When you add a Path component to a dynamic form, a field's configuration on the page layout overrides the UI Behavior value selected for it on the dynamic form. For example, Opportunity Information Description is set as required on the Opportunity page layout but has a UI Behavior value of None on the dynamic form. The Path component treats the Opportunity Information Description field as required.

See Also

- [Create a Path](#)
- [Considerations for Using Kanban Views](#)
- [Considerations and Guidelines for Administering Kanban](#)
- [Metadata Available for Translation](#)

Considerations and Guidelines for Creating Paths on Leads, Opportunities, and Accounts

Review these considerations and guidelines for paths on the Lead, Opportunity, and Account objects.

REQUIRED EDITIONS

Available in: Lightning Experience

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

Lead Paths

- If you create a path for leads, we recommend making Unqualified status the first step.

Opportunity Stage Durations in Paths and Reports

- To create an Opportunity History report that mirrors the path, group by **From Stage** and filter by **Stage Change**.
- Opportunity stage durations aren't shown in paths in Experience Cloud sites.
- Opportunity stage durations are displayed differently in paths and reports.
 - In paths, durations are rounded up to the nearest day. A duration of a minute is displayed as 1 day.
 - In reports, durations aren't rounded up. A duration of less than 24 hours is displayed as 0 days.
- Opportunity stage durations are totaled differently in paths and reports.
 - In paths, the stage duration is the number of days that the opportunity spends in a stage.
 - In reports, the stage duration is the number of days from the time that the opportunity entered the stage to the time it's moved to the next stage.

 **Example** An opportunity is moved into the Proposal stage, stays there for 2 days, and then moves down the path into the Negotiation stage. Later, the opportunity is moved back into the Proposal stage and stays there for 3 days, where it currently remains. In Paths, both times that the opportunity is in the Proposal stage are totaled, for a stage duration of 5 days. In reports, although the opportunity is back in the Proposal stage, the stage duration shows only the stage duration between the first two stages, which is 2 days.

Business Accounts Versus Person Accounts

- If person accounts are enabled, the account record type selected determines whether a path is for business accounts or person accounts.

Build a Culture of Recognition with WDC

WDC is a suite of tools that help reps, managers, and teams enter and endorse skills, and give thanks. These activities build a culture of recognition.

REQUIRED EDITIONS

Available in: Salesforce Classic

WDC is available for existing WDC customers in **Professional Edition, Enterprise Edition, Performance**

Edition, Unlimited Edition, and Developer Edition.

 **Important** Starting in Spring '22, WDC isn't available to new Salesforce customers. For existing customers, WDC features and records from Badges, Skills, and Thanks aren't affected and will remain available in the application beyond Spring '22. WDC Goals, Coaching, Feedback, Performance, and Rewards features won't appear in the application anymore, and records created previously will no longer be accessible.

 **Note** On May 1, 2020, we rebranded this suite. It's now called WDC.

[Set Up WDC](#)

Set up WDC and its features.

[Configure WDC](#)

Configure WDC to meet the needs of your business.

[Manage WDC](#)

Use these WDC features to thank coworkers.

Set Up WDC

Set up WDC and its features.

REQUIRED EDITIONS

Available in: Salesforce Classic

WDC is available for existing WDC customers in **Professional Edition, Enterprise Edition, Performance Edition, Unlimited Edition, and Developer Edition**.

 **Important** Starting in Spring '22, WDC isn't available to new Salesforce customers. For existing customers, WDC features and records from Badges, Skills, and Thanks aren't affected and will remain available in the application beyond Spring '22. WDC Goals, Coaching, Feedback, Performance, and Rewards features won't appear in the application anymore, and records created previously will no longer be accessible.

WDC has various features to help your sales and service teams. These features include recognizing skills and giving thanks.

After you receive your WDC licenses, set up WDC.

1. [Considerations for Setting Up WDC](#)

Plan out your implementation before enabling WDC in your organization.

2. [Assign a WDC Administrator](#)

Before enabling WDC in your organization, you must assign a WDC user feature license to the person who will be the system administrator and responsible for setting up WDC for your organization.

3. Enable WDC Features

Administrators can enable preferences for WDC features on the WDC Settings page.

4. Assign WDC Licenses

After granting access to WDC features with permission sets or profiles, assign users a WDC license.

5. Configure WDC Features

Configure the Recognition and Skills features.

Considerations for Setting Up WDC

Plan out your implementation before enabling WDC in your organization.

REQUIRED EDITIONS

Available in: Salesforce Classic

WDC is available for existing WDC customers in **Professional Edition**, **Enterprise Edition**, **Performance Edition**, **Unlimited Edition**, and **Developer Edition**.

 **Important** Starting in Spring '22, WDC isn't available to new Salesforce customers. For existing customers, WDC features and records from Badges, Skills, and Thanks aren't affected and will remain available in the application beyond Spring '22. WDC Goals, Coaching, Feedback, Performance, and Rewards features won't appear in the application anymore, and records created previously will no longer be accessible.

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USER PERMISSIONS NEEDED

To enable WDC features:	Customize Application
To assign permission sets:	Assign Permission Sets
To assign profiles:	Manage Users
To set field-level security:	Manage Profiles and Permission Sets
AND	
Customize Application	

Before beginning the implementation process, Salesforce must enable WDC permissions and provision WDC licenses for your organization. Contact Salesforce to coordinate this with you. Meanwhile, check if your organization has available WDC licenses: in Setup, enter *Company Information* in the **Quick Find** box, then select **Company Information**, and check for WDC User under **Feature Licenses**.

 **Note** We recommend that you enable Chatter regardless of the edition your org is using. Many WDC

features use the Chatter feed to notify and interact with users. To confirm that Chatter is enabled, from Setup, enter *Chatter Settings* in the **Quick Find** box, then select **Chatter Settings**, and verify that Chatter Settings is enabled.

When using WDC features in the mobile app, you can't create custom badges.

See Also

[Assign a WDC Administrator](#)

Assign a WDC Administrator

Before enabling WDC in your organization, you must assign a WDC user feature license to the person who will be the system administrator and responsible for setting up WDC for your organization.

REQUIRED EDITIONS

Available in: Salesforce Classic

WDC is available for existing WDC customers in **Professional Edition**, **Enterprise Edition**, **Performance Edition**, **Unlimited Edition**, and **Developer Edition**.

 **Important** Starting in Spring '22, WDC isn't available to new Salesforce customers. For existing customers, WDC features and records from Badges, Skills, and Thanks aren't affected and will remain available in the application beyond Spring '22. WDC Goals, Coaching, Feedback, Performance, and Rewards features won't appear in the application anymore, and records created previously will no longer be accessible.

 **Note** On May 1, 2020, we rebranded this suite. It's now called WDC.

USER PERMISSIONS NEEDED

To assign a WDC administrator: Customize Application

If you're the administrator setting up WDC, assign the license to yourself.

1. From Setup, enter *Users* in the **Quick Find** box, then select **Users**.
2. Find the name of the person who will be the system administrator and click **Edit** next to their name.
3. In the right-hand column, select the **WDC User** checkbox.
4. Click **Save**.

We strongly recommend that you create a separate WDC Administrator profile with limited access because the standard Salesforce System Administrator profile is so powerful.

See Also

[Enable WDC Features](#)

Enable WDC Features

Administrators can enable preferences for WDC features on the WDC Settings page.

REQUIRED EDITIONS

Available in: Salesforce Classic

WDC is available for existing WDC customers in **Professional Edition**, **Enterprise Edition**, **Performance Edition**, **Unlimited Edition**, and **Developer Edition**.

! **Important** Starting in Spring '22, WDC isn't available to new Salesforce customers. For existing customers, WDC features and records from Badges, Skills, and Thanks aren't affected and will remain available in the application beyond Spring '22. WDC Goals, Coaching, Feedback, Performance, and Rewards features won't appear in the application anymore, and records created previously will no longer be accessible.

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USER PERMISSIONS NEEDED

To enable WDC features: Customize Application

1. From Setup, enter *WDC Settings* in the **Quick Find** box, then select **WDC Settings**.
2. Select the WDC features you want to enable:

Feature	Section	Description
Enable Thanks	Thanks Settings	Enable Thanks to allow users to recognize others with thanks badges on the Chatter feed. If you disable this setting, users no longer see the Thanks action in the Chatter publisher. However, they can still see previously created Thanks posts.
Enable Skills	Skills Settings	Enable Skills to allow users to add skills to their profiles and endorse the skills of other users. Enabling this setting replaces the Knowledgeable About widget on Chatter profiles.
Restrict Skill and Endorsement Editing to Record Detail Pages	Skills Settings	Disables inline editing of skills and endorsements on Chatter profiles, and restricts editing to record detail pages. Recommended if you have customized these objects with custom required fields.

Feature	Section	Description
		 Note Don't enable this setting if you want to use skills in Chatter profiles.
Enable Automatic Skill Feed Posts	Skills Settings	Enable to automatically create Chatter feed posts when a user adds a new skill.
Enable Suggested Skills	Skills Settings	Enable Suggested Skills to have the skills widget suggest skills for users to add based on their Chatter Topics activity.

3. Click **Save**.

[Assign WDC Permission Sets](#)

Assign permission sets with WDC access to your users from Setup.

[Assign WDC Profiles](#)

Assign profiles with WDC access to your users from Setup.

See Also

[Assign WDC Permission Sets](#)

Assign WDC Permission Sets

Assign permission sets with WDC access to your users from Setup.

REQUIRED EDITIONS

Available in: Salesforce Classic

WDC is available for existing WDC customers in **Professional Edition**, **Enterprise Edition**, **Performance Edition**, **Unlimited Edition**, and **Developer Edition**.

 **Important** Starting in Spring '22, WDC isn't available to new Salesforce customers. For existing customers, WDC features and records from Badges, Skills, and Thanks aren't affected and will remain available in the application beyond Spring '22. WDC Goals, Coaching, Feedback, Performance, and Rewards features won't appear in the application anymore, and records created previously will no longer be accessible.

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USER PERMISSIONS NEEDED

To assign permission sets:

Assign Permission Sets

Before you can assign permission sets to your users, you must create permission sets with WDC access.

Refer to [Recommended WDC Permission Sets](#) for more information.

1. From Setup, enter *Users* in the **Quick Find** box, then select **Users**.
2. Select a user.
3. In the Permission Set Assignments related list, click **Edit Assignments**.
4. To assign a permission set, select it from the Available Permission Sets box and click **Add**. To remove a permission set assignment, select it from the Enabled Permission Sets box and click **Remove**.

You can also assign permission sets to many users at the same time. For more information, see “Assign a Permission Set to Multiple Users” in the Salesforce Help.



Note Some permissions require users to have a permission set license before you can grant the permissions. For example, if you add the Use Identity Connect user permission to the Identity permission set, you can assign only users with the Identity Connect permission set license to the permission set.

5. Click **Save**.

[Recommended WDC Permission Sets](#)

Create different permission sets for different types of WDC users.

See Also

- [Recommended WDC Permission Sets](#)
- [Recommended WDC Profiles](#)
- [Assign WDC Profiles](#)
- [Assign WDC Licenses](#)

Recommended WDC Permission Sets

Create different permission sets for different types of WDC users.

REQUIRED EDITIONS

Available in: Salesforce Classic

WDC is available for existing WDC customers in **Professional Edition**, **Enterprise Edition**, **Performance Edition**, **Unlimited Edition**, and **Developer Edition**.

- Important** Starting in Spring '22, WDC isn't available to new Salesforce customers. For existing customers, WDC features and records from Badges, Skills, and Thanks aren't affected and will remain available in the application beyond Spring '22. WDC Goals, Coaching, Feedback, Performance, and Rewards features won't appear in the application anymore, and records created previously will no longer be accessible.

- Note** On May 1, 2020, we rebranded this suite. It's now called WDC.

Create new permission sets for each type of WDC user.

Use the tables below to assign the appropriate object settings and system permissions for each permission set.

Standard User

The Standard User permission set gives a user all the basic WDC functionality.

Standard User Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Available						
	Visible						
Documents							
Endorsements							
Recognition (tab)	Available						
	Visible						
Skills	Available						
	Visible						
Skill Users							

Standard User System Permissions

System Permissions	Enabled
API Enabled	
Edit Events	
Edit Tasks	

WDC Administrator

The WDC Administrator permission set gives a user full administrative access to WDC objects and features. This permission set should be assigned instead of the Standard User permission set.

Standard User Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Available						
	Visible						
Documents							
Endorsements							
Skills	Available						
	Visible						
Skill Users							

WDC Administrator System Permissions

System Permissions	Enabled
API Enabled	
Edit Events	
Edit Tasks	
Moderate Chatter	
View Setup and Configuration	

See Also

[Assign WDC Permission Sets](#)

Assign WDC Profiles

Assign profiles with WDC access to your users from Setup.

REQUIRED EDITIONS

Available in: Salesforce Classic

WDC is available for existing WDC customers in **Professional Edition**, **Enterprise Edition**, **Performance Edition**, **Unlimited Edition**, and **Developer Edition**.

! **Important** Starting in Spring '22, WDC isn't available to new Salesforce customers. For existing customers, WDC features and records from Badges, Skills, and Thanks aren't affected and will remain available in the application beyond Spring '22. WDC Goals, Coaching, Feedback, Performance, and Rewards features won't appear in the application anymore, and records created previously will no longer be accessible.

! **Note** On May 1, 2020, we rebranded this suite. It's now called WDC.

USER PERMISSIONS NEEDED

To assign profiles:

Manage Users

Before you can assign profiles to your users, you must create profiles with WDC access. Refer to [Recommended WDC Profiles](#) for more information.

1. From Setup, enter *Users* in the **Quick Find** box, then select **Users**.
2. Click **Edit** next to a user.
3. From the **Profile** drop-down, select the profile you would like to assign.
4. Click **Save**.

Recommended WDC Profiles

Create different profiles for different types of WDC users.

Recommended WDC Profiles

Create different profiles for different types of WDC users.

REQUIRED EDITIONS

Available in: Salesforce Classic

WDC is available for existing WDC customers in **Professional Edition**, **Enterprise Edition**, **Performance Edition**, **Unlimited Edition**, and **Developer Edition**.

! **Important** Starting in Spring '22, WDC isn't available to new Salesforce customers. For existing customers, WDC features and records from Badges, Skills, and Thanks aren't affected and will remain available in the application beyond Spring '22. WDC Goals, Coaching, Feedback, Performance, and Rewards features won't appear in the application anymore, and records created previously will no longer be accessible.

! **Note** On May 1, 2020, we rebranded this suite. It's now called WDC.

Create a new profile for each type of WDC user.

! **Note** Professional Edition organizations will need to grant access through existing profiles. The WDC Only User, Chatter Only User, and Standard User profiles grant basic access to WDC objects. The

System Administrator profile grants users full administrative access to all WDC features.

Use the tables below to assign the appropriate object settings and system permissions for each profile.

Standard User

The Standard User profile gives a user all the basic WDC functionality.

Standard User Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Default On						
Documents		✓	✓	✓			
Endorsements		✓	✓	✓	✓		
Recognition (tab)	Default On						
Skills	Default On	✓	✓				
Skill Users		✓	✓	✓	✓		

Standard User System Permissions

System Permissions	Enabled
API Enabled	✓
Edit Events	✓
Edit Tasks	✓

WDC Administrator

The WDC Administrator profile gives a user full administrative access to WDC objects and features.

WDC Administrator Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Default On						
Documents		✓	✓	✓	✓	✓	✓

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Endorsements		✓	✓	✓	✓	✓	✓
Recognition (tab)	Default On						
Skills	Default On	✓	✓	✓	✓	✓	✓
Skill Users		✓	✓	✓	✓	✓	✓

WDC Administrator System Permissions

System Permissions	Enabled
API Enabled	✓
Edit Events	✓
Edit Tasks	✓
Moderate Chatter	✓
View Setup and Configuration	✓

See Also

- [Assign WDC Profiles](#)
- [Assign WDC Permission Sets](#)

Assign WDC Licenses

After granting access to WDC features with permission sets or profiles, assign users a WDC license.

REQUIRED EDITIONS

Available in: Salesforce Classic

WDC is available for existing WDC customers in **Professional Edition**, **Enterprise Edition**, **Performance Edition**, **Unlimited Edition**, and **Developer Edition**.

! **Important** Starting in Spring '22, WDC isn't available to new Salesforce customers. For existing customers, WDC features and records from Badges, Skills, and Thanks aren't affected and will remain available in the application beyond Spring '22. WDC Goals, Coaching, Feedback, Performance, and Rewards features won't appear in the application anymore, and records created previously will no longer be accessible.

! **Note** On May 1, 2020, we rebranded this suite. It's now called WDC.

WDC has two types of licenses.

- WDC Only user licenses are for users who don't have a Salesforce license and will only use the WDC features in your organization.



Note WDC Only user licenses have limited administrator functionality. Assign WDC User Feature licenses instead for users who will be administering performance summary cycles or other WDC features.

- WDC User Feature licenses are for users who also have a Salesforce license.

You may want to configure WDC features before assigning licenses to all users. For example, you may want to initially limit licenses to WDC administrators to avoid exposing certain features prior to your launch date.

[Assign WDC Only User Licenses](#)

Assign a WDC Only license to users who don't have a Salesforce license and will only use WDC.

[Assign WDC User Feature Licenses](#)

Assign a WDC User Feature license to users who also have a Salesforce license.

See Also

[Configure WDC Features](#)

Assign WDC Only User Licenses

Assign a WDC Only license to users who don't have a Salesforce license and will only use WDC.

REQUIRED EDITIONS

Available in: Salesforce Classic

WDC is available for existing WDC customers in **Professional Edition**, **Enterprise Edition**, **Performance Edition**, **Unlimited Edition**, and **Developer Edition**.

Important Starting in Spring '22, WDC isn't available to new Salesforce customers. For existing customers, WDC features and records from Badges, Skills, and Thanks aren't affected and will remain available in the application beyond Spring '22. WDC Goals, Coaching, Feedback, Performance, and Rewards features won't appear in the application anymore, and records created previously will no longer be accessible.

Note On May 1, 2020, we rebranded this suite. It's now called WDC.

USER PERMISSIONS NEEDED

To assign user licenses:

Manage Users

WDC Only user licenses have limited administrator functionality. Assign WDC User Feature licenses instead for users who will be administering WDC features.

1. From Setup, enter *Users* in the **Quick Find** box, then select **Users**.
2. Click **Edit** next to a user.
3. From the **User License** drop-down, select **WDC Only**.
4. Click **Save**.

See Also

[Assign WDC Licenses](#)
[Assign WDC User Feature Licenses](#)

Assign WDC User Feature Licenses

Assign a WDC User Feature license to users who also have a Salesforce license.

REQUIRED EDITIONS

Available in: Salesforce Classic

WDC is available for existing WDC customers in **Professional Edition**, **Enterprise Edition**, **Performance Edition**, **Unlimited Edition**, and **Developer Edition**.

 **Important** Starting in Spring '22, WDC isn't available to new Salesforce customers. For existing customers, WDC features and records from Badges, Skills, and Thanks aren't affected and will remain available in the application beyond Spring '22. WDC Goals, Coaching, Feedback, Performance, and Rewards features won't appear in the application anymore, and records created previously will no longer be accessible.

 **Note** On May 1, 2020, we rebranded this suite. It's now called WDC.

USER PERMISSIONS NEEDED

To assign user feature licenses: [Manage Users](#)

1. From Setup, enter *Users* in the **Quick Find** box, then select **Users**.
2. Click **Edit** next to a user.
3. In the right-hand column, select the **WDC User** checkbox.
4. Click **Save**.

See Also

[Assign WDC Licenses](#)
[Assign WDC Only User Licenses](#)

Configure WDC Features

Configure the Recognition and Skills features.

REQUIRED EDITIONS

Available in: Salesforce Classic

WDC is available for existing WDC customers in **Professional Edition**, **Enterprise Edition**, **Performance Edition**, **Unlimited Edition**, and **Developer Edition**.

 **Important** Starting in Spring '22, WDC isn't available to new Salesforce customers. For existing customers, WDC features and records from Badges, Skills, and Thanks aren't affected and will remain available in the application beyond Spring '22. WDC Goals, Coaching, Feedback, Performance, and Rewards features won't appear in the application anymore, and records created previously will no longer be accessible.

 **Note** On May 1, 2020, we rebranded this suite. It's now called WDC.

Configure these features:

- Recognition: Create and give thanks badges
- Skills: Share and endorse skills

 **Note** We recommend that you enable Chatter regardless of the edition your org is using. Many WDC features use the Chatter feed to notify and interact with users. To confirm that Chatter is enabled, from Setup, enter *Chatter Settings* in the **Quick Find** box, then select **Chatter Settings**, and verify that Chatter Settings is enabled.

Thanks and Skills Features

Set up Thanks and Skills features by configuring thanks in the Chatter publisher and assigning a publisher layout to profiles.

See Also

[Set Up WDC](#)

Thanks and Skills Features

Set up Thanks and Skills features by configuring thanks in the Chatter publisher and assigning a publisher layout to profiles.

REQUIRED EDITIONS

Available in: Salesforce Classic

WDC is available for existing WDC customers in **Professional Edition**, **Enterprise Edition**, **Performance Edition**, **Unlimited Edition**, and **Developer Edition**.

 **Important** Starting in Spring '22, WDC isn't available to new Salesforce customers. For existing

customers, WDC features and records from Badges, Skills, and Thanks aren't affected and will remain available in the application beyond Spring '22. WDC Goals, Coaching, Feedback, Performance, and Rewards features won't appear in the application anymore, and records created previously will no longer be accessible.

-  **Note** On May 1, 2020, we rebranded this suite. It's now called WDC.

Make sure you've enabled the desired Thanks and Recognition features prior to configuring them. From Setup, enter "WDC Settings" in the **Quick Find** box, then select **WDC Settings** and enable the relevant settings.

[Configure Thanks in the Chatter Publisher and Salesforce Mobile App Action Bar](#)

You can change the position of the Thanks action in the Chatter publisher and the Salesforce mobile app action bar, or even hide Thanks for specific profiles.

[Assign Publisher Layout to Profiles](#)

Assign the publisher layout with Thanks to user profiles. People with these profiles can thank their coworkers directly from the publisher.

See Also

[Configure WDC Features](#)

Configure Thanks in the Chatter Publisher and Salesforce Mobile App Action Bar

You can change the position of the Thanks action in the Chatter publisher and the Salesforce mobile app action bar, or even hide Thanks for specific profiles.

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USER PERMISSIONS NEEDED

To set up actions:

Customize Application

To modify the Chatter publisher, actions in the publisher must be enabled.

1. From Setup, enter *Chatter Settings* in the **Quick Find** box, then select **Chatter Settings**.
2. Confirm that **Enable Actions in the Publisher** is selected in the Actions in the Publisher section. If it isn't enabled, click **Edit**, select **Enable Actions in the Publisher**, and click **Save**.
3. From Setup, enter *Publisher Layouts* in the **Quick Find** box, then select **Publisher Layouts**.
4. Click **Edit** next to the Global Publisher Layout.
5. Drag the **Thanks** action to where you want it to appear in the Chatter publisher or the Salesforce mobile app action bar.
6. Click **Save**.

You can hide Thanks for specific users by changing profile visibility settings.

See Also

- [Thanks and Skills Features](#)
[Assign Publisher Layout to Profiles](#)

Assign Publisher Layout to Profiles

Assign the publisher layout with Thanks to user profiles. People with these profiles can thank their coworkers directly from the publisher.

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USER PERMISSIONS NEEDED

To set up quick actions:

Customize Application

If not everyone in your organization should have this feature, create another layout without Thanks and assign it to a profile. People with that profile won't see Thanks in their publisher.

1. From Setup, enter *Publisher Layouts* in the **Quick Find** box, then select **Publisher Layouts**.
2. Click **Publisher Layout Assignment**.
3. Click **Edit Assignment**.
4. Select a user profile by clicking anywhere on its row in the table.

5. From the Publisher Layout, select the global publisher layout that you want to assign to the highlighted profile.
6. Save the layout.

See Also

[Thanks and Skills Features](#)

[Configure Thanks in the Chatter Publisher and Salesforce Mobile App Action Bar](#)

Configure WDC

Configure WDC to meet the needs of your business.

REQUIRED EDITIONS

Available in: Salesforce Classic

WDC is available as an add-on license for **Professional Edition**, **Enterprise Edition**, **Unlimited Edition**, or **Developer Edition**, and is included in **Performance Edition**.

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[WDC Editions and Permissions](#)

Skills and Thanks functionality are freely available to Sales Cloud users. The permissions and preferences necessary for different tasks are broken up by feature area.

[Enable or Disable WDC Settings](#)

On the WDC Settings page, you can enable and disable features like Thanks and Skills for your organization.

[Skills Customization](#)

You can change object permissions for the skill and endorsement objects to suit the needs of your organization.

[Skills Limitations](#)

Skills and endorsements have special behaviors and limitations.

WDC Editions and Permissions

Skills and Thanks functionality are freely available to Sales Cloud users. The permissions and preferences necessary for different tasks are broken up by feature area.

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Available in: Salesforce Classic

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General WDC Administrator Tasks

This includes tasks for administering and implementing WDC.

Administrator Task	Preferences and Permissions Required
Enable WDC features:	“Customize Application”
Assign a WDC administrator:	“Customize Application”
Assign permission sets:	“Assign Permission Sets”
Assign profiles:	“Manage Users”
Assign user licenses:	“Manage Users”
Assign user feature licenses	“Manage Users”
Set up actions:	“Customize Application”
Customize fields tracked in feeds:	“Customize Application”
Set field-level security:	“Manage Profiles and Permission Sets” “Customize Application”

Thanks Tasks

This includes tasks for WDC end users, such as viewing and creating thanks badges.

End User Task	Preferences and Permissions Required
View the Badges tab:	No additional user permissions needed

End User Task	Preferences and Permissions Required
Build a badge:	“Create” on Documents

Skills Tasks

This includes tasks for WDC end users using skills.

End User Task	Preferences and Permissions Required
Add skills:	“Create” on Skills and Skill Users
Remove skills:	“Delete” on Skill Users
Add endorsements to skills:	“Create” on Endorsements

See Also

[Enable or Disable WDC Settings](#)

[Set Up WDC](#)

Enable or Disable WDC Settings

On the WDC Settings page, you can enable and disable features like Thanks and Skills for your organization.

REQUIRED EDITIONS

Available in: Salesforce Classic

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

 **Important** Starting in Spring '22, WDC isn't available to new Salesforce customers. For existing customers, WDC features and records from Badges, Skills, and Thanks aren't affected and will remain available in the application beyond Spring '22. WDC Goals, Coaching, Feedback, Performance, and Rewards features won't appear in the application anymore, and records created previously will no longer be accessible.

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USER PERMISSIONS NEEDED

To edit WDC settings:

Customize Application

1. From Setup, enter “WDC Settings” in the **Quick Find** box, then select **WDC Settings**.
2. Select the WDC feature you want to enable or deselect the feature you want to disable.

Feature	Section	Description
Enable Thanks	Thanks Settings	<p>Enable Thanks to allow users to recognize others with thanks badges on the Chatter feed.</p> <p>If you disable this setting, users no longer see the Thanks action in the Chatter publisher. However, they can still see previously created Thanks posts.</p>
Enable Skills	Skills Settings	<p>Enable Skills to allow users to add skills to their profiles and endorse the skills of other users. Enabling this setting replaces the Knowledgeable About widget on Chatter profiles.</p>
Restrict Skill and Endorsement Editing to Record Detail Pages	Skills Settings	<p>Disables inline editing of skills and endorsements on Chatter profiles, and restricts editing to record detail pages. Recommended if you have customized these objects with custom required fields.</p> <p> Note Don't enable this setting if you want to use skills in Chatter profiles.</p>
Enable Automatic Skill Feed Posts	Skills Settings	Enable to automatically create Chatter feed posts when a user adds a new skill.
Enable Suggested Skills	Skills Settings	Enable Suggested Skills to have the skills widget suggest skills for users to add based on their Chatter Topics activity.

3. Click **Save**.

See Also

- [Set Up WDC](#)
- [WDC Editions and Permissions](#)
- [Skills Customization](#)

Skills Customization

You can change object permissions for the skill and endorsement objects to suit the needs of your organization.

REQUIRED EDITIONS

Available in: Salesforce Classic

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Customize the skill and endorsement objects in the same way you edit other objects. This includes adding custom fields, modifying page layouts, and adding triggers, workflow, and validation rules. You can also customize the hovers that appear on skills, so that you expose specific standard and custom fields.

The screenshot shows a Salesforce Chatter profile for a user named Dan Perkins. The profile card is titled "Skill User" and includes "View" and "Edit" buttons. It displays the user's name, a small profile picture, and their skills: "User" (Dan Perkins [User Skills]) and "Skill" (Contract Negotiation). Below the profile card, there is a section titled "About Me" containing the following text:

I've been at AW Computing since March 2011 in a number of different roles across sales and industry enablement. I am currently an AE for Healthcare solutions reporting to Alicia Burton in San Francisco. In my free time, I enjoy running, hiking, and spending time with my family.

Administrators can change object permissions for the skill and endorsement objects to suit the needs of their organization. For example, you can configure object settings so users can't create skills, and only skills created by an administrator can be assigned to others. By default, supported user profiles have the ability to see, create, edit, and remove skills, and administrators have “Modify All Data” and “View All Data” permissions.

Additionally, administrators can change some skills settings on the WDC Settings page. From Setup, enter **WDC Settings** in the **Quick Find** box, then select **WDC Settings**.

WDC Setting	What It Does
Edit Skills and Endorsements via record detail pages	Disables inline editing of skills and endorsements on Chatter profiles. Recommended if you have customized these objects with custom required fields. Don't enable this setting if you want to use

WDC Setting	What It Does
	skills in Chatter profiles.
Generate feed posts when users add a new skill	Automatically creates a Chatter feed post when a user adds a new skill to a profile.
Enable Suggested Skills	Automatically suggests skills based on users' Chatter topics.

You can also install a package with additional reports and dashboards for thanks and skills features:

- [Thanks and Skills Reports and Dashboards \(Production Package\)](#)
- [Thanks and Skills Reports and Dashboards \(Sandbox Package\)](#)

See Also

[Skills Overview](#)

[Skills Limitations](#)

[Object Permissions](#)

[Viewing and Editing Object Permissions in Permission Sets and Profiles](#)

Skills Limitations

Skills and endorsements have special behaviors and limitations.

REQUIRED EDITIONS

Available in: Salesforce Classic

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 **Note** In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology.

Note the following restrictions:

- The Skills feature is not supported in Communities.
- Skill User and Endorsement records can only be deleted by the owner and users with the "Modify All"

- Data” permission.
- To restore the users and endorsements associated with a deleted skill, retrieve the skill from the Recycle Bin. Creating a skill with the same name will not restore the prior associations.
 - Users can only endorse others, not themselves. Users can't be endorsed more than once by the same person on the same skill.
Administrators can endorse users on behalf of other users through the API.
 - Users can't see the skills widget on a Chatter profile page unless Chatter is enabled.

See Also

- [Skills Overview](#)
- [Skills Customization](#)
- [Enable or Disable WDC Settings](#)

Manage WDC

Use these WDC features to thank coworkers.

REQUIRED EDITIONS

Available in: Salesforce Classic

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[Thank Coworkers](#)

Thank your coworkers by posting badges to their Chatter feed.

[Skills Overview](#)

Skills allow users to share information about their professional expertise. With skills, users can discover, collaborate with, and endorse others based on their knowledge.

Thank Coworkers

Thank your coworkers by posting badges to their Chatter feed.

REQUIRED EDITIONS

Available in: Salesforce Classic

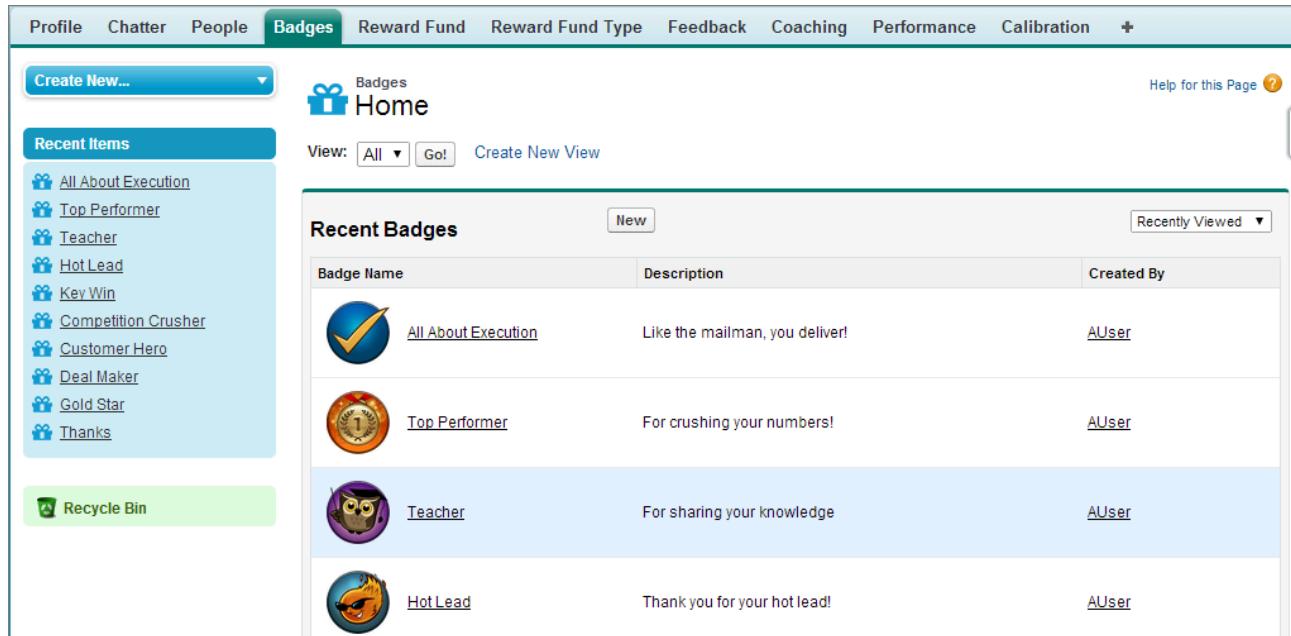
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WDC Recognition includes Thanks with unlimited custom badges. Managers can create reports and dashboards to view data on Recognition leaders. In addition to the required user permissions, your administrator must enable Thanks for your organization. Depending on how your administrator configured WDC, the Recognition tab and Badges tab may appear as top-level tabs. Additionally, the Recognition tab may appear as a subtab on your Chatter profile.

Checkmark **Note** Users can create, edit, share, and give thanks badges without a WDC license. For more information about obtaining WDC, contact Salesforce.



The screenshot shows the Salesforce Badges tab interface. At the top, there is a navigation bar with links for Profile, Chatter, People, Badges (which is the active tab), Reward Fund, Reward Fund Type, Feedback, Coaching, Performance, Calibration, and a plus sign for more options. Below the navigation bar, there is a "Create New..." button and a "Recent Items" sidebar containing links to various badge categories like All About Execution, Top Performer, Teacher, Hot Lead, Key Win, Competition Crusher, Customer Hero, Deal Maker, Gold Star, and Thanks. The main content area is titled "Badges Home" and displays a "Recent Badges" section. This section includes a "New" button, a "Recently Viewed" dropdown, and a table with four rows of badge details:

Badge Name	Description	Created By
All About Execution	Like the mailman, you deliver!	AUser
Top Performer	For crushing your numbers!	AUser
Teacher	For sharing your knowledge	AUser
Hot Lead	Thank you for your hot lead!	AUser

Access the library of available badges from the Badges tab. Click **New** to create a badge, or click a badge to see or edit badge details. You can only view the badges you have permission to give, and your ability to create or edit badges may be limited depending on how your feature is configured.

The screenshot shows a Chatter post from 'Alicia Barton'. The message reads: 'Thanks for all your feedback and helping me meet my sales quota this quarter. You're an amazing team player!' Below the message is a circular badge icon with two hands shaking, labeled 'Change Badge'. At the bottom left is a 'To My Followers' dropdown and an info icon. On the right is a green 'Share' button.

Give thanks badges from the Chatter publisher. Users are currently limited to giving badges to one user at a time. For more information, see [Give Thanks to Coworkers](#).

View the badges a user has received on the Recognition tab of their Chatter profile.

[Create a Badge](#)

Create custom badges to recognize and thank your coworkers.

[Configure Access to Thanks Badges](#)

Configure access to a thanks badge using its Access related list.

See Also

[Create a Badge](#)

[Configure Access to Thanks Badges](#)

[Enable or Disable WDC Settings](#)

Create a Badge

Create custom badges to recognize and thank your coworkers.

REQUIRED EDITIONS

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USER PERMISSIONS NEEDED

To view the Badges tab:	No additional user permission needed
To build a badge:	<ul style="list-style-type: none"> • Create on Documents • The Restrict Custom Badge Creator setting is disabled by default. If the setting is enabled, users need the Create Custom Badge Definitions permission.

1. Click the Badges tab.
If the Badges tab isn't displayed, click  to the right of your current tabs and select it from the All Tabs page.
2. Click **New**.
3. Enter a name and description for the badge, add a badge image, and optionally assign badge limits.

 **Note**

- Badges can't be transferred from a sandbox organization to a production organization.
- You can limit access to badge records with the Access related list, but badge images are externally available.

Badge Field	Description
Badge Name	The name of the badge.
Active	Indicates that the badge is active and available to give. This setting is enabled by default.
Owner Name	The name of the badge owner.
Company Badge	Select to make this badge a company badge. Only users with the Chatter moderator permission can create and edit company badges. Company badges enable all users to give the badge.
Description	A description that explains the significance of the badge.
Image URL	A visual representation of the badge. Click the image field to select a picture from a directory on your computer. Badge images are stored at 128 x 128 pixels and are externally available.
Limit Number	The number of badges that are available. This

Badge Field	Description
	can be per user or across all users. The default value is unlimited badges.
Limit Start Date	Indicates when the system begins to count the number of badges used. The default value is the date the badge is created.
Limit Type	Select Per User to have Limit Number apply to each user. Select Per Company to have Limit Number apply to the entire organization.

4. Click **Save**.

Access for custom badges is set to all internal users by default. To change the access to a custom badge, go to the badge detail page and click **Edit List** on the Access related list.

See Also

[Thank Coworkers](#)

[Configure Access to Thanks Badges](#)

Configure Access to Thanks Badges

Configure access to a thanks badge using its Access related list.

REQUIRED EDITIONS

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1. From the **Badges** tab, click the badge you'd like to modify.

If you don't see the Badges tab, click  to the right of your current tabs and select it from the All Tabs page.

2. Under the Access related list, click **Edit List**.

3. Enter the public groups or users you want to grant access to.

You can only grant access to users with supported licenses.

4. Click **Save**.

See Also

- [Thank Coworkers](#)
- [Create a Badge](#)

Skills Overview

Skills allow users to share information about their professional expertise. With skills, users can discover, collaborate with, and endorse others based on their knowledge.

REQUIRED EDITIONS

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The Skills feature makes it easier to identify experts in different areas. Users can add or remove skills on their Chatter profile page or on record detail pages, and other users can endorse those skills. Use the global search bar to search for experts with specific skills.

Chatter > People > Dan Perkins •

Skills	
Sales	2 ⬤
Contract Negotiation	1 ⬤
Sales Management	1 ⬤
Forecasting	0 ⬤
Supply Chain	0 ⬤
Customer Demos	0 ⬤

[Add a Skill Via Record Detail Pages](#)

Add skills to share your professional expertise.

[Remove a Skill Via Record Detail Pages](#)

Remove a skill if it no longer applies.

[Endorse a Skill Via Record Detail Pages](#)

Endorse a user's skill to promote their expertise in a specific area.

See Also

[Enable or Disable WDC Settings](#)

[Skills Customization](#)

[Skills Limitations](#)

Add a Skill Via Record Detail Pages

Add skills to share your professional expertise.

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USER PERMISSIONS NEEDED

To add skills: Create on Skills and Skill Users

If the skill already exists, use the global search bar to find the skill, and click **Add to My Profile** on the skill record.

1. From your personal settings, enter *Advanced User Details* in the Quick Find box, then select **Advanced User Details**. No results? Enter *Personal Information* in the Quick Find box, then select **Personal Information**.
2. In the User Skills related list, click **New Skill**.
3. Enter the name of your skill and an optional description.
4. Click **Save**.
The skill is created.
5. Click **Add To My Profile**.
6. Click **Save**.
The skill is associated with you.

You can also add skills on Chatter profile pages.

See Also

[Skills Overview](#)

- [Remove a Skill Via Record Detail Pages](#)
- [Endorse a Skill Via Record Detail Pages](#)
- [Personalize Your Salesforce Experience](#)

Remove a Skill Via Record Detail Pages

Remove a skill if it no longer applies.

REQUIRED EDITIONS

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USER PERMISSIONS NEEDED

To remove skills:

Read on Skills

AND

Delete on Skill Users

1. From your personal settings, enter *Advanced User Details* in the Quick Find box, then select **Advanced User Details**. No results? Enter *Personal Information* in the Quick Find box, then select **Personal Information**.
2. In the User Skills section, click **Del** next to the skill you want to remove.
3. Click **OK**.

The skill is no longer associated with you, but it's not deleted. Only skill owners with the proper permissions and users with "Modify All Data" can delete skills.

You can also remove skills on Chatter profile pages.

See Also

[Skills Overview](#)

[Add a Skill Via Record Detail Pages](#)

Endorse a Skill Via Record Detail Pages Personalize Your Salesforce Experience

Endorse a Skill Via Record Detail Pages

Endorse a user's skill to promote their expertise in a specific area.

REQUIRED EDITIONS

Available in: Salesforce Classic

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USER PERMISSIONS NEEDED

To add endorsements to skills:

Create on Endorsements

AND

Read on Skills and Skill Users

1. Go to the profile page of the user you'd like to endorse.
2. Click the dropdown button in the upper right corner and select **User Detail**.
3. In the User Skills section, click the Skill User Name or Endorsements link next to the skill you'd like to endorse.
4. Click **Add Endorsement**.
5. Click **Save**.

You can also endorse skills on Chatter profile pages.

See Also

[Skills Overview](#)

[Add a Skill Via Record Detail Pages](#)

[Remove a Skill Via Record Detail Pages](#)

Artificial Intelligence and Sales Cloud

AI makes the sales process smarter at every step. Salesforce's AI technology—Einstein—automates data entry and predictive analysis so you can make every selling moment count.

Einstein Features in Sales Cloud

Many Sales Cloud features use AI and machine learning. Review which features are best for you, and see the license requirements for each feature.

Einstein and Data Usage in Sales Cloud

Einstein is built on data. When using Sales Cloud, review this table to understand the type of data used by Einstein features.

Set Up Einstein Opportunity Scoring for Sales Cloud Users

Einstein Opportunity Scoring, which is part of the Sales Cloud Einstein product suite, is available to eligible customers at no extra cost. Turn on Einstein and we take care of the rest.

Manage Sales Cloud Users' Access to Einstein Features

Einstein Opportunity Scoring, which is part of the Sales Cloud Einstein product suite, is available to eligible customers at no extra cost. Access is available through the Sales Cloud Einstein For Everyone permission set. Review who has access to the permission set, what's included, and how to manage user assignments.

See Also

[Agentforce for Sales](#)

Einstein Features in Sales Cloud

Many Sales Cloud features use AI and machine learning. Review which features are best for you, and see the license requirements for each feature.

Feature	Where It Appears	Which Licenses Include It
Einstein Lead Scoring	<ul style="list-style-type: none">Lightning ExperienceSalesforce ClassicSalesforce app (list views only)	<ul style="list-style-type: none">Sales Cloud EinsteinSales EngagementAccount EngagementAdvanced Edition
Einstein Opportunity Scoring	<ul style="list-style-type: none">Lightning ExperienceSalesforce ClassicSalesforce app (list views only)	<ul style="list-style-type: none">Sales Cloud EinsteinSalesforce user license
Einstein Automated Contacts (Feature is scheduled for retirement on February 15,	Lightning Experience	Sales Cloud Einstein

Feature	Where It Appears	Which Licenses Include It
2025. See Einstein Automated Contacts Retirement .)		
Einstein Forecasting	<ul style="list-style-type: none"> Lightning Experience Salesforce Classic Salesforce app 	Sales Cloud Einstein  Note Salesforce Forecasting and the forecast hierarchy must be enabled.
Einstein Coach	Lightning Experience	Einstein for Sales with an Enablement add-on
Einstein Conversation Insights	Lightning Experience	Included in Performance and Unlimited editions and available as an add-on in Enterprise Edition
Einstein Activity Capture	Lightning Experience	<ul style="list-style-type: none"> Sales Cloud Einstein Sales Engagement Revenue Intelligence  Note Einstein Activity Capture Standard is available to up to 100 users who have only a Salesforce user license.
Einstein Email Insights	Lightning Experience	Included with Einstein Activity Capture
Einstein Recommended Connections	Lightning Experience	Included with Einstein Activity Capture
Einstein Campaign Insights	Lightning Experience	Account Engagement Advanced and Premium Editions
Einstein Behavior Scoring	Lightning Experience	Account Engagement Advanced and Premium Editions
Einstein Attribution	Lightning Experience	Account Engagement Advanced and Premium Editions
Einstein Send Time Optimization	Lightning Experience	Account Engagement Advanced and Premium Editions
Einstein for Sales: Sales and	Lightning Experience, Salesforce	Einstein for Sales add-on

Feature	Where It Appears	Which Licenses Include It
Emails	email integrations for Outlook and Gmail	
Einstein for Sales: Call Summaries	Lightning Experience, Einstein Conversation Insights	Einstein Conversation Insights (included in Enterprise, Performance, and Unlimited editions and available as an add-on in Enterprise Edition for more than 10 users) with the Einstein for Sales add-on
Einstein for Sales: Call Explorer	Lightning Experience, Einstein Conversation Insights	Einstein Conversation Insights (included in Enterprise, Performance, and Unlimited editions and available as an add-on in Enterprise Edition for more than 10 users) with the Einstein for Sales add-on
Einstein for Sales: Sales Signals	Lightning Experience, Einstein Conversation Insights	Einstein Conversation Insights (included in Enterprise, Performance, and Unlimited editions and available as an add-on in Enterprise Edition for more than 10 users) with Data 360 and the Einstein for Sales add-on
Einstein for Sales: Generative Conversation Insights	Lightning Experience, Einstein Conversation Insights	Einstein Conversation Insights (included in Enterprise, Performance, and Unlimited editions and available as an add-on in Enterprise Edition for more than 10 users) with the Einstein for Sales add-on
Einstein for Sales: Summarize Record	<ul style="list-style-type: none"> • Lightning Experience • Salesforce app 	Einstein for Sales add-on
Einstein for Sales: Create Close Plan	<ul style="list-style-type: none"> • Lightning Experience • Mobile 	Einstein for Sales add-on
Einstein for Sales: Find Similar Deals	<ul style="list-style-type: none"> • Lightning Experience 	Einstein for Sales add-on

Feature	Where It Appears	Which Licenses Include It
	<ul style="list-style-type: none"> Salesforce app 	
Einstein for Sales: Add Record to Cadence	<ul style="list-style-type: none"> Lightning Experience Salesforce app 	Einstein for Sales add-on
Einstein for Sales: Create a To-Do	<ul style="list-style-type: none"> Lightning Experience Salesforce app 	Einstein for Sales add-on
Einstein for Sales: Create a Label	<ul style="list-style-type: none"> Lightning Experience Salesforce app 	Einstein for Sales add-on
Einstein for Sales: Find Contact Interactions	<ul style="list-style-type: none"> Lightning Experience Salesforce app 	Einstein for Sales add-on
Einstein for Sales: Find Past Collaborators	<ul style="list-style-type: none"> Lightning Experience Salesforce app 	Einstein for Sales add-on
Einstein for Sales: Get Product Pricing	<ul style="list-style-type: none"> Lightning Experience Salesforce app 	Einstein for Sales add-on
Einstein for Sales: Identify Contact Role	<ul style="list-style-type: none"> Lightning Experience Salesforce app 	Einstein for Sales add-on
Einstein for Sales: Identify Key Contacts	<ul style="list-style-type: none"> Lightning Experience Salesforce app 	Einstein for Sales add-on
Einstein for Sales: Label a Record	<ul style="list-style-type: none"> Lightning Experience Salesforce app 	Einstein for Sales add-on
Einstein for Sales: Log a Call	<ul style="list-style-type: none"> Lightning Experience Salesforce app 	Einstein for Sales add-on

Feature	Where It Appears	Which Licenses Include It
Einstein for Sales: Review My Day	<ul style="list-style-type: none"> • Lightning Experience • Salesforce app 	Einstein for Sales add-on
Einstein for Sales: Send Meeting Request	<ul style="list-style-type: none"> • Lightning Experience • Salesforce app • Salesforce email integrations for Outlook, Exchange, and Gmail 	Einstein for Sales add-on
Einstein for Sales: Get Product Pricing	<ul style="list-style-type: none"> • Lightning Experience • Salesforce app 	Einstein for Sales add-on
Einstein for Sales: Close Deals	<ul style="list-style-type: none"> • Lightning Experience • Salesforce app 	Einstein for Sales add-on
Einstein for Sales: Communicate with Customers	<ul style="list-style-type: none"> • Lightning Experience • Salesforce app • Salesforce email integrations for Outlook, Exchange, and Gmail 	Einstein for Sales add-on
Einstein for Sales: Conversation Explorer	<ul style="list-style-type: none"> • Lightning Experience • Salesforce app 	Einstein for Sales add-on
Einstein for Sales: Forecast Sales Revenue	<ul style="list-style-type: none"> • Lightning Experience • Salesforce app 	Einstein for Sales add-on
Einstein for Sales: Manage Deals	<ul style="list-style-type: none"> • Lightning Experience • Salesforce app 	Einstein for Sales add-on
Einstein for Sales: Prospect	<ul style="list-style-type: none"> • Lightning Experience • Salesforce app 	Einstein for Sales add-on

Einstein and Data Usage in Sales Cloud

Einstein is built on data. When using Sales Cloud, review this table to understand the type of data used by Einstein features.

The table lists the customer data that's submitted by the customer to Salesforce services as defined in the [Main Services Agreement \(MSA\)](#). The table also indicates which features use global models trained on customer data. These models look for aggregated trends across multiple Salesforce customers. If an Einstein feature uses a global model, the customer can opt out of the global model and have control over whether their data contributes to global models.

Customer data from Einstein Conversation Insights (ECI) is not used to train global models. Global predictive models are used to provide customers with meaningful predictions, but ECI customer data is not used in training these models.

For more information on how to control how your data is used, see [Salesforce Einstein: Global Model Opt-Out Process](#).

For data usage details about Agentforce (Default), see [Agents and Data Usage](#).

Product	Feature	Customer Data and Salesforce Objects Used	Usage Data Used	Global Model Used	Generative AI Model Used
Einstein Conversation Insights	Einstein Conversation Insights	Account, Contact, Opportunity, OpportunityHistory, OpportunityStage, User, VoiceCall, VideoCall, VideoCallRecording, VoiceCallRecording, VideoCallParticipant, meeting data	N/A	Yes	No
Einstein Features (Einstein applications included in versions of Sales Cloud)	Einstein Activity Capture - Email Insights	User email	N/A	Yes	No
	Einstein Activity Capture - Recommended Connections	User email and events (recipient and participant metadata only)	N/A	No	No

Product	Feature	Customer Data and Salesforce Objects Used	Usage Data Used	Global Model Used	Generative AI Model Used
	Einstein Deal Insights (available in Pipeline Inspection only)	Same as (based on admin configuration): Einstein Activity Capture - Email Insights, Einstein Conversation Insights, Einstein Opportunity Scoring, Case	N/A	No	No
	Einstein Opportunity Scoring	Account, Contact, CurrencyType, Event, EventRelation, Lead, Opportunity, OpportunityContactRole, OpportunityFieldHistory, OpportunityHistory, OpportunityLineItem, OpportunityScore, OppyScoringAIApplicationConfig, OpportunityStage, OpportunityTeamMember, PIAIAplicationConfig, PricebookEntry, Quote, RecordType, SalesAIScoreCycle, SalesAIScoreModelFactor, TaskOrganization, PermissionSet, PermissionSetAssignment, PermissionSetLicense, PermissionSetLicenseAssign, User, UserRole, Profile, OrgWideEmailAddress, MLModel, AIRecordInsight, AIInsightValue, AIInsightReason, SalesAIScoreCycle, SalesAIScoreAIFactor, AIApplication, MLPredictionDefinition,	Opportunity score user interaction feedback such as opportunity score rendered, hover on list view, and record home page	Yes	No

Product	Feature	Customer Data and Salesforce Objects Used	Usage Data Used	Global Model Used	Generative AI Model Used
Einstein Generative AI for Sales	Sales Call Center	VoiceCall, VideoCall, VideoCallParticipant, OpportunitySplitType, OpportunitySplit objects, Product2, Product2History, Enterprise Territory Management objects, OpportunityLineItemSchedule, QuoteLineItem, Quote, Order, OrderItem, Contract, ContractLineItem, Invoice, InvoiceLine, Asset, AssetTag, Product2, ProductMedia. If Einstein Activity Capture is enabled: User emails, email insights, meeting data (events). If Einstein Conversation Insights is enabled: Insights.			
		Automatic Contact Creation	Contact, User emails, events	N/A	No
		Contact Suggestions on Seller Home	Contact, User emails, events	N/A	No
Einstein Generative AI for Sales	Automatic Contact Enhancements	Contact, User emails	N/A	No	Yes
	Account Research	Account	N/A	No	Yes
	Sales Emails	Account, Contact, Lead, Product, and User	Email, Engagement data based on send clicks	No	Yes

Product	Feature	Customer Data and Salesforce Objects Used	Usage Data Used	Global Model Used	Generative AI Model Used
Sales Cloud Einstein	Call Summaries	Video Call, Voice Call	Engagement data based on summaries processed	No	Yes
	Call Explorer	Video Call, Voice Call	Engagement data based on questions asked	No	Yes
	Sales Signals	Video Call, Voice Call	Engagement data based on conversations processed	No	Yes
	Generative Conversation Insights	Video Call, Voice Call	Engagement data based on calls processed for insights	No	Yes
Sales Cloud Einstein	Einstein Automated Contacts <i>(retiring February 2025)</i>	ContactSuggestionInsight, OpportunityContactRoleSuggestionInsight, RecordRecommendation, PredictionDefinition, Contact, Lead, AccountTeamMember, EntitySubscription, Event, EventRelation, Task, Account, Opportunity, OpportunityHistory, OpportunityContactRole, OpportunityTeamMember, Organization, PermissionSet, PermissionSetAssignment, PermissionSetLicense, PermissionSetLicenseAssign, User, UserRole, Profile, OrgWideEmailAddress, RecordType, CurrencyType. If Einstein Activity Capture is enabled: User email and meetings.	Contact suggestion insights, opportunity contact role suggestion insights user interaction feedback such as contact suggestion insights rendered, dismiss, undo dismiss, expand, collapse, open dropdown menu, review suggestion, reject suggestion on Lightning Platform and Record Home	No	No

Product	Feature	Customer Data and Salesforce Objects Used	Usage Data Used	Global Model Used	Generative AI Model Used
	Einstein Forecasting	Same as Einstein Opportunity Scoring with the following additional entities: Individual, Period, ForecastingPrediction, ForecastingPredictionElement, ForecastingPredictionReason, ForecastingPredictionTrend, ForecastingType, OpportunitySplit, OpportunitySplitType, FiscalYearSettings, ForecastingSegmentationConfig, ForecastingTunerConfig, PeriodType, ForecastingQuota, ForecastingSourceDefinition, ForecastingTypeSource, ForecastingFilter, ForecastingFilterCondition	Forecasting prediction user interaction feedback such as forecasting prediction rendered, hover, and click prediction cell.	No	No
	Einstein Lead Scoring	Lead, LeadHistory, Task, Event, Account, Contact, RecordType, Organization, LeadIQConfiguration, AIApplication, AIModelDefinition, MLPredictionDefinition, MLDataDefinition	Lead score user interaction feedback such as lead score rendered, hover on list view, and record home page.	Yes	No
	Einstein Activity Capture –Email Insights, Einstein Activity Capture–Recommended Connections, Einstein Opportunity	See Einstein Features	See Einstein Features	See Einstein Features	See Einstein Features

Product	Feature	Customer Data and Salesforce Objects Used	Usage Data Used	Global Model Used	Generative AI Model Used
	Scoring				
Sales Engagement	Einstein Activity Capture – Email Insights, Einstein Activity Capture – Recommended Connections	See Einstein Features	See Einstein Features	See Einstein Features	See Einstein Features
	Einstein Conversation Insights	See Einstein Conversation Insights	See Einstein Conversation Insights	See Einstein Conversation Insights	See Einstein Conversation Insights
	Lead Scoring	See Sales Cloud Einstein	See Sales Cloud Einstein	See Sales Cloud Einstein	See Sales Cloud Einstein

Set Up Einstein Opportunity Scoring for Sales Cloud Users

Einstein Opportunity Scoring, which is part of the Sales Cloud Einstein product suite, is available to eligible customers at no extra cost. Turn on Einstein and we take care of the rest.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To turn on Einstein Opportunity Scoring For Everyone:

Customize Application AND Modify All Data

 **Note**

- For customers without the Sales Cloud Einstein license, Einstein Opportunity Scoring is available on a rolling basis starting in the Spring '20 release. For details about timing and eligibility, contact your Salesforce account executive.
- Opportunity scores are available in both Salesforce Classic and Lightning Experience, but you have to turn on Einstein in Lightning Experience.
- When you don't have any Sales Cloud Einstein licenses, Einstein Opportunity Scoring isn't available in sandbox or for Salesforce Government Cloud customers.
- If you're missing the option to enable Einstein Opportunity Scoring, contact Salesforce Customer Support.

1. To get started with Einstein, follow the in-app prompts. Or, from Setup in Lightning Experience, enter *Assisted Setup* in the Quick Find. Then, select **Assisted Setup** under Einstein Sales.
2. Confirm that you understand what happens when you turn on Einstein.
3. Click **Turn It On**. If needed, review and accept the terms.

Here's what happens next.

- We analyze your teams' past opportunities to build a scoring model. Building a model can take anywhere from a few hours to a few days, depending on how much data you have. The model, which is refreshed at regular intervals, is used to generate scores.
- We add the Score field to your standard and custom opportunity page layouts. If you use full view as your default record view, scores don't always appear in the layout's first section.
- We add the Opportunity Score field to the Recently Viewed list view. Add the field to public opportunity list views and ask your sales teams to add it to their own opportunity list views.
- We assign the Sales Cloud Einstein For Everyone permission set to all users who have a Salesforce user license. Users see scores after they're generated. You can remove access for individual users through the permission set.
- We create a Sales Insights Integration user and assign it to a user profile of the same name. Although you see the user and profile listed in your org, they're used only behind the scenes.



Tip If you don't see scores a few days after turning on Einstein, review information about how Einstein scores your opportunities. If you still need help, contact Salesforce Customer Support for assistance.

4. To customize the scoring model, go to the Einstein Opportunity Scoring setup page and click **Review Settings**.
 - a. Read the introduction, and then click **Next**.
 - b. Choose whether to have Einstein consider all opportunity records or only a subset when building the scoring model. Then, click **Next**. If needed, define the conditions, and click **Next**.
 - c. Choose whether to have Einstein consider all opportunity custom fields when building the scoring model. Then, click **Next**. If needed, deselect the fields you want Einstein to ignore, and click **Next**.

d. Review your settings. Then, click **Start** to begin the scoring process.

It can take up to 48 hours to analyze your data, build a new scoring model, and update scores. To check the status, return to the Einstein Opportunity Scoring setup page.

See Also

[Einstein Opportunity Scoring](#)

[Manage Sales Cloud Users' Access to Einstein Features](#)

[Understand How Einstein Scores Your Opportunities](#)

[*Implementation Guide: Einstein Opportunity Scoring for Everyone*](#)

Manage Sales Cloud Users' Access to Einstein Features

Einstein Opportunity Scoring, which is part of the Sales Cloud Einstein product suite, is available to eligible customers at no extra cost. Access is available through the Sales Cloud Einstein For Everyone permission set. Review who has access to the permission set, what's included, and how to manage user assignments.

REQUIRED EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS NEEDED

To create permission sets: Manage Profiles and Permission Sets

To assign permission sets: Assign Permission Sets

The Sales Cloud Einstein For Everyone permission set is intended for users who don't have a Sales Cloud Einstein license. For details about whether the permission set is available to you, contact your Salesforce account executive.

The Sales Cloud Einstein For Everyone permission set includes the following permissions.

Permission	Description	Enabled by Default
Use Einstein Opportunity Scoring	Lets users see opportunity scores, which indicate which deals are more likely to close.	Yes
View Opportunity Scoring Model Factors	Lets users see all factors used by Opportunity Scoring to build scoring models. Scoring models are used to score individual records. Users who can view	No. Clone the Sales Cloud Einstein For Everyone permission set, enable the permission, and assign the permission set to users.

Permission	Description	Enabled by Default
	model factors can sometimes see the object data and object-related data used to build the models, regardless of their sharing settings.	

1. From Setup, enter *Permission Sets* in the Quick Find. Then, select **Permission Sets**.
2. Click the Sales Cloud Einstein For Everyone permission set.
3. Click **Manage Assignments**. Add and remove assignments, as needed.

See Also

[Einstein Opportunity Scoring](#)

[Set Up Einstein Opportunity Scoring for Sales Cloud Users](#)

[Implementation Guide: Einstein Opportunity Scoring for Everyone](#)

Digital Engagement for Sales Cloud

Sales reps who use the Lightning Sales Console can use digital channels to stay in touch with prospects. Digital channels include multiple types of messaging apps and chat. Plus, Omni-Channel lets sales managers route communications to the right sales team. Sales Engagement users can use digital channels from the workflow queue. Learn about the digital channels that are available for the Sales Console.

REQUIRED EDITIONS

Available in: Lightning Experience

Available for an extra cost in: **Enterprise** and **Unlimited** Editions

Chat or Messaging licenses are required.

Note

- The guided setup flows that are part of Service Cloud aren't available with Sales Cloud. Instead, manually set up your Digital Engagement implementation.
- The documentation for Digital Engagement features applies to Service Cloud and Sales Cloud, except where noted. Sometimes, the term *agents* is used instead of *sales reps*.
- For information on the features included in the Digital Engagement subscription, see our [pricing docs](#).

Digital Engagement Feature	Sales Benefits	Setup Information
Omni-Channel	<ul style="list-style-type: none"> Unify your channels and manage your sales reps' workload. Route work requests to the most available and qualified sales rep. 	Customize Omni-Channel <ul style="list-style-type: none"> Messaging must be enabled. Make sure that users have visibility to all required fields.
Channel-Object Linking	<ul style="list-style-type: none"> Create rules to quickly link channel interactions to objects such as Contacts. Fine-tune rules so that linking happens automatically or so that sales reps are prompted with suggested records to link. 	Channel-Object Linking
Web chat	<ul style="list-style-type: none"> When prospects visit your website, reach out to them with timely information and keep them on your site. Increase sales rep productivity by allowing them to engage with multiple prospects at the same time. 	<ul style="list-style-type: none"> Create a Basic Chat Implementation Set Up Your Embedded Chat Window <p> Note Make sure that users have visibility to all required fields.</p>
Einstein Bots	<ul style="list-style-type: none"> Free up your sales reps' time by handling routine requests and gathering information to help with the upcoming chat. For example, collect lead information through a bot conversation instead of a web form. Qualify and route leads to the right team. If you use Sales Engagement, route leads to cadences. 	Einstein Bots

Digital Engagement Feature	Sales Benefits	Setup Information
Messaging	<ul style="list-style-type: none"> Automatically follow up on leads by sending SMS text messages after the web form is filled out. Sales Engagement users can complete tasks and follow up on leads via SMS right from their Work Queue. Build one-on-one relationships and engage with key customers. 	<ul style="list-style-type: none"> Set Up Messaging Channels Messaging Data Protection and Customer Privacy Set Up Automatic Message Notifications Message with Customers <p> Note Make sure that users have visibility to all required fields.</p>

 **Note** Unused conversations and triggered and bulk messages are forfeited at the subscription's end date. To purchase additional conversations or triggered and bulk messages, contact your Salesforce representative.

See Also

[Lightning Sales Console](#)

[Sales Engagement](#)

Contact and Lead Imports

If you have permission to import data, you can import up to 50,000 contacts and leads at a time using a CSV file and a simplified import flow. If you have access to the Data Import Wizard, or are part of an Einstein Activity Capture configuration that allows contact syncing, you can choose the method you want to use at the time of import.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Enterprise, and Performance** editions

The Basic Data Import is for importing new contacts or leads only. Ask your Salesforce admin to turn on the Basic Data Import in Salesforce, which is available in Enterprise and Performance editions. Then, if you have the View Setup and Configuration permission plus permission to import contacts or leads, you can choose how to import new contacts or leads based on your system configuration.

 **Important** When completing the import, the **Import from File** option supports UTF-8 character encoding only. If you require a different character encoding format, select **Import, Update, or Export** to complete your import using the Data Import Wizard, which allows you to select a

character code standard.

The CSV file import uses the same data matching and import rules as the Data Import Wizard and offers these key features.

- Easy to follow, guided experience.
- A sample CSV file to ensure your data is in the right format.
- Automated matching to data already in your system to identify duplicate records.
- Easy to select options to map fields in your file to fields in Salesforce.
- Previews of mapped fields.

After you import your data, you receive an email summary with the results of the import. If the import failed due to multiple errors, an error details file is attached. If the import failed only because of duplicate records, no error details are attached.

Salesforce recommends that you test a small file first to make sure that you've prepared your source data correctly. Any duplicate leads are identified by matches in Name only.

For large or complex import jobs, to import data for other objects, to import updates to existing contacts and leads, or for support for other Salesforce editions, use the Data Import Wizard or the Data Loader import options.

See Also

- [Choosing a Method for Importing Data](#)
- [What is Imported for Business Accounts and Contacts?](#)
- [What is Imported for Leads?](#)

More Sales Features

Locate documentation for earlier versions of features we've upgraded.

[Drive Sales with Partners](#)

Partners are the companies with which you collaborate to close your sales deals. For each opportunity or account you create, the Partners related list allows you to store information about your partners and the roles they play in the opportunity or account. A partner must be an existing account within Salesforce.

[Add LinkedIn Sales Navigator to Sales Cloud](#)

Sales reps can connect with customers in more ways with more information using the LinkedIn Sales Navigator native integration. Sales reps can see LinkedIn profiles on lead, contact, opportunity, and account pages. And they can send InMails and connection requests with Lightning actions. Sales managers can add LinkedIn InMail and connection request steps to Sales Engagement cadences.

Drive Sales with Partners

Partners are the companies with which you collaborate to close your sales deals. For each opportunity or account you create, the Partners related list allows you to store information about your partners and the roles they play in the opportunity or account. A partner must be an existing account within Salesforce.

REQUIRED EDITIONS

Available in: Salesforce Classic

Available in: all editions in orgs activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions in orgs activated after Summer '09

If your organization has been enabled for partners, you can create partner accounts. Partner accounts are business accounts that a channel manager uses to manage partner organizations, partner users, and activities. **They are completely separate from account partnerships that are displayed in the Partners related list on an account.** For more information about creating and managing partner portals, see [Create and Manage Partner Portals](#).

 **Tip** If your organization uses person accounts, you can use partner roles to relate person accounts to each other. For example, if you have individual person account records for several members of a household or family, then you can use partner roles such as “Spouse” or “Sibling” to associate those records.

Sharing Information with Partners

Partners are companies or individuals that directly drive sales or help you close sales deals.

Add Partner Relationships

The opportunity and account detail pages include a Partners related list for viewing and adding partner relationships.

Partner Fields

A partner has the following fields, listed in alphabetical order.

Deleting Partners

Removing a partner from an opportunity or account removes the partner's relationship with the opportunity or account, but does not delete the account.

Create a Partner Portal

Starting in Summer '13, the partner portal is no longer available for orgs that aren't currently using it. Existing orgs continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Experience Cloud sites.

Sharing Information with Partners

Partners are companies or individuals that directly drive sales or help you close sales deals.

REQUIRED EDITIONS

Available in: Salesforce Classic

Available in: all editions in orgs activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions in orgs activated after Summer '09

You can track partner sales in your Salesforce org in different ways.

- [Add partners](#) to account and opportunity records.
- Enable your org for partners, create partner accounts, create partner users, and collaborate with them on your channel sales data in a partner community (recommended) or partner portal.
- Use [Salesforce to Salesforce](#) if your partner has a Salesforce org of their own.

Add Partner Relationships

The opportunity and account detail pages include a Partners related list for viewing and adding partner relationships.

REQUIRED EDITIONS

Available in: Lightning Experience, Salesforce Classic, and all versions of the Salesforce app

Available in: **All** Editions for orgs created before Summer '09

Available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions for orgs created in Summer '09 and later

USER PERMISSIONS NEEDED

To add partners to an account:

Edit on accounts

AND

Read on opportunities

To add partners to an opportunity:

Read on accounts

USER PERMISSIONS NEEDED

AND

Edit on opportunities

To view account information for a specific partner, click the partner's name in the Partners related list. If you don't have permission to view a partner account, the account name still appears in the related list on the account or opportunity. However, you don't have access to other information about that account.

1. In the Partners related list, click **New**.
2. On opportunities, you can choose a primary partner by selecting **Primary**. Partners marked as primary appear in opportunity reports.
3. In the Partner column, enter the name of an account. In Lightning Experience, you can add multiple partners at a time. In Salesforce Classic, you can also create an account by opening the lookup dialog and clicking **New**.
4. In the Role column, choose the role that the partner account plays in the account or opportunity. Remove a partner relationship by clicking **Delete** (Lightning Experience) or **Del** (Salesforce Classic) next to the partner. You can't open partner records from the Partners related list in the new Salesforce mobile app.

If you change the account for an opportunity that has partners, all partners are deleted from the Partners related list.

Selecting a partner on an account or opportunity automatically creates a reverse partner relationship so that each account lists the other as a partner. The role you select is applied to the partner account; in the current account, the reverse role is applied.

Your Salesforce admin sets the available roles and the corresponding reverse roles.

Your admin can customize the columns displayed in the related list.

Partner Fields

A partner has the following fields, listed in alphabetical order.

REQUIRED EDITIONS

Available in: Salesforce Classic

Available in: all editions in orgs activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions in orgs activated after Summer '09

Field	Description
Partner Name	Name of partner. You can enter an existing account, or use the lookup icon to search for (or optionally, create) a new account.
Primary	Option that specifies the primary partner for the opportunity.
Role	Role of partner for a specific opportunity or account. The role is correlated to the reverse role, applied to the reverse partner relationship. Select from a picklist of available roles, which are set by an administrator.

Deleting Partners

Removing a partner from an opportunity or account removes the partner's relationship with the opportunity or account, but does not delete the account.

REQUIRED EDITIONS

Available in: Salesforce Classic

Available in: all editions in orgs activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions in orgs activated after Summer '09

USER PERMISSIONS NEEDED

To delete partners from an account:	Edit on accounts
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To delete partners from an opportunity:	Edit on accounts
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AND

Edit on opportunities

 **Note** If you change the account for an opportunity that has partners, all partners are deleted from the Partners related list.

To remove a partner relationship from an opportunity or account, click **Del** next to the partner's name. Removing a partner affects an opportunity or account in the following ways.

Deleting a Partner From	Does This
An account	Removes the partner from the account and from <i>all</i> opportunities for that account with which the partner was associated.
An opportunity	If the partner is associated with only one opportunity for an account, the partner is removed from both the opportunity <i>and</i> the account. If the partner is associated with multiple opportunities for an account, the partner is removed from that opportunity <i>only</i> . The partner remains associated with other opportunities <i>and</i> with the account.

Create a Partner Portal

Starting in Summer '13, the partner portal is no longer available for orgs that aren't currently using it. Existing orgs continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Experience Cloud sites.

REQUIRED EDITIONS

Available in: Salesforce Classic

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

 **Note** Starting in Summer '13, the partner portal is no longer available for orgs that aren't currently using it. Existing orgs continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Experience Cloud sites. Existing orgs using partner portals may continue to use their partner portals or transition to Experience Cloud. Contact your Salesforce Account Executive for more information.

For detailed information about creating a partner portal, see the [Create and Manage Partner Portals](#) guide. Generic information about user management, sharing, and CRM data remains available from the Salesforce help.

Add LinkedIn Sales Navigator to Sales Cloud

Sales reps can connect with customers in more ways with more information using the LinkedIn Sales Navigator native integration. Sales reps can see LinkedIn profiles on lead, contact, opportunity, and account pages. And they can send InMails and connection requests with Lightning actions. Sales

managers can add LinkedIn InMail and connection request steps to Sales Engagement cadences.

REQUIRED EDITIONS

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

This feature is available to users with a Sales Navigator Team or Enterprise license from LinkedIn.

This article is about the native LinkedIn Sales Navigator integration in Salesforce. For information about the AppExchange version of Sales Navigator from LinkedIn, see [Sales Navigator Help at LinkedIn](#).

The native integration of LinkedIn Sales Navigator and the AppExchange package offer different combinations of features.

Feature	Native Integration	AppExchange Package
Lightning actions for InMails and connection requests	Yes	Yes
LinkedIn Profile components on lead, contact, opportunity, and account pages	Yes	Yes
InMail and connection request steps in Sales Engagement cadences	Yes	No
Data validation (Not at Company flag)	No	Yes
Support for Salesforce Classic	No	Yes

 **Note** On lead, contact, opportunity, and account record pages, sales users use the LinkedIn Sales Navigator component to match the record with its LinkedIn profile. You can't unmatch a record and a profile, except by associating the record with a different profile.

[Set Up LinkedIn Sales Navigator](#)

To set up LinkedIn Sales Navigator, turn on the LinkedIn Sales Navigator native integration and then add the native Sales Navigator components to lead, contact, opportunity, person account, and business account page layouts. If you have customized page layouts for leads, contacts, opportunity, or accounts, add InMail and connection request actions to those layouts.

[Send LinkedIn InMail and Connection Requests from Salesforce](#)

When LinkedIn Sales Navigator is turned on, sales users can send InMail and Connection Requests right from lead, contact, opportunity, person account, and business account records.

Set Up LinkedIn Sales Navigator

To set up LinkedIn Sales Navigator, turn on the LinkedIn Sales Navigator native integration and then add the native Sales Navigator components to lead, contact, opportunity, person account, and business account page layouts. If you have customized page layouts for leads, contacts, opportunity, or accounts, add InMail and connection request actions to those layouts.

REQUIRED EDITIONS

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

-  **Tip** Check out this feature in Salesforce Go! Find a guided setup experience, explore more content, discover related features, and monitor feature usage. See [Discover and Set Up Features With Salesforce Go](#).

This feature is available to users with a Sales Navigator Team or Enterprise license from LinkedIn.

This article is about the native LinkedIn Sales Navigator integration in Salesforce. For information about the AppExchange version of Sales Navigator from LinkedIn, see [Sales Navigator Help at LinkedIn](#).

To turn on the LinkedIn Sales Navigator native integration:

1. In Setup, enter *LinkedIn Sales Navigator* in the search box. Then click **LinkedIn Sales Navigator**.
2. In the LinkedIn Sales Navigator Integration tab, turn on the Sales Navigator Integration. When you turn on the LinkedIn Sales Navigator native integration, InMail and connection request actions appear automatically in the Actions menu on default page layouts.
3. Optionally enable LinkedIn's CRM Sync feature to allow Salesforce and LinkedIn to sync certain lead and contact data and save LinkedIn activities as tasks in Salesforce. To enable LinkedInCRM Sync, click [Go to LinkedIn Settings](#).

Next, add Sales Navigator components and actions to page layouts.

[Add LinkedIn Sales Navigator Components to Lead, Contact, and Account Page Layouts](#)

To let sales users see LinkedIn profiles on lead, contact, opportunity, and account pages, add the LinkedIn Sales Navigator components to Lightning pages.

[Add LinkedIn Sales Navigator Lightning Actions to Lead, Contact, and Account Page Layouts](#)

When you turn on the native integration of LinkedIn Sales Navigator, Salesforce adds InMail and connection request actions to default page layouts. If you have any customized page layouts, manually add InMail and connection request actions to those layouts.

Add LinkedIn Sales Navigator Components to Lead, Contact, and Account Page Layouts

To let sales users see LinkedIn profiles on lead, contact, opportunity, and account pages, add the LinkedIn Sales Navigator components to Lightning pages.

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USER PERMISSIONS NEEDED

To edit and save Lightning pages in the Lightning Customize Application
App Builder:

1. In Setup, enter *Lightning App Builder* in the search box, and then click **Lightning App Builder**.
2. Find the Lightning page you want to update and click **Edit**.
3. Drag the appropriate Sales Navigator component onto the page layout.
 - For lead, contact, opportunity, and person account pages, you can add the Sales Navigator: Member Profile (Native) component to the page layout.
 - For opportunity and business account pages, you can add the Sales Navigator: Company Profile (Native) component to the page layout.
4. Save your changes. Repeat the process for each Lightning page you want to customize.

Add LinkedIn Sales Navigator Lightning Actions to Lead, Contact, and Account Page Layouts

When you turn on the native integration of LinkedIn Sales Navigator, Salesforce adds InMail and connection request actions to default page layouts. If you have any customized page layouts, manually add InMail and connection request actions to those layouts.

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USER PERMISSIONS NEEDED

1. In Setup, click **Object Manager**.
2. Click the name of the object you want to edit, such as Lead, and click **Page Layouts**.
3. Click the name of the page layout you want to edit.

4. In the Lead Layout section, click **Buttons**.
5. From the button list, drag the Send Sales Navigator InMail and the Send Sales Navigator Connection Request buttons to the Standard Buttons section of the Lead Detail section.
6. Save your changes.

Send LinkedIn InMail and Connection Requests from Salesforce

When LinkedIn Sales Navigator is turned on, sales users can send InMail and Connection Requests right from lead, contact, opportunity, person account, and business account records.

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To send an InMail from a record page:

From the Actions menu, choose **Send Sales Navigator InMail**.

To send a connection request from a record page:

- From the Actions menu, choose **Send Sales Navigator Connection Request**.

Resources for the Sales Professional

In addition to Salesforce Help, Salesforce creates guides and tip sheets to help you learn about our features and successfully administer Salesforce.

	For End Users	For Admins
Account Management		
Campaign Influence Implementation Guide (PDF)	✓	✓