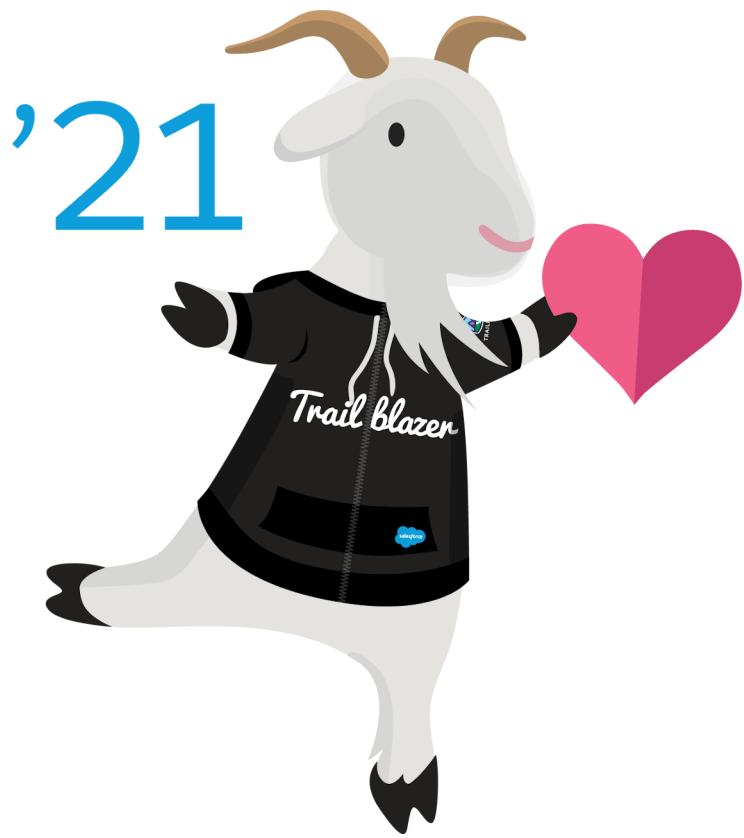




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# Get Started with Salesforce

Salesforce, Summer '21



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# CONTENTS

<a href="#">Get Started with Salesforce</a> .....	1
<a href="#">What Is Salesforce?</a> .....	1
<a href="#">Log In, Navigate, and Search Salesforce</a> .....	63
<a href="#">Verify Your Identity</a> .....	90
<a href="#">Personalize Your Salesforce Experience</a> .....	104
<a href="#">Index</a> .....	193



# GET STARTED WITH SALESFORCE

Welcome to Salesforce, the award-winning cloud computing service designed to help you manage your customer relationships, integrate with other systems, and build your own applications! Here are some key concepts to help you understand the Salesforce products and editions and guide you through common tasks in Salesforce.

## [What Is Salesforce?](#)

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

## [Log In, Navigate, and Search Salesforce](#)

New to Salesforce? Learn how to navigate, customize, and manage basic CRM features.

## [Verify Your Identity](#)

Use identity verification tools to secure and protect your data from unauthorized access.

## [Personalize Your Salesforce Experience](#)

Update your personal information, for example your email address. Change your password and security question. If you have administrator permissions, you can also customize your Salesforce org.

## EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: All editions

# What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Run your business from anywhere with Salesforce. Use standard products and features to manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

But standard products and features are only the beginning. With our platform, you can customize and personalize the experience for your customers, partners, and employees and easily extend beyond out of the box functionality.

## [Concepts, Products, and Services](#)

As you get started with Salesforce, it's helpful to learn some key concepts and terms. They come up frequently when you interact with the product, our documentation, and our service professionals. The concepts and terms here help you understand how Salesforce works.

## [The Salesforce Admin](#)

The Salesforce administrator—or “admin” is a Salesforce user with system administration duties and other super powers. Admins are responsible for setting up Salesforce for their organizations and making sure it runs smoothly.

## [What Happens When You Purchase Salesforce](#)

New to Salesforce, or maybe you're not so new? In either case, to get the most out of Salesforce, it helps to know how your org is created and the types of licenses, permissions, and profiles that you receive. Understanding how these elements interact and impact what users can do saves you time.

## EDITIONS

Available in: both Lightning Experience and Salesforce Classic

Your Salesforce edition determines which features and functionality you can access.

### [Push Updated Licenses to Sandbox Orgs](#)

As your organization's needs change, your licensing needs evolve. When you update licenses, you want your production and sandbox orgs to be in sync. Often you can refresh your sandbox to ensure that its licensing information matches your production org's. Or, to ensure that your sandbox orgs receive updated license information, you can use the Match Production Licenses to Sandbox tool.

### [License Updates and Your Org](#)

When you purchase Salesforce, you receive licenses, permissions, and profiles that shape your org and what users can do in it. You can also create permission sets to help with permission management. Understand the impact of license updates on permissions in your profiles and permission sets.

### [Salesforce Editions](#)

We offer bundles of features and services, each geared toward specific business needs.

### [Salesforce Features and Edition Allocations](#)

Allocations for Salesforce features by edition.

### [Data and File Storage Allocations](#)

Storage allocation per Salesforce edition and number of standard licensed users in your organization.

### [Maps and Location Service Allocations](#)

Limits for map views per user.

### [Supported Browsers and Devices, Languages, and Accessibility Standards](#)

Learn about the browsers, languages, and accessibility standards that Salesforce supports.

### [Additional Resources](#)

Looking for more resources? Check out our tip sheets, implementation guides, videos, and walkthroughs.

## Concepts, Products, and Services

As you get started with Salesforce, it's helpful to learn some key concepts and terms. They come up frequently when you interact with the product, our documentation, and our service professionals. The concepts and terms here help you understand how Salesforce works.

### Concepts

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

### Editions

Available in: Salesforce Classic ([not available in all orgs](#) on page 9)

Available in: **All Editions**

Concept	Definition
Trust	<p>A Salesforce term for its company-wide commitment to building and delivering the most secure, fast, and reliable cloud-based service available.</p> <p><code>trust.salesforce.com</code> is a systems status website that provides Salesforce customers and the community access to real-time and historical system performance information and updates. It also lists incident reports and maintenance schedules across all its key system components.</p> <p><code>trust.salesforce.com</code> is free to all members of the Salesforce community.</p>

## Products and Services

Salesforce includes the following products and services.

### Salesforce Applications

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

### Lightning Platform

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

### AppExchange

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

### Salesforce.com Community

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

## Terms

Term	Definition
App	Short for <i>application</i> . A collection of components such as tabs, reports, dashboards, and Visualforce pages that address specific business needs. Salesforce provides standard apps, which you can customize, such as Sales and Service. You can customize the standard apps to match the way you work.
Edition	One of several bundles of Salesforce products and services, each geared toward a different set of business needs. All Salesforce editions share the look and feel, but they vary by feature, functionality, and pricing.
Object	<p>A definition of a specific type of information you can store in Salesforce. For example, the Case object lets you store information about customer inquiries. For each object, your organization has multiple, specific records.</p> <p>Salesforce comes with lots of standard objects, but you can create custom objects, as well.</p>
Organization	A deployment of Salesforce that has a defined set of licensed users. Your organization includes all your data and applications.

Term	Definition
Record	A collection of fields that store information about a specific item of a specific type. A record is an object, such as a contact, an account, or an opportunity. For example, you can have a contact record to store information about Joe Smith, and a case record store information about his training inquiry.
Release	Salesforce releases new products and features three times per year, and we identify releases by season—Winter, Spring, and Summer—along with the calendar year. <i>Example:</i> Winter '15.  For every Salesforce release, the Salesforce release notes include new features and products that are generally available or in beta release. They also describe all changes to existing features and products. You can find the release notes when you search for "Release Notes" in the Salesforce Help.
Salesforce	The name of the Salesforce cloud computing CRM service and the company name.

## The Salesforce Admin

The Salesforce administrator—or “admin” is a Salesforce user with system administration duties and other super powers. Admins are responsible for setting up Salesforce for their organizations and making sure it runs smoothly.

Admins have special permissions. For example, they can add user accounts and specify what people can see and do in Salesforce. Admins can create custom Salesforce objects, workflows, validation rules, reports, and more. Admins can manage user profile information and delete Chatter feed updates, including posts and comments. Admins are planners, problem-solvers, and heroes. All Salesforce organizations have at least one administrator. Your administrator’s role can be as simple or as complex as your company’s size and structure. In smaller organizations, the admin is often someone who also uses Salesforce the way other users do: to sell products or provide customer service, for example.

Salesforce offers lots of features and items that you can set up and configure yourself. For some things, though, partner with your trusty admin to help you get the best of what Salesforce has to offer.

Here are a few examples of the kinds of things your admin can help you with or do for you.

- Find or use an object, field, or feature you heard about during training.
- Create a custom workflow that lets you find out when a case is closed.
- Create a custom approval process that allows you to sign off on employee expenses.
- Create a custom report for your sales region.
- Give you a user permission that’s not granted as part of your user profile.
- Answer questions about your own or others’ access to records.
- Address those cursed error messages that ask you to contact your administrator for help or more information.

How you contact your administrator, and when and why, depends on your company’s internal business policies and practices.

## What Happens When You Purchase Salesforce

New to Salesforce, or maybe you’re not so new? In either case, to get the most out of Salesforce, it helps to know how your org is created and the types of licenses, permissions, and profiles that you receive. Understanding how these elements interact and impact what users can do saves you time.

When your order is activated, our provisioning process creates a license request. The license request includes definitions that build out your org. These definitions consist of settings that indicate which licenses, permissions, and profiles you receive. It’s these basic elements that shape the org that you use and what users can do in it.

## Licenses

You probably know that we offer different license types. Think of them as org-level and user-level licenses. You can also purchase permission set licenses and add-on licenses.

### Org-Level Licenses

When you purchase Salesforce, you purchase an org-level license, or edition. An edition defines your:

- Features, such as contracts or Collaborative Forecasts
- Amounts, such as quantity of storage and the number of sandboxes

To check how much storage or the number of sandboxes that your org has, from Setup, in the Quick Find box, enter *Storage Usage* or *Sandboxes*.

### User-Level Licenses

Your org receives a specific number of user licenses, such as Salesforce or Chatter Free user licenses. A user license defines:

- User permissions, such as Activate Contracts or View All Forecasts
- CRUD (Create, Read, Update, and Delete) access allowed on objects, such as who can create a contract or delete an account

When you create users, you assign each one to a user license. A user license defines the permissions or the maximum capabilities that a user can have.

To see which user licenses your org has, from Setup, in the Quick Find box, enter *Company Information*, and then select **User Licenses**.

### Permission Set Licenses

Permission set licenses let you offer more functionality to users in your org. An example of a permission set license is Identity Connect. When you purchase a permission set license, you receive user permissions pertaining to the license and the accompanying CRUD permissions. For example, with Identity Connect, you receive the Use Identity Connect permission, which allows assigned users to use the feature.

To check which permission set licenses your org has, from Setup, in the Quick Find box, enter *Company Information*, and select **Permission Set Licenses**.

### Add-on Licenses

Add-on licenses extend functionality at the org level. An example is the purchase of more API requests to extend the limit for your org.

## Permissions

User permissions specify:

- Tasks that users can perform
- Features that users can access in your org configuration

The base user permissions, such as Activate Contracts or View All Forecasts, that someone has depends on the user license assigned. You can use profiles and permission sets to refine which permissions a group of users has.

For example, users with the View All Forecasts permission can view other users' forecasts, but they must have the correct user license. If you assign the Chatter Free user license to users, they do not receive the View All Forecasts permission because this user license does not offer it.

To find which user license a user is assigned, from Setup, in the Quick Find box, enter *Users*. Click the name of the user whose information you want to view. Look for User License.

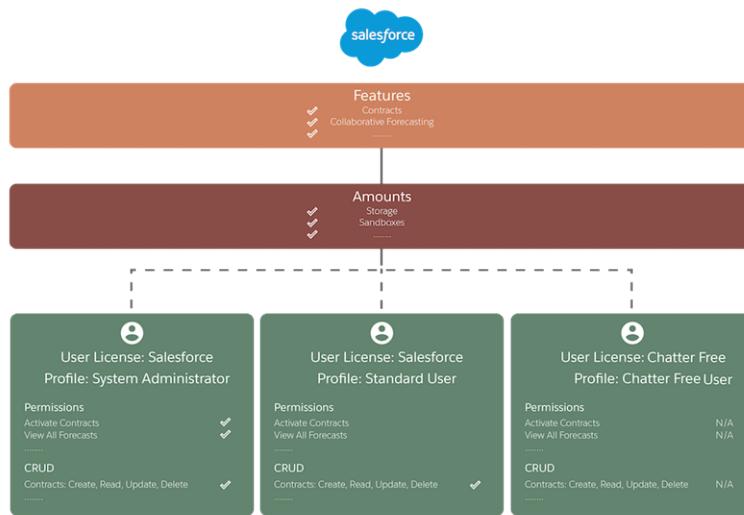
## Profiles

You can have standard profiles and custom profiles, depending on the edition that you purchase. Profiles define:

- User access to objects and data
- What users can do within the org

When you create users, you assign each user a profile. A profile belongs to exactly one user license type. Let's say that your purchase comes with the Salesforce and Chatter Free license types, among others. You assign profiles to users based on these licenses.

For example, based on the Salesforce user license, you can assign the System Administrator, Standard User, or one of several other profiles to a user. Based on the Chatter Free user license, you can assign only the Chatter Free User or Chatter Moderator User profiles to users.



You can create custom profiles to offer different permissions or functionality to users with the same user license. However, using a permission set is typically a more efficient way to achieve the same goal. (Make sure that the permissions defined in the profile or permission set don't exceed the permissions defined in the user license, though.) For example, you can assign a profile to a group of users. Then, you can assign users different permission sets to give certain people in that group more capabilities.

To see which profile and permission sets that a user is assigned, from Setup, in the Quick Find box, enter *Users*. Click the name of the user whose information you want to view. To check the assigned profile, look for Profile. Click **Permission Set License Assignments** or **Permission Set Assignments: Activation Required** for permission set information.

### SEE ALSO:

[Salesforce Editions](#)

[Data and File Storage Allocations](#)

[Licenses Overview](#)

## Push Updated Licenses to Sandbox Orgs

As your organization's needs change, your licensing needs evolve. When you update licenses, you want your production and sandbox orgs to be in sync. Often you can refresh your sandbox to ensure that its licensing information matches your production org's. Or, to ensure that your sandbox orgs receive updated license information, you can use the Match Production Licenses to Sandbox tool.

When you use the Match Production Licenses to Sandbox tool, all provisioned changes are matched in the production org.

To match licenses to a sandbox org, make sure that the status of the related production org is active. Then log in to your sandbox. From Setup, go to Company Information, and select **Match Production Licenses**.



**Warning:** If the sandbox's related production environment is in trial or demo status, do not use the matching tool. Using the tool with a trial or demo org can result in destructive changes. If you're unsure whether the sandbox's production org is in active status, log a case with Salesforce Customer Support. They can confirm your org's status before you use the tool.

SEE ALSO:

[Sandbox Setup Considerations](#)

## License Updates and Your Org

When you purchase Salesforce, you receive licenses, permissions, and profiles that shape your org and what users can do in it. You can also create permission sets to help with permission management. Understand the impact of license updates on permissions in your profiles and permission sets.

Changes to your org impact its functionality and your users. For instance, what happens if you upgrade your Salesforce edition? Or maybe you decide to purchase an add-on license. Let's say that your org:

- Upgraded from Professional Edition to Enterprise Edition
- Uses Service Cloud, and you purchased the additional functionality that the SOS add-on offers

After you upgrade:

- You want to use approval processes. Review the relevant user and object-level permissions for users who are approval admins.
- Ensure that you enable related features for the SOS add-on. Give users who need the add-on the correct permissions. For best results, use Salesforce Help to set up your add-on. For example, you must enable Omni-Channel in your org before you set up SOS.

Each org is different, and each user has different requirements. When you purchase an upgrade or add-on, we suggest reviewing help topics and videos in Salesforce Help and checking user permissions.

To see which profile and permission sets that a user is assigned, from Setup, in the Quick Find box, enter *Users*. Click the name of the user whose information you want to view. To check the assigned profile, look for Profile. For permission set information, click **Permission Set License Assignments** or **Permission Set Assignments: Activation Required**.

SEE ALSO:

[Salesforce Editions](#)

[What Happens When You Purchase Salesforce](#)

[Licenses Overview](#)

## Salesforce Editions

We offer bundles of features and services, each geared toward specific business needs.

These bundles, called *editions*, share a look and feel but vary by functionality and pricing. Some customers start with a basic edition and upgrade to a more feature-rich edition as business requirements evolve.

It's easy to learn which features are available in various editions. Just search for features in Salesforce Help. Toward the top of every topic, you can see the editions in which the feature's available. Here's a quick description of each edition we offer.

-  **Note:** For many trial and purchased subscription editions for new orgs, Lightning Experience is the exclusive user interface for end users. See [Lightning Experience Only Editions](#).

Edition	What's Great About It
Essentials	Designed for small businesses that want to get started with a CRM system quickly. It includes intuitive walkthroughs and a setup assistant to get started, an easy-to-use UI, and administration tools to customize your deployment as you grow.
Professional	Designed for businesses requiring full-featured CRM functionality. It includes straightforward and easy-to-use customization, integration, and administration tools to facilitate any small to midsize deployment.
Enterprise	Meets the needs of large and complex businesses. It gives you advanced customization and administration tools, in addition to all the functionality available in Professional Edition, that can support large-scale deployments. Enterprise Edition also includes access to Salesforce APIs, so you can easily integrate with back-office systems.
Unlimited	Maximizes your success and extends it across the entire enterprise through the Lightning Platform. It gives you new levels of platform flexibility for managing and sharing all your information on demand. Includes all Enterprise Edition functionality, Premier Support, full mobile access, unlimited custom apps, increased storage limits, and other features.
Developer	Provides access to the Lightning Platform and APIs. It lets developers extend Salesforce, integrate with other applications, and develop new tools and applications. Developer Edition also provides access to many of the features available in Enterprise Edition.
	 <b>Note:</b> Salesforce doesn't provide technical support for Developer Edition. But you can ask for help from developer community message boards after you register for the Lightning Platform developer website: <a href="http://developer.salesforce.com">developer.salesforce.com</a> .

Compare editions and their features in [Salesforce Pricing and Editions](#).

### Find Your Edition

Your Salesforce edition affects which features and functionality are available in your org.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

### Lightning Experience–Only Editions

Customers using Lightning Experience are more productive than customers working in Salesforce Classic. To ensure that our customers benefit from these productivity gains, selected trials and purchased subscriptions for several editions offer Lightning Experience as the exclusive user interface for end users without admin permissions. Admins in these orgs can access Salesforce Classic, but they can't disable Lightning Experience or grant users access to Salesforce Classic on the Lightning Experience Migration Assistant setup page.

### Salesforce Editions That Are No Longer Sold

Some Salesforce editions are no longer sold. You can continue to use your Contact Manager, Group, Personal, Performance, or Database.com Edition org or purchase one of the editions that are currently sold: Professional, Enterprise, Unlimited, and Developer Editions.

### Controlled Setting Edition: What's Different or Unavailable in Controlled Setting Edition

The Controlled Setting Edition is a version of the Salesforce application that gives customers enhanced control of data flows within their Salesforce org. The Controlled Setting Edition restricts the use of features that require connections outside of the customer's Salesforce org. Because of this isolation restriction, some features are unavailable. This document details those unavailable features. As the Controlled Settings Edition evolves, the list of available features changes. This document is the source of truth for features available in the Controlled Setting Edition.

## Find Your Edition

Your Salesforce edition affects which features and functionality are available in your org.

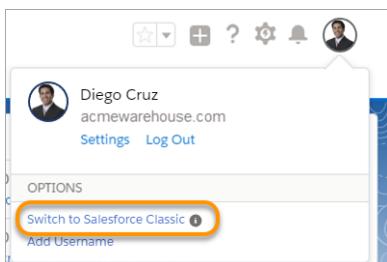
To find out which edition you're using, look at **Organization Edition** on the **Company Information** page.

1. From Setup, enter *Company Information* in the Quick Find box, then select **Company Information**.
2. **Organization Edition** appears in the lower right.

## Lightning Experience–Only Editions

Customers using Lightning Experience are more productive than customers working in Salesforce Classic. To ensure that our customers benefit from these productivity gains, selected trials and purchased subscriptions for several editions offer Lightning Experience as the exclusive user interface for end users without admin permissions. Admins in these orgs can access Salesforce Classic, but they can't disable Lightning Experience or grant users access to Salesforce Classic on the Lightning Experience Migration Assistant setup page.

Want to determine if Lightning Experience is the exclusive interface? For end users, the Switch to Salesforce Classic option isn't available when Lightning Experience is the only interface for the edition.



### Editions

Available in: Lightning Experience

If you believe that your org has a strong business need for your end users to access Salesforce Classic, use the exception request process.

1. Go to [Salesforce Help Finder](#) and log in with your Salesforce credentials .
2. Click the **Feature Activation** topic, and then the **Other** category .

3. Click **Log a New Case**.
4. For the **Subject** field, enter *Enable Classic*.
5. For the **Description** field, enter details on why you are requesting end-user access to Salesforce Classic.
6. Check that the OrgId is accurate, and then submit the case.

## Salesforce Editions That Are No Longer Sold

Some Salesforce editions are no longer sold. You can continue to use your Contact Manager, Group, Personal, Performance, or Database.com Edition org or purchase one of the editions that are currently sold: Professional, Enterprise, Unlimited, and Developer Editions.



**Note:** Lightning Experience isn't available in Contact Manager, Personal, or Database.com Edition orgs.

### Editions

Available in: **Contact Manager, Group, Personal, Performance, and Database.com Editions**

#### Contact Manager Edition

This edition is designed for small businesses and provides access to key contact management features including accounts, contacts, activities, calendars, notes and attachments, and reports. Contact Manager provides straightforward, easy-to-use customization options.

#### Group Edition

This edition is designed for small businesses and work groups with a limited number of users. Group Edition users can manage their customers from the start of the sales cycle through the end and provide customer support and service. Group Edition offers access to accounts, contacts, opportunities, leads, cases, dashboards (read only), and reports.

#### Personal Edition

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



**Note:** Personal Edition orgs purchased after June 2009 don't have access to opportunities.

#### Performance Edition

This edition is designed for customers who want to drive growth, increase customer satisfaction, and maximize sales and service success in the social and mobile world. Performance Edition orgs include all Unlimited Edition functionality plus clean, targeted lead and customer data from Data.com, coaching and feedback tools from WDC, trusted identity services from Identity, and more. For customers in Japan, Singapore, and South Korea, we offer Performance Edition Limited, which includes all Performance Edition functionality except Data.com.

#### Database.com

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

As a Salesforce customer, you already use Database.com when you create custom objects, manage security, or import data with the Lightning platform and API. A stand-alone version of Database.com is available for developers who want to create applications that harness other languages, platforms, and devices.

We don't provide Database.com-specific documentation. Refer to the Salesforce documentation and the list of features that Database.com supports. This list identifies the Salesforce documentation subjects that apply to Database.com. Also, every feature's

Edition Table includes Database.com if the feature is available in Database.com. Use the Salesforce Help, release notes, workbooks, and developer guides for APIs, Apex, SOQL, and SOSL.

#### SEE ALSO:

[Salesforce Editions](#)

## Controlled Setting Edition: What's Different or Unavailable in Controlled Setting Edition

The Controlled Setting Edition is a version of the Salesforce application that gives customers enhanced control of data flows within their Salesforce org. The Controlled Setting Edition restricts the use of features that require connections outside of the customer's Salesforce org. Because of this isolation restriction, some features are unavailable. This document details those unavailable features. As the Controlled Settings Edition evolves, the list of available features changes. This document is the source of truth for features available in the Controlled Setting Edition.

### Unsupported or Partially Supported Features

Feature or Setting	Available with Differences	Not Available	Notes
Adoption Apps	✓		Salesforce1 banner in Salesforce Classic is unavailable because it relies on external resources.
Adoption Assistance	✓		These features aren't available because they rely on external resources. <ul style="list-style-type: none"> <li>• Optimizer app is unavailable.</li> <li>• Access to the Transition Assistant is unavailable.</li> <li>• Lightning Experience Welcome Mat is unavailable.</li> </ul>
Auth Providers		✓	Can't create authentication providers. Outbound connections for authentication aren't allowed.
B2B Commerce deployed with Lightning Experience		✓	B2B Commerce deployed with Lightning Experience is unavailable.
Commerce Cloud		✓	Commerce Cloud is unavailable. No access to Salesforce Checkout and Self Service order center.
Customer Data Platform		✓	Customer Data Platform is unavailable.
Data Assessment		✓	Company Recommendation is unavailable. Data assessment tab is unavailable. Data journey company match feature is unavailable. Data.com Discovery is disabled.
Data Cloud		✓	Neither Data.com nor Data.com trial is available. Data.com Prospector is disabled.

Feature or Setting	Available with Differences	Not Available	Notes
			<p>Recommended Accounts is unavailable.</p> <p>Data.com List Pool Usage Calculation is unavailable.</p> <p>Datacloud Address Match functionality is disabled, in both the UI and via the API.</p> <p>Datacloud Address Extended Match functionality is unavailable.</p> <p>No access to Dunn &amp; Bradstreet Accounts data.</p> <p>Dunn &amp; Bradstreet Enterprise data is disabled.</p> <p>Can't run Enable Data.com or Full Clean.</p> <p>Salesforce Account Matching, Matching for Large Ops, Async Matching, Bulk API, Social API, and Sync API are all disabled.</p> <p>Datacloud API for pilot is disabled.</p>
Einstein.ai	✓		Einstein.ai Data Access via Cloud to Cloud is disabled.
Tableau CRM Connector	✓		External data connectors are limited to Salesforce Connector, Amazon S3, and AWS RDS.
Einstein Case Classification		✓	Record prediction is disabled.
Einstein EP API	✓		<p>Einstein Metadata models are disabled.</p> <p>Einstein Metadata access is disabled.</p>
Einstein Search		✓	Einstein Search is unavailable.
Einstein SmartAgent Suggested Article		✓	<p>Einstein Article Recommends is unavailable.</p> <p>Einstein Answers is disabled.</p> <p>Einstein Answer Snippets is disabled.</p>
Einstein SmartAgent Suggested Response		✓	Einstein Reply Recommendations is unavailable.
Essentials Cloud	✓		Salesforce Essentials is unavailable.
Experience Cloud	✓		<p>Out of office messages are unavailable.</p> <p>Trailhead badges card is disabled.</p> <p>CMS isn't supported.</p> <p>Posts can't be categorized by sentiment.</p> <p>No video allowed in the rich text editor on content detail pages.</p> <p>Sitemap Generation is disabled.</p> <p>Experience Cloud Content Delivery Network (CDN) is disabled.</p>

Feature or Setting	Available with Differences	Not Available	Notes
Geocodes		✓	Geocodes are unavailable.
Google Apps		✓	Google Apps are unavailable. Gmail connector is unavailable.
Help Links	✓		Help links do not redirect to the Salesforce Help site.
In-App Guidance	✓		User feedback in Lightning Experience is unavailable.
ISV Intelligence	✓		Advanced access to App Analytics Usage Logs is unavailable. Can't access the Intelligence data. Can't collect ISV Intelligence for Partner Ops or ISVs. Can't collect or read Usage Metrics Data. Can't be the Environment Hub Master.
Lightning Bridge	✓		In Canvas App Previewer, the Heroku Quick Start button is dimmed (not available for selection).
Lightning Console	✓		Debug view in Console is unavailable.
Sales Dialer		✓	Sales Dialer is unavailable.
Lightning for Outlook / Gmail		✓	Email integration with Outlook and Gmail is unavailable.
Lightning Object Creator		✓	Lightning Object Creator is unavailable.
Lightning Platform Partnerships		✓	Google Sheets, Skype for Salesforce, and Cisco Spark are unavailable.
Lightning Sync		✓	Lightning Sync is unavailable.
Maps and Location Services		✓	Maps and location services are unavailable.
Microsoft Teams Integration		✓	Microsoft Teams integration is unavailable.
Mobile Features		✓	Mobile is unavailable.
Mobile Push		✓	Mobile push is unavailable.
Pardot		✓	Pardot is unavailable.
Platform Encryption & Keys	✓		Neither "Bring Your Own Key" nor "Self Signed Certificates" is available.
Platform Functions		✓	Platform Functions is unavailable.
Private Connect		✓	Private Connect is unavailable.

Feature or Setting	Available with Differences	Not Available	Notes
Quip	✓		Files Connect (includes Quip) is unavailable. Isotope (Engage) is unavailable.
Sales Cloud Einstein		✓	Lead Score is unavailable. Implicit integration is unavailable. Forecasting Predictive service is unavailable. Sales Cloud Einstein for Everyone is unavailable.
Sales Cloud Leads	✓		Lead generation integration is restricted (no public lead sources are available).
Salesforce Authenticator		✓	Salesforce Authenticator is unavailable.
Salesforce Flow	✓		Cloud Flow Designer is unavailable.
Scratch Orgs		✓	Scratch orgs are unavailable for the Controlled Setting Edition.
Self Service Discovery		✓	Rich link preview rendering is unavailable.
Service Cloud Messaging		✓	Live Messaging is unavailable.
Service Cloud - Social Customer Service		✓	Social Publisher and Social Objects are unavailable.
Service Cloud - SOS		✓	Service Cloud - SOS is unavailable.
Service Cloud - Web2Case, Web2Lead	✓		Recaptcha is unavailable.
Social Accounts, Contacts, and Leads		✓	Social profiles (such as Twitter and YouTube) are unavailable.
Topic Influence Work for Knowledge	✓		Topics event tracking is unavailable.

## Salesforce Features and Edition Allocations

Allocations for Salesforce features by edition.

*Allocations* generally refer to amounts granted based on the edition you purchase. Information for specific feature *limits*, such as the number of total and active rules in your org, are in Salesforce Help; see the topics for using that feature.

Feature	Personal Edition	Contact Manager	Group Edition	Essentials Edition	Professional Edition	Enterprise Edition	Unlimited and Performance Edition	Developer Edition
Action plans: maximum tasks	N/A					75		
Active lookup filters	5 per object							
Active validation rules per object		20				100	500	100
Attachments: maximum size in the Notes & Attachments related list <sup>1</sup>	N/A			25 MB for file attachments. 2 GB for feed attachments.				
Categories: maximum default categories and hierarchy levels	N/A					<ul style="list-style-type: none"> <li>100 categories in a data category group</li> <li>5 levels in a data category group hierarchy</li> </ul>		
Category groups: maximum default						5 category groups, with 3 groups active at a time		
Certificates: maximum						50		
Content deliveries: default delivery bandwidth per rolling 24-hour window	50 GB							
Content deliveries: default delivery view counts per rolling 24-hour window	50,000							
Content deliveries: maximum file size for online viewing	25 MB							
Content: maximum file size				<ul style="list-style-type: none"> <li>2 GB</li> <li>2 GB (including headers) when uploaded via Connect REST API</li> <li>2 GB (including headers) when uploaded via REST API</li> <li>38 MB when uploaded via SOAP API</li> <li>10 MB when uploaded via Bulk API</li> <li>150 MB when uploaded via Bulk API 2.0</li> <li>10 MB when uploaded via Visualforce</li> </ul>				
Content: maximum libraries	2,000							

Feature	Personal Edition	Contact Manager	Group Edition	Essentials Edition	Professional Edition	Enterprise Edition	Unlimited and Performance Edition	Developer Edition
Content: maximum number of documents	30,000,000							
Content: maximum number of documents and versions in a 24-hour period (adjustable)	200,000			2,500	200,000			2,500
Content packs: maximum files	N/A	50						
Custom apps <sup>2</sup>	N/A	1		9,999	255 To exceed this number, contact Salesforce.	260 To exceed this number, contact Salesforce.	Unlimited	10
Custom big objects	100	100	N/A	100	100	100	100	100
Custom fields per object <sup>3</sup>	5	25	100	100	100	500	800	500
Custom labels	N/A			5,000	5,000			
Custom links: maximum label length	1,024 characters							
Custom links: maximum URL length	3,000 bytes <sup>4</sup>							
Custom objects <sup>5</sup>	N/A	5	50	0	50	200	3,000	400
Custom objects: deletion of parent records in a many-to-many relationship	N/A	Available unless more than 200 junction object records are associated with the deleted parent record <i>and</i> the junction object has a roll-up summary field that rolls up to the other parent.	N/A	Available unless more than 200 junction object records are associated with the deleted parent record <i>and</i> the junction object has a roll-up summary field that rolls up to the other parent.				
Custom objects: maximum master-detail relationships					2 <sup>6</sup>			
Custom permissions	N/A					1,000		
Custom profiles: maximum	N/A			2	3	1,500 per user license type		

Feature	Personal Edition	Contact Manager	Group Edition	Essentials Edition	Professional Edition	Enterprise Edition	Unlimited and Performance Edition	Developer Edition												
Custom settings: cached data allocation	The lesser of 10 MB or 1 MB multiplied by the number of full-featured user licenses in your org (N/A in Contact Manager, Essentials Edition, and Professional Editions)																			
Custom settings: maximum fields per setting	100	N/A	100	N/A	N/A	300	300	300												
Divisions: maximum	N/A					100	N/A													
Documents: maximum size of custom app logo	20 KB																			
Documents: maximum size of document to upload	5 MB																			
Documents: maximum size of file name (with extension)	255 characters																			
Entitlement processes and milestones	N/A				You can create up to 1,000 entitlement processes total, with up to 10 milestones per process. If your org was created before Summer '13, its maximum entitlement processes can be lower. Contact Salesforce to increase it.															
External objects <sup>7</sup>	N/A					200														
Field history tracking: maximum standard or custom fields tracked for standard or custom objects	N/A	20																		
File size: maximum in Chatter and on the Files tab	2 GB																			
Fiscal years: maximum custom	250																			
Formulas: maximum displayed characters after an evaluation of a formula expression	1,300																			
Formulas: maximum length	3,900 characters																			

Feature	Personal Edition	Contact Manager	Group Edition	Essentials Edition	Professional Edition	Enterprise Edition	Unlimited and Performance Edition	Developer Edition
Formulas: maximum size when compiled	5,000 bytes							
Formulas: maximum size when saved	4,000 bytes							
Formulas: unique relationships per object	15							
Formulas: VLOOKUP functions per object	10							
Ideas: maximum size of HTML idea comment	N/A				4 KB			
Ideas: maximum size of HTML idea description					32 KB			
Lightning Apps <sup>2</sup>	N/A				10	25	Unlimited	N/A
Lightning pages: maximum components in a region	100							
Master-detail relationship: maximum child records	10,000 <sup>8</sup>							
Objects: maximum number of deleting combined objects and child records	100,000							
Omni-Channel: maximum pending routing requests <sup>9</sup>	N/A				200,000			
Omni-Channel: maximum queued work items <sup>10</sup>					45,000 per hour			
Opportunity Teams: maximum members	N/A					30		
Permission sets: maximum (created)	N/A	1		5	10	1,000		
Permission sets: maximum (created and added as part of an	N/A			1,500				

Feature	Personal Edition	Contact Manager	Group Edition	Essentials Edition	Professional Edition	Enterprise Edition	Unlimited and Performance Edition	Developer Edition
installed managed AppExchange package)								
Permission set groups: maximum (created per org)	N/A				10	800		
Permission sets groups: maximum (created and added as part of an installed managed AppExchange package)	N/A				1,000			
Processes and flows: total	N/A			5		4,000		
Processes and flows: active	N/A			5		2,000		
Question: maximum characters	N/A					1,000		
Question: maximum characters (with Chatter Answers Optimize Question Flow enabled)						32,000		N/A
Quote PDF: maximum logo height	N/A			150 pixels				
Quote PDF: maximum logo size				5 MB				
Recycle Bin: maximum records	25 times your MB storage capacity as records. For example, an org with a storage allocation of 2,000MB (2GB) can have 50,000 records in the Recycle Bin: $25 \times 2,000 = 50,000$ records.							
Reply: maximum characters	N/A					1,000		N/A
Reply (private): maximum characters (with Chatter Answers Optimize Question Flow enabled)						4,000		N/A
Reply (public): maximum characters (with Chatter Answers Optimize						32,000		N/A

Feature	Personal Edition	Contact Manager	Group Edition	Essentials Edition	Professional Edition	Enterprise Edition	Unlimited and Performance Edition	Developer Edition
Question Flow (enabled)								
Shared Activities								
Sharing rules	N/A				You can create up to 300 sharing rules per object, including up to 50 criteria-based rules.			
Static resources				A static resource can be up to 5 MB. An org can have up to 250 MB of static resources total.				
Tabs <sup>2</sup>	N/A	3	5	9,999	1,210 To exceed this number, contact Salesforce.	1,225 To exceed this number, contact Salesforce.	1,225 To exceed this number, contact Salesforce.	100
Tags								
Territories: maximum account assignment rules	N/A					15		
Users: maximum created	1	5	10	5	Unlimited			2
Users: maximum created (Chatter Free)	N/A	5,000						
Web-to-Case: maximum new cases generated in a 24-hour period				55,500	5,000 <sup>11</sup>			
Web-to-Lead: maximum new leads generated in a 24-hour period	N/A			55,500	500 <sup>11</sup>			

<sup>1</sup> You can add an attachment to the Attachments related list of a case, solution, campaign, task, or event, or to the Notes & Attachments related list of an account, contact, lead, opportunity, or custom object. If you don't see the related list on task or event page layouts, ask your admin to add it.

<sup>2</sup> Lightning apps, custom apps, and custom tabs that are contained in a managed package that's publicly posted on the AppExchange don't count against the allocations for your Salesforce edition.

<sup>3</sup> An org can't have more than 900 custom fields on most object types, regardless of the edition or source of those fields. In addition to the limits listed above, you can install custom fields from AppExchange for a total of 900 fields. For example, you can create 800 custom fields on an object in the Unlimited Edition, plus install 100 custom fields from a managed package that are limited to specific objects. Additional restrictions apply for activities, long text area fields, relationship fields, and roll-up summary fields. For more information, see [Custom Fields Allowed Per Object](#).

<sup>4</sup> When data is substituted for the tokens in the URL, the link can exceed 3,000 bytes. Some browsers enforce additional limits for the maximum URL length.

<sup>5</sup> The custom objects that are contained in a managed package that's publicly posted on the AppExchange don't count against the allocations for your Salesforce edition. At the same time, an org can't have more than 3,000 custom objects, regardless of the source or namespace of those objects. For example, in Unlimited Edition: 2,000 custom objects created, 1,000 custom objects installed by packages. Soft-deleted custom objects and their data count against your limits. We recommend that you hard delete or erase custom objects you no longer need.

<sup>6</sup> Each relationship is included in the maximum custom fields allowed.

<sup>7</sup> The amount of 200 external objects applies regardless of how many Salesforce Connect add-ons you purchase for your org. External objects don't count toward the amount for custom objects.

<sup>8</sup> As a best practice, don't exceed 10,000 child records for a master-detail relationship.

<sup>9</sup> Maximum objects that can be pending for Omni-Channel routing in an org. When an item is assigned to Omni-Channel-enabled queues, Omni attempts to route it to an available agent. If no agent is available, the work is pending routing. You may experience degraded performance in Omni-Channel Supervisor when queues surpass 10,000 pending routing requests.

<sup>10</sup> Maximum records that can be queued per hour in an org, across all Omni-Channel-enabled queues. Each time an item is assigned to an Omni-Channel queue, the platform checks how many items were queued in the preceding hour. If the max has been reached, the item isn't assigned to the queue.

<sup>11</sup> If your org exceeds its daily Web-to-Case or Web-to-Lead amount, the default case owner or default lead creator receives a notification email that contains information about the case or lead. When your org reaches the 24-hour max, Salesforce stores additional requests in a pending request queue that contains Web-to-Case and Web-to-Lead requests. The requests are submitted when the amount refreshes. The pending request queue has an allocation of 50,000 combined requests. If your org reaches the pending request maximum, additional requests are rejected and not queued. Your admin receives email notifications for the first five rejected submissions. Contact Salesforce Customer Support to change your org's pending request allocation.

#### SEE ALSO:

[Salesforce Editions](#)

[Data and File Storage Allocations](#)

## Data and File Storage Allocations

Storage allocation per Salesforce edition and number of standard licensed users in your organization.

### Storage Capacity

Storage is divided into two categories. File storage includes files in attachments, Files home, Salesforce CRM Content, Chatter files (including user photos), the Documents tab, the custom File field on Knowledge articles, and Site.com assets. Data storage includes the following:

- Accounts

- Article types (format: “[Article Type Name]”)
- Article type translations (format: “[Article Type Name] Version”)
- Campaigns
- Campaign Members
- Cases
- Case Teams
- Contacts
- Contracts
- Custom objects
- Data translations
- Email messages
- Events
- Forecast items
- Google docs
- Ideas
- Leads
- List Email
- Notes
- Opportunities
- Opportunity Splits
- Orders
- Quotes
- Quote Template Rich Text Data
- Solutions
- Tags: Unique tags
- Tasks
- All objects tied to Field Service enablement (for a full list, see the [Field Service Developer Guide](#))

## Data Storage

Starting in late March 2019, Contact Manager, Group, Essentials, Professional, Enterprise, Performance, and Unlimited Editions are allocated 10 GB for data storage, plus incrementally added user storage. For example, a Professional Edition org with 10 users receives 10 GB of data storage, plus 200 MB, for 10.2 GB of total data storage.

## File Storage

Contact Manager, Group, Professional, Enterprise, Performance, and Unlimited Editions are allocated 10 GB of file storage per org. Essentials edition is allocated 1 GB of file storage per org.

Orgs are allocated additional file storage based on the number of standard user licenses. In Enterprise, Performance, and Unlimited Editions, orgs are allocated 2 GB of file storage per user license. Contact Manager, Group, Professional Edition orgs are allocated 612 MB per standard user license, which includes 100 MB per user license plus 512 MB per license for the Salesforce CRM Content feature license. An org with fewer than 10 users will receive a total of 1 GB of per-user file storage rather than 100 MB per user license.

 **Note:** Each Salesforce CRM Content feature license provides an additional 512 MB of file storage, whether Salesforce CRM Content is enabled or not.

File storage and data storage are calculated asynchronously, so if you import or add a large number of records or files, the change in your org's storage usage isn't reflected immediately.

The minimum values in the table below apply to Salesforce and Salesforce Platform user licenses. If your org uses custom user licenses, contact Salesforce to determine your exact storage amount. For a description of user licenses, see [User Licenses](#).

### Big Object Storage

Contact Manager, Group, Enterprise, Performance, Unlimited, Developer, and Personal editions are allocated storage for 1 million big object records per org. Contact Salesforce to increase the limit. Big object storage is calculated asynchronously, so new records aren't immediately reflected. While big object record limits are not actively monitored, Salesforce reserves the right to enforce the limit if necessary.

 **Note:** In most cases, the allocation is enforced and records can't be added once the allocation is exceeded. For active production orgs, the allocation of big object records is enforced contractually.

Salesforce Edition	Data Storage Minimum per Org	Data Storage Allocation per User License	File Storage Allocation per Org	File Storage Allocation per User License
Contact Manager				
Group		20 MB	612 MB	
Professional				
Enterprise	10 GB		10 GB	
Performance		120 MB		
Unlimited		20 MB for Lightning Platform Starter user licenses		2 GB
Developer	5 MB			
Personal	20 MB (approximately 10,000 records)	N/A	20 MB	N/A
Essentials	10 GB		1 GB	

### SEE ALSO:

[Salesforce Editions](#)

[Salesforce Features and Edition Allocations](#)

## Maps and Location Service Allocations

Limits for map views per user.

Maps and location services uses Google Maps to display maps on standard address fields, enable creation of Visualforce maps, and helps users enter new addresses with autocomplete.

## Limits for Map Views

Each paid and provisioned user is allotted 4,000 map views per year. The map view limit for an entire organization is the total allotted map views of its paid and provisioned users. That total number of map views for an organization is shared by both paid and unpaid users. A map view is defined as one of the following:

- Display of an individual standard address map.



**Note:** Display of billing and shipping address on the same record is considered separate map views.

- Display of a single Visualforce map.
- Display of a map marker whose location is specified by an address on a Visualforce map.



**Note:** Map markers with location defined by latitude and longitude don't incur a map view.

- Each autocomplete on standard address field lookup.

## Supported Browsers and Devices, Languages, and Accessibility Standards

Learn about the browsers, languages, and accessibility standards that Salesforce supports.

### [Supported Browsers and Devices](#)

Supported browsers and devices for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience.

### [Supported Languages](#)

Salesforce offers three levels of language support: fully supported languages, end-user languages, and platform-only languages. For fully supported languages, all Salesforce features and UI text appear in the chosen language. End-user languages allow individual users to select a language other than the company's default language for end-user facing UI. In situations where Salesforce doesn't provide default translations, use platform-only languages to localize apps and custom functionality that you build on the Salesforce Platform.

### [Accessibility Standards](#)

Learn about the standards that Salesforce follows to design applications with accessibility in mind.

## Supported Browsers and Devices

Supported browsers and devices for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience.

### [Supported Browsers and Devices for Lightning Experience](#)

See the supported browsers and devices for Lightning Experience.

### [Supported Browsers and Devices for Salesforce Classic](#)

See the supported browsers and devices for Salesforce Classic.

[Recommendations and Requirements for All Browsers](#)

For the best experience and security, follow these guidelines.

**SEE ALSO:**[Device and Browser Best Practices](#)[Tableau CRM Requirements](#)[Technical Requirements for Lightning Experience](#)[Technical Requirements for Tablets](#)[Technical Requirements for Phones](#)[Tableau CRM Requirements](#)

## Supported Browsers and Devices for Lightning Experience

See the supported browsers and devices for Lightning Experience.

**Where:** Lightning Experience is available in the Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

**Note:**

- Salesforce doesn't support nonbrowser applications that embed WebView or similar controls to render content for Salesforce Classic or Lightning Experience. Examples of approaches that embed this type of control include Salesforce Mobile SDK, Microsoft's WebBrowser Control, Electron's embedded Chromium browser, iOS's UIWebView and WKWebView, and Android's WebView.
- You can't access Lightning Experience in a mobile browser. Instead, we recommend that you use the Salesforce mobile app when you work on a mobile device.
- You can access Lightning Experience on iPad Safari. For more information, see [Lightning Experience on iPad Safari Considerations](#).
- Lightning Experience doesn't support incognito or other private browsing modes.

## Desktops and Laptops

Salesforce supports these following browsers. Make sure that your browsers are up to date. Other browsers or older versions of supported browsers aren't guaranteed to support all features.

**!** **Important:** Support for Internet Explorer 11 to access Lightning Experience ended on December 31, 2020.

- When using IE11, a permanent banner displays in your Salesforce org indicating that you're on an unsupported browser.
- IE11 has [significant performance issues](#) in Lightning Experience.
- This change doesn't impact Salesforce Classic.

**!** **Important:** Support for the non-Chromium version of Microsoft Edge in Lightning Experience and Salesforce Classic ended on December 31, 2020.

	<b>Microsoft® Internet Explorer®</b>	<b>Microsoft® Edge (non-Chromium)</b>	<b>Microsoft® Edge Chromium</b>	<b>Google Chrome™</b>	<b>Mozilla® Firefox®</b>	<b>Apple® Safari®</b>
Lightning Experience	Not supported	Not supported	Supports latest stable browser version			
Experience Builder sites	Not supported	Not supported	Supports latest stable browser version			
Special setup considerations?	Not supported	Not supported	No	No	No	No
Limitations?	Yes	Yes	Yes	No	Yes	Yes

 **Note:** The browser vendor defines “latest” for their own browser. Check with your browser vendor to determine the latest version available.

## Tablets

Use Apple Safari on iPadOS (iOS 13.x) or later. Portrait orientation and orientation switching aren’t supported on Lightning Experience on iPad Safari. Use landscape orientation and maximize your Safari browser to full width. To avoid orientation switching, turn on the iPad rotation lock.

We support only the Salesforce mobile app for Android-based tablets.

	<b>Apple® Safari®</b>	<b>Google Chrome™</b>	<b>Other Browsers</b>	<b>Salesforce Mobile App</b>
iPadOS	Supported	Not supported	Not supported	Supported
Android	N/A	Not supported	Not supported	Supported

 **Note:** Salesforce treats touch-enabled laptops, including Microsoft Surface and Surface Pro devices, as laptops instead of tablets. It’s not possible to access the Salesforce mobile app on these devices. Users are always redirected to the full site experience that’s enabled for them—Lightning Experience or Salesforce Classic. Only standard keyboard and mouse inputs are supported on these types of devices.

## Phones

For the best experience, use the Salesforce mobile app.

[Lightning Experience on iPad Safari Considerations](#)

Understand what's different or not supported when you view Lightning Experience on an iPad® instead of a desktop computer.

## SEE ALSO:

- [Technical Requirements for Lightning Experience](#)
- [Tableau CRM Requirements](#)
- [Technical Requirements for Tablets](#)
- [Technical Requirements for Phones](#)
- [Requirements for the Salesforce Mobile App](#)
- [Supported Browsers for Experience Cloud Sites](#)

**Lightning Experience on iPad Safari Considerations**

Understand what's different or not supported when you view Lightning Experience on an iPad® instead of a desktop computer.

These features work differently or aren't supported, but they aren't blocked from use.

Feature or Setting	Available with Differences	Not Supported	Notes
<b>General Functionality</b>			
Portrait orientation		✓	Portrait orientation and orientation switching aren't supported on Lightning Experience on iPad Safari. Use landscape orientation and maximize your Safari browser to full width. To avoid orientation switching, turn on the iPad rotation lock.
Screen resolution	✓		<p>The minimum screen resolution required to support all Salesforce features is 1024 x 768.</p> <p> <b>Note:</b> The Three Regions template and the pinned region templates are designed with Lightning console apps in mind. Three-region templates require more screen width to display correctly and can display incorrectly on certain devices or monitors with low resolutions.</p>
Hover	✓		<p>Hover isn't supported on Lightning Experience on iPad Safari except for these features.</p> <p><b>Einstein Search</b></p> <p>If you view Lightning Experience on an iPad, Einstein Search record previews and related list quick links do not show hover pages.</p> <ul style="list-style-type: none"> <li>• To see record previews, tap on the ellipses across from the record name shown in the instant results. The record preview appears on the right. If you tap on a record name, you go to that record's home page.</li> </ul>

Feature or Setting	Available with Differences	Not Supported	Notes
			<ul style="list-style-type: none"> <li>In the related list quick links, tap on any link to see the list view for that entry. You can't hover over a quick link to show the home page.</li> </ul> <p><b>Calendar</b></p> <p>When using Lightning Experience on iPad Safari, users can tap events to see the event preview card. To close, users can tap anywhere outside the preview card.</p>
Setup		✓	Setup isn't supported, including anything accessed from the Setup Menu  and Setup Home, like Lightning App Builder and Flow Builder.
Personal settings		✓	Accessing personal settings isn't supported on Lightning Experience on iPad Safari. We recommend that you use Lightning Experience on a desktop to access your personal settings.
Screen reader: VoiceOver		✓	<p>The use of a screen reader isn't supported in Lightning Experience on iPad Safari because Apple Safari's screen reader, VoiceOver, doesn't support:</p> <ul style="list-style-type: none"> <li>Reporting detailed information in tables that use the data type, grid</li> <li>Accurately reading the menu items in a dropdown list</li> <li>Focus management</li> </ul> <p>We recommend that you use Lightning Experience on a desktop when using a screen reader.</p>
Utility bar: Pop-out		✓	Popping-out docked utility bar items isn't supported in Lightning Experience on iPad Safari.
Visualforce and Custom iframes		✓	Visualforce pages and custom iframes aren't supported in Lightning Experience on iPad Safari.
iPad keyboards		✓	iPad keyboards aren't supported on Lightning Experience on iPad Safari.
Safari settings	✓		<p>If you encounter UI rendering issues, turn off these Safari settings.</p> <ul style="list-style-type: none"> <li>Block All Cookies</li> <li>Prevent Cross-Site Tracking</li> <li>Private Browsing</li> <li>Block Pop-ups (Pop-up blocking can prevent some pages from opening in a new tab.)</li> </ul>
<b>Sales and Productivity</b>			
Sales Dialer		✓	Sales Dialer isn't supported on Lightning Experience on iPad Safari. We recommend that you use Lightning Experience on a desktop to use Sales Dialer.
Dialer		✓	Dialer features are available in Lightning Experience on the desktop only.

Feature or Setting	Available with Differences	Not Supported	Notes
Outlook Integration	✓		On an iPad, the buttons at the bottom of the Outlook integration pane, such as Save and Cancel, aren't visible when using the Outlook on the web email client in Safari. Sales reps can scroll to use the buttons at the bottom of the pane.
CPQ		✓	Salesforce CPQ and Billing aren't supported on Lightning Experience on iPad Safari. We recommend that you use Lightning Experience on a desktop to use Salesforce CPQ and Billing.
<b>Pardot</b>			
Pardot apps		✓	Pardot isn't supported on Lightning Experience on iPad Safari. To use Pardot, the Pardot Lightning app, Salesforce Engage, B2B Marketing Analytics, or Snippets, we recommend you use Lightning Experience on desktop.
B2B Marketing Analytics	✓		B2B Marketing Analytics isn't fully supported on Lightning Experience on iPad Safari. Dashboards don't always appear completely inside Analytics Studio, so we recommend that you open the app from the Analytics tab in Lightning Experience. Alternatively, try the Tableau CRM app for iOS.
<b>Service</b>			
Field Service: Creating service reports		✓	Creating service reports from work orders or service appointments isn't supported on Lightning Experience on iPad Safari.
Field Service: Dispatcher console		✓	The dispatcher console isn't supported on iPad Safari. We recommend that you use Lightning Experience on a desktop to use the dispatcher console.
Feed Publisher		✓	In the Spring '20 edition of Lightning Experience on iPad Safari, check your text editors for rich text editor support. For example, check for support in a feeds publisher. If you don't have rich text editor support—you can't add an emoji or a hyperlink—you're using an older, unsupported editor. Talk with Salesforce Support to upgrade to the latest editor.
Service Cloud Voice		✓	Voice isn't supported on Lightning Experience on iPad Safari. We recommend that you use Lightning Experience on a desktop to use Voice.
<b>Analytics</b>			
Tableau CRM		✓	Salesforce currently doesn't support Tableau CRM with Apple Safari.
Report Builder: Dragging fields and columns	✓		When you build or edit reports with Lightning Experience on Apple iPad Safari, you can't drag fields and columns in the Fields and Overview panes. As a workaround, add columns using the <b>Add column...</b> lookup. To reorder columns, remove them from the report, then add them back in the order you prefer.

Feature or Setting	Available with Differences	Not Supported	Notes
Dashboard Builder: Dragging components to reposition or resize		✓	When you build or edit dashboards with Lightning Experience on Apple iPad Safari, you can't drag components to reposition or resize them. We recommend that you use Lightning Experience on a desktop to reposition or resize dashboard components.
<b>External Apps</b>			
AppExchange		✓	AppExchange solutions aren't supported on Lightning Experience on iPad Safari. We recommend that you use Lightning Experience on a desktop with solutions that you install from AppExchange.

## Supported Browsers and Devices for Salesforce Classic

See the supported browsers and devices for Salesforce Classic.

**Where:** Salesforce Classic is available in all editions.

 **Note:** Using Salesforce Classic in a mobile browser isn't supported. Instead, we recommend using the Salesforce mobile app when you're working on a mobile device.

 **Important:** Support for the non-Chromium version of Microsoft Edge in Lightning Experience and Salesforce Classic ended on December 31, 2020.

	Microsoft® Internet Explorer®	Microsoft® Edge (non-Chromium)	Microsoft® Edge Chromium	Google Chrome™	Mozilla® Firefox®	Apple® Safari®
Salesforce Classic	IE 11 only	Not supported	Supports latest stable browser version			
Salesforce Classic Console	IE 11 only	Not supported	Supports latest stable browser version	Supports latest stable browser version	Supports latest stable browser version	Not supported
Special setup considerations?	Yes	Not supported	No	No	Yes	No
Limitations?	Yes	Yes	Yes	No	No	Yes

 **Note:** The browser vendor defines "latest" for their own browser. Check with your browser vendor to determine the latest version available.

## Recommendations and Requirements for All Browsers

For the best experience and security, follow these guidelines.

The following recommendations and requirements apply for all browsers, whether you're using Salesforce Classic or Lightning Experience.

-  **Note:** Salesforce doesn't support non-browser applications that embed WebView or similar controls to render content for Salesforce Classic, or Lightning Experience. Examples of approaches that embed this type of control include Salesforce Mobile SDK, Microsoft's WebBrowser Control, Electron's embedded Chromium browser, iOS's UIWebView and WKWebView, and Android's WebView.
- For all browsers, enable JavaScript, cookies, and TLS 1.2. If TLS 1.2 isn't available, enable TLS 1.1. Browsers that don't support TLS 1.1 or TLS 1.2 won't be able to access Salesforce after we deactivate TLS 1.0. Deactivation has already occurred in sandbox orgs and concludes with production orgs on July 22, 2017.
- Some features use iframes to work in Lightning Experience, so you must have the appropriate browser security settings for iframes to load correctly. Follow your browser's instructions to enable working with iframes and third-party cookies. For example: In Internet Explorer, set the **Launching programs and files in an IFRAME** security setting to **Enable** or **Prompt**. In Safari and Chrome, we recommend changing your privacy settings to allow all cookies.
- The minimum screen resolution required to support all Salesforce features is 1024 x 768. Lower screen resolutions don't always properly display Salesforce features such as Report Builder and Page Layout Editor. The Three Regions template and the pinned region templates are designed with Lightning console apps in mind. They feature a main region and two sidebars with fixed proportional widths. The main region is 50%, and the side region widths are each 25%. Three-region templates require more screen width to display correctly. Three-region templates can display incorrectly on certain devices or monitors with low resolutions.



**Note:** Even if your monitor settings meet the minimum screen resolution, resizing a Salesforce browser window to below the minimum resolution can cause display issues.

- 4K displays can cause issues with components that are programmed with screen percentages in mind. Resize and then refresh your window to solve most issues.
- Moving a window from a 4K display to a 1080p or 1440p display can cause unwanted behavior or resizing issues.
- For Mac OS users on Apple Safari or Chrome, make sure the system setting `Show scroll bars` is set to **Always**.
- Some third-party browser plug-ins and extensions can interfere with the functionality of Chatter. If you experience malfunctions or inconsistent behavior with Chatter, disable the browser's plug-ins and extensions and try again.

Other products and features may also be affected by third-party plug-ins and extensions.

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

- Internet Explorer is the only supported browser for:
  - Standard mail merge (Salesforce Classic)
  - Connect Offline
- For the best experience on machines with 8 GB of RAM in the Salesforce Console, use Chrome.

### Considerations for Microsoft Edge and Edge Chromium

Salesforce supports the latest stable version of the Chromium version of Microsoft Edge for Salesforce Classic and Lightning Experience. Salesforce supports Microsoft Edge Chromium only on Windows.

### EDITIONS

Salesforce Classic available in: **All Editions**

### EDITIONS

Lightning Experience is available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

#### [Considerations for Microsoft Internet Explorer](#)

Salesforce Classic supports the latest stable version of Internet Explorer 11. Lightning Experience isn't supported. Apply all Microsoft software updates.

#### [Considerations for Apple Safari](#)

Salesforce supports the latest stable version of Apple Safari. Apply all Apple software updates.

#### [Considerations for Mozilla Firefox](#)

Salesforce makes every effort to test and support the most recent version of Firefox. However, Lightning Experience currently doesn't support Private Browsing.

#### [Considerations for Google Chrome](#)

Salesforce supports the latest stable version of Google Chrome.

#### SEE ALSO:

[Device and Browser Best Practices](#)

### **Considerations for Microsoft Edge and Edge Chromium**

Salesforce supports the latest stable version of the Chromium version of Microsoft Edge for Salesforce Classic and Lightning Experience. Salesforce supports Microsoft Edge Chromium only on Windows.

**!** **Important:** Support for the non-Chromium version of Microsoft Edge in Lightning Experience and Salesforce Classic ended on December 31, 2020.

#### **How do I know which version of Edge I have?**

The Microsoft Edge Chromium browser uses the  icon, while non-Chromium Edge uses the  icon.

#### Considerations for Microsoft Edge (Non-Chromium)

The developer console doesn't support Microsoft Edge.

### **Considerations for Microsoft Internet Explorer**

Salesforce Classic supports the latest stable version of Internet Explorer 11. Lightning Experience isn't supported. Apply all Microsoft software updates.

**!** **Important:** Support for Internet Explorer 11 to access Lightning Experience ended on December 31, 2020.

- When using IE11, a permanent banner displays in your Salesforce org indicating that you're on an unsupported browser.
- IE11 has [significant performance issues](#) in Lightning Experience.
- This change doesn't impact Salesforce Classic.

Keep the following considerations in mind when using Salesforce with Microsoft Internet Explorer.

- Lightning Experience sometimes exceeds IE11 data storage limits, which can cause performance problems. When you exceed the limits, you receive a message similar to "Do you want to allow force.com to use additional storage on your computer?" Agreeing removes the data limit for Lightning Experience. Another option is to set a 30-MB storage limit by following these steps.

1. In Settings, select **Internet Options**.
2. On the General tab, under the Browser History section, click **Settings**.
3. On the Cache and Databases tab, increase the **Notify me when a website cache or database exceeds** option to 30 MB.

**4. Click OK.**

- Salesforce Classic is supported in IE11 on Windows 8 and 8.1 for touch-enabled laptops with standard keyboard and mouse inputs only. There's no support for mobile devices or tablets where touch is the primary means of interaction.
- If you're using Microsoft® Internet Explorer® versions 9–10, you're redirected to Salesforce Classic even if your preference is set to Lightning Experience.
- Compatibility Mode in Internet Explorer isn't supported.
- Changing the compatibility parsing mode of the browser, for example, by using the `X-UA-Compatible` header, isn't supported.
- The Salesforce Optimizer, Lightning Configuration Converter, and Lightning Experience Release Check aren't supported in IE11.
- Support for Internet Explorer 11 in Lightning Experience ended on December 31, 2020. Prior to that date, Internet Explorer 11 was specifically unsupported for:
  - Experience Builder
  - Developer Console
  - Flow Builder
  - Salesforce CPQ and Billing
  - Floating headers for Lightning report builders
  - Dragging files into feed posts in Lightning Experience, and dragging files into feed comments in both Lightning Experience and Classic

### Setup Considerations for Salesforce Classic

To maximize the performance of Internet Explorer, set the following in the Internet Options dialog box via your browser's settings.

#### General Tab

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

#### Security Tab

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

#### Privacy Tab

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

#### Advanced Tab

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

- Don't select the **Do not save encrypted pages to disk** option.
- Select **Use TLS 1.0**, **Use TLS 1.1**, and **Use TLS 1.2**. Make sure to **deselect Use SSL 2.0** and **Use SSL 3.0**. SSL is no longer supported by Salesforce. TLS 1.0 won't be supported after we deactivate it, currently scheduled for June 2016 for sandbox orgs and early 2017 for production orgs.



**Tip:** The **Empty Temporary Internet Files folder when browser is closed** option causes the cache to clear when Internet Explorer is shut down. This increases privacy but sometimes decreases performance.

- If you use Internet Explorer, confirm that you have TLS 1.1 and TLS 1.2 enabled.
- The HTML solution editor in Internet Explorer 11 isn't supported in Salesforce Knowledge.

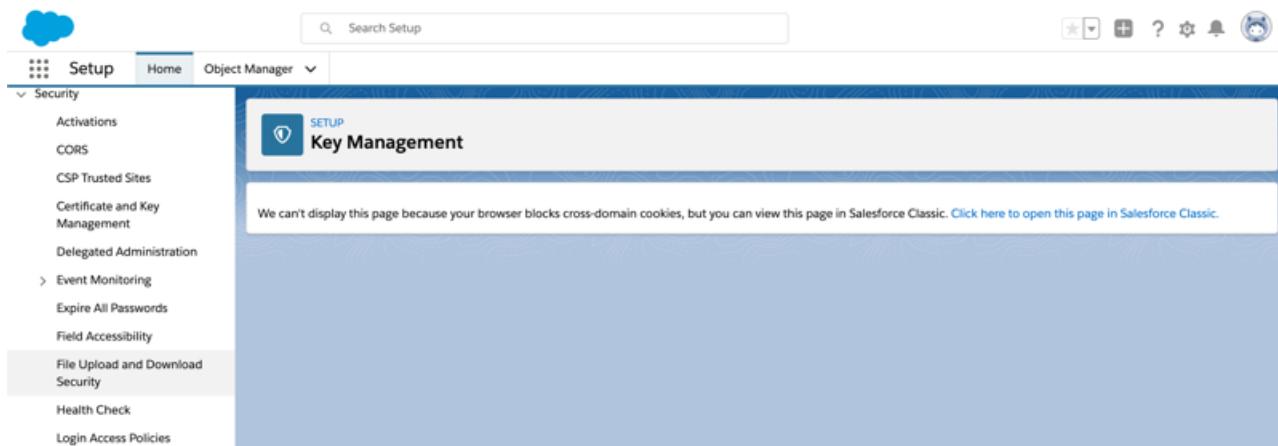
## Considerations for Apple Safari

Salesforce supports the latest stable version of Apple Safari. Apply all Apple software updates.

Salesforce currently doesn't support Analytics with Apple Safari.

If you use the Tab key to navigate, the tab order can be different when tabbing forward versus tabbing backward, and some UI elements can't be focused. To ensure the tab order is consistent, and that each element can be focused, turn on **Press Tab to highlight each item on a webpage** in your browser settings.

To protect user privacy, Apple Safari version 13.1 changed the default settings to block cookies in cross-domain iframes. The Prevent Cross-Site Tracking privacy setting is enabled by default. Visualforce pages embedded within page layouts and some pages in Setup rely on cross-domain cookies to work properly in Lightning Experience, so these pages aren't displaying correctly. If you encounter issues with one of these Setup pages, click the link to reload the page in Salesforce Classic.



To display content for Visualforce pages, follow the steps in the [Cannot Load Images and Other Content When Using Safari](#) knowledge article to change your org's metadata.

You can also turn off these Safari settings.

- Block All Cookies
- Prevent Cross-Site Tracking



**Warning:** Salesforce isn't responsible for any sharing of data based on this change from default settings.

- Private Browsing
- Block Pop-ups

Pop-up blocking can prevent some pages from opening in a new tab.

## Considerations for Mozilla Firefox

Salesforce makes every effort to test and support the most recent version of Firefox. However, Lightning Experience currently doesn't support Private Browsing.

## Setup Considerations for Salesforce Classic

Configure advanced preferences to maximize performance.

1. Type `about:config` in the browser's location bar, and press Enter.
2. If a warning displays, click **I'll be careful, I promise!**
3. Search for the following preferences and set them to the recommended value by double-clicking the preference name. Changes take effect immediately.
4. Enable tab focus on text fields, form elements, and links by setting this accessibility preference.

Preference	Recommended Value	Default Value
accessibility.tabfocus	7	1

5. Change how the browser retains common resources across requests by setting these caching preferences.

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



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



**Tip:** Setting `privacy.sanitize.sanitizeOnShutdown` to "True" causes the cache to clear when Firefox shuts down. This increases privacy, but can decrease performance.

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

Refer to [MozillaZine Knowledge Base](#) and [Firefox Support Home Page](#) for more information on these and other preferences.

## Considerations for Google Chrome

Salesforce supports the latest stable version of Google Chrome.

The Use Strict Site Isolation setting in Chrome can cause some Salesforce features not to work. Disable the setting to restore the features.

## Supported Languages

Salesforce offers three levels of language support: fully supported languages, end-user languages, and platform-only languages. For fully supported languages, all Salesforce features and UI text appear in the chosen language. End-user languages allow individual users to select a language other than the company's default language for end-user facing UI. In situations where Salesforce doesn't provide default translations, use platform-only languages to localize apps and custom functionality that you build on the Salesforce Platform.

A two-character language code identifies each language, such as `en`. A five-character locale code is used for languages that differ depending on the location. For example, `en_AU`.

In addition to the Salesforce language support, you can localize your org. One option is to use the Translation Workbench to translate your text customizations and override labels and translations from managed packages. You can translate everything from custom picklist values to custom fields so that your global users can use Salesforce in their language.

Another option is to rename tabs and fields in Salesforce. If your custom application uses only a few standard Salesforce tabs and fields, you can translate them.

## Fully Supported Languages

You can change the language for all features, including Help, to one of the following fully supported languages from the Setup page. Enter *Company Information* in the Quick Find box, select **Company Information**, and then select **Edit**. In the Default language field, select your desired language and click **Save**.

 **Note:** Setting a default language is different from setting a default locale. See Select Your Language, Locale, and Currency in Salesforce Help for more information.

- Chinese (Simplified): `zh_CN`
- Chinese (Traditional): `zh_TW`
- Danish: `da`
- Dutch: `nl_NL`
- English: `en_US`
- Finnish: `fi`
- French: `fr`
- German: `de`
- Italian: `it`
- Japanese: `ja`
- Korean: `ko`
- Norwegian: `no`
- Portuguese (Brazil): `pt_BR`
- Russian: `ru`
- Spanish: `es`
- Spanish (Mexico): `es_MX` Spanish (Mexico) defaults to Spanish for customer-defined translations.
- Swedish: `sv`
- Thai: `th` The Salesforce user interface is fully translated to Thai, but Help is in English.

## End-User Languages

End-user languages are useful if you have a multilingual organization or partners who speak languages other than your company's default language. For end-user languages, Salesforce provides translated labels for all standard objects and pages, except admin pages, Setup, and Help. When you specify an end-user language, labels and Help that aren't translated appear in English. End-user languages are intended only for personal use by end users. Don't use end-user languages as corporate languages. Salesforce doesn't provide customer support in end-user languages.

End-user languages include:

- Arabic: `ar`

- Bulgarian: bg
- Croatian: hr
- Czech: cs
- English (UK): en\_GB
- Greek: el
- Hebrew: iw
- Hungarian: hu
- Indonesian: in
- Polish: pl
- Portuguese (European): pt\_PT
- Romanian: ro
- Slovak: sk
- Slovenian: sl
- Turkish: tr
- Ukrainian: uk
- Vietnamese: vi

 **Important:** Before enabling end-user languages Arabic and Hebrew, review the right-to-left language support limitations.

## Platform-Only Languages

In situations where Salesforce doesn't provide default translations, use platform-only languages to localize apps and custom functionality that you build on the Salesforce Platform. You can translate items such as custom labels, custom objects, and field names. You can also rename most standard objects, labels, and fields. Informational text and non-field label text aren't translatable.

Platform-only languages are available in all places where you can select a language in the application. However, when you select a platform-only language, all standard Salesforce labels default to English or, in select cases, to an end-user or fully supported language.

 **Note:** Language support is closely tied to the API version. For example, we introduced support for Belgian Dutch (nl\_BE) in API version 40.0. To take advantage of this language, you must use API version 40.0 or later. In general, we recommend using the most recent version of the API to make the most of our language features.

When you specify a platform-only language, labels for standard objects and fields default to English, except:

- Dutch (Belgium) defaults to Dutch
- English (Australia), English (India), English (Malaysia), and English (Philippines) default to English (UK)
- French (Belgium), French (Canada), French (Luxembourg), and French (Switzerland) default to French
- German (Austria), German (Belgium), German (Luxembourg), and German (Switzerland) default to German
- Italian (Switzerland) defaults to Italian
- Malay defaults to Indonesian
- Montenegrin defaults to Serbian (Latin)
- Romanian (Moldova) defaults to Romanian

The following platform-only languages are supported.

- Albanian: sq
- Afrikaans: af

- Amharic: am
- Arabic (Algeria): ar\_DZ
- Arabic (Bahrain): ar\_BH
- Arabic (Egypt): ar\_EG
- Arabic (Iraq): ar\_IQ
- Arabic (Jordan): ar\_JO
- Arabic (Kuwait): ar\_KW
- Arabic (Lebanon): ar\_LB
- Arabic (Libya): ar LY
- Arabic (Morocco): ar\_MA
- Arabic (Oman): ar\_OM
- Arabic (Qatar): ar\_QA
- Arabic (Saudi Arabia): ar\_SA
- Arabic (Sudan): ar\_SD
- Arabic (Syria): ar\_SY
- Arabic (Tunisia): ar\_TN
- Arabic (United Arab Emirates): ar\_AE
- Arabic (Yemen): ar\_YE
- Armenian: hy
- Basque: eu
- Bosnian: bs
- Bengali: bn
- Burmese: my
- Catalan: ca
- Chinese (Hong Kong): zh\_HK
- Chinese (Singapore): zh\_SG
- Chinese (Malaysia): zh\_MY
- Dutch (Belgium): nl\_BE
- English (Australia): en\_AU
- English (Canada): en\_CA
- English (Hong Kong): en\_HK
- English (India): en\_IN
- English (Ireland): en\_IE
- English (Malaysia): en\_MY
- English (New Zealand): en\_NZ
- English (Philippines): en\_PH
- English (Singapore): en\_SG
- English (South Africa): en\_ZA
- Estonian: et
- Farsi: fa

- French (Belgium): fr\_BE
- French (Canada): fr\_CA
- French (Luxembourg): fr\_LU
- French (Switzerland): fr\_CH
- Georgian: ka
- German (Austria): de\_AT
- German (Belgium): de\_BE
- German (Luxembourg): de\_LU
- German (Switzerland): de\_CH
- Gujarati: gu
- Hawaiian: haw
- Haitian Creole: ht
- Hindi: hi
- Icelandic: is
- Irish: ga
- Italian (Switzerland): it\_CH
- Kannada: kn
- Kazakh: kk
- Khmer: km
- Latvian: lv
- Lithuanian: lt
- Luxembourgish: lb
- Macedonian: mk
- Malay: ms
- Malayalam: ml
- Maltese: mt
- Marathi: mr
- Montenegrin: sh\_ME
- Romanian (Moldova): ro\_MD
- Romansh: rm
- Russian (Armenia): ru\_AM
- Russian (Belarus): ru\_BY
- Russian (Kazakhstan): ru\_KZ
- Russian (Kyrgyzstan): ru\_KG
- Russian (Lithuania): ru\_LT
- Russian (Moldova): ru\_MD
- Russian (Poland): ru\_PL
- Russian (Ukraine): ru\_UA
- Samoan: sm
- Serbian (Cyrillic): sr

- Serbian (Latin): sh
- Spanish (Argentina): es\_AR
- Spanish (Bolivia): es\_BO
- Spanish (Chile): es\_CI
- Spanish (Colombia): es\_CO
- Spanish (Costa Rica): es\_CR
- Spanish (Dominican Republic): es\_DO
- Spanish (Ecuador): es\_EC
- Spanish (El Salvador): es\_sv
- Spanish (Guatemala): es\_GT
- Spanish (Honduras): es\_HN
- Spanish (Nicaragua): es\_NI
- Spanish (Panama): es\_PA
- Spanish (Paraguay): es\_PY
- Spanish (Peru): es\_PE
- Spanish (Puerto Rico): es\_PR
- Spanish (United States): es\_US
- Spanish (Uruguay): es\_UY
- Spanish (Venezuela): es\_VE
- Swahili: sw
- Tagalog: tl
- Tamil: ta
- Te reo: mi
- Telugu: te
- Urdu: ur
- Welsh: cy
- Xhosa: xh
- Zulu: zu

 **Important:** Before enabling Urdu as a platform-only language, review the right-to-left language support limitations.

#### [Right-to-Left \(RTL\) Language Support](#)

To make right-to-left (RTL) language users feel more at home, Salesforce supports Arabic and Hebrew as end-user languages and Urdu as a platform language. In Lightning Experience and Experience Builder sites, the RTL Language Layout is the default layout for right-to-left languages, with some important limitations. Salesforce Classic and Experience Cloud sites using Salesforce Tabs + Visualforce offer limited support for RTL languages for some features.

#### SEE ALSO:

- [Right-to-Left \(RTL\) Language Support](#)
- [Select Your Language, Locale, and Currency](#)
- [Enable or Disable Translation Workbench](#)

## Right-to-Left (RTL) Language Support

To make right-to-left (RTL) language users feel more at home, Salesforce supports Arabic and Hebrew as end-user languages and Urdu as a platform language. In Lightning Experience and Experience Builder sites, the RTL Language Layout is the default layout for right-to-left languages, with some important limitations. Salesforce Classic and Experience Cloud sites using Salesforce Tabs + Visualforce offer limited support for RTL languages for some features.

Lightning Experience and Experience Builder sites support Arabic and Hebrew as [end-user languages](#), and Urdu as a platform language.

Right-to-left language layout in Lightning Experience and Experience Builder sites focuses on the standard use cases for common Sales and Service Cloud objects plus standard reports and dashboards. The RTL layout supports UI mirroring and has appropriate UI and text alignment for bidirectional languages. It's the default layout in Lightning Experience and Experience Builder sites for right-to-left languages.

 **Note:** The user's personal language determines whether languages are displayed from right to left or from left to right for that user. For instance, if a user's language is set to English, Hebrew text displays from left to right for that user and can render incorrectly.

Salesforce Classic and Experience Cloud sites using Salesforce Tabs + Visualforce provide only limited support for some features for these right-to-left languages. Because right-to-left languages aren't fully supported in Salesforce Classic, many features don't appear as expected. There are no plans to expand the list of supported features for Salesforce Classic.

## Right-to-Left Language Support Limitations

When enabling a right-to-left language, be aware of these limitations.

- Right-to-left support isn't available for all Clouds and features, as detailed in the following limitations tables.
- Google Chrome is the recommended browser for Lightning Right-to-Left (RTL) Support. Apple Safari is also supported. Other browsers aren't recommended for Lightning RTL Support. See [Supported Browsers and Devices for Lightning Experience](#) for requirements and limitations for Google Chrome and Apple Safari.
- Lightning right-to-left support is available with Technical Requirements for Tablets. Otherwise, it isn't supported in the Salesforce mobile app or any other mobile app or mobile browser.
- Salesforce doesn't provide default translations for Urdu because it's a platform-only language. However, you can localize apps and custom functionality that you build on the Salesforce Platform with Urdu. If the app or functionality has right-to-left support, the resulting translations display right to left. See [Supported Languages in Salesforce Help](#) for more information on platform-only languages.

## Clouds with Right-to-Left Support Limitations

Cloud	Supported in Lightning Experience?	Supported in Salesforce Classic?	Details
Commerce Cloud	No	No	
Experience Cloud	Can be applied with custom CSS in Aura sites built with Experience Builder. Not available in sites built using Lightning Web Runtime (LWR)	Not supported in sites using Salesforce Tabs + Visualforce	

## Editions

Available in: Lightning Experience

Limited support in: Salesforce Classic ([not available in all orgs](#))

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

Cloud	Supported in Lightning Experience?	Supported in Salesforce Classic?	Details
Consumer Goods	Partial	No	Right-to-left support for Hebrew only.
Financial Services Cloud	Partial	No	Right-to-left support for Hebrew only.
Health Cloud	Partial	No	Right-to-left support for Hebrew only.
Marketing Cloud	No	No	
Pardot	No	No	
Sales Cloud Einstein	No	No	
Salesforce CPQ and Billing	No	No	

### Features with Right-to-Left Language Support Limitations

Feature	Supported in Lightning Experience?	Supported in Salesforce Classic?	Lightning Experience RTL Support Limitations
Case Feed	Yes	Limited support	
Chat	Yes	Limited support	Einstein-powered chatbots support only English.
Data.com / Lightning Data	No	No	
Einstein Activity Capture	No	No	
Tableau CRM	No	No	
Emails	No	No	
Enterprise Territory Management	No	No	
Feeds	No	No	
Field Service	No	No	
Learning Paths	No	Not available in Salesforce Classic	
Inbox	Yes	No	<ul style="list-style-type: none"> <li>Features available with an Inbox license in Outlook and Gmail integrations aren't compatible with RTL languages. Included are Insert Availability, Send</li> </ul>

Feature	Supported in Lightning Experience?	Supported in Salesforce Classic?	Lightning Experience RTL Support Limitations
			<p>Later, Email Tracking, and Text Shortcuts.</p> <ul style="list-style-type: none"> <li>When an RTL language is selected in Gmail, the side panel appears on the left side of your inbox or calendar, not on the right. However, the panel's contents are displayed correctly from right to left.</li> </ul>
Knowledge	Yes	Limited support	
Sales Dialer	No	No	
PDF generation	No	No	
Search	Yes	No	See <a href="#">Right-to-Left (RTL) Language Limitations for Search</a>
Visualforce	No	No	

## Known Issues with RTL in Lightning Experience

Lightning Right-to-Left Support has the following known visual discrepancies:

- In report builder, when working in a right-to-left language, the formula editing menu flows from right to left. But the formula editing field for summary and row-level formulas flows from left to right.
- Improper alignment and minor misplacement of some UI elements including images, arrows, and buttons
- Potential minor overlapping or truncated UI elements

## Feedback

Have questions or comments on right-to-left language support in Lightning Experience? Open the Help Menu and select **Give feedback about Salesforce** to share your thoughts.

### SEE ALSO:

[Supported Languages](#)

[Right-to-Left \(RTL\) Language Limitations for Search](#)

[Technical Requirements for Tablets](#)

## Accessibility Standards

Learn about the standards that Salesforce follows to design applications with accessibility in mind.

Salesforce is committed to providing on-demand enterprise applications accessible to all individuals, including users working with assistive devices, such as speech recognition software and screen readers.

 **Important:** Accessibility features in Salesforce Classic are no longer maintained or enhanced.

We recommend that you instead use Lightning Experience, which offers the latest accessibility features. The use of a screen reader isn't supported in Lightning Experience on iPad Safari because Apple Safari's screen reader, VoiceOver, doesn't support:

- Reporting detailed information in tables that use the data type, grid
- Accurately reading the menu items in a dropdown list
- Focus management

We recommend that you use Lightning Experience on a desktop when using a screen reader.

To help meet our goal of universal design, Lightning Experience follows the internationally recognized best practices in Section 508 of the Rehabilitation Act and the Web Content Accessibility Guidelines (WCAG) 2.0 Level AA to the extent possible. Find Voluntary Product Accessibility Templates (VPATs) for specific Salesforce products on our [Product Accessibility Status page](#).

## Recommended Screen Readers and Browsers

Operating System	Screen Reader	Recommended Browsers
Windows®, latest version	NVDA, latest version	Google Chrome®, latest version
Windows, latest version	Freedom Scientific JAWS, latest version	Google Chrome, latest version
macOS, latest version	VoiceOver	Google Chrome, latest version, or Safari®, latest version

 **Note:** Salesforce pilot and beta features don't always provide full accessibility.

### [Low-Vision Users Who Require Magnification](#)

Salesforce supports standard OS-level, browser, and third-party magnification tools. Adjust the zoom setting to suit your needs.

### [Deaf or Hearing Impaired Users](#)

Salesforce provides captions for videos accessible through the **Help & Training** link at the top of any page.

### [Use Lightning Experience with a Screen Reader](#)

Learn how to get the most out of a screen reader and other assistive technologies when you use Lightning Experience, where accessibility features are built in.

### [Use Salesforce Classic with Assistive Technologies](#)

Learn how Salesforce accessibility mode changes your experience with Salesforce Classic.

### [Keyboard Shortcuts](#)

Use keyboard shortcuts to work efficiently in Salesforce. Shortcuts help you navigate and work with records faster and without using your mouse. You can use these shortcuts with your web browser shortcuts.

## EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

[Contact Salesforce About Accessibility](#)

Have a question, need guidance, or want to report an issue regarding Salesforce Accessibility? Here are some resources and links to help you navigate.

## Low-Vision Users Who Require Magnification

Salesforce supports standard OS-level, browser, and third-party magnification tools. Adjust the zoom setting to suit your needs.

**EDITIONS**

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

## Deaf or Hearing Impaired Users

Salesforce provides captions for videos accessible through the **Help & Training** link at the top of any page.

**EDITIONS**

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

## Use Lightning Experience with a Screen Reader

Learn how to get the most out of a screen reader and other assistive technologies when you use Lightning Experience, where accessibility features are built in.

**!** **Important:** The use of a screen reader isn't supported in Lightning Experience on iPad Safari because Apple Safari's screen reader, VoiceOver, doesn't support:

- Reporting detailed information in tables that use the data type, grid
- Accurately reading the menu items in a dropdown list
- Focus management

We recommend that you use Lightning Experience on a desktop when using a screen reader.

The examples focus on using Sales Cloud pages, but many tips are applicable to other products when you choose Lightning Experience.

See browser and screen reader recommendations in [Accessibility Standards](#).

**EDITIONS**

Available in: Lightning Experience

Available in: All editions

## General Screen Reader Tips

Salesforce is a complex web application that takes time to learn and understand. Screen readers can be complex applications themselves. We recommend that you become familiar with your screen reader's modes and navigation shortcuts on less complex websites before using it with Lightning Experience. Refer to your screen reader's documentation for guidelines and common usage tips.



**Note:** While Salesforce does its best to comply with accessibility standards, sometimes glitches occur with certain combinations of screen readers and web browsers. If you encounter difficulties that aren't documented here, try using Salesforce with a different combination of screen reader and browser.

See [Known Accessibility Issues in Lightning Experience](#).

## Screen Reader Modes

In this documentation, we sometimes reference putting your screen reader into a specific mode to interact with part of a page. It's useful to know your screen reader's modes and ways of switching between them before using Salesforce. Most screen readers for Windows have multiple modes.

When you use Salesforce and other web applications, the screen reader must switch modes between navigating pages and interacting with them. Sometimes a screen reader switches to the appropriate mode automatically if it correctly interprets elements on the page. Other times you must switch modes manually to get the behavior you want.

### Navigation mode (JAWS Virtual mode and NVDA Browse mode)

This mode is the default mode for most screen readers. In this mode, use your screen reader's cursor keys to navigate element by element through the page, and use screen reader shortcuts to jump between elements of a particular type. The keys you press are sent to the screen reader rather than the underlying page. For instance, in NVDA's Browse mode, pressing the h key navigates to the next heading.

### Interaction mode (JAWS Forms mode and NVDA Focus mode)

This mode is for interacting with controls on the page, such as form fields, tabs, list boxes, trees, and combo boxes. In this mode, the keys you press are sent to the underlying page rather than the screen reader. For instance, pressing the h key while on a text input in NVDA's Focus mode types "h" in the text input. Pressing the Escape key returns you to navigation mode.

Listen for a click sound in NVDA and JAWS to inform you of mode changes.

Check your screen reader's documentation to learn more about its modes.

## General Lightning Experience Navigation Tips

Keep these navigation tips in mind as you use Lightning Experience.

- With NVDA, you sometimes need to enable **Focus Mode** when you navigate to a menu or a picklist inside a form.
- After you open a dialog, interact with it, and close it, the focus is placed on the button that launched the dialog.
- Don't use the screen reader's list of links. Because Salesforce is a complex application, it's possible to lose contextual information around a link.
- When you type in edit fields or combo boxes that perform as type-ahead or autocomplete fields, your screen reader reads the lists. To navigate to an item, use the arrow keys.
- We recommend using a screen reader that supports live regions, because status updates are often provided using this method.

## General Keyboard Accessibility Tips

Some examples of keyboard navigation techniques include:

- Tab key moves to links and controls.
- Spacebar switches the state of buttons.
- Spacebar opens menus.
- Arrow keys move between menu items.
- Arrow keys move between tabs in a tab set.

## Lightning Experience Keyboard Shortcuts

Lightning Experience has its own set of custom keyboard shortcuts. To open a dialog that lists available keyboard shortcuts, press Ctrl+/ on Windows or Cmd+/ on macOS.

The dialog includes shortcuts for common global actions and navigation. The Lightning Console UI provides an even richer collection of keyboard shortcuts. Make sure that you are using these keyboard shortcuts in your screen reader's interaction mode or in combination with your screen reader's passthrough key to avoid conflicts with your screen reader's default shortcuts.

### [Navigate Lightning Experience Pages](#)

Learn about the structure of pages in Lightning Experience with details for screen readers.

### [Lightning Experience Tips for Screen Readers](#)

Learn tips for using a screen reader with some parts of the Lightning Experience UI.

### [Known Accessibility Issues in Lightning Experience](#)

Learn about known issues for screen readers and Lightning Experience.

#### SEE ALSO:

[Keyboard Shortcuts for Lightning Experience](#)

[Keyboard Shortcuts for Lightning Console Apps](#)

## Navigate Lightning Experience Pages

Learn about the structure of pages in Lightning Experience with details for screen readers.

The examples focus on using Sales Cloud pages, but many tips are applicable to other products when you choose Lightning Experience.

We recommend that you partner with someone familiar with the Lightning pages used in your Salesforce org. Administrators can customize the display of tabs and UI options for your org.

We encourage administrators to improve the usability of pages for specific groups of users by removing unnecessary page content. Consider using the Lightning App Builder to create more simplified pages for screen reader users by omitting complex structural items, such as tab sets.

### Page Header

The page header includes:

- Skip links
- Global search box
- Buttons for navigating to favorites and managing them
- Global Actions quick create menu
- Contextual help menu , which launches a panel
- Setup menu
- Notifications button, which launches a panel
- User profile button, which launches a panel

### Skip Links

The top of each page has two links: Skip to Navigation and Skip to Main Content.

### EDITIONS

Available in: Lightning Experience

Available in: All editions

- Skip to Navigation moves the focus to the navigation section after the page header. The navigation section begins with an App Launcher button that launches the app picker. In most Salesforce apps, the App Launcher button is followed by navigation items that provide access to the main Salesforce objects, such as Accounts and Opportunities. In Console apps, the App Launcher button is followed by a link to a Salesforce object, a menu to select another object type, and a set of open tabs.
- Skip to Main Content moves the focus to the content of the current page and bypasses common links at the top of each page. For example, if you open Chatter, you're placed at the top of your feed. This link skips both the page header and the navigation items.



**Tip:** For accessibility, every feed has a hidden Skip Feed link that you get to by tabbing. Skip Feed skips you past the feed to the End Feed tag. From End Feed, you can tab into the column that typically shows features like Einstein Recommendations and Trending Topics. Whether a Chatter publisher is present, the Skip Feed link follows the tab succession, Sort by, Search, Filter (if present), Refresh this feed, and then Skip Feed.

## Global Search

The top of each Salesforce page has an editable combo box labeled Search Salesforce. Use this box to search your Salesforce org for records, files, Chatter groups and posts, and users. When you begin typing, a list of auto-suggested searches and records displays. Use the arrow keys to navigate the list of search suggestions. Or continue typing your search term, and press Enter to do a full search. When you press Enter on a suggested record, you go directly to the item. When you press Enter on a suggested search in the list, you go to a Search Results screen. On the screen, the search results are grouped by the object type, such as User or Group.

The Search Results screen is divided into sections, each marked with a heading level 2.

- The first heading level 2 is "Searchable objects from navigation bar." This section contains links to narrow your search.
- Subsequent heading level 2s list the types of records returned. A search for Universal Containers can produce headings for Accounts, Contacts, Leads, and Opportunities.

If no headings follow the "Searchable objects from navigation bar" heading, your search didn't return any results. If the search did return results, you hear the number of results when the page loads.

## Favorites

The page header has two buttons for managing favorite pages. Use the first button to add or remove the current page. The button label is Add Favorite if the page is not on your favorites list. The label changes to Remove Favorite when the page is added. This button is disabled on pages that don't support favorites.

The next button, Favorites List, opens a dialog that you can use to jump to a favorite page in Salesforce. The dialog lists your favorites and includes an Edit Favorites button. If you have many favorites, the dialog starts with a favorites search combo box, which is in focus when you open the dialog. Type a search term, or use your arrow keys to navigate through your favorites list. Press Enter to navigate to the highlighted favorite. Use the Edit Favorites button to open a new dialog where you can rearrange, rename, and remove pages in your favorites list.

See [Favorites Considerations](#).

## Navigation Region

After the header region is the navigation section of the page. This section begins with the App Launcher button, which opens a quick view of the App Launcher with a View All link. Use the View All link to open the full App Launcher dialog that contains apps configured by your administrator. Use this dialog to switch between apps. You can also use the App Launcher to access a Salesforce object in your org.

### Standard App Navigation

After the App Launcher are the main navigation items for the current Salesforce app. The app navigation items can be a mix of links to any item associated with a tab, such as Lightning pages, Visualforce pages, Lightning components, and object home pages, such

as Accounts, Opportunities, and Leads. Some objects have menus associated with them. Use these menus to access recently used records of this object type and to create a record of this object type.

### Lightning Console App Navigation

In Lightning console apps, the App Launcher is followed by a link to an object home, or a Select link if no object is selected. The object menu is labeled Show Navigation Menu. You can use these controls to browse through records of certain object types.

After these controls are your open Workspace tabs. Use arrow keys to navigate between tabs. Each tab contains an action menu button and a Close button. When you're focused on a tab, use the Tab key to navigate to one of its buttons.

In Lightning console apps, modal dialogs are limited to the tab that triggered them. So even if a modal dialog takes your keyboard focus, you can still navigate away from that tab. To start a "go to" keyboard shortcut, press **Ctrl+Alt+g** or **Cmd+Opt+g** instead of only pressing g.

## Page Content

After the navigation section is the main content of the page. There are two main types of pages, each with a similar layout: object home pages and record pages.

Beyond these two common page types, there are several unique pages, including Home, Tasks, Notes, Reports, Dashboards, News, Forecasts, and Chatter. Chatter pages include the feed, user profiles, groups, and Files. We encourage you to explore these page types and develop your own navigation strategies.

### Object Home

All object home pages in Lightning Experience have the same layout. At the beginning of the main content section is the List View picker. To select a list view, use the associated heading level 1 link. After the list view heading link, an object home page has several actions.

- Action bar, which can contain several buttons or links and an overflow menu of actions that you can take at the object level
- List view control menu, where you can create, share, delete, and edit list views for the object
- Display picker, where you can switch between a list view and a Kanban view
- Refresh button
- Edit button, to edit values inline
- Chart button
- Filter button, which opens a panel for filtering your list view results

After this set of controls is the list view, which is an inline editable grid. After you tab to the grid, press the Enter key to enter the grid. To navigate the grid, use the arrow keys or screen reader table navigation. Edit buttons indicate that editing is allowed. Use an Edit button to change the values of fields. If you've made edits, press the Escape key to leave the grid, and then press the Tab key to access the Save and Cancel buttons.

### Record Page

The main content area on a record page begins with the object type, followed by the record name, which is the page's heading level 1. After the heading is the action bar for the page. These buttons and links, and possibly an overflow menu, contain actions that relate to this record. The actions can include Edit, Delete, Change Owner, and so on. Most of these actions open and place focus in a modal dialog.

After the action bar is the highlights panel, which has top details about the record, taken from the object's primary compact layout. Unless the record page has been customized differently, after the highlights panel, you find two lists of tabs (also called tab sets). Depending on the record's object type, these tabs reveal record details, Chatter for the record, related lists, record activities, or anything else configured by your admin. Use these tabs to get information, activity, and collaboration related to the record.

## Related Lists

Related lists contain information about records that are linked to the record that you're on. All related lists and similar cards on record pages begin with a heading level 2 and are identified with the ARIA article landmark.

You can perform actions on objects and records inside related list cards.

## Lightning Experience Tips for Screen Readers

Learn tips for using a screen reader with some parts of the Lightning Experience UI.

### EDITIONS

Available in: Lightning Experience

Available in: All editions

### Composer Windows

A composer window is a dialog that stays at the bottom of your browser window. A composer persists across Salesforce pages until you close the composer or the browser tab. Typically, you use a composer for creating records. For example, you use a composer window when you create an object from the Global Actions menu in the page header.

A composer window consists of:

- A heading level 2
- Minimize or Restore button for switching the visibility of the composer window
- Maximize button for changing the composer window to a modal view
- Close button for closing the composer window without completing the task
- Composer body content, which usually consists of form fields
- Other buttons, such as Save or Done

When a composer opens, the first field in the composer window has focus. Press the Tab key to move the focus through the fields inside the composer window. Press the Escape key to navigate to the composer's header. From the composer's header, use Shift+Tab to navigate out of the composer and back to the browser tab.

To quickly navigate between two open composer windows, press the Escape key from inside a composer window to focus its header. Then use your arrow keys to navigate to the other composer window's header. When you're focused on the header of the composer you want to work in, press Enter to move into the composer's content area.

For easier navigation with a screen reader, we recommend having only one or two composer windows open at a time. When too many composer windows are open to fit on the screen, an overflow menu button appears. To reach this overflow menu button, press **g**, then press **d**. You might need to also use your screen reader's passthrough keys to send the g and d key presses directly to the page.

See also [Keyboard Shortcuts for Lightning Experience Composer Windows](#).

### Type-Aheads and Lookups

Forms in Salesforce use combo boxes for lookup fields.

#### For single-select lookup fields

When you select a value for the lookup, the combo box input field is replaced with an HTML link. The link represents the filled-in value and is wrapped in an application role so that the data is sent to the application. You can clear the value by navigating to the link with your Tab key and pressing the Delete key. Your focus then moves to the restored combo box input.

#### For multi-select lookup fields

When you select a value for the lookup, the value is added to a list of selected values immediately after the combo box. This list is wrapped in an application role. From the combo box, press the Tab key to move your focus into the list of selected values. Use the arrow keys to navigate the list, and use the Delete key to remove individual values. When you navigate away from a lookup with

selected values, the combo box is hidden on the page. Navigate back to the selected values to reveal the combo box again so that you can add more values.

## Modal Dialogs

Many buttons in the Salesforce user interface open modal dialogs in the current browser window. When a modal dialog opens, everything else on the page is obscured so that your attention stays on the modal dialog's content. Keyboard focus also stays in the modal dialog until you close it.

Close a modal dialog by using the Close button near the top of the modal or by pressing the Escape key. When you close a modal, the underlying page's interactivity is restored, and your focus returns to the button that you used to launch that modal dialog.

In Lightning console apps, modal dialogs are limited to the tab that triggered them. So even if a modal dialog takes your keyboard focus, you can still navigate away from that tab. To start a "go to" keyboard shortcut, press **Ctrl+Alt+g** or **Cmd+Opt+g** instead of only pressing g.

## Tab Sets

When you encounter a tab set in Lightning Experience, use the arrow keys to navigate between the tabs. Use the Tab key to navigate to the first focusable element in the selected tab's panel.

Known issue: Lightning tab sets are wrapped in an application role. You can't navigate them using the NVDA virtual cursor.

## Sales Path

Opportunity workspace and Lead workspace page layouts can include the Sales Path feature, which represents the stages required for working through a sales process. Sales Path consists of stages represented with tabs that you can navigate with your arrow keys. To indicate that you've completed a stage, select its stage tab and use the Mark Stage as Complete button.

## Tables and List Views

Salesforce displays records in tables called list views. To navigate to a list view, use the screen reader's shortcut for moving to the next table. If a page contains more than one list view, navigate by headings rather than by using the next table shortcut to get better context.

Table column headers in list views include buttons to control the view. For example, the buttons can sort data alphabetically and adjust column width. Your screen reader might announce these buttons along with the heading text while navigating between columns in the table.

## Checkboxes on Record Detail Pages

When navigating and reading record detail pages, checkboxes are presented as graphics with a description of True or False according to their status. A description of True means the box is checked, and a description of False means it isn't checked.

When you edit a record, either by pressing the Edit button at the top of the record detail page or by pressing the Edit button next to a specific field, checkboxes become interactive controls that you select or deselect by using the space bar.

## Navigation in List Views

Salesforce list views use a grid interaction pattern. To navigate, we recommend that you use the grid's keyboard controls rather than your screen reader's table layer. Make sure that your screen reader is in interaction mode before you use the grid interactions. When you enter the list view using your Tab key, your screen reader switches to interaction mode.

Similar to many screen readers, list view grids have two modes.

## Navigation mode

Navigation mode is the default mode for list views to let you quickly navigate the list view's contents.

Navigation mode has the following keyboard functionality.

- Use arrow keys to navigate between cells.
- Press the Tab key to navigate out of the list view.
- Press the Enter key to switch to action mode. If your screen reader cursor is on a cell that contains a single interactive control, pressing Enter switches to action mode. It then performs that control's default action. If the current cell has more than one interactive control, pressing Enter switches to action mode. Your focus is then placed on the first interactive control in the cell.

## Action mode

Many cells in a list view can have actionable content, such as links, action menus, and inline edit. Switching to action mode lets you interact with these controls.

Action mode has the following keyboard functionality.

- Use arrow keys or the Tab key to navigate between controls.
- With focus on a control, you can use any key that you normally use to activate the control. For example, use the Spacebar to select a checkbox or the Enter key to follow a link.
- Press the Escape key to switch back to navigation mode. There's a known issue with Windows screen readers when you press Escape on a list view. The screen reader switches out of interaction mode instead of switching the list view out of action mode. To continue navigating the list view, manually switch your screen reader back to its interaction mode.

See also [Known Accessibility Issues in Lightning Experience](#).

## Known Accessibility Issues in Lightning Experience

Learn about known issues for screen readers and Lightning Experience.

- When using NVDA, before interacting with a menu or a form's dropdown list, enable **Focus Mode** on your screen reader. Forms in Lightning Experience use accessible menus instead of standard picklists.
- After closing a dialog, use the browser's search feature to return to a known point on the page. After you open, interact with, and close a dialog, focus is placed on the button that launched the dialog.
- With VoiceOver on macOS, when you navigate through a list of items in a combo box using arrow keys, the screen reader doesn't read out the highlighted items.
- Many elements that function as buttons identify themselves as links to screen readers.
- Some interactive components are wrapped in an application role, which can present usability challenges in NVDA and JAWS. These components are tabs, filled-in lookup fields, and interactive lists. If you have issues with these components, use your Tab key to navigate into them rather than your virtual cursor. To use these components as intended, switch to your screen reader's interaction mode if it doesn't switch automatically.
- Salesforce's tree grids have limited screen reader support. In particular, NVDA skips over tree grids with the virtual cursor. With VoiceOver, you can navigate to the tree grid using the virtual cursor, but you can't use the virtual cursor to navigate through the tree grid. We recommend using your Tab key to navigate through a tree grid.

### EDITIONS

Available in: Lightning Experience

Available in: All editions

## Use Salesforce Classic with Assistive Technologies

Learn how Salesforce accessibility mode changes your experience with Salesforce Classic.

Salesforce Classic includes an alternate user interface mode for using assistive technologies. Most new features are designed with accessibility in mind and are accessible in standard mode. However, accessibility mode might better suit your needs, especially if you are using speech recognition or screen reading software to create reports and dashboards or interact with list views.

 **Note:** Accessibility features in Salesforce Classic are no longer maintained or enhanced. We recommend that you instead use Lightning Experience, which offers the latest accessibility features.

### [Enable Accessibility Mode](#)

Enable accessibility mode in Salesforce Classic.

### [Accessibility Mode Features](#)

Learn how accessibility mode changes your experience using Salesforce.

### [Accessibility Tips for Salesforce Classic](#)

Learn about accessibility features designed for users working with assistive devices, such as speech recognition software and screen readers.

## Enable Accessibility Mode

Enable accessibility mode in Salesforce Classic.

1. From your personal settings, enter *Accessibility* in the Quick Find box, then select **Accessibility**. No matching results? Enter *Personal Information* in the Quick Find box, then select **Personal Information**.
2. Select **Accessibility Mode**.
3. Click **Save**.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

## Accessibility Mode Features

Learn how accessibility mode changes your experience using Salesforce.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### Accessibility Mode Features That Enhance Usability

- Access setup pages from a Setup link at the top of the page.
- Dropdown menus include a Go button that you select to navigate to the option you choose in the dropdown list.
- Menu buttons are rendered as a dropdown list with a Go button.
- Overlay pages are rendered as separate popup windows.
- The HTML editor is replaced with a text box. This text box only accepts HTML and does not recognize plain text entries like carriage returns. To separate content, you must use paragraph or line break HTML tags.
- When viewing a dashboard, the View Dashboard auto-complete filter is replaced with a standard dropdown menu.
- The Edit Columns link on the Manage Members page, accessible via the Manage Members dropdown on a campaign detail page, becomes a dropdown button. The Edit Columns overlay is replaced by a standard setup page.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

- Clicking a requested meeting in the Open Activities related list and in some list views doesn't open the meeting detail page. Instead, a dialog opens that instructs you to contact the meeting organizer for details about the requested meeting.
- The Turn My Email On dropdown list on a Chatter group displays as a Chatter Email Settings link that opens your settings for receiving Chatter email.

#### Disabled Chatter Features

- Edit Chatter posts and comments

#### Disabled Calendar Features

- Event detail overlays in the calendar view
- Drag-and-drop editing
- Drag-and-drop scheduling
- Click-and-create events
- The New Meeting Request button on the Open Activities related list



**Note:** As a result, you can't request a meeting in accessibility mode, and the Requested Meetings subtab in the Calendar section of the Home tab doesn't display any meetings.

#### Disabled Report and Dashboard Features

- Drag-and-drop editing in the dashboard builder
  - Creating and editing reports in report builder
- Note:** Report builder is required to create or edit joined reports and reports containing cross filters or buckets. Users with accessibility mode enabled can run those reports, but can't create or edit them. To create reports in accessibility mode, you must use the report wizard.
- Drag-and-drop to move reports and dashboards between folders

#### Disabled List View Features

- Related list hover links
- These enhanced list features:
  - Inline editing
  - Rearranging and adjusting the width of columns
  - Editing, deleting, or refreshing the current list view
  - Changing the number of records displayed per page
  - Jumping to a specific page of results

#### Other Disabled Features

- The Check Spelling button for solutions
- The latest Manage Members page
- The Recent Tags dropdown menu when you add the tag component to the sidebar
- When finding similar opportunities, the Match Criteria sidebar on the search results page

- The list of similar questions as you type a question in an answers zone



**Tip:** Users with accessibility mode enabled should use the search box on the Answers tab to see if their question has already been asked before they post their question.

## Accessibility Tips for Salesforce Classic

Learn about accessibility features designed for users working with assistive devices, such as speech recognition software and screen readers.

### Sighted Keyboard Users

Learn about Salesforce accessibility features designed for sighted keyboard users.

#### Specific Color Users

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### Sighted Keyboard Users

Learn about Salesforce accessibility features designed for sighted keyboard users.

- Selected areas on the screen include highlights to give you an on-screen visual indication of focus.
- These elements are identified in our page markup to help you interact with them.
  - Headings are marked as headings rather than field set and legend elements to group form controls.
  - The main heading for the page (typically at the start of the main content area) is a level 1 heading. You can shift to this heading with a shortcut key.
  - Data tables have data table markup (except for enhanced list views in Standard Mode) to aid identification of headers for each cell.
  - Lists provided in the main content area are marked as lists.
- A skip link (the first keyboard-focusable link on each page) allows you to shift the focus to the start of the main content area. This feature bypasses the navigational menus before the main content area and reduces the number of tab presses required to reach the main content area of the page.
- Keyboard focus is placed inside dialog boxes when they open and remains locked there until the dialog is closed.
- On edit pages, the keyboard focus defaults to the first editable field on the page. When creating or editing a task or event, the keyboard focus defaults to the Subject field, regardless of its location on the page.
- Buttons, links, and fields that aren't currently active are labeled with a "disabled" attribute. For example, when using a wizard with multiple steps, some buttons are disabled until you select a specific option.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

## Specific Color Users

Browser and operating system settings don't change the colors displayed within images. Salesforce implements many images as background images, which aren't displayed when browser and operating system settings for color display are in effect. If you rely on browser settings and your operating system to change your display to a particular color combination, try to:

- Display image text alternatives to access information provided by important images.
- Override our CSS for these classes: assistiveText, zen-assistiveText. Then set your browser settings according to your preferences.

In addition,

- Some charts (for example, in reports and dashboards) rely on color to display information. If you have trouble interpreting the information in charts, select **Color-Blind Palette on Charts** from your personal detail page. This option sets an alternate color palette for charts that has been optimized for use by color-blind users. Dashboard emails don't use the alternate palette. You can also click a chart to view its source report.
- Dashboards contain charts and graphs that are visual in nature. To access the report data used to generate the chart or graph, select the dashboard component.



**Note:** The underlying report can contain more data than what is represented in the dashboard component. It can also contain some data that you don't have access to due to sharing settings.

## Keyboard Shortcuts

Use keyboard shortcuts to work efficiently in Salesforce. Shortcuts help you navigate and work with records faster and without using your mouse. You can use these shortcuts with your web browser shortcuts.

Keyboard shortcuts aren't case-sensitive. For example, Shift+B is the same as Shift+b. If Ctrl, Alt, or Shift is part of the shortcut, the sequence of the keys doesn't matter. For example, Ctrl+Alt+A is the same as Alt+Ctrl+A.

To learn more about Salesforce accessibility for keyboard users, see [Sighted Keyboard Users](#).

### Editions

Available in: Salesforce Classic ([not available in all orgs](#))

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

### Editions

Available in: Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

#### [Keyboard Shortcuts for Salesforce Classic](#)

Work faster in Salesforce Classic apps with keyboard shortcuts. You can use shortcuts to open recent items and show or hide the sidebar.

#### [Keyboard Shortcuts for Lightning Experience](#)

Work faster in Lightning Experience apps with keyboard shortcuts. You can search for, edit, save, and close a record without touching a mouse.

[Keyboard Shortcuts for Lightning Experience Composer Windows](#)

Use keyboard shortcuts to work efficiently in Lightning Experience composer windows. Open a composer window to create tasks, jot down notes, log a call, and more. Keyboard shortcuts make it easy to cycle through the fields inside a composer and work your way through multiple composer windows that are open at the same time.

## SEE ALSO:

- [Keyboard Shortcuts for Lightning Console Apps](#)
- [Keyboard Shortcuts for Salesforce Classic Console Apps](#)
- [Keyboard Shortcuts for Macros](#)
- [Keyboard Shortcuts for Health Cloud Console](#)
- [Keyboard Shortcuts for Building Tableau CRM Dashboards and Lenses](#)
- [Keyboard Shortcuts for Dashboards in Lightning Experience](#)
- [Keyboard Shortcuts for Data Categories](#)

**Keyboard Shortcuts for Salesforce Classic**

Work faster in Salesforce Classic apps with keyboard shortcuts. You can use shortcuts to open recent items and show or hide the sidebar.

## EDITIONS

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

Command	Description	Shortcut
Open Recent Items record	<p>Opens a record listed in the Recent Items list. Press any number from 0 to 9. For example, press Alt+1 to open the first item in the list, Alt+2 to open the second item, and so on. To open the 10th item in the list, press Alt+0. If you're using Mozilla® Firefox®, press Shift+Alt+<i>number</i> to open the record. If you're using Microsoft® Internet Explorer®, press Alt+<i>number</i> to highlight a record. To open the selected record, press Enter.</p>	Windows: Alt+ <i>number</i> macOS: Ctrl+Option+ <i>number</i>
Show or hide sidebar	Show or hide the collapsible sidebar. To use this shortcut, your org must enable the collapsible sidebar.	Windows: Alt+S macOS: Option+S

## Keyboard Shortcuts for Lightning Experience

Work faster in Lightning Experience apps with keyboard shortcuts. You can search for, edit, save, and close a record without touching a mouse.

### Note:

- You can't customize keyboard shortcuts in Lightning Experience.
- Keyboard shortcuts aren't case-sensitive. For example, Shift+B is the same as Shift+**b**. If Ctrl, Alt, or Shift is part of the shortcut, the sequence of the keys doesn't matter. For example, Ctrl+Alt+A is the same as Alt+Ctrl+A.
- For shortcuts that specify "then," release the first key, or key combo, before typing the next key. The comma isn't part of the shortcut.
- Keyboard shortcuts are supported on U.S. and U.K. keyboards. Shortcuts that include / (forward slash) and . (period) aren't supported on other language keyboards.
- Lightning Experience keyboard shortcuts don't work on Salesforce Classic apps viewed in Lightning Experience or in Visualforce or iFramed components.

These shortcuts work in all Lightning apps with standard navigation. Lightning apps with console navigation have additional shortcuts. You can't use these shortcuts in apps created in Salesforce Classic.

### Editions

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

Command	Description	Shortcut
<b>Global</b>		
Close or deselect	<p>Close or deselect a window.</p> <p>You can't close some windows and dialogs with this shortcut.</p>	Esc
Edit	<p>Edit a record.</p> <p>This shortcut doesn't work with Lightning Knowledge articles, reports, dashboards, feed items, approval requests, and email messages.</p>	e
Insert quick text	Displays the quick text browser. Use the browser to find, preview, and insert quick text.	Windows: Ctrl+. macOS: Cmd+.
Open or close Macros	Opens or closes the Macros utility.	m
Open or close Notes	<p>Opens or closes the Notes utility.</p> <p>To use this shortcut, first open the utility.</p>	n
Post to feed	<p>Submits a post or comment.</p> <p>You can submit posts, comments, and questions with details. This shortcut doesn't work on other publisher actions, such as emails and polls.</p>	Windows: Ctrl+Enter macOS: Cmd+Enter
Save	<p>Save a record.</p> <p>Your focus must be on a field.</p>	Windows: Ctrl+s macOS: Cmd+s
Search	Places your cursor in the search box.	/

Command	Description	Shortcut
Show shortcut menu	Displays the available shortcuts in a modal window.	Windows: Ctrl+/ macOS: Cmd+/
<b>Navigation</b>		
Focus notifications	Focuses the notification panel. Press the shortcut again to focus the next notification.	c
Focus notifications (reverse order)	Focuses the notification panel. Press the shortcut again to focus the previous notification.	Shift+c
Go to composer window	Goes to the docked composer window.	g, then d
Go to publisher	Takes you to the publisher.  If your publisher has multiple actions, you can use the Tab and arrow keys to navigate within the publisher.	g, then p
Go to other region	On certain pages, moves among regions of the page. For example: <ul style="list-style-type: none"><li>• Between a prompt, such as a walkthrough, and a feature</li><li>• Between a kanban card and the side panel</li><li>• Among panes in a builder, such as the Lightning App Builder</li></ul>	Windows: Ctrl+F6 macOS: Cmd+F6
Go to utility bar	Goes to the utility bar.	g, then u

## SEE ALSO:

[Use Lightning Experience with a Screen Reader](#)

## Keyboard Shortcuts for Lightning Experience Composer Windows

Use keyboard shortcuts to work efficiently in Lightning Experience composer windows. Open a composer window to create tasks, jot down notes, log a call, and more. Keyboard shortcuts make it easy to cycle through the fields inside a composer and work your way through multiple composer windows that are open at the same time.

In addition to the standard keyboard shortcuts available with your Web browser, Lightning Experience supports these handy shortcuts when using the composer windows.

Description	Shortcut
Opens the overflow menu from anywhere on the page	g, then d
Moves through the list of open composer windows in the overflow menu	Up Arrow and Down Arrow
Moves between open composer windows	Left Arrow and Right Arrow
Moves focus to inside the composer window (from a composer window's header)	Enter

## Editions

Available in Lightning Experience

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

Description	Shortcut
Cycles through the fields inside the composer window	Tab
Moves focus from a composer window to the window's header	Esc

## Contact Salesforce About Accessibility

Have a question, need guidance, or want to report an issue regarding Salesforce Accessibility? Here are some resources and links to help you navigate.

**FIND AN ANSWER IN HELP** For general questions about accessibility features that affect end users, start by searching for an answer in our [help documentation](#).

**REPORT AN ISSUE** If you've found an accessibility issue you'd like to report or simply need additional user support, follow the appropriate steps to [create a support case](#). Use the 'Disability and Product Accessibility' topic when creating the case.

**CHECK ON ACCESSIBILITY STATUS AND PROVIDE AUDIT FINDINGS** The results of Salesforce product accessibility audits may be available on our [product accessibility status page](#). If you want to provide your product accessibility compliance audit to Salesforce, refer to this [documentation](#).

**LEARN MORE ABOUT ACCESSIBILITY** If you want to learn more Accessibility and accessible Salesforce design, testing, and development best practices, take our [Get Started with Web Accessibility Trail](#). These modules provide links to many further relevant resources.



**Note:** Customer support is not available for Personal and Developer edition users. In addition, knowledge base access is not available for Developer Edition users.

### Editions

Available in: Lightning Experience

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

## Additional Resources

Looking for more resources? Check out our tip sheets, implementation guides, videos, and walkthroughs.

### Editions

Available in: All Editions

#### [Tip Sheets and Implementation Guides](#)

In addition to online help, Salesforce publishes additional material to help you be successful.

These documents include tip sheets, implementation guides, and other resources that describe the features and capabilities of Salesforce.

#### [Get More Done Faster with Walkthroughs](#)

Interactive walkthroughs guide you step-by-step through a task or feature. Salesforce creates walkthroughs to help you be successful with Salesforce.

#### [Handy Videos to Learn More About Salesforce](#)

Sometimes it's easier to understand how things work when you see them in action. We've put together a bunch of informative videos that you can use to learn more about Salesforce. And they're all organized by themes in playlists, some of which are already very popular. Be sure to check them out when you get a chance!

## Tip Sheets and Implementation Guides

In addition to online help, Salesforce publishes additional material to help you be successful. These documents include tip sheets, implementation guides, and other resources that describe the features and capabilities of Salesforce.



**Note:** Adobe Reader® is required to open Adobe® PDF files. To download the latest version of Reader, go to [www.adobe.com/products/acrobat/readstep2.html](http://www.adobe.com/products/acrobat/readstep2.html).

- Printable Tip Sheets & User Guides — All Users
- Learn More About Setting Up Salesforce
- Resources for the Sales Professional
- Service Cloud Printed Resources
- Reports and Dashboards
- Collaboration Resources for Users
- Experience Cloud Resources
- Health Cloud Resources
- Printable Tip Sheets and User Guides — For Administrators
- Health Cloud Resources

## Get More Done Faster with Walkthroughs

Interactive walkthroughs guide you step-by-step through a task or feature. Salesforce creates walkthroughs to help you be successful with Salesforce.

Before you click a walkthrough link, make sure that you have the correct user permissions and license associated with the feature. Otherwise you can't access the proper pages in Salesforce. Then, click the link to open the walkthrough. If you're not already logged in, you are prompted to log in to your account.

The walkthrough guides you through a series of steps to help you complete a task or review a feature directly within your own Salesforce account.



**Note:** Keep in mind that walkthroughs guide you through your own Salesforce account rather than a demo environment. So you're actually changing the data in your org as you follow along through the steps. If you're concerned about these changes, follow the walkthrough in a sandbox account or other test environment first.

### Editions

Available in: All Editions

## Handy Videos to Learn More About Salesforce

Sometimes it's easier to understand how things work when you see them in action. We've put together a bunch of informative videos that you can use to learn more about Salesforce. And they're all organized by themes in playlists, some of which are already very popular. Be sure to check them out when you get a chance!

### Editions

Available in: All Editions



### Who Sees What Series—Lightning Experience

This is a must watch series if you want to understand how roles, profiles, and sharing rules work together to provide access to all the various objects and records in your Salesforce organization.

Short URL: <http://force.co/whoseeswhatlightning>

If you're not using Lightning Experience yet, see [Who Sees What Series—Salesforce Classic](#).



## Journey to Lightning Experience

See what's involved in transitioning your Salesforce Classic org to Lightning Experience — from evaluating your org's readiness and developing your rollout strategy to preparing your implementation and training your users for the coming change.



## How Tos for Lightning Experience

Welcome to Lightning Experience, the new and improved Salesforce. Here's the complete collection of videos focused on the Lightning Experience interface. From settings things up to getting productive with new sales and service features, we've got admins and end users covered.



## How Tos for Salesforce Classic

You've probably seen our videos in a help topic, or in a trail. Here is a collection of all of our How To videos for the Salesforce Classic user interface, for both administrators and end users.



## How To Import Data into Salesforce

This 5-part video series walks you through all aspects of data import, from preparing your import files to matching owner and parent record IDs.

Short URL: <http://sforce.co/dataimport>



## Get Started with Reports and Dashboards—Lightning Experience

Salesforce offers a powerful set of reporting tools in Lightning Experience. Watch these videos to learn how to build reports that answer your business questions, and dashboards that provide actionable insights to executives, managers, and associates alike.



## Get Started with Reports and Dashboards—Salesforce Classic

This collection of videos from Salesforce will get you up and running with Salesforce Classic reports and dashboards in no time. Learn about the Salesforce Classic report builder, cross filters, joined reports, and matrix reports. Get tips on how to create and update dashboards. Even find out how to schedule reports to run automatically, or make them run faster!



## How Tos for Einstein Analytics

Einstein Analytics is a powerful suite of business intelligence tools that surface insights and actions from your business data. Watch these videos to learn how to explore your data, build interactive dashboards, and create end-to-end analytics solutions with apps.



## How Tos for Salesforce Health Cloud

This video series will get you up and running with the Salesforce Health cloud in no time. From managing your calendar on the Today page to managing entire patient care teams, the Health Cloud streamlines it all, so you can get back to what you do best.



## How Tos for Salesforce Essentials

Salesforce Essentials is the best CRM solution for small business. This collection of videos will help you get your information into Essentials, sell faster, and offer simple customer support to keep your customers happy.

# Log In, Navigate, and Search Salesforce

New to Salesforce? Learn how to navigate, customize, and manage basic CRM features.

### Usernames and Passwords

In Salesforce, each user is uniquely identified with a username, password, and profile. Together with other settings, the profile determines which tasks a user can perform, what data the user can see, and what the user can do with the data.

### Log In for the First Time

Your welcome email includes a link to your organization's Salesforce site and your login information.

### Change Your Password

After you log in, you can change your password for better security. If you lost your password, click the **Forgot Your Password** link on the login page to reset your password via email.

### Change Your Security Question

If you forget your password and have to reset it, you're sometimes required to verify your identity by answering a security question that you previously chose. You can change the security question and answer on the Change My Password page in your personal settings.

### Download Plug-Ins for Documentation and Online Training Courses

The Salesforce PDF documentation and online training courses use free plug-ins like Adobe Reader and Macromedia Flash Player.

### Navigate Salesforce

At the top of each Salesforce page are tabs and links for navigating to major features in Salesforce.

### Search Across Salesforce

Search across Salesforce, including records, Chatter feeds, people, groups, and tasks. Search is available via the Salesforce site, a Salesforce mobile app, or a custom search implementation built on the Salesforce platform.

### Set Up Your Chatter Profile

Your Chatter profile describes who you are to your coworkers and any customers you communicate with. It features your photo and basic information like your professional title and contact details.

### Explore the Salesforce Setup Menu

Salesforce includes many options for setting up, maintaining, and customizing your organization. If you're a Salesforce administrator or developer, you use the Setup menu frequently.

### View and Display FAQ

Common questions around popup windows, buttons, links, and other display elements on Salesforce pages.

### Tips for New Users

Some tips to help you become a fast, productive Salesforce user on day one.

## Usernames and Passwords

In Salesforce, each user is uniquely identified with a username, password, and profile. Together with other settings, the profile determines which tasks a user can perform, what data the user can see, and what the user can do with the data.

Unless otherwise specified, users must not share their passwords with other users. Reassign user credentials to new users only after the previous user is permanently deactivated and no longer has access to the org's services and content. If you reuse user credentials as permitted and described here, reassign only the username. Do not reassign the password.

Your username must be unique across all Salesforce orgs, including trial and Sandbox orgs. The username must be in the format of an email address, for example, jane@salesforce.com. The email used in your username need not function or match the email address used for the account. You can have the same email address associated with your account across multiple orgs. For example, create unique usernames like jane@company.sandbox and jane@trialorg.company.com, for different accounts that are associated with the same email address. Keep in mind that Salesforce Customer Support can't change usernames or deactivate users from an org. If you get a Duplicate Username error, check if the username is already in use in your production, trial, or Sandbox orgs. Deactivate or change the username for the user record, then create your account with your desired username in your production org. If you're unable to change or deactivate a username, contact your Salesforce admin for help. If you're unable to locate the org where the username is already in use, try a different username to create your account.

## Log In for the First Time

Your welcome email includes a link to your organization's Salesforce site and your login information.

Here's how to log in for the first time.

1. Check your email for your login information.
2. Click the link provided in the email.  
The link logs you in to the site automatically.
3. The site prompts you to set a password and choose a security question and answer to verify your identity in case you forget your password.

## Change Your Password

After you log in, you can change your password for better security. If you lost your password, click the **Forgot Your Password** link on the login page to reset your password via email.

To protect the privacy of your data, change your password periodically. If your Salesforce administrator expires user passwords on a periodic basis, you're prompted to change your password at the end of each period.



### Note:

- If you have the "User Single Sign-On" permission, only an administrator can reset your password. For help, contact your Salesforce administrator.
- You can't reset your password in the Salesforce mobile app.

1. From your personal settings, enter *Password* in the Quick Find box, then select **Change My Password**.
2. Enter the password information requested.
3. Click **Save**.

### Editions

Available in: Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

Available in: **All** Editions

### Editions

Available in: Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

Available in: **All** Editions

### Editions

Available in: both Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

Available in: **All** Editions

## Change Your Security Question

If you forget your password and have to reset it, you're sometimes required to verify your identity by answering a security question that you previously chose. You can change the security question and answer on the Change My Password page in your personal settings.

-  **Note:** If you don't see the Change My Password option, contact your Salesforce admin for assistance.
1. From your personal settings, enter *Password* in the Quick Find box, then select **Change My Password**.
  2. Enter your current password.
  3. From the Security Question drop-down menu, select a question.
  4. Enter your answer to the question in the *Answer* field.
  5. Click **Save**.

### EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

Available in: **All** Editions

## Download Plug-Ins for Documentation and Online Training Courses

The Salesforce PDF documentation and online training courses use free plug-ins like Adobe Reader and Macromedia Flash Player.

- **Adobe Reader**—For viewing PDF documentation. Go to the [Adobe Reader download page](#) to download a free copy.
- **Macromedia Flash Player**—For taking online training courses. Go to the [Adobe Flash Player download page](#) to download a free copy.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

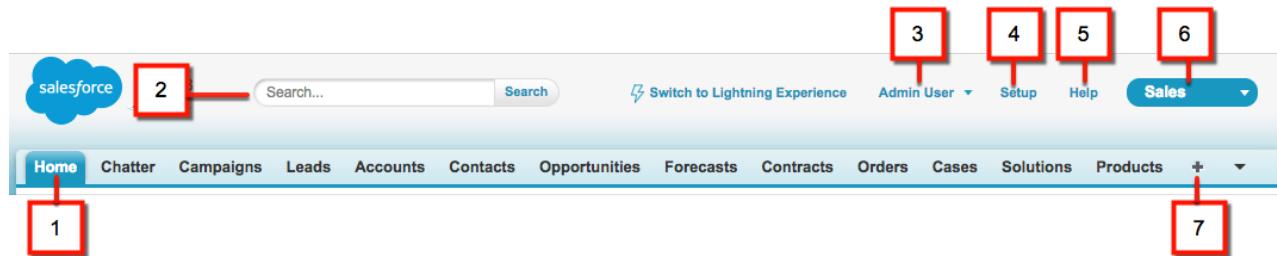
## Navigate Salesforce

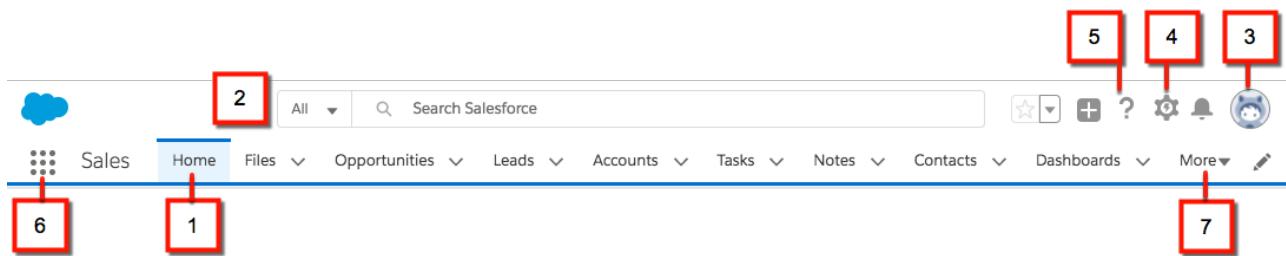
At the top of each Salesforce page are tabs and links for navigating to major features in Salesforce.

### EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

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





- Click a tab to switch between objects and features (1)
- Search to find a record (2)
- Access user-specific customizations from your profile (3)
- If you have administrator privileges, use the Setup menu to customize Salesforce for your organization (4)
- Access help resources and training (5)
- View and access other apps within Salesforce (6). Each app contains different features and tabs.
- View more tabs that aren't visible on the nav bar (7).

### [Explore the Home Page](#)

When you log in to Salesforce, the first thing you see is most likely the Home page.

### [Explore Objects](#)

Object home pages show information for your Salesforce objects, like a list of your accounts.

### [Explore Detail Pages](#)

Detail pages show you details about a record, for example, details about a particular account.

### [Access Other Salesforce Apps](#)

Looking for a particular feature? Check out the app menu or App Launcher to see all the Salesforce apps that are available to you.

### [Considerations for Navigation](#)

Consider these points when navigating Salesforce.

## [Explore the Home Page](#)

When you log in to Salesforce, the first thing you see is most likely the Home page.

What you see depend on your user interface, edition, layout, and customizations.

Home in Lightning Experience focuses on top sales user priorities, including quarterly sales performance. There's even an Assistant, which is your users' action list of things to do. You can also use the Lightning App Builder to create custom Home pages for different profiles.

The screenshot shows the Salesforce Home page. At the top left is a chart titled "Quarterly Performance" showing revenue trends from July to September. The top right has a "Assistant" sidebar with notifications for new leads assigned to the user. Below the chart is a "News" section with links to various industry news articles. At the bottom are sections for "Upcoming Events" and "Today's Tasks".

Home in Salesforce Classic gives you a high-level view of your work, including recently viewed items, your Chatter feed, and calendar of events.

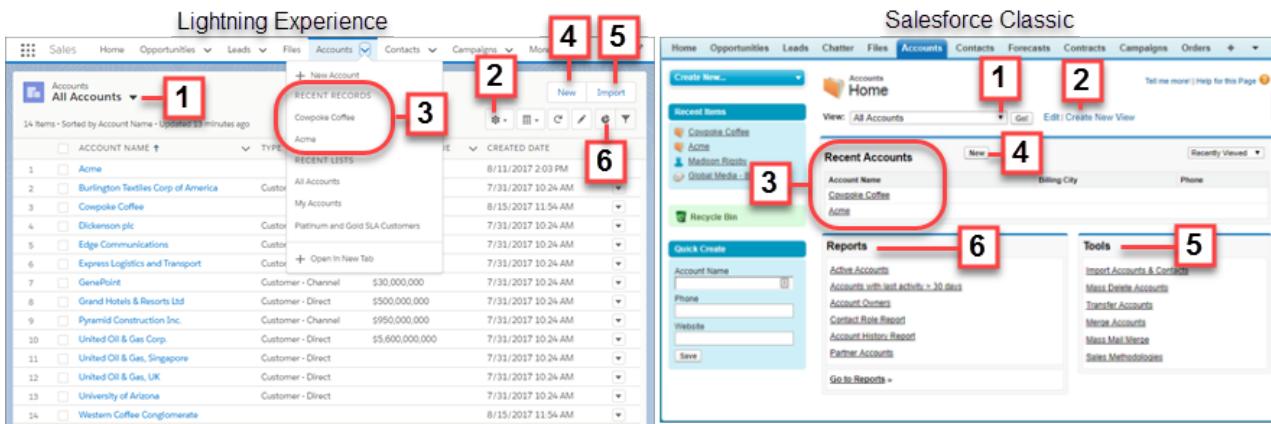
## Explore Objects

Object home pages show information for your Salesforce objects, like a list of your accounts.

Let's walk through what you see on the Accounts object home page. From the App Launcher, find and open **Sales**, and then click **Accounts**.

The navigation model in Lightning Experience is optimized for efficiency with actions in the navigation bar. However, both Salesforce Classic and Lightning Experience provide similar functionality on object pages:

- A dropdown menu (1) for list views related to Accounts. You can also create list views and edit existing ones (2).
- Recent account records (3). You can also click **New** (4) to create an account record.
- Tools to import and manage records (5).
- Ways to visualize data with reports and charts (6).



## Explore Detail Pages

Detail pages show you details about a record, for example, details about a particular account.

Let's navigate to the Accounts home page and click an account name.

The account details you see depend on how your administrator configured the page layout and your user permissions for that account. The way record pages look is different in Salesforce Classic and Lightning Experience. Lightning Experience has two default record page views. Full view is similar to how record pages look in Salesforce Classic. Grouped view streamlines records by balancing things out across different tabs and columns on the page.

Generally, an account detail page in Lightning Experience and Salesforce Classic contains these sections and items:

- A profile image (1), if available, and social network links (2)
- A feed (3), where you can add and view comments about a record
- Detailed information about the account record (4) and related records (5)

**Lightning Experience: Full View**

**Lightning Experience: Grouped View**

**Salesforce Classic**

## SEE ALSO:

[Activities View](#)

## Access Other Salesforce Apps

Looking for a particular feature? Check out the app menu or App Launcher to see all the Salesforce apps that are available to you.

There are other Salesforce apps that are available to you right from within Salesforce. Other apps include the Salesforce Marketing app, the Service app, and any custom apps for your organization.

Any third-party apps that are connected to your Salesforce org are called connected apps. If your org has connected apps, they appear in the App Launcher. Third-party apps are productivity apps such as Gmail™ and Microsoft Office 365™.

## EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: All editions except Database.com

[Open Another App from the App Launcher in Salesforce Classic](#)

Navigate between your Salesforce apps and connected apps from a single menu.

[Open Another App in Lightning Experience](#)

Use the App Launcher to navigate between your apps. You can easily switch between apps and access other Salesforce items and features.

## Open Another App from the App Launcher in Salesforce Classic

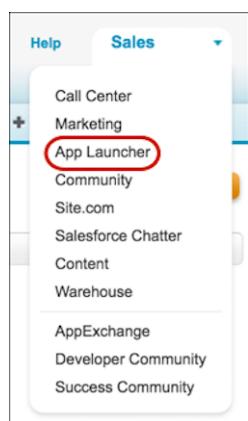
Navigate between your Salesforce apps and connected apps from a single menu.



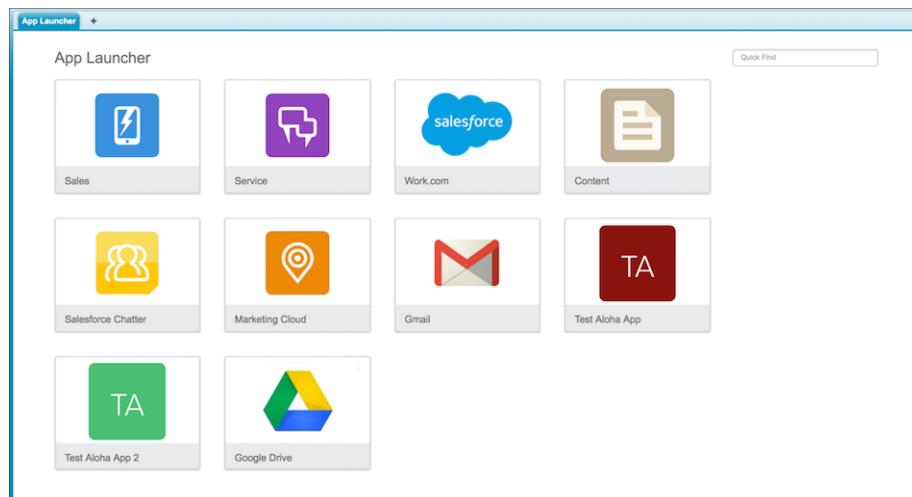
**Note:** These steps work in Salesforce Classic. If you see the App Launcher icon (⋮) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.

You must have access to the Salesforce app or connected app to see and open it from the App Launcher.

- To open the App Launcher, from the drop-down app menu at the upper-right corner of any Salesforce page, select **App Launcher**.



- In the App Launcher, click the tile for the app that you want.



### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#) on page 9)

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

### USER PERMISSIONS

To see the App Launcher:

- Use Identity Features

## Open Another App in Lightning Experience

Use the App Launcher to navigate between your apps. You can easily switch between apps and access other Salesforce items and features.



**Note:** These steps work in Lightning Experience. If you see the App Launcher icon (⋮) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.

- To open the App Launcher, on the left side of the navigation bar, click ⋮.

The App Launcher displays all your available Salesforce apps and items. In contrast, the navigation bar displays all the items contained in the app that you're currently using.

### EDITIONS

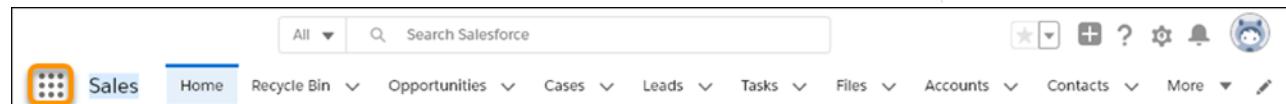
Available in: Lightning Experience

Available in: All editions except Database.com

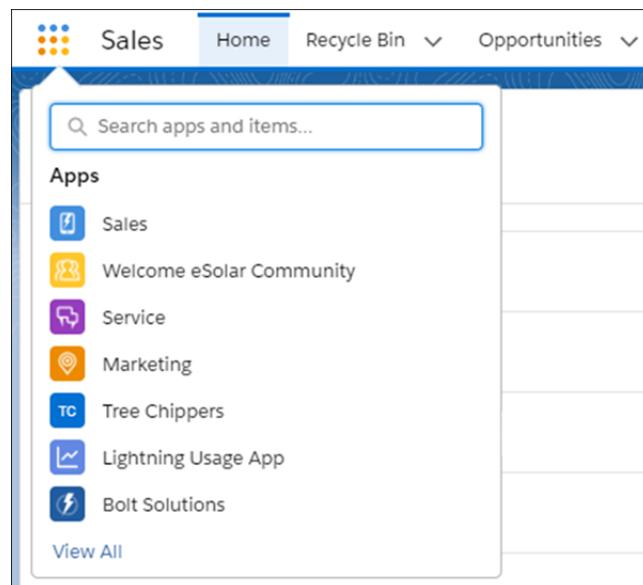
### USER PERMISSIONS

To use an app:

- Access to that app as specified in your user profile or permission sets.

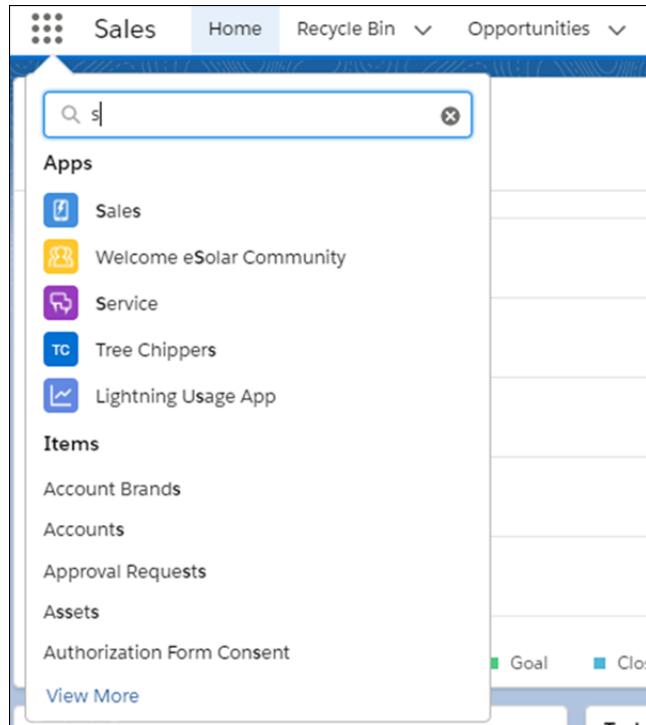


A quick view of the App Launcher displays a search bar and the first 7 apps listed in the App Launcher.



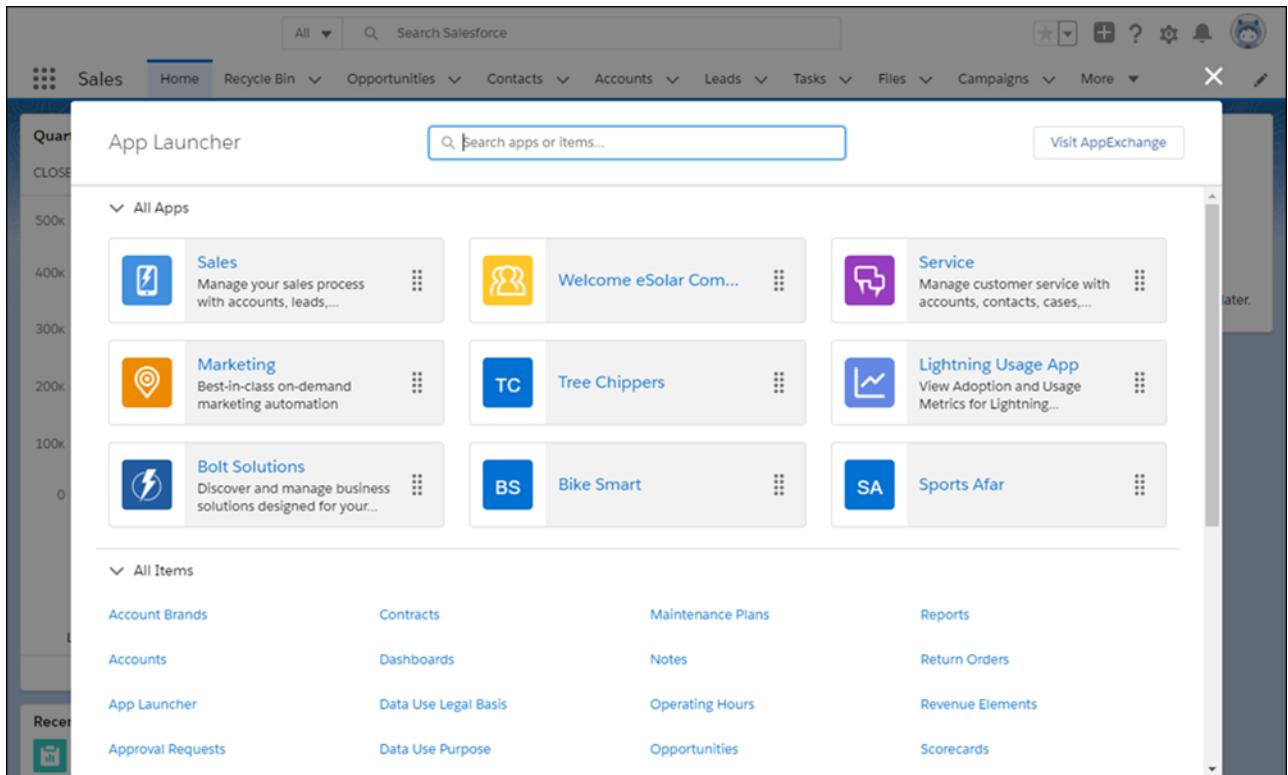
- To look for apps or items by name, use the **Search apps and items** box.

For example, start typing the name of an app or item, such as *Service*. Up to 7 apps or items (or if there are both app and item results, up to 5 each) containing the string appear as you type. If there are more results, a **View More** link appears and when clicked, the full App Launcher opens with all the results highlighted.



- To see all your available Salesforce apps and items, click **View All**.

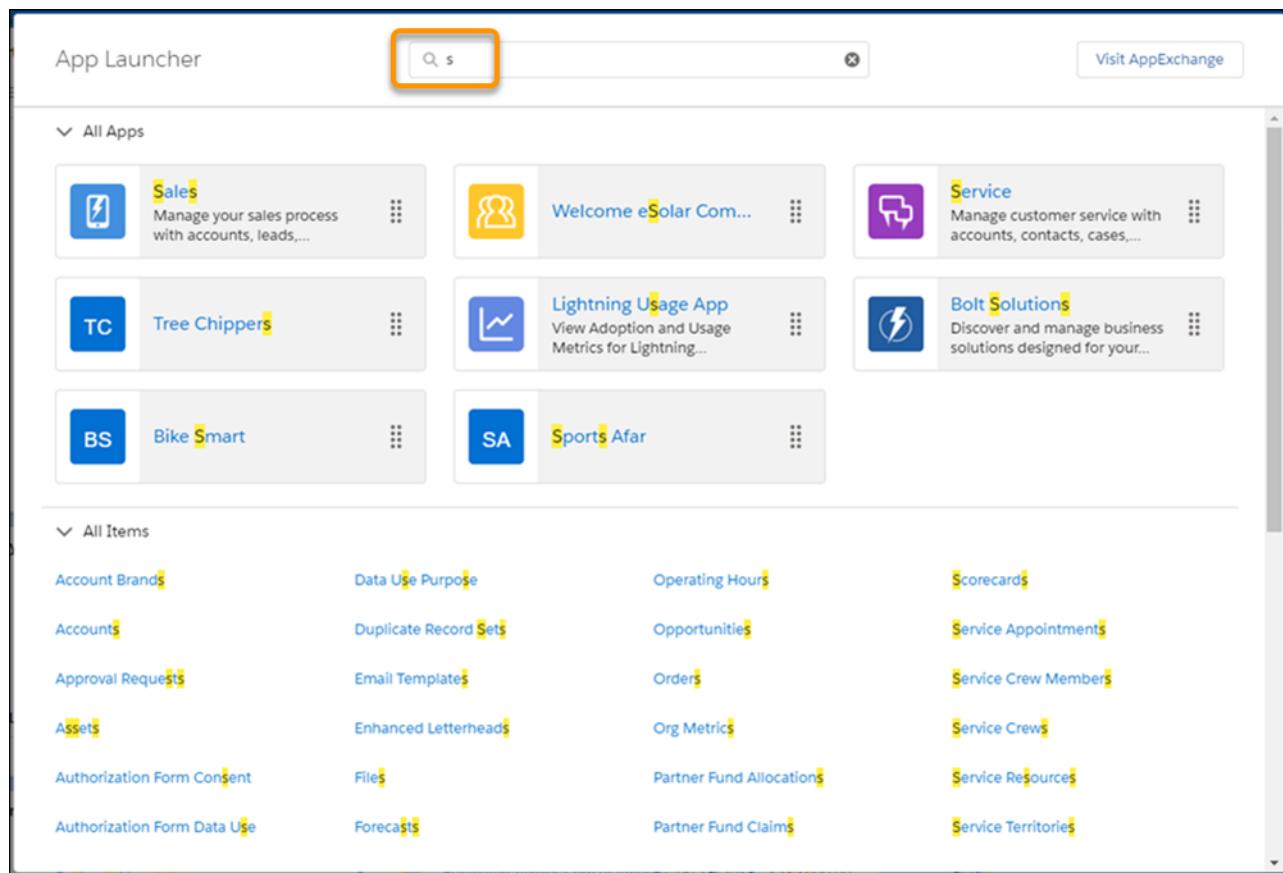
The App Launcher displays standard Salesforce apps, custom apps, and the connected apps that your Salesforce admin has installed for your convenience. Connected apps are third-party apps, such as Gmail, Google Drive, and Windows365.



When you open a connected app, it opens in a new tab. If you are using Safari, be sure to set your popup blocker to allow popups. Otherwise, your connected app doesn't launch.

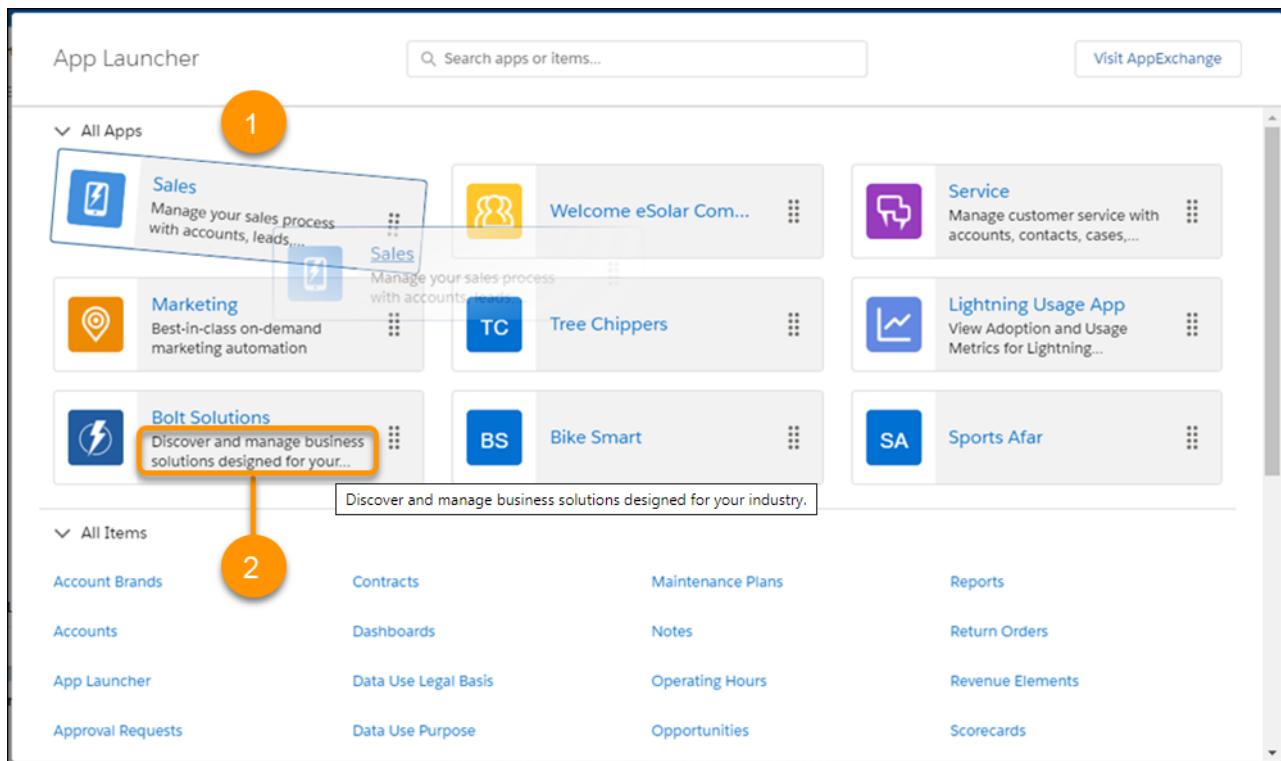
- To look for apps or items by name, use the **Search apps and items** box at the top of the App Launcher.

For example, start typing the name of the app, such as *Service*, and all apps and items containing the string appear and are highlighted as you type.



The screenshot shows the Salesforce App Launcher interface. At the top left is the "App Launcher" label. To its right is a search bar with the placeholder text "Q: s" and an "x" button to clear it. Further right is a "Visit AppExchange" button. Below the search bar, there's a section titled "All Apps" which is currently collapsed. Underneath it, there are four app tiles arranged in two rows of two. The first tile is "Sales" (blue icon), the second is "Welcome eSolar Com..." (yellow icon), the third is "Service" (purple icon), and the fourth is "Bolt Solutions" (blue icon). Below the "All Apps" section is another collapsed section titled "All Items". Under "All Items", there are eight items arranged in two rows of four. The items are: Account Brands, Data Use Purpose, Operating Hours, Scorecards; Accounts, Duplicate Record Sets, Opportunities, Service Appointments; Approval Requests, Email Templates, Orders, Service Crew Members; Assets, Enhanced Letterheads, Org Metrics, Service Crews; Authorization Form Consent, Files, Partner Fund Allocations, Service Resources; and Authorization Form Data Use, Forecasts, Partner Fund Claims, Service Territories.

- Drag an app tile from one position to another to sort them by the apps that you use most (1). Hover over a truncated description (2) to see the full description of the app.



Don't see what you want? Ask your Salesforce admin if more apps are available.

## Considerations for Navigation

Consider these points when navigating Salesforce.

### Lightning Experience on iPad Safari

Setup isn't supported, including anything accessed from the Setup Menu and Setup Home, like Lightning App Builder and Flow Builder.

### Salesforce Mobile App

Not every Lightning Experience feature is in the Salesforce mobile app. Consider these differences.

- On most devices, the Salesforce mobile app is supported on portrait orientation only. The one exception is when using Salesforce for Android and Salesforce for iOS on iPad tablets, where both portrait and landscape orientation are supported.
- The mobile browser app interface does rotate into landscape orientation but isn't guaranteed to work in this orientation.
- The Lightning Experience utility bar isn't available in the Salesforce mobile app.

## Search Across Salesforce

Search across Salesforce, including records, Chatter feeds, people, groups, and tasks. Search is available via the Salesforce site, a Salesforce mobile app, or a custom search implementation built on the Salesforce platform.

### EDITIONS

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

#### [Search for Records in Lightning Experience](#)

To find a record, use global search at the top of the page. Filter and sort your search results to find what you need fast.

#### [Search for Records in Salesforce Classic](#)

If enabled, use global search, at the top of every page, to search across Salesforce.

#### [Filter and Sort Search Results in Lightning Experience](#)

Global search can produce lots of search results. Filter and sort your results to find what you want fast.

#### [Refine Search Results in Salesforce Classic](#)

Use our guidelines for sorting and filtering your results to quickly find records.

#### [Search Feeds in Lightning Experience](#)

Search for people, groups, and files across your feeds.

#### [Search Your Feeds in Salesforce Classic](#)

Search feeds, people, groups, topics, and files across Chatter.

### SEE ALSO:

[Find Information with Search](#)

[Search List Views in Lightning Experience](#)

## Search for Records in Lightning Experience

To find a record, use global search at the top of the page. Filter and sort your search results to find what you need fast.

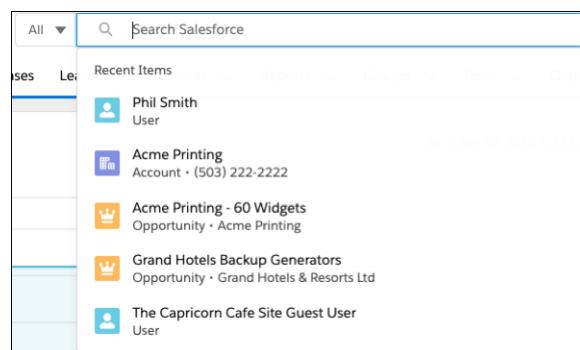
**Tip:** Be as specific as possible to get the best results. For example, if you're looking for John Smith from your sales team, enter his full name. Or if you're looking for the sales report from March 2015, enter *sales report March 2015*.

- When you click in the search box, the instant results dropdown list shows shortcuts to your recent items. Select one to go right to the record.

### EDITIONS

Available in Lightning Experience

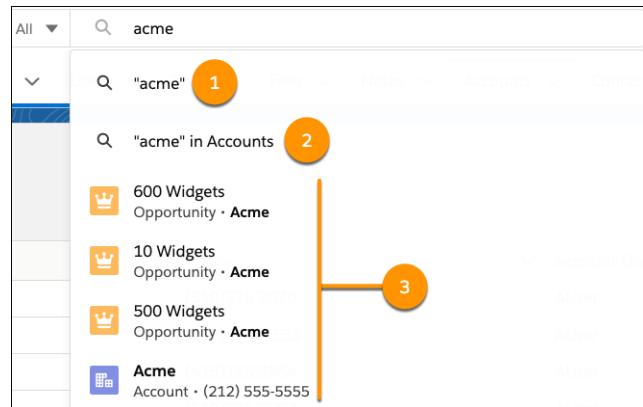
Available in: **All** editions  
except **Data.com**



2. As you type, the list updates with suggested matches and search options.

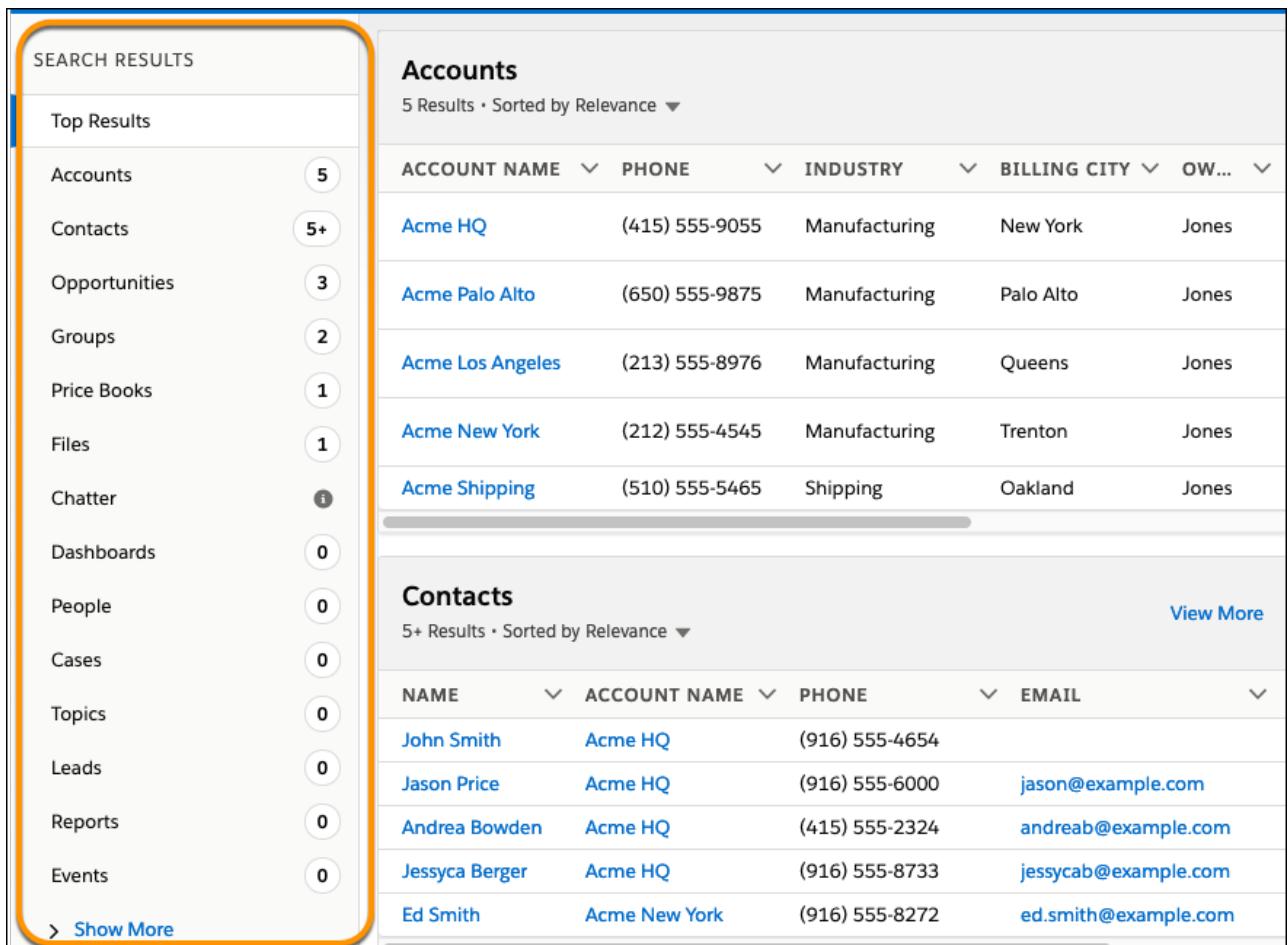
In the instant results dropdown list, you can also:

- Search across all searchable objects (1). You can also press Enter for the same results.
- Search within the current object you're on (2).
- Select a suggested record and go directly to the record (3).



3. If you don't see the record that you want, press Enter to see the full search results.

The Top Results page shows the best matches for the objects you use most. From this high-level overview, it's easy to find what you need. To see results for a specific object, click the object's name in the sidebar. If you don't see an object listed under Search Results, select **Show More**. Searchable objects are listed alphabetically.



The screenshot shows the Salesforce search interface. On the left, a sidebar titled "SEARCH RESULTS" lists various objects with their counts: Accounts (5), Contacts (5+), Opportunities (3), Groups (2), Price Books (1), Files (1), Chatter (1), Dashboards (0), People (0), Cases (0), Topics (0), Leads (0), Reports (0), and Events (0). A "Show More" link is at the bottom. To the right, the main area displays two tables: "Accounts" and "Contacts".

**Accounts**

5 Results • Sorted by Relevance ▾

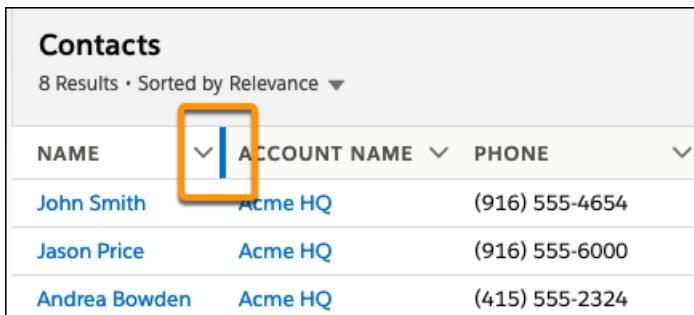
ACCOUNT NAME	PHONE	INDUSTRY	BILLING CITY	OW...
Acme HQ	(415) 555-9055	Manufacturing	New York	Jones
Acme Palo Alto	(650) 555-9875	Manufacturing	Palo Alto	Jones
Acme Los Angeles	(213) 555-8976	Manufacturing	Queens	Jones
Acme New York	(212) 555-4545	Manufacturing	Trenton	Jones
Acme Shipping	(510) 555-5465	Shipping	Oakland	Jones

**Contacts**

5+ Results • Sorted by Relevance ▾

NAME	ACCOUNT NAME	PHONE	EMAIL
John Smith	Acme HQ	(916) 555-4654	
Jason Price	Acme HQ	(916) 555-6000	jason@example.com
Andrea Bowden	Acme HQ	(415) 555-2324	andreib@example.com
Jessyca Berger	Acme HQ	(916) 555-8733	jessycab@example.com
Ed Smith	Acme New York	(916) 555-8272	ed.smith@example.com

To adjust column widths on the search results page, click and drag the borders in the column header.



The screenshot shows a table titled "Contacts" with 8 results. The columns are "NAME", "ACCOUNT NAME", and "PHONE". The "ACCOUNT NAME" column header is highlighted with a blue box. The table data is as follows:

NAME	ACCOUNT NAME	PHONE
John Smith	Acme HQ	(916) 555-4654
Jason Price	Acme HQ	(916) 555-6000
Andrea Bowden	Acme HQ	(415) 555-2324

Text wrapping is on by default, but you can change this preference for a column by clicking the down arrow in the column header.

Contacts			
8 Results • Sorted by Relevance ▾			
NAME	ACCOUNT NAME	PHONE	
John Smith	✓ Wrap text	(916) 555-4654	
Jason Price	Clip text	(916) 555-6000	
Andrea Bowden	Acme HQ	(415) 555-2324	

 Note:

- Column width and text wrapping preferences aren't remembered for Tasks, Events, and Dashboards search results. They go back to their defaults in future searches.
- Column resizing and text wrapping aren't available for search results from external sources.

Still can't find a record? Here are easy things you can do to quickly get on the right search track.

- Limit the number of results by entering more specific search terms. For example, enter the full name and company (*Mike Jones Salesforce*) or last name and ZIP code (*Jones 94123*).
- Searching for a specific contact or opportunity? Get more targeted results by adding the account name to your phrase. For example, *John Smith Acme* or *200 Widgets Acme*. Adding the account name also works for record suggestions in Lightning Experience instant results.
- Check your spelling and make sure you enter the complete search term.
- If you recently created or updated the record, wait a few minutes for the record to be made searchable. If you can't find your record after 15 minutes, contact your admin. Not all fields on a record are searchable.
- If you think the record isn't appearing due to permission issues, check with your admin. We show you only the records that you have access to.

With global search from your internal org, you can get uneven results when searching for an Experience Cloud site User record. Here's why and what you can do about it. Each Experience Cloud site has a unique network ID. When you create a user through **Contact record > Create External User**, the new User record is assigned to a site's network ID.

Global search looks for records in the internal org, which has a different network ID than the Experience Cloud site. A global search doesn't search inside Experience Cloud sites. Since the User record is associated with a network ID, global search doesn't return results for that record.

The workaround is to create User records in the internal org, and then associate the records to an Experience Cloud site. You can associate an internal User record to a site by linking the internal record to a Contact record. After you forge the link, you can find the User record through global search. The User record's network ID is now associated with the internal org.

SEE ALSO:

[What Are the Results I See As I Type in the Search Bar?](#)

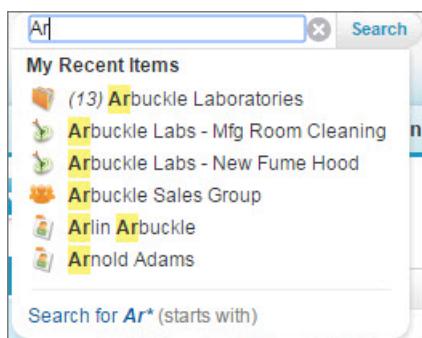
[Filter and Sort Search Results in Lightning Experience](#)

## Search for Records in Salesforce Classic

If enabled, use global search, at the top of every page, to search across Salesforce.

Be as specific as possible when entering search terms to get best, most targeted results. For example, let's say you're looking for John Smith from your sales team. Enter his full name. Or if you're looking for the sales report from March 2015, enter *sales report March 2015*.

1. Enter your search term.



### EDITIONS

Available in Salesforce Classic

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

As you type, notice that the dropdown list includes **My Recent Items** and highlights the part of the record name that matches your search term.

2. Press Enter or click **Search**.

You're taken to the search results page.

The screenshot shows the 'Search Results' page with the following numbered callouts:

- 1**: Points to the search bar at the top left.
- 2**: Points to the 'Records' section header and the 'Accounts (10+)' link.
- 3**: Points to the first row of the 'Accounts' table.
- 4**: Points to the 'Search All' link at the bottom left.
- 5**: Points to the 'Show More' link at the bottom of the 'Accounts' table.

**Records**

Action	Account Name	Region	Billing Country
Edit	Arbuckle Laboratories	EMEA	Greece
Edit	Arbuckle Laboratories	EMEA	Portugal
Edit	Arbuckle Laboratories	EMEA	Spain
Edit	Arbuckle Laboratories	EMEA	Spain
Edit	Arbuckle Laboratories	EMEA	Switzerland

**Campaigns (2)**

Action	Campaign Name	Parent Campaign	Type	Status	Start Date	End Date	Total Responses	Owner Alias
Edit	Arbuckle Labs - Mfg Room Cleaning		Advertisement	Planned			0	AUser
Edit	Arbuckle Labs - New Fume Hood		Advertisement	Planned			0	AUser

**Contacts (1)**

Action	Name	Account Name	Mobile	Mailing City	Phone	Email	Contact Owner Alias
Edit	Mr. Arlin Arbuckle	Arbuckle Laboratories		Oslo			AUser

On the search results page, you can

- **Search Feeds** (1) to see posts from your company that match your search terms.
- Use the **Records** view (2) to see a few records for each frequently used object.
- Click an object name in the left search navigation (3) to see results for only that object.
- Click **Search All** (4) to see the results for more objects.
- Use **Show More** (5) under an object's search results to see all results for the object.

The order of the objects is based on how frequently you use each object.

If you can't find the record you need right away, try to refine your search. You can either sort results by clicking the headers or filter the results by selecting **Show Filters**.

Still can't find a record? Try these tips.

- Limit the number of results by entering more specific search terms. For example, enter the full name and company (*Mike Jones Salesforce*) or last name and ZIP code (*Jones 94123*).
- Searching for a specific contact or opportunity? Get more targeted results by adding the account name to your phrase. For example, *John Smith Acme* or *200 Widgets Acme*. Adding the account name also works for record suggestions in Lightning Experience instant results.
- Check your spelling and make sure you enter the complete search term.
- If you recently created or updated the record, wait a few minutes for the record to be made searchable. If you can't find your record after 15 minutes, contact your admin. Not all fields on a record are searchable.
- If you think the record isn't appearing due to permission issues, check with your admin. We show you only the records that you have access to.

#### SEE ALSO:

- [How Does Search Work?](#)
- [Instant Results in Salesforce Classic](#)
- [Refine Search Results in Salesforce Classic](#)

## Filter and Sort Search Results in Lightning Experience

Global search can produce lots of search results. Filter and sort your results to find what you want fast.

### See the best matches from across Salesforce on the Top Results page

The Top Results page shows the best matches for the objects you use most. It's what you see when you don't search for a specific object. To see more results for an object, click **View More**.

### See results for a specific object

To see results for a specific object, click the object's name in the sidebar of the search results page.

### See all available objects under Show More

If you don't see an object listed under Search Results, select **Show More**. Searchable objects are listed alphabetically.

### Filter your results

You can filter search results for accounts, cases, contacts, dashboards, files, Knowledge articles, leads, notes, opportunities, people, and tasks. You can also filter results for custom objects. To see filtering options, click the object's name in the sidebar (1).

#### EDITIONS

Available in: Lightning Experience

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

The screenshot shows the Salesforce search interface. On the left, under 'SEARCH RESULTS', there's a sidebar with 'Top Results' showing 'Contacts' (circled 1) and 'Expand List'. Below it is a 'REFINE BY' section with fields for 'Name', 'Account Name' (containing 'HQ', circled 3), and 'Phone'. On the right, the main area is titled 'Contacts' (circled 2) with the sub-header '7 Results Filtered by Account Name Sorted by Relevance'. It lists seven contacts with their names, account names, and phone numbers.

NAME	ACCOUNT NAME	PHONE
John Smith	Acme HQ	(916) 555-4654
Jason Price	Acme HQ	(916) 555-6000
Andrea Bowden	Acme HQ	(415) 555-2324
Jessyca Berger	Acme HQ	(916) 555-8733
Howard Jones	Acme HQ	(916) 555-7565
Leanne Tomlin	Acme HQ	(916) 555-8284
Edward Stamos	Acme HQ	(916) 555-5567

Search results update as you apply filters. See which filters are applied above the results (2). To remove a filter, click **Clear** (3).

The fields that can be filtered for an object are the ones your admin includes in the search results layout for that object.

When you filter by dates, you can select from predefined ranges such as "Last 7 Days" and "Last 30 Days." You can't enter a custom date range.

### Sort your results

To sort search results, click the field name at the top of the columns or use the sort dropdown menu.

The screenshot shows the 'Contacts' list with 8 results. The top header says '8 Results • Sorted By Relevance ▾'. A dropdown menu is open over the first contact, showing 'SORT BY' options: 'Relevance' (selected, checked), 'Name', 'Account Name', 'Phone', 'Email', and 'Contact Owner Alias'. The main list shows contacts sorted by relevance.

NAME	ACCOUNT NAME	PHONE	EMAIL
John Smith		555-4654	
Jason Price		555-6000	jason@example.com
Andrea Bowden		555-2324	andreab@example.com
Jessyca Berger		555-8733	jessycab@example.com
Ed Smith		555-8272	ed.smith@example.com
Howard Jones		555-7565	h.jones@salesforce.com
Leanne Tomlin		555-8284	leanne@example.com
Edward Stamos	Acme HQ	(916) 555-5567	edward@example.com

To change the sort direction, click the field name or the arrow in the column header.

Contacts		
8 Results • Sorted by Name ▾		
NAME ↑	ACCOUNT NAME	PHONE
Andrea Bowden	Acme HQ	(415) 555-2324
Ed Smith	Acme New York	(916) 555-8272
Edward Stamos	Acme HQ	(916) 555-5567
Howard Jones	Acme HQ	(916) 555-7565
Jason Price	Acme HQ	(916) 555-6000
Jessyca Berger	Acme HQ	(916) 555-8733
John Smith	Acme HQ	(916) 555-4654
Leanne Tomlin	Acme HQ	(916) 555-8284

If the search layout includes all non-sortable fields, the sort dropdown menu is disabled.

### See results from outside of Salesforce

If your admin connected an external search engine to your org, results appear under the External Results header in the sidebar of the search results page. External sources are listed alphabetically. Frequently used external data sources also appear in Top Results. And if the source was added to the navigation bar, it also appears under Search Results. Select the Title to go to the record detail page or **View** to go to the external document directly. Depending on the external source, the URL opens in the external source website or in a frame inside Salesforce.

### More Search Tips and Best Practices

Here are easy things you can do to quickly get on the right search track.

- Limit the number of results by entering more specific search terms. For example, enter the full name and company (*Mike Jones Salesforce*) or last name and ZIP code (*Jones 94123*).
- Searching for a specific contact or opportunity? Get more targeted results by adding the account name to your phrase. For example, *John Smith Acme* or *200 Widgets Acme*. Adding the account name also works for record suggestions in Lightning Experience instant results.
- Check your spelling and make sure you enter the complete search term.
- If you recently created or updated the record, wait a few minutes for the record to be made searchable. If you can't find your record after 15 minutes, contact your admin. Not all fields on a record are searchable.
- If you think the record isn't appearing due to permission issues, check with your admin. We show you only the records that you have access to.

## Refine Search Results in Salesforce Classic

Use our guidelines for sorting and filtering your results to quickly find records.

When you use the global search bar, you search through all objects and multiple fields types, including custom and long text fields, within a record. If you enter multiple terms, results containing all the search terms are returned, which can be a lot of records! Here are some strategies to find the record that you're looking for after performing a full search.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#) on page 9)

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

## Search All

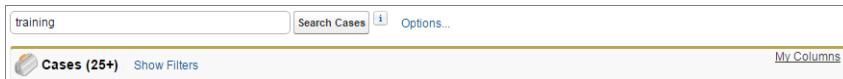
Search defaults to return results for the objects that you use most frequently. To expand the search to other objects, use **Search All**.

If you don't have a **Search All** option, global search doesn't have enough information about which objects you use. Your results include all objects until it has more information.

## Pin

Hover over and pin important objects to the top of the search results object list in the sidebar. You can always unpin or reorder objects later. Pinning is helpful for objects that you don't use frequently.

## Filter



- Use **Options...** to restrict your search to items you own, if available, to exact phrase searches, and to divisions, if your organization uses them.
- Use **Show Filters**, if available, to filter your search results.
- Use **My Columns**, if available, to customize which columns display by customizing **Selected Fields** from the **Available Fields**.

 **Note:** Your admin determines the availability of filter fields and customizable columns in a search layout. If your admin didn't create a search layout or if search layouts aren't available for an object, you can't filter search results or customize the columns in search results. Filters aren't available in Customer Portals or partner portals.

## More Search Tips and Best Practices

Here are easy things you can do to quickly get on the right search track.

- Limit the number of results by entering more specific search terms. For example, enter the full name and company (*Mike Jones Salesforce*) or last name and ZIP code (*Jones 94123*).
- Searching for a specific contact or opportunity? Get more targeted results by adding the account name to your phrase. For example, *John Smith Acme* or *200 Widgets Acme*. Adding the account name also works for record suggestions in Lightning Experience instant results.
- Check your spelling and make sure you enter the complete search term.
- If you recently created or updated the record, wait a few minutes for the record to be made searchable. If you can't find your record after 15 minutes, contact your admin. Not all fields on a record are searchable.
- If you think the record isn't appearing due to permission issues, check with your admin. We show you only the records that you have access to.

## SEE ALSO:

[I Know a Record Exists—Why Can't I Find It?](#)

## Search Feeds in Lightning Experience

Search for people, groups, and files across your feeds.

1. In the global search field at the top of the page, enter your search term.

On the left side of the global search field, you can click a menu and select **Chatter**. Selecting Chatter limits your results to matches in feeds only. If you limit your search up front, you can skip step 2.

2. On the search result page, click **Chatter** to see posts from the All Company feed that include matches to your search term.

With global search from your internal org, you can get uneven results when searching for an Experience Builder site User record. Here's why and what you can do about it. Each site has a unique network ID. When you create a site user through **Contact record > Create External User**, the new User record is assigned to a site's network ID.

Global search looks for records in the internal org, which has a different network ID than the site. A global search doesn't search inside sites. Since the User record is associated with a site network ID, global search doesn't return results for that record.

The workaround is to create User records in the internal org, and then associate the records to a site. You can associate an internal User record to a site by linking the internal record to a Contact record. After you forge the link, you can find the User record through global search. The User record's network ID is now associated with the internal org.

-  **Note:** Salesforce supports hyperlinks and entity links, but only hyperlinks are searchable. An entity link is a user at-mention or a record slash-mention. An easy way to tell if a link is a hyperlink or entity link is to hover over the link in a post. If a hover card pops up with details about the user or record, then it's an entity link. If there's no hover card but instead a tooltip with the link url, then it's a hyperlink.

## Search Your Feeds in Salesforce Classic

Search feeds, people, groups, topics, and files across Chatter.

1. Enter your search term in the global search box.
2. Click **Search**.

The search results page shows matches across Salesforce, including Chatter. From the search results page, you can further refine your search. For example, to see search results across all Chatter feeds, click **Search Feeds**.

You can also search specific feeds. For example, to find where a person is mentioned in a group, type the person's name in the search box above the group feed.

-  **Example:** Watch a Demo:  [Search in Salesforce Classic](#)

### Editions

Available in Lightning Experience

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

### Editions

Available in Salesforce Classic

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

## Set Up Your Chatter Profile

Your Chatter profile describes who you are to your coworkers and any customers you communicate with. It features your photo and basic information like your professional title and contact details.

Set up your Chatter profile soon after you begin using Salesforce, and update it often.

-  **Note:** If your organization doesn't use Chatter, you can still add and edit personal information.

1. Click the **Chatter** tab and find the placeholder profile image on the left side of the page. Click *Your Name* next to the placeholder image.
2. To update your profile photo, hover over the placeholder image and click **Add Photo**.

 **Tip:** Use a photo of you and not a group of people or a pet. Chatter is a business tool, so choose a photo you don't mind showing to your boss and CEO.

3. To update your contact information, click  under your profile photo. In the **Edit Profile** box, complete the fields on the Contact tab and the About tab.
-  **Tip:** Complete your profile with details about the department you work in, your experience, or projects you are currently working on.

4. Click **Save All**.

## Explore the Salesforce Setup Menu

Salesforce includes many options for setting up, maintaining, and customizing your organization. If you're a Salesforce administrator or developer, you use the Setup menu frequently.

All setup options are all available from the Setup menu. The way you access the Setup menu depends on which Salesforce experience you're using and on your organization's user interface settings.

1. Look at the top of any Salesforce page.
    - If you're using Lightning Experience, click , then select **Setup Home**.
    - If you're using Salesforce Classic and you see **Setup** in the user interface header, click it.
    - If you're using Salesforce Classic and you don't see **Setup** in the header, click your name, then select **Setup**.
  2. Enter the name of the Setup page, record, or object that you want in the **Quick Find** box, then select the appropriate page from the menu.
-  **Tip:** Type the first few characters of a page's name in the **Quick Find** box. As you type, pages that match your search terms appear in the menu. For example, to find the Language Settings page, type *lang* in the **Quick Find** box, then select **Language Settings**.

## View and Display FAQ

Common questions around popup windows, buttons, links, and other display elements on Salesforce pages.

### Editions

Available in: Salesforce Classic (not available in all orgs on page 9)

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

### Editions

Available in: Salesforce Classic (not available in all orgs on page 9) and Lightning Experience

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

### [What's the Collapsible Sidebar?](#)

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

### [Why Can't I See Some Features?](#)

You learn about Salesforce features in our help documentation and training videos. However, sometimes you can't seem to find or access these features in your Salesforce org.

### [Why Can't I View Salesforce Popup Windows Such as Lookup Dialogs and Help Pages?](#)

Test your browser's popup blocker settings. If the settings are configured for maximum security, you can't view any popup windows within Salesforce, including popups that provide necessary functionality.

### [Why Can't I See Some Buttons and Links?](#)

Buttons and links only display for users who have the appropriate permissions to use them.

### [Why Did My Data Disappear When I Pressed the Backspace Key While Editing a Record in Salesforce Classic?](#)

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

### [Can I Change or Delete the List of Entries That Appears When I Edit a Text Field in Salesforce Classic?](#)

No. These auto-complete entries that appear when you are editing certain text fields are a feature of Internet Explorer.

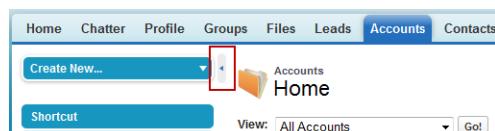
### [Why Am I Getting an Error Message?](#)

When you're working in Salesforce, you can occasionally get an error message. Typically, an error message appears when you try to view, edit, or delete information to which you don't have access.

## What's the Collapsible Sidebar?

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

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



### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

The options in your sidebar vary depending on the features that are available in your org and whether your administrator has customized the page layout.

## Why Can't I See Some Features?

You learn about Salesforce features in our help documentation and training videos. However, sometimes you can't seem to find or access these features in your Salesforce org.

Here are some reason why you can't find or access a particular feature or object.

- You don't have the required permissions and access settings
- Your company renamed some standard objects and fields or created their own custom objects and fields

### EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

Available in: All editions

- The feature you're looking for isn't included in your company's Salesforce edition or Salesforce experience
- You have to first adjust your custom page views or install external apps to enable the feature

## Why Can't I View Salesforce Popup Windows Such as Lookup Dialogs and Help Pages?

Test your browser's popup blocker settings. If the settings are configured for maximum security, you can't view any popup windows within Salesforce, including popups that provide necessary functionality.

For example, maximum security settings block calendar popup for choosing a date on an activity, lookup dialogs for selecting a record, and Help pages.

To test your popup settings:

1. From your personal settings, enter *Reminders* in the Quick Find box, then select **Activity Reminders**. No results? Enter *Personal Information* in the Quick Find box, then select **Personal Information**.
2. Click **Open a Test Reminder**.

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

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

## Why Can't I See Some Buttons and Links?

Buttons and links only display for users who have the appropriate permissions to use them.

For example, users who do not have the "Delete" permission on opportunities do not see the **Delete** button on an opportunity detail page. They also don't see the **Del** link on an opportunity related list.

[Why can't I see the Sharing button on a record in Salesforce Classic?](#)

## Why can't I see the Sharing button on a record in Salesforce Classic?

The **Sharing** button lets users grant other users access to a record beyond the organization-wide defaults or sharing rules. You can easily remove this access after it's no longer needed.

You have access to the **Sharing** button when your sharing model is either Private or Public Read Only for a type of record or related record. For example, the **Sharing** button may appear on an account even though your organization-wide default for accounts is Public Read/Write, if your organization-wide default for related opportunities is Public Read Only.

When the button is available on the page layout, administrators see the button on all records. Non-administrators see this button on records that only they own.

## Why Did My Data Disappear When I Pressed the Backspace Key While Editing a Record in Salesforce Classic?

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

## Can I Change or Delete the List of Entries That Appears When I Edit a Text Field in Salesforce Classic?

No. These auto-complete entries that appear when you are editing certain text fields are a feature of Internet Explorer.

The browser remembers text that you entered previously and provides a list of those entries for you to automatically complete the field. If you would like to turn off this feature, click **Tools** on your browser's menu bar. Select **Internet Options**, click the **Content** tab, and then choose the **AutoComplete** button to change your browser's settings.

## Why Am I Getting an Error Message?

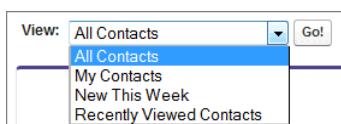
When you're working in Salesforce, you can occasionally get an error message. Typically, an error message appears when you try to view, edit, or delete information to which you don't have access.

Click your browser's Back button to return to the previous page. If you feel you have incorrectly received an error, click **Help & Training** at the top of any page. Select **Contact Support > Open a Case**, or select the My Cases tab to submit your issue directly to Customer Support.

## Tips for New Users

Some tips to help you become a fast, productive Salesforce user on day one.

- When you click an object to find your data, you don't see a full list of your existing records. Salesforce keeps these records tucked out of view until you manually recall them, in case you want to choose a subset of the full list. Choose an option within *View*, and click **Go!**



### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#) on page 9)

Available in: All Editions

- Related lists* are links featured at the bottom of object pages. Related lists provide quick access to other related objects. This feature adds much value, because it gives you fast access to information. It means less navigation and can speed up your workflow. In the Accounts object, your related lists can look something like this:

Account Detail		Edit	Delete	Sharing								
Account Owner	Matt Wilson [Change]	Phone	1-408-555-2091									
Account Name	ABC Labs [View Hierarchy]	Fax	1-408-555-2092									
Parent Account		Website	<a href="http://www.ABCLabs.net">http://www.ABCLabs.net</a>									
		Prospect Rating	Warm									
<b>Sales Region</b> <table> <tr> <td>Region</td> <td>Zone</td> </tr> </table>					Region	Zone						
Region	Zone											
<b>Additional Information</b> <table> <tr> <td>Type</td> <td>Customer</td> <td>Employees</td> <td>120</td> </tr> <tr> <td>Industry</td> <td>Biotechnology</td> <td>Annual Revenue</td> <td>USD 7,500,000.00</td> </tr> </table>					Type	Customer	Employees	120	Industry	Biotechnology	Annual Revenue	USD 7,500,000.00
Type	Customer	Employees	120									
Industry	Biotechnology	Annual Revenue	USD 7,500,000.00									
<b>Support Plan Information</b> <table> <tr> <td>Has Support Plan</td> <td>✓</td> <td>Support Plan Expiration Date</td> <td>7/2/2014</td> </tr> <tr> <td colspan="4">Description</td> </tr> </table>					Has Support Plan	✓	Support Plan Expiration Date	7/2/2014	Description			
Has Support Plan	✓	Support Plan Expiration Date	7/2/2014									
Description												
<b>Address Information</b> <table> <tr> <td>Billing Address</td> <td>54 Park Drive San Jose, CA 95035 USA</td> <td>Shipping Address</td> <td>54 Park Drive San Jose, CA 95035 USA</td> </tr> </table>					Billing Address	54 Park Drive San Jose, CA 95035 USA	Shipping Address	54 Park Drive San Jose, CA 95035 USA				
Billing Address	54 Park Drive San Jose, CA 95035 USA	Shipping Address	54 Park Drive San Jose, CA 95035 USA									

Salesforce delivers the application with some standard related lists, but administrators can also customize some related list items.

- Our help and training materials probably mention some features that your company hasn't enabled, or that your permissions profile doesn't allow you to access. To find out more about a feature, contact the Salesforce administrator at your company. Not sure who that is? Reach out to the person at your company who introduced you to Salesforce.
- Save your work! It's easy to update the fields in a record and then navigate away from that screen without saving. Make a habit of seeking out the save button before clicking away through another page element.

## Verify Your Identity

Use identity verification tools to secure and protect your data from unauthorized access.

### [Methods for Verifying Your Identity](#)

Identity verification tools, like Salesforce Authenticator, one-time password generators, and text messages help to protect your Salesforce data and account from unauthorized access.

#### [Salesforce Authenticator](#)

Welcome to the Salesforce Authenticator mobile app. You can use Salesforce Authenticator as a verification method for device activation or multi-factor authentication (MFA) login requirements.

#### [Verify Your Identity with a Temporary Code](#)

When you can't access the verification method you usually use for multi-factor authentication (MFA), ask your Salesforce admin to give you a temporary verification code. The code is valid for 1 to 24 hours. Your admin sets the expiration time, but you can expire the code early if you no longer need it.

#### [Troubleshoot Login Issues](#)

Can't log in? Forgot your username or password, or you're locked out from too many login attempts? To resolve login problems, try these solutions.

### SEE ALSO:

[Verify Your Identity with a TOTP Authenticator App](#)

## Methods for Verifying Your Identity

Identity verification tools, like Salesforce Authenticator, one-time password generators, and text messages help to protect your Salesforce data and account from unauthorized access.

When you log in to Salesforce from a browser or application that we don't recognize, and your IP address is outside a trusted IP range, you're prompted to verify your identity.

Salesforce asks you to verify your identity using one of the following verification methods.

### **Salesforce Authenticator Mobile App**

If you connected the Salesforce Authenticator app (version 2 or later) to your account, use the app to verify your Salesforce account activity. Salesforce sends a push notification to your mobile device. When you get the notification, open the app, verify the activity details, and tap **Approve** on your mobile device.

### **U2F Security Key**

If you registered a U2F security key that is associated with your account, use the security key to verify your Salesforce account activity. Salesforce prompts you to insert the security key into your computer's USB port.

### EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

### One-Time Password Generator App

If you connected an authenticator app (like Salesforce Authenticator or Google Authenticator) to your account, use the mobile app to generate a verification code. This type of code is sometimes called a “time-based one-time password.” The code value changes periodically.

### SMS Text Message

If you have a verified mobile number associated with your account, you receive a verification code in a text message sent to your phone. If you don’t have a verified mobile number, you’re prompted to register one when you log in to Salesforce. Registering your mobile phone number verifies it and enables this method when you’re challenged in the future. If your mobile number changes, contact your Salesforce admin.

### Email

Salesforce sends a verification code in an email to the address associated with your account. The code expires after 24 hours.

The identity verification page includes a “Don’t ask again” option, which is selected by default. If you leave the option selected and click **Verify**, Salesforce doesn’t ask you to verify your identity again when you log in from the same browser or application. Exceptions are if you clear browser cookies, set your browser to delete cookies, or browse in private or incognito mode. In these cases, you’re prompted to verify your identity every time you log in to Salesforce from an IP address that’s not defined as trusted for your org.

 **Note:** When you log in from a public or shared device, deselect **Don't ask again**. Deselecting this option ensures that subsequent users have to verify their identity when they log in from that device.

#### SEE ALSO:

[Verify Your Identity with a TOTP Authenticator App](#)

## Salesforce Authenticator

Welcome to the Salesforce Authenticator mobile app. You can use Salesforce Authenticator as a verification method for device activation or multi-factor authentication (MFA) login requirements.

### Editions

Salesforce Authenticator setup available in: both Salesforce Classic and Lightning Experience

Multi-factor authentication with Salesforce Authenticator available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions

#### [What Is Multi-Factor Authentication?](#)

We all want to keep our online accounts and data secure. Multi-factor authentication (MFA) is a great way to do just that. MFA adds an extra layer of security to Salesforce by requiring you to enter two or more pieces of evidence about your identity—or factors—each time you log in. The first factor is something you know, like your username and password combination. The second is a verification method that you have in your possession, like the Salesforce Authenticator mobile app. With MFA, even if hackers steal your password, they can’t log in because they don’t have your mobile device with Salesforce Authenticator installed on it.

#### [Requirements for Salesforce Authenticator](#)

The Salesforce Authenticator mobile app is supported on various mobile platforms, with some device, operating system, and mobile browser requirements. You need an Internet connection to communicate with Salesforce for user verifications of account activity and location-based automated verifications. The app generates verification codes as time-based one-time passwords, or TOTPs without an Internet connection on your mobile device, so you can still log in to your other accounts when you’re offline.

#### [Salesforce Authenticator Accessibility Considerations](#)

Salesforce Authenticator is designed with accessibility in mind and delivers a fully accessible mobile experience for everyone, including users working with screen readers. Unlike the full Salesforce site, Salesforce Authenticator doesn’t require accessibility mode to give users working with assistive devices a fully accessible experience.

### [Locale and Language Support for Salesforce Authenticator](#)

Salesforce Authenticator works with almost all Salesforce-supported locales and the fully supported end-user languages. Salesforce Help includes a list of supported locales and languages. Languages that are read right to left, including Arabic and Hebrew, aren't currently supported.

### [Connect Your Salesforce Account to Salesforce Authenticator](#)

Connect your Salesforce account to the Salesforce Authenticator mobile app so you can use the app as a verification method for multi-factor authentication (MFA). Sometimes in Salesforce, you're prompted to connect your account as you log in, or you connect the account through your personal settings.

### [Back Up Your Connected Accounts in the Salesforce Authenticator Mobile App](#)

You can back up your Connected Accounts in the Salesforce Authenticator mobile app. If you lose, damage, or replace your mobile device, you can restore your Connected Accounts on another mobile device.

### [Restore Connected Accounts in the Salesforce Authenticator Mobile App](#)

If you back up your Connected Accounts in the Salesforce Authenticator mobile app, you can restore them on another mobile device.

### [Remove an Account from Salesforce Authenticator](#)

When you no longer want to use the app for multi-factor authentication (MFA) logins, or want to switch to a new device, remove your Salesforce account from the Salesforce Authenticator mobile app.

### [Verify Your Identity with Salesforce Authenticator](#)

After you install the Salesforce Authenticator app on your mobile device and connect your Salesforce account, use the app to securely log in to your account or access restricted resources in Salesforce. You can also block activity that you don't recognize and report it to your admin.

### [Automate Multi-Factor Authentication Logins from a Trusted Location with Salesforce Authenticator](#)

Enable location services in the Salesforce Authenticator mobile app, and then use the app to automate multi-factor authentication (MFA) logins from a trusted location. Examples of trusted locations can include your home or office. You can enable location services for Salesforce accounts, but not for any other Connected Accounts.

### [Let Salesforce Authenticator Intelligently Save Your Trusted Locations](#)

With the help of Einstein, you control whether Salesforce Authenticator automatically trusts locations that you use three or more times.

### [Stop Location-Based Automated Verifications in Salesforce Authenticator](#)

To turn off automated verification from a location, you can remove it from your list of trusted locations.

### [Use Salesforce Authenticator with Your Other Accounts](#)

You can use the Salesforce Authenticator mobile app to log in to your other online accounts. For example, use Salesforce Authenticator to add an extra layer of security when you log in to your Facebook account. When you use the app with your other accounts, you verify your identity by entering 6-digit time-based one-time passwords (TOTPs). You can use Salesforce Authenticator with any service that supports multi-factor authentication (MFA) with TOTPs.

## What Is Multi-Factor Authentication?

We all want to keep our online accounts and data secure. Multi-factor authentication (MFA) is a great way to do just that. MFA adds an extra layer of security to Salesforce by requiring you to enter two or more pieces of evidence about your identity—or factors—each time you log in. The first factor is something you know, like your username and password combination. The second is a verification method that you have in your possession, like the Salesforce Authenticator mobile app. With MFA, even if hackers steal your password, they can't log in because they don't have your mobile device with Salesforce Authenticator installed on it.

Many mobile authenticator apps generate verification codes that expire after a certain amount of time. When you log in to an online account that requires MFA, you enter the code along with your username and password. Salesforce Authenticator makes MFA even easier with more options for verification. You can verify your identity by entering a code or by simply responding to a notification. You can even set up a trusted location and verify your identity just by being there.

When someone tries to log in or access restricted online data in your Salesforce account, Salesforce sends a notification to your mobile device. You open the Salesforce Authenticator app to see details of the online activity. After you check the details, you can tap **Approve** to verify that the activity belongs to you. If you don't recognize the activity, you tap **Deny** to block it. You can also flag the blocked activity for your Salesforce admin.

When you enable location services for Salesforce Authenticator, you unleash even more powerful features. If you're in your home or office, for example, you can tell Authenticator to verify your activities automatically from that trusted location. Automation gives you the extra security of MFA, and you don't even have to take your phone out of your pocket.

Before you can use Salesforce Authenticator for MFA logins into Salesforce, you must connect the app to your Salesforce account. You can connect the app anytime from your personal settings. Connecting the app doesn't mean that you're required to use MFA every time you log in. Your admin sets up an MFA requirement for you in keeping with your company's security policies. If your admin requires MFA before you connect Salesforce Authenticator to your account, you're prompted to connect the app the next time you log in.

## Salesforce Authenticator Isn't Only for Your Salesforce Account

You can also use the app to log in to your other online accounts. For example, use Salesforce Authenticator to add an extra layer of security when you log in to Facebook. When you connect Salesforce Authenticator to accounts other than Salesforce, you verify your identity with verification codes instead of notifications or location-based verification. You can use Salesforce Authenticator with any service that supports MFA with time-based one-time passwords (TOTPs).

### EDITIONS

Salesforce Authenticator setup available in: both Salesforce Classic and Lightning Experience

Multi-factor authentication with Salesforce Authenticator available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions

## Requirements for Salesforce Authenticator

The Salesforce Authenticator mobile app is supported on various mobile platforms, with some device, operating system, and mobile browser requirements. You need an Internet connection to communicate with Salesforce for user verifications of account activity and location-based automated verifications. The app generates verification codes as time-based one-time passwords, or TOTPs without an Internet connection on your mobile device, so you can still log in to your other accounts when you're offline.

### Supported Devices and Browsers

Salesforce Authenticator is supported in portrait orientation in these environments.

Salesforce Authenticator App	Supported Devices	Supported Mobile Operating Systems
iOS, v2 or later	iPhone 5 or later models	iOS 13.4 or later
Android, v2 or later	Android phones	Android 7.0 or later

### EDITIONS

Salesforce Authenticator setup available in: both Salesforce Classic and Lightning Experience

Multi-factor authentication with Salesforce Authenticator available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions

For optimal Salesforce Authenticator performance, we recommend keeping your mobile device's operating system updated and upgrading to a late model device as allowed by your mobile plan. Future Salesforce versions sometimes require removing support for older operating systems, and sometimes newer operating system releases don't perform well on older devices.

### Salesforce Editions and Licenses

These Salesforce editions and user license types allow the use of Salesforce Authenticator for identity verification and multi-factor authentication.

#### Salesforce Editions

- Essentials Edition
  - Group Edition
  - Professional Edition
  - Enterprise Edition
  - Performance Edition
  - Unlimited Edition
  - Developer Edition
  - Contact Manager Edition
- Database.com Edition isn't supported.

#### User License Types

- Salesforce users
  - Salesforce Platform and Salesforce users
  - Customer Community, Customer Community Plus, and Partner Community external users
  - Portal users who are a member of a Salesforce community
- These user license types aren't supported: portal users (unless a member of a Salesforce community), Database.com users, Sites and Site.com users, Data.com users, and WDC users.

### Wireless Connection

Salesforce Authenticator needs a Wi-Fi or cellular network connection to communicate with Salesforce. For cellular connections, a 3G network or faster is required. For the best performance, we recommend using Wi-Fi or LTE. Salesforce Authenticator generates valid verification codes when your device is offline, so you can still use it to log in to your other accounts. You can also view your activity history and list of trusted locations when the device is offline.

## Salesforce Authenticator Accessibility Considerations

Salesforce Authenticator is designed with accessibility in mind and delivers a fully accessible mobile experience for everyone, including users working with screen readers. Unlike the full Salesforce site, Salesforce Authenticator doesn't require accessibility mode to give users working with assistive devices a fully accessible experience.

Check your mobile device's documentation for more information about using a screen reader.

## Locale and Language Support for Salesforce Authenticator

Salesforce Authenticator works with almost all Salesforce-supported locales and the fully supported end-user languages. Salesforce Help includes a list of supported locales and languages. Languages that are read right to left, including Arabic and Hebrew, aren't currently supported.

## Connect Your Salesforce Account to Salesforce Authenticator

Connect your Salesforce account to the Salesforce Authenticator mobile app so you can use the app as a verification method for multi-factor authentication (MFA). Sometimes in Salesforce, you're prompted to connect your account as you log in, or you connect the account through your personal settings.

If you're prompted to connect Salesforce Authenticator to your Salesforce account as you log in, follow the onscreen instructions. To connect the app from your personal settings in Salesforce, log in to your account, then follow these steps.

1. Download and install the Salesforce Authenticator app for the type of mobile device you use.
  - For iPhone, get the app from the [App Store](#).
  - For Android devices, get the app from [Google Play](#).
2. From your personal settings, in the Quick Find box, enter *Advanced User Details*, then select **Advanced User Details**. No results? In the Quick Find box, enter *Personal Information*, then select **Personal Information**.
3. Find **App Registration: Salesforce Authenticator**, and click **Connect**.
4. For security purposes, you're sometimes prompted to either log in to your account again or enter a passcode sent via email or text message.
5. Open the Salesforce Authenticator app on your mobile device.  
If you're opening the app for the first time, you see a tour of the app's features. Take the tour, or go straight to adding your Salesforce account to the app.
6. In the app, tap **Add an Account**.  
The app generates a unique two-word phrase.
7. In your Salesforce browser window, enter the phrase in the **Two-Word Phrase** field.

### Editions

Salesforce Authenticator setup available in: both **Salesforce Classic** and **Lightning Experience**

Multi-factor authentication with Salesforce Authenticator available in: **Essentials**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, **Developer**, and **Contact Manager** Editions

8. Click **Connect**.
9. In the Salesforce Authenticator app on your mobile device, you see details about the account you're connecting. To complete the account connection, tap **Connect** in the app.

To help keep your account secure, we send you an email notification whenever a new identity verification method is added to your Salesforce account. You get the email whether you add the method or your Salesforce admin adds it on your behalf.

## Back Up Your Connected Accounts in the Salesforce Authenticator Mobile App

You can back up your Connected Accounts in the Salesforce Authenticator mobile app. If you lose, damage, or replace your mobile device, you can restore your Connected Accounts on another mobile device.

You can enable backups in these ways:

- Tap the Notifications icon ( ) in the upper right corner, then tap **Enable Backups**.
- If you don't see a notification, tap the Settings icon ( ) in the upper left corner, then tap **Back up accounts**.

After you enable backups, complete the backup process by verifying your mobile number and setting a four-digit passcode.

1. When prompted, enter your mobile number and tap **Send**.
2. Salesforce Authenticator sends you a text message with a link. Tap the link in the text message.
3. Authorize your mobile device to open the Salesforce Authenticator mobile app. This process is different on Android and iOS devices.
  - For Android, if prompted to select which app to open the link with, tap **Salesforce Authenticator** from the list. If your web browser opens, tap **Open Salesforce Authenticator**.
  - For iOS, when asked for permission to open Salesforce Authenticator, tap **Open** to approve.

The Salesforce Authenticator app opens, completing the mobile number verification process.

4. Set your four-digit or longer passcode. This passcode lets you restore your accounts on a new device.

To change or update your mobile number, in the Settings menu, tap **Verified number**. Enter a new mobile number and repeat the verification process.

To change your passcode, in the Settings menu, tap **Change backup passcode**. Enter a new passcode.

## Restore Connected Accounts in the Salesforce Authenticator Mobile App

If you back up your Connected Accounts in the Salesforce Authenticator mobile app, you can restore them on another mobile device.

Before you restore your accounts, keep these things in mind.

- If the new device has a different phone number, change the verified number in the previous device before you restore your accounts. In your Salesforce Authenticator app on the previous device, tap the Settings icon ( ) in the upper left corner, then tap **Verified number**. Complete the [steps to verify your new number](#) on page 96. You're not required to create a new four-digit passcode. You can now restore your accounts on the new device.
- Connected Accounts are active on only one device at a time. If you restore your Connected Accounts on a new device, you can no longer access them from the previous device.
- To restore your Connected Accounts on a new device, restore your accounts before creating new Connected Accounts on the new device. You can't restore Connected Accounts from a backup after creating new Connected Accounts.
- Custom connection names, custom usernames, and the sort order of your connections aren't preserved. These settings return to their initial values. You can rename and resort your connections after you restore them.

1. From the Let's Get Started screen, tap **Restore from Backup**.
2. When prompted, enter your mobile number and tap **Send**.

3. Salesforce Authenticator sends you a text message with a link. Tap the link in the text message.
4. Authorize your mobile device to open the Salesforce Authenticator mobile app. This process is different on Android and iOS devices.
  - For Android, if prompted to select which app to open the link with, tap **Salesforce Authenticator** from the list. If your web browser opens, tap **Open Salesforce Authenticator**.
  - For iOS, when asked for permission to open Salesforce Authenticator, tap **Open** to approve.The Salesforce Authenticator app opens, completing the mobile number verification process.
5. In the Salesforce Authenticator app, enter your passcode.  
When you see your Connected Accounts, the restoration process is complete.

## Remove an Account from Salesforce Authenticator

When you no longer want to use the app for multi-factor authentication (MFA) logins, or want to switch to a new device, remove your Salesforce account from the Salesforce Authenticator mobile app.

These steps are for users who want to disconnect Salesforce Authenticator from their Salesforce account. For admins who want to disconnect a user's account, such as when a user loses the device running Salesforce Authenticator, see the admin instructions in [Disconnect Salesforce Authenticator from a User's Account](#).

 **Note:** Before you remove an account from the Salesforce Authenticator app on your mobile device, make sure that you have another MFA verification method available so that you don't lose access to your Salesforce account.

If you're disconnecting an account to switch to a new device, follow the steps to back up your Connected Accounts before proceeding.

1. Begin in a web browser, in your Salesforce account. From your personal settings, in the Quick Find box, enter *Advanced User Details*, then select **Advanced User Details**. No results? In the Quick Find box, enter *Personal Information*, then select **Personal Information**.
2. Find **App Registration: Salesforce Authenticator**, and click **Disconnect**.
3. Open the Salesforce Authenticator app on your mobile device.
4. In the app list of Connected Accounts, find the account you want to remove.
5. Swipe left on the account username.
6. Tap **Remove** or **Delete**, whichever appears.  
A confirmation dialog appears.
7. To confirm the removal of the account, tap **Remove**.

If Salesforce Authenticator was your only MFA verification method, you're prompted to register another method the next time you log in to Salesforce.

### SEE ALSO:

- [Back Up Your Connected Accounts in the Salesforce Authenticator Mobile App](#)
- [Disconnect Salesforce Authenticator from a User's Account](#)

### EDITIONS

Salesforce Authenticator setup available in: both Salesforce Classic and Lightning Experience

Multi-factor authentication with Salesforce Authenticator available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions

## Verify Your Identity with Salesforce Authenticator

After you install the Salesforce Authenticator app on your mobile device and connect your Salesforce account, use the app to securely log in to your account or access restricted resources in Salesforce. You can also block activity that you don't recognize and report it to your admin.

Before you can use the app for multi-factor authentication (MFA) logins, [connect it to your Salesforce account](#).

1. Log in to your Salesforce account, or try to access a restricted resource in Salesforce. Salesforce Authenticator sends a notification to your mobile device.
2. Respond to the notification by opening Salesforce Authenticator. The app displays details of your account activity including your username, the service you're trying to access, and information about the device used for the activity (such as your computer). If location services are enabled and available, the app shows your current location. Due to the nature of geolocation technology, the accuracy of geolocation fields such as street address, country, or city can vary.
3. If you recognize the details, tap **Approve** on your mobile device. If you don't recognize the details, tap **Deny**.

If you approve the request, you're logged in to Salesforce or granted access to the desired resource.

If you deny a login request, Salesforce Authenticator asks you what to do about the unrecognized activity. To prevent unauthorized access to your account and alert your admin of the potential security breach, tap **Block Activity and Flag**. This action also creates a log entry in [Identity Verification History](#). To prevent access to your account without flagging, tap **Just Block Activity**.

### Editions

Salesforce Authenticator setup available in: both Salesforce Classic and Lightning Experience

Multi-factor authentication with Salesforce Authenticator available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions

## Automate Multi-Factor Authentication Logins from a Trusted Location with Salesforce Authenticator

Enable location services in the Salesforce Authenticator mobile app, and then use the app to automate multi-factor authentication (MFA) logins from a trusted location. Examples of trusted locations can include your home or office. You can enable location services for Salesforce accounts, but not for any other Connected Accounts.

Before you can use the app as a verification method for an MFA login requirement, connect the app to your Salesforce account.

You're prompted to allow location services:

- On Android when first setting up your device
- On iOS when first setting up your device or on restoring your account

Automated verification works best when Salesforce Authenticator always has access to your precise location and is allowed to run in the background. Your mobile device's location data doesn't leave the app. Allowing access to your location lets you automate MFA logins when you're working at your office, home, or other trusted location.

1. Respond to a notification from Salesforce Authenticator by opening the app on your mobile device.

The app displays details of your account activity, including your username, the service you're trying to access, and information about the device used for the activity. If location services are enabled and available, the app shows your current location. Owing to the nature of geolocation technology, the accuracy of geolocation fields such as street address, country, or city can vary.

2. Check the details.

### Editions

Salesforce Authenticator setup available in: both Salesforce Classic and Lightning Experience

Multi-factor authentication with Salesforce Authenticator available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions

3. If you recognize the details, and you're in a location you trust, switch on **Always verify from here**.

4. Tap **Approve**.

In Salesforce, you're logged in or granted access to the desired resource. The next time you take the same action from the same location, the Salesforce Authenticator app automatically verifies the activity for you. You need your mobile device with you, but you don't receive an app notification.

## Let Salesforce Authenticator Intelligently Save Your Trusted Locations

With the help of Einstein, you control whether Salesforce Authenticator automatically trusts locations that you use three or more times.

Use the Einstein Automation Settings button on the Settings page to enable or disable this option. When enabled, locations that you trust three or more times are automatically trusted for future logins. Trusted locations are saved indefinitely, or until you remove them from the app. If you disable Einstein Automation, your existing trusted locations remain in place. Einstein Automation is enabled on new downloads of Salesforce Authenticator with these device settings. iOS has location services permission set to Always and Background App Refresh enabled. Android has location services set to High Accuracy Mode.



**Note:** Background App Refresh is disabled in Low Power Mode. Forcing your app to close can interfere with request automation.

### Editions

Salesforce Authenticator setup available in: both Salesforce Classic and Lightning Experience

Multi-factor authentication with Salesforce Authenticator available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions

## Stop Location-Based Automated Verifications in Salesforce Authenticator

To turn off automated verification from a location, you can remove it from your list of trusted locations.

1. Open the Salesforce Authenticator app on your mobile device.
2. In your Connected Accounts list, tap the arrow icon( ) to go to the account detail page.
3. In Trusted Locations, tap **View All**.
4. Tap the location you want to stop trusting.
5. Tap **Remove Trusted Location**.  
The app asks you to confirm that you want to turn off automated verifications from this location.
6. Tap **Remove**.

### Editions

Salesforce Authenticator setup available in: both Salesforce Classic and Lightning Experience

Multi-factor authentication with Salesforce Authenticator available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions

## Use Salesforce Authenticator with Your Other Accounts

You can use the Salesforce Authenticator mobile app to log in to your other online accounts. For example, use Salesforce Authenticator to add an extra layer of security when you log in to your Facebook account. When you use the app with your other accounts, you verify your identity by entering 6-digit time-based one-time passwords (TOTPs). You can use Salesforce Authenticator with any service that supports multi-factor authentication (MFA) with TOTPs.

- !** **Important:** Before you can use the app to log in, configure your desired account for MFA and connect the account to Salesforce Authenticator. This process varies depending on the service you're using. Refer to your desired service's instructions for configuring MFA and connecting an authenticator app. If your service uses QR codes to connect accounts for MFA, Salesforce Authenticator can scan them.

After you connect your account to Salesforce Authenticator, follow these steps to verify your identity with MFA.

1. Log in to your desired account.  
The service prompts you to enter a verification code.
2. On your mobile device, open the Salesforce Authenticator app.  
Your Connected Accounts are listed in the app. Each account has its own 6-digit verification code.
3. Note the verification code for the account that you want to access.  
Each verification code expires after 30 seconds.
4. In your browser window for the account you're logging in to, enter the 6-digit verification code.  
You're logged in to your account.

## Verify Your Identity with a Temporary Code

When you can't access the verification method you usually use for multi-factor authentication (MFA), ask your Salesforce admin to give you a temporary verification code. The code is valid for 1 to 24 hours. Your admin sets the expiration time, but you can expire the code early if you no longer need it.

If your Salesforce admin has given other users permission to help you with MFA, they can give you a temporary code. Your company's Help Desk or support staff, for example, sometimes has this permission.

The temporary code is for MFA only. It isn't valid for identity verification when you log in from a browser or app we don't recognize.

1. Ask your Salesforce admin (or someone designated by your admin) for a temporary verification code.  
Your admin sets how long the code is valid. You can use the code multiple times until it expires.  
You get an email notification whenever your admin generates a temporary code for you.
2. Enter the temporary code where prompted in the identity verification screen.
3. If you don't need the code any more and it's still valid, expire the code.
  - a. 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**.
  - b. Find **Temporary Verification Code** and click **Expire Now**.

### Editions

Salesforce Authenticator setup available in: both Salesforce Classic and Lightning Experience

Multi-factor authentication with Salesforce Authenticator available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions

### Editions

Available in: both Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

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

## Troubleshoot Login Issues

Can't log in? Forgot your username or password, or you're locked out from too many login attempts? To resolve login problems, try these solutions.

Your Salesforce admin sets password policies for your org. These policies determine how many times you can attempt to log in, how long you're locked out, and what your password requirements are.

To protect the privacy of your data, change your password periodically. If your Salesforce administrator expires user passwords on a periodic basis, you're prompted to change your password at the end of each period.



### Note:

- If you have the "User Single Sign-On" permission, only an administrator can reset your password. For help, contact your Salesforce administrator.
- You can't reset your password in the Salesforce mobile app.
- Forgot your password? [Retrieve it.](#)
- Locked out? Wait until the lockout period expires and try again, or contact your Salesforce admin.
- Password expired? We prompt you to change your password.
- Accessing Salesforce from outside a trusted IP range, using a new browser or app? We prompt you to [verify your identity](#).
- What does Use Custom Domain on the login page mean? If your Salesforce admin created a company-specific My Domain name for your org, click **Use Custom Domain** to provide the My Domain name and log in.

A My Domain URL is in the form `https://MyDomainName.my.salesforce.com`, where *MyDomainName* is a name provided by your admin.

### [Reset Your Forgotten Password](#)

If you forgot your password, you can easily reset it using the forgot password link on the login page. All you need is your username.

### [Reset Your Security Token](#)

When you access Salesforce from an IP address that's outside your company's trusted IP range using a desktop client or the API, you need a security token to log in. A security token is a case-sensitive alphanumeric code that you append to your password or enter in a separate field in a client application.

### [Update Your Token in Salesforce Outlook Edition](#)

After you reset your security token in Salesforce, you can update your token in Salesforce Outlook.

### [Update Your Token in Connect Offline, Connect for Office, and Data Loader](#)

After you received your new Salesforce security token, you can update your token in Connect Offline, Connect for Office, and Data Loader.

### [Grant Login Access](#)

If you need help resolving a problem, you can grant login access to your account to a Salesforce administrator or a support representative.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

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

## Reset Your Forgotten Password

If you forgot your password, you can easily reset it using the forgot password link on the login page. All you need is your username.

- Watch a Demo (Salesforce Classic) (33 seconds)

When you log in to Salesforce from a browser or application that we don't recognize, and your IP address is outside a trusted IP range, you're prompted to verify your identity.

- On the login page, click the forgot password link.
- Enter your username and click **Continue**. An email containing instructions to reset your password is sent to the address specified in your Salesforce personal settings.
- Within 24 hours, click the link provided in the email, answer your security question, and click **Continue**. (The link in the email can be used only once, and expires after 24 hours.)
- When prompted, enter a new password.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

## Reset Your Security Token

When you access Salesforce from an IP address that's outside your company's trusted IP range using a desktop client or the API, you need a security token to log in. A security token is a case-sensitive alphanumeric code that you append to your password or enter in a separate field in a client application.

Your security token isn't displayed in your settings or profile.

If your admin assigned you the Multi-Factor Authentication for API Logins permission, use the code generated by an authenticator app, such as Salesforce Authenticator, for the security token value.

-  **Note:** If you have the API only user permission, you can't manually reset your security token. To reset your token, contact your admin.

- From your personal settings, in the Quick Find box, enter *Reset*, and then select **Reset My Security Token**.
- Click **Reset Security Token**. The new security token is sent to the email address in your Salesforce personal settings.

You also receive a new security token email when you reset your password.

-  **Tip:** Before you access Salesforce from a new IP address, we recommend that you get your security token from a trusted network using **Reset My Security Token**.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

Connect for Office not available in **Database.com**

Connect Offline available in: Salesforce Classic

Connect Offline available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Update Your Token in Salesforce Outlook Edition

After you reset your security token in Salesforce, you can update your token in Salesforce Outlook.

Your security token isn't displayed in your settings or profile. A new security token is emailed to you when you reset your password. Or you can reset your token separately.

If your admin assigned you the Multi-Factor Authentication for API Logins permission, use the code generated by an authenticator app, such as Salesforce Authenticator, for the security token value.

1. In Outlook, go to **Tools > Salesforce Options**.
2. In the password window, enter your password and security token, with the security token added to the end of your password. For example, *mypasswordXXXXXXXXXX*.
3. To test that you correctly entered your password and token, click **Verify**.
4. Click **OK**.

### Editions

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

Connect for Office not available in: **Database.com**

Connect Offline available in: Salesforce Classic

Connect Offline available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Update Your Token in Connect Offline, Connect for Office, and Data Loader

After you received your new Salesforce security token, you can update your token in Connect Offline, Connect for Office, and Data Loader.

Your security token isn't displayed in your settings or profile.

If your admin assigned you the Multi-Factor Authentication for API Logins permission, use the code generated by an authenticator app, such as Salesforce Authenticator, for the security token value.

A new security token is emailed to you when you reset your password. Or you can reset your token separately.

- When you log in, add the security token value to the end of your password, such as *mypasswordXXXXXXXXXX*.



**Note:** If you get an invalid password error when you log in, try logging in only with your password. You can get this error if you use your security token to log in from an IP address that's within a trusted IP range set by your admin.

### Editions

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

Connect for Office not available in: **Database.com**

Connect Offline available in: Salesforce Classic

Connect Offline available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Grant Login Access

If you need help resolving a problem, you can grant login access to your account to a Salesforce administrator or a support representative.

By default, your company's administrators can access your account without any action from you. If your organization requires users to grant login access to administrators, you can grant access for a specified duration.

For security reasons, the maximum period for granting access is 1 year. Once you granted access, administrators or support representatives can use your login and access your data to help you resolve problems.

1. From your personal settings, enter *Login Access* in the *Quick Find* box, then select the option to grant login access.
2. Set the access expiration date by choosing a value from the picklist.
3. Click **Save**

If an administrator, support representative, or publisher makes setup changes using your login, the setup audit trail lists the changes and the username. In some organizations, records of clicks made by an administrator logged in as you are also kept for auditing purposes.

 **Note:** If your administrator has restricted access to certain support organizations, you can't grant access to these organizations. Packaged application licenses can also prevent access.

## Personalize Your Salesforce Experience

Update your personal information, for example your email address. Change your password and security question. If you have administrator permissions, you can also customize your Salesforce org.

### [My Settings: Update Your Personal Settings](#)

Your personal settings help you customize your Salesforce experience. View or update your personal settings like your password and security question, email settings, and organize your tabs and pages.

### [Update Your Profile Page](#)

Click your name or your profile picture to navigate to your profile page. The page offers controls for changing your avatar and updating your contact information. Your contact information is visible to everyone in your company.

### [Personalize Your Navigation](#)

Personalize your Salesforce navigation so you can work more efficiently.

### [Update Your Chatter and Experience Cloud Site Settings](#)

Get ready for Chatter and Experience Cloud sites. Follow people and records, and join a couple of groups that interest you.

### [Organize Your Day](#)

Stay on top of your meetings, tasks, and sales goals.

### [Organize Your Data](#)

Salesforce stores much of your data, like account information, in individual *records*, and organizes the data within *objects*. You can view and update your records and run reports on your data.

### EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

Available in: **All** Editions

Granting administrator access available in: **Enterprise, Performance, Unlimited, Developer, and Database.com** Editions

### USER PERMISSIONS

To view setup audit trail history:

- [View Setup and Configuration](#)

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: All Editions.

### [Brand Your Org in Lightning Experience](#)

Rally your team around your brand and important initiatives, like a new product launch, with a set of custom brand images and colors in your org. We call them *themes*. You can choose one of the built-in Salesforce themes, or create your own custom themes with just a few clicks.

### [Try New Features with the Lightning Extension for Chrome](#)

Are you an early adopter of the latest and greatest technology ... or do you want to become one? With the Lightning Extension for your browser, you can gain access to the latest Lightning features and try them before everyone else.

## My Settings: Update Your Personal Settings

Your personal settings help you customize your Salesforce experience. View or update your personal settings like your password and security question, email settings, and organize your tabs and pages.

To get started on any task, click a menu from the left pane, then select the menu item you want. The personal settings page also includes quick links for easy access to the most commonly used personal settings tools and tasks.

### [Access Your Personal Settings in Salesforce Classic](#)

If you use Salesforce Classic, your personal settings are located either in Personal Setup or My Settings.

### [Access Your Personal Settings in Lightning Experience](#)

If you use Lightning Experience, your personal settings are located either in Personal Setup or My Settings.

### [Update Personal Information](#)

Update your name, phone number, email, address, and work information on the Personal Information page in My Settings.

### [Edit Your Email Settings](#)

You can change your outgoing email settings to specify the name that appears and add an optional signature. You can also specify a return address and opt to automatically send BCC emails to yourself at the return address.

### [Edit Your Language and Locale Settings](#)

### [Add, Remove, and Organize Your Tabs in Salesforce Classic](#)

Salesforce Classic uses tabs as starting points for viewing, adding, and editing information for an object. Different apps can have different sets of tabs. Add tabs for items you use frequently in any app.

### [Customize Your Pages](#)

Specify the related lists that appear in detail pages.

### [Personalize Lightning Experience Display](#)

Change the look of Lightning Experience by selecting your preferred combination of field label alignment and the amount of space between page elements.

### [Personalize Your Record Activities View Settings](#)

Change how activities display on your record pages.

### [Set Record Type Preferences](#)

Set an option to automatically insert your default record type when you create records. If you use this setting, you're no longer prompted to select a particular record type.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#) on page 9)

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

## Access Your Personal Settings in Salesforce Classic

If you use Salesforce Classic, your personal settings are located either in Personal Setup or My Settings.

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

Depending on your organization's user interface settings, you should see either **Setup** or **My Settings** in the menu.

- From the menu under your name, click **Setup** or **My Settings**.
- Do one of the following:
  - If you clicked **Setup**, look on the left side of the page and click a menu item to display its sub-menu, then click the item you want.

### EDITIONS

Available in: Salesforce Classic (not available in all orgs on page 9)

Available in: All editions except Database.com.

This screenshot shows the 'My Personal Information' page for a user named Jan Jones. At the top right, there is a dropdown menu with the user's name 'Jan Jones'. A red box labeled '1' points to this menu. A red box labeled '2' points to the 'Setup' option within the dropdown menu. On the left sidebar, there is a 'Personal Setup' section with a 'My Personal Information' menu item. A red box labeled '3' points to this menu item. The main content area displays 'My Personal Information' with various settings like language, time zone, and quota.

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

This screenshot shows the 'Hello, Josh Wood!' page. At the top right, there is a dropdown menu with the user's name 'Josh Wood'. A red box labeled '1' points to this menu. A red box labeled '2' points to the 'My Settings' option within the dropdown menu. On the left sidebar, there is a 'My Settings' section with a 'Personal' menu item. A red box labeled '3' points to this menu item. The main content area displays 'Hello, Josh Wood!' and provides quick links to 'Change my password', 'Edit my personal information', 'Manage my Chatter email notifications', and 'Customize my tabs'.



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

## Access Your Personal Settings in Lightning Experience

If you use Lightning Experience, your personal settings are located either in Personal Setup or My Settings.



**Note:** Accessing personal settings isn't supported on Lightning Experience on iPad Safari. We recommend that you use Lightning Experience on a desktop to access your personal settings.

1. At the top of any Salesforce page, click your image.
2. Click **Settings**.
3. On the left side of the page, click a menu item to display its submenu, then click the item you want.



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



**Note:** If you receive an error message regarding insufficient privileges when trying to access your personal settings, ask your Salesforce admin to enable the Improved Setup User Interface option. If you're an admin, from Setup, enter *User Interface* in the **Quick Find** box, then select **User Interface**. Select **Improved Setup User Interface**, and click **Save**.

## Update Personal Information

Update your name, phone number, email, address, and work information on the Personal Information page in My Settings.

1. From your personal settings, enter *Personal* in the **Quick Find** box, then select **Personal Information**.
2. Enter *Personal Information* in the **Quick Find** box, then select **Personal Information**.
3. To make changes, click **Edit**  
If you change your email address, a confirmation message is sent to the new address. Click the link in the message for the new email address to take effect. This process ensures system security.
4. Save your changes.

### EDITIONS

Available in: Lightning Experience

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

### EDITIONS

Available in: Salesforce Classic (not available in all orgs on page 9) and Lightning Experience

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

## Edit Your Email Settings

You can change your outgoing email settings to specify the name that appears and add an optional signature. You can also specify a return address and opt to automatically send BCC emails to yourself at the return address.

-  **Note:** Before using the personal email setting When you click an email address to compose an email, which email editor do you want to use?, confirm that the Global Publisher Layout has the email action in the **Salesforce Mobile and Lightning Experience Action** section.

1. From your personal settings, in the Quick Find box, enter *My Email Settings*, then select **My Email Settings**.
2. Make your changes.

-  **Note:** Depending on your org's settings, if you change your email address, you can be prompted to confirm your identity. To confirm your identity, make sure that you have access to your previously registered email account.

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

Signatures aren't added to emails that use Lightning email templates or email template builder templates. To include a signature, use Sender merge fields in the template.

The signature field can include HTML links. To track the number of link clicks, add the `<a>` tag with the `href` attribute. The attribute must start with `http://` or `https://`.

-  **Example:** `<a href="http://www.google.com">bing</a>`

### SEE ALSO:

- [View Engagement for Specific Emails on Lead, Contact, and Person Account Records](#)  
[Engagements and Alerts in the Outlook and Gmail Integrations](#)

## Edit Your Language and Locale Settings

1. From your personal settings, enter *Time Zone* in the Quick Find box, then select **Language and Time Zone**. No results? Enter *Personal Information* in the Quick Find box, then select **Personal Information**.

2. Specify these settings as needed.
  - For *Time Zone*, select your primary time zone.
  - For *Locale*, select your country or geographic region.
  - For *Language*, select your primary language. All text and online help appears in the language you select.
  - For *Email Encoding*, select the character set and encoding option for email that you send from Salesforce.

-  **Note:** Any user in a new org created after the 228 release will have Unicode as the default. Existing org users will still have the prior default settings, but they can update to UTF-8.

3. Click **Save**.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

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

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

## Add, Remove, and Organize Your Tabs in Salesforce Classic

Salesforce Classic uses tabs as starting points for viewing, adding, and editing information for an object. Different apps can have different sets of tabs. Add tabs for items you use frequently in any app.

1. Click the Plus icon (+) to the right of your current tabs.  
The All Tabs page appears. By default, it shows all the tabs you have available to view or add.
2. If you want to see a list of just the tabs for a specific app, select that app from the View drop-down list.
3. Click **Customize My Tabs**.
4. In the Custom App drop-down list, select the app where you want the tab to appear.  
For example, if you want the Ideas tab to appear in your Marketing app, select *Marketing* and the Ideas tab appears in that app only.
5. To add or remove tabs and change their order, use the Add, Remove, Up, and Down arrows.
6. Click **Save**.
7. If you added a tab to an app you're not actively using, open that app to see your new tab.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

## Customize Your Pages

Specify the related lists that appear in detail pages.

1. From your personal settings, enter *Customize My* in the Quick Find box, then select **Customize My Pages**. No results? Enter *Display* in the Quick Find box, then select **Change My Display**.

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

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

- To add or remove related lists, select a related list and click the **Add** or **Remove** arrow.
-  **Note:** This setting may change if your administrator changes the page layout for a particular tab.
- To change the order of the related lists, select a related list title in the Selected List box, and click the **Up** or **Down** arrow.
2. Save your changes.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#) on page 9)

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

## Personalize Lightning Experience Display

Change the look of Lightning Experience by selecting your preferred combination of field label alignment and the amount of space between page elements.

1. At the top of a Salesforce page, click your image.
2. Select a display density setting.
  - Comfy is a spacious view with labels on the top of fields and more space between page elements.
  - Compact is a denser view with labels to the left of fields and less space between page elements.

### EDITIONS

Available in: Lightning Experience

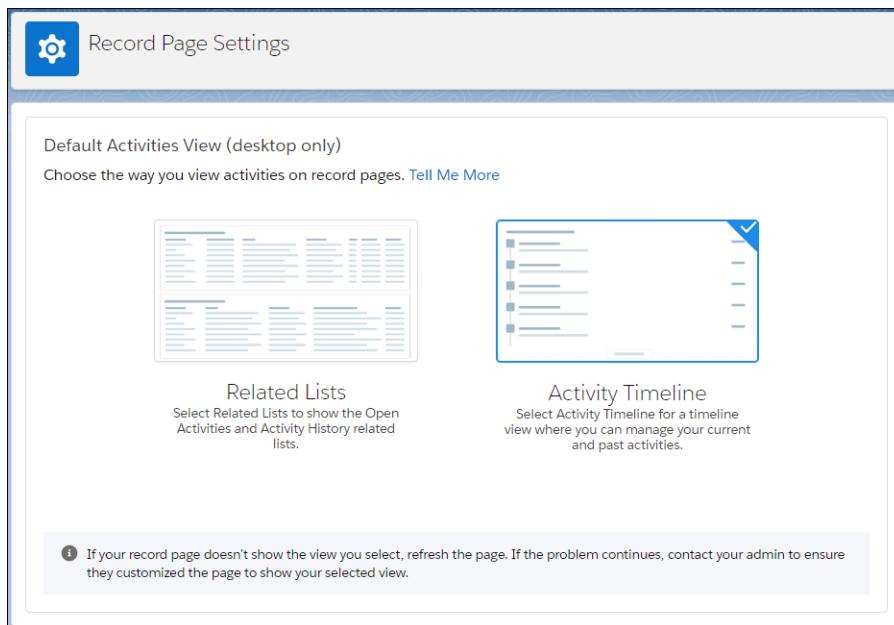
Available in: **Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

 **Note:** Changing the density instantly reloads the page, so save any changes beforehand. If you have multiple browser tabs open, refresh the other tabs in use to see the new display density setting.

## Personalize Your Record Activities View Settings

Change how activities display on your record pages.

1. At the top of a Salesforce page, click your image.
2. Select **Settings**.
3. In Setup, enter *Record Page Settings* in the Quick Find box, and select **Record Page Settings**.



4. Select a default activity view.
5. Click **Save**.

 **Note:** If your record page doesn't show the view you select, refresh the page. If the problem continues, contact your admin to check whether you can use your selected view.

### SEE ALSO:

[Activities View](#)

### EDITIONS

Available in: Lightning Experience

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

## Set Record Type Preferences

Set an option to automatically insert your default record type when you create records. If you use this setting, you're no longer prompted to select a particular record type.

- From your personal settings, enter *Record Type* in the *Quick Find* box, then select **Set Default Record Types** or **Record Type Selection**—whichever one appears.

If the Record Type Selection option isn't available, your org isn't using record types or multiple record types aren't available.

- Select the data type to specify that you want to use the default record type whenever you create that type of record. Otherwise, leave the box unchecked.

If your org uses person accounts and you check the *Account* box, you automatically select the default record type for all account types. You can't set separate default record type for business accounts and person accounts. If you work with both accounts types, leave the box blank.

To appear in the available record types list, a custom object must have a custom tab created for it.

- Click **Save**.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#) on page 9)

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

## Update Your Profile Page

Click your name or your profile picture to navigate to your profile page. The page offers controls for changing your avatar and updating your contact information. Your contact information is visible to everyone in your company.

Available in: Salesforce Classic and Lightning Experience

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

You can update all fields on your profile, except the Manager field. Only your Salesforce admin can update the Manager field.

## Personalize Your Navigation

Personalize your Salesforce navigation so you can work more efficiently.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

#### [Personalize the Navigation Bar in Lightning Experience](#)

Customize an app's navigation bar so that the user interface suits the unique way you work. You can add and reorder items, and rename or remove items you've added.

#### [Personalized Navigation Considerations](#)

Keep these considerations in mind when personalizing an app's navigation bar in Lightning Experience.

#### [Create Shortcuts to Salesforce Pages with Favorites](#)

Quickly access important records, lists, groups, and other frequently used pages in Salesforce. A favorite is similar to a bookmark in a web browser, but your favorites list is always available regardless of the browser or computer that you use to log in to Lightning Experience.

#### [Favorites Considerations](#)

Keep these considerations in mind when working with favorites.

[Customize Your Tabs in Salesforce Classic](#)

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

## Personalize the Navigation Bar in Lightning Experience

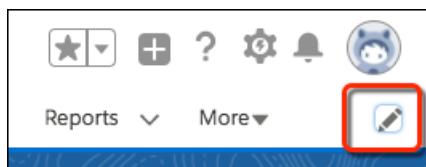
Customize an app's navigation bar so that the user interface suits the unique way you work. You can add and reorder items, and rename or remove items you've added.

Admins define which default items are available in an app's navigation bar, but you can change certain parts of the user interface on your own. You can add items to the navigation bar, and rename or remove the items you add. You can't rename or remove default items that your admin specified for the app, including any custom or standard objects.

Watch the video to see how.  [Personalize Navigation in Lightning Experience \(English Only\)](#)

 **Note:** Customizations made to the navigation bar in a Lightning app sync to the Salesforce mobile app navigation menu for that Lightning app. Customizations made to the navigation menu in the Salesforce mobile app sync to the desktop version of that app.

1. To make multiple updates to the navigation bar, click the pencil icon.

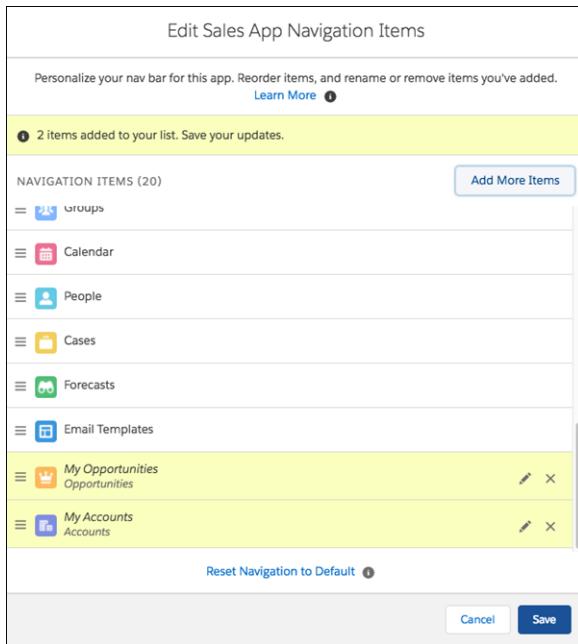


- a. To reorder the items already in your navigation bar, drag them.
- b. To rename items in your navigation bar, click the pencil icon next to the item you want to rename. You can't rename items that your admin has specified for the app.
- c. To remove items from your navigation bar, click the x next to the item. You can't remove items that your admin has specified for the app.
- d. To add items to your navigation bar, click **Add More Items**. Search through your favorites or all available items in your org, and choose what to add. After you make your selections, you can reorder or remove items before saving your changes. You can't rename or remove items that your admin has specified for the app.

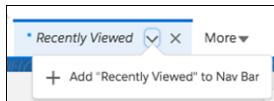
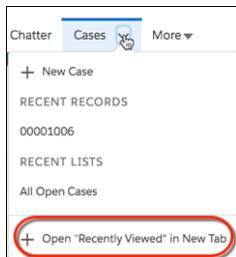
### EDITIONS

Available in: Lightning Experience

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



2. To make a few changes in the navigation bar.
  - a. If you want reorder tabs, drag tabs around the navigation bar.
  - b. If you're viewing a page, such as a list or dashboard, and want to add it to the navigation bar, create a temporary tab. To create a temporary tab, select **Open in New Tab** in the current tab's dropdown menu. To permanently add the tab to the navigation bar, select **Add to Nav Bar** from the temporary tab's dropdown menu.



**Note:** Temporary tabs open when you open an item that doesn't have a parent object already in the navigation bar. For example, if you open a contract record or contract list, it opens under Contracts if Contracts is available in the navigation bar. If Contracts isn't available, the record or list opens as a temporary tab.

The asterisk to the left of the item name indicates that it's a temporary tab. The temporary tab is removed from the navigation bar when you close it, log out of Salesforce, or switch to a different app.

#### SEE ALSO:

- [Personalized Navigation Considerations](#)
- [Personalize the Navigation Menu for Lightning Console Apps](#)
- [Customize a Lightning App Navigation Menu in the Salesforce Mobile App](#)

## Personalized Navigation Considerations

Keep these considerations in mind when personalizing an app's navigation bar in Lightning Experience.

- You can reorder, rename, or remove items that you added to a navigation bar, but you can't remove or rename the default items defined by admins. If an admin removes a default item, the item remains in your personalized app navigation bar, but you can delete it.
- A navigation bar can have up to 50 items, including the default items. If a navigation bar already has 50 default items, you can't add more.
- If you open temporary tabs and then open a new web browser tab, the temporary tabs aren't available in the new browser tab.
- Admins can't access or modify the personal items users add to a navigation bar.
- Temporary tabs open when you open an item that doesn't have a parent object already in the navigation bar. For example, if you open a contract record or contract list, it opens under Contracts if Contracts is available in the navigation bar. If Contracts isn't available, the record or list opens as a temporary tab.
- Personalizations that you make in Lightning Experience aren't available in Salesforce Classic.

#### EDITIONS

Available in: Lightning Experience

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

## Considerations for Admins

- Help users get the most out of personalized navigation by upgrading your Classic apps to Lightning apps. Users can't personalize the navigation bar of Classic apps in Lightning Experience.
- Check what's in your apps. Users can't remove the items you include in the navigation bar, and they can't personalize the navigation bar when it contains more than 50 items. For example, if you include 32 items in an app's navigation bar, users can add 18 more personal items.
- Items that you add to an app's navigation bar are added to the end of users' personalized navigation bars in the order that you added them.
- When you remove an item from an app, that item remains in your users' personalized navigation bars, and users can then delete it.
- If you don't want your users to personalize the navigation bar for a specific app, disable personalization. From Setup in Lightning Experience, go to the **App Manager**. For the desired app, select **App Options**. Select **Disable end user personalization of navigation items in this app**.
- If you don't want your users to personalize the navigation bar for any app, disable personalization. From Setup, enter *User Interface* in the Quick Find box, then select **User Interface**. Select **Disable Navigation Bar Personalization in Lightning Experience**. Salesforce recommends disabling navigation personalization by app instead of for the entire org.
- Control if temporary tabs are created when users access items outside of the app. From Setup in Lightning Experience, go to the **App Manager**. Edit the desired app. On the **App Options** page, select **Disable temporary tabs for items outside of this app**.
- The tab's dropdown menu includes an option to create an item. For example, create an account by selecting **+ New Account** from the Account tab's dropdown menu. However, the New action doesn't appear if:

- Users don't have the create permission for the object
- The New action isn't part of the search layout for the object's list view



**Tip:** To avoid opening temporary tabs, add the appropriate parent objects to the navigation bar. For example, to prevent a contract list or record from opening as a temporary tab, add Contracts to the navigation bar.

#### SEE ALSO:

[Personalize the Navigation Bar in Lightning Experience](#)

## Create Shortcuts to Salesforce Pages with Favorites

Quickly access important records, lists, groups, and other frequently used pages in Salesforce. A favorite is similar to a bookmark in a web browser, but your favorites list is always available regardless of the browser or computer that you use to log in to Lightning Experience.

1. To add the current page—for example, all open leads—to your favorites list, click the star in the Lightning Experience header.  
A highlighted star means you're on a favorite. To remove a favorite, click the highlighted star.
2. To view your top favorites, click the dropdown next to the star. Each favorite shows the name and record type. After you start using favorites, your three-most frequently used favorites appear in the navigation bar dropdown menu for certain objects. **My Favorites** is helpful when you have numerous favorites and want to see only the pages that relate to a specific object. If you use a favorites page often, consider adding it to your navigation bar.
3. To add items, reorder the list, or rename favorites, click **Edit Favorites**.

#### SEE ALSO:

[Personalize the Navigation Bar in Lightning Experience](#)

[Favorites Considerations](#)

## Favorites Considerations

Keep these considerations in mind when working with favorites.

- Favorites support these types of content. You can have up to 200 favorites.
  - Record home for standard and custom objects, including Visualforce overrides of these record views.
  - Lists
  - Dashboards
  - Reports
  - Report and dashboard folders
  - Chatter groups



**Note:** You can't favorite list views on the Reports, Dashboards, Files, and Notes tabs. You also can't favorite Visualforce overrides of list views and individual Chatter posts.

- You can't favorite things in setup pages, but you can still access your favorites from these areas.
- Salesforce admins can't edit or share favorites. Only individual users can manage favorites.

#### Editions

Available in: Lightning Experience

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

#### Editions

Available in: Lightning Experience

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

- You can add favorites only for specific versions of Knowledge articles. Favorites follow these rules for Knowledge articles.
  - If the newest version is published, the favorite points to it.
  - If the favorite currently points to an older, published version, and the newest version is a draft, the favorite continues to point to the published version.
  - If no published version exists, the favorite points to the latest draft version.
  - If no published or draft version exists, the favorite points to the latest archived version.
  - The favorite points to the newer version in the same language as the older, published version. For example, if you have a favorite published version in English and you publish a new version in Spanish, the favorite continues to point to the English version. If you publish a new English version, the favorite points to the new version.

**SEE ALSO:**

[Create Shortcuts to Salesforce Pages with Favorites](#)

## Customize Your Tabs in Salesforce Classic

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

1. From your personal settings, if you're using the Improved Setup User Interface, enter *Customize My* in the Quick Find box, then select **Customize My Tabs**. Otherwise, enter *Display* in the Quick Find box, then select **Change My Display**.
  2. If you have access to multiple apps, select the app whose tabs you want to customize from the Custom Apps drop-down list.  
By default, you'll see the tabs for the selected custom app that are set for your profile.
-  **Note:** The first tab that displays when you select an app may change if your administrator changes the app's default landing tab.
3. If desired, add each tab you want to display and change the display order of the tabs you've selected.
  4. Save your changes.

**SEE ALSO:**

[Set Up the User Interface in Salesforce Classic](#)

**EDITIONS**

Available in: Salesforce Classic ([not available in all orgs](#) on page 9)

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

## Update Your Chatter and Experience Cloud Site Settings

Get ready for Chatter and Experience Cloud sites. Follow people and records, and join a couple of groups that interest you.

[Change Your Profile or Group Photo](#)

Upload a photo to your profile so people can see who you are. Upload a photo for groups that you own or manage.

**EDITIONS**

Available in: Salesforce Classic ([not available in all orgs](#) on page 9)

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

### [Follow People and Records](#)

Follow people and records to see their updates in your feed. When you follow people, you can see their posts, comments, and likes on the feeds that you also have access to. If a person you follow posts to a group you don't have access to, you can't see that post. When you follow a record, you are notified about activity on the record, provided feed-tracking is enabled on the record's type.

#### [Follow Records](#)

Follow records to see updates in your feed, including field changes, posts, tasks, and comments.

#### [Update Your Email Notifications in Chatter](#)

Set your preferences for when to be notified via email about Chatter activity. For example, you can choose to not receive a notification when you have a new follower or when someone likes your posts.

#### SEE ALSO:

[Join or Leave Groups](#)

## Change Your Profile or Group Photo

Upload a photo to your profile so people can see who you are. Upload a photo for groups that you own or manage.

Available in: Salesforce Classic and Lightning Experience

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

1. Go to your profile or the group's page.
2. Mouse over the photo and click **Add Photo** or **Update**.
3. Browse for the photo you want to upload and open the file.

You can upload photos in .jpg, .gif, or .png format, up to 10 MB in Classic and 16 MB in Lightning Experience. Photos also have a 36 MP dimension limit.

4. Create a thumbnail image by dragging the dotted lines across the photo.  
If the photo is for your profile and you're a member of any Experience Cloud sites, you can select `Show my photo on publicly accessible pages`. This option makes the photo visible to guest users viewing publicly accessible sites or pages that don't require login.
5. Save your changes.

## Follow People and Records

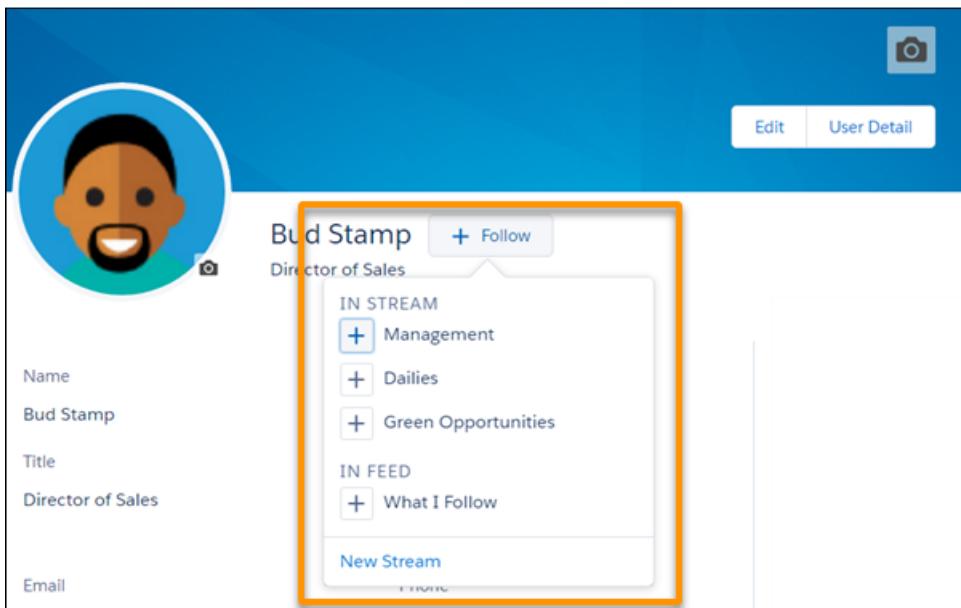
Follow people and records to see their updates in your feed. When you follow people, you can see their posts, comments, and likes on the feeds that you also have access to. If a person you follow posts to a group you don't have access to, you can't see that post. When you follow a record, you are notified about activity on the record, provided feed-tracking is enabled on the record's type.

Available in: Salesforce Classic and Lightning Experience

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

 **Note:** If someone can see a record that you own, then they can follow that record. People can follow only the records that they can see.

To follow a person or a record, click **Follow** on a person's profile or a record page. If the **Follow** button has a **+** in front of it, you have more options. Click the button to see options for following the person or record and for adding it to a new or existing stream. To follow the person or record from the menu, click **What I Follow**.



 **Note:** You can find streams in Lightning Experience on the Chatter home page.

In Salesforce Classic, you can see the people and records that you follow and the people who are following you. View the Following list on your profile, and filter the results by user or by an object type.

When you follow people, you see their posts, comments, and likes in your feed. You can follow a maximum combined total of 500 people, topics, and records. To see how many items you're following, view the Following list on your profile.

To stop following a person from your profile, mouse over the follower, then, in the hover, mouse over the **Following** label. In Salesforce Classic, click  . In Lightning Experience, select **Unfollow**. When you stop following a person, their past posts continue to appear in your What I Follow feed. But you don't see any future updates from them.

## Follow Records

Follow records to see updates in your feed, including field changes, posts, tasks, and comments.

Available in: Salesforce Classic and Lightning Experience

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

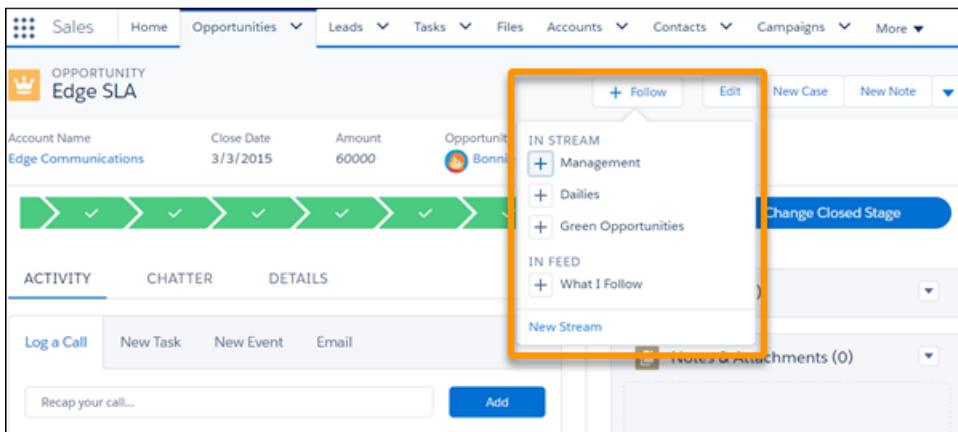
### USER PERMISSIONS

To view a record:

- Read on the record

The field changes that you see in your feed depend on the fields that your administrator has configured for feed tracking. Updates to encrypted custom fields don't appear in feeds.

To follow a record, click **Follow** on the record page. If the **Follow** button has a **+** in front of it, you have more options. Click the button to see options for following the record and for adding it to a new or existing stream. To follow the record from the menu, click **What I Follow**.



 **Note:** You can find streams in Lightning Experience on the Chatter page.

1. To automatically follow the records that you create, here's what you do:
1. Click your profile avatar at the top of the page, and select **Settings**.
2. Enter *My Feeds* in the Quick Find box, and select **My Feeds**.
3. Select **Automatically follow records I create**.

You can auto-follow the records that you create, but you can't auto-follow tasks, events, or dashboards.

When you follow a record, you see updates to the record in your feed. When you create a child record, the owner of the parent record becomes the owner of the child record by default. But, despite your **Automatically follow** setting, you don't automatically follow the child record. Follow the child record explicitly, even when you're the owner of the parent record.

You can follow a maximum combined total of 500 people, topics, and records. To see how many items you're following, view the Following list on your profile. In Lightning Experience, only the people who you follow and who are following you appear on your profile.

To stop following a record on the record page, mouse over the **Following** label. In Salesforce Classic, click  . In Lightning Experience, what you see depends on whether streams are enabled. If streams are enabled, click **Following** and deselect **What I Follow**. If streams aren't enabled, when you mouse over Following, you see **Unfollow**. Click **Unfollow**.

## Update Your Email Notifications in Chatter

Set your preferences for when to be notified via email about Chatter activity. For example, you can choose to not receive a notification when you have a new follower or when someone likes your posts.

Available in: Salesforce Classic and Lightning Experience

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

1. From the menu under your name, click **Setup** or **My Settings**.
2. Click **Chatter**.
3. Click **Email Notifications**.

4. Select your preferences.
5. Save your changes.

## Organize Your Day

Stay on top of your meetings, tasks, and sales goals.

### EDITIONS

#### Schedule and Track Your Tasks and Events

If you have Lightning Sync or Einstein Activity Capture installed, your Outlook or Google events sync with Salesforce. Those synced events appear in the Calendar section.

#### Track Your Sales Performance

Use the performance chart on the Home page in Lightning Experience to track your sales performance or the performance of your sales team against a customizable sales goal.

#### View Important Updates with the Assistant

Use the Assistant on the Home page in Lightning Experience to view important updates over the course of your day.

Available in: Salesforce Classic ([not available in all orgs](#) on page 9)

Available in: All Editions.

## Schedule and Track Your Tasks and Events

If you have Lightning Sync or Einstein Activity Capture installed, your Outlook or Google events sync with Salesforce. Those synced events appear in the Calendar section.

In the My Tasks section, you can

- Create tasks
- View and filter the list of tasks assigned to you. The list displays up to 15 tasks. To view all your tasks, click **View More**.

 identifies tasks that are part of a Salesforce Classic recurring series.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#) on page 9)

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

In the Calendar section, you can:

- Create events and meeting requests
- View a list of scheduled events for the next seven days.

The tab displays up to 50 events per day.  identifies events that are part of a Salesforce Classic recurring series,  identifies events with invitees.

The Requested Meetings subtab lists meetings you requested but haven't confirmed. The tab displays a maximum of 100 requested meetings.

### SEE ALSO:

[Tasks](#)

[Events and Calendars](#)

## Track Your Sales Performance

Use the performance chart on the Home page in Lightning Experience to track your sales performance or the performance of your sales team against a customizable sales goal.

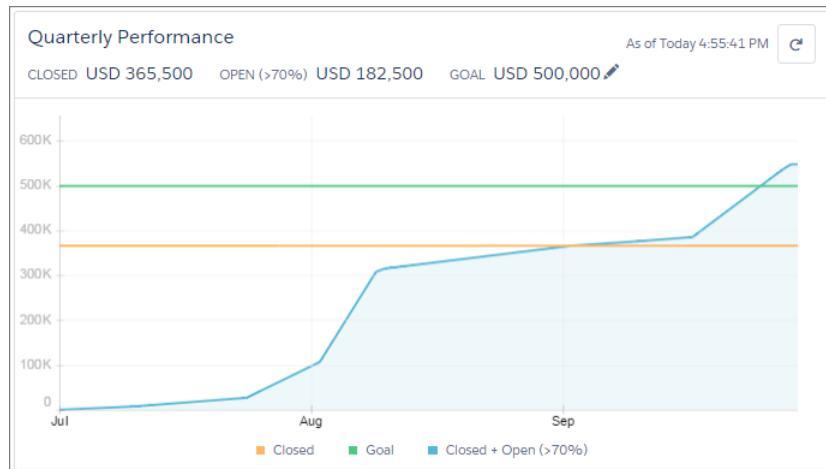
The performance chart displays data based on your sales team's opportunities if you have an associated team. Otherwise, the chart displays opportunities you own. Only opportunities for the current sales quarter that are closed or open with a probability over 70% are displayed.

- Closed—The sum of your closed opportunities.
- Open (>70%)—The sum of your open opportunities with a probability over 70%. The blue line in the chart is the combined total of the closed opportunities and open opportunities with a probability over 70%.
- Goal—Your customizable sales goal for the quarter. This field is specific to the performance chart and has no impact on forecast quotas or any other type of goal. Click  to set the goal.

### EDITIONS

Available in: Lightning Experience

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



Hover over the chart to see the closed and committed opportunity amounts for different dates. If you hover over a date when an opportunity was closed or set to a probability over 70%, a blue dot appears. Click the dot to see a window with more opportunity details.

The performance chart isn't refreshed automatically. Click  to make sure you have the most up-to-date view of your sales performance.

 **Note:** The performance chart isn't compatible with custom fiscal years. If your org has custom fiscal years enabled, your admin can create custom reports and dashboards to display on the Home page.

### SEE ALSO:

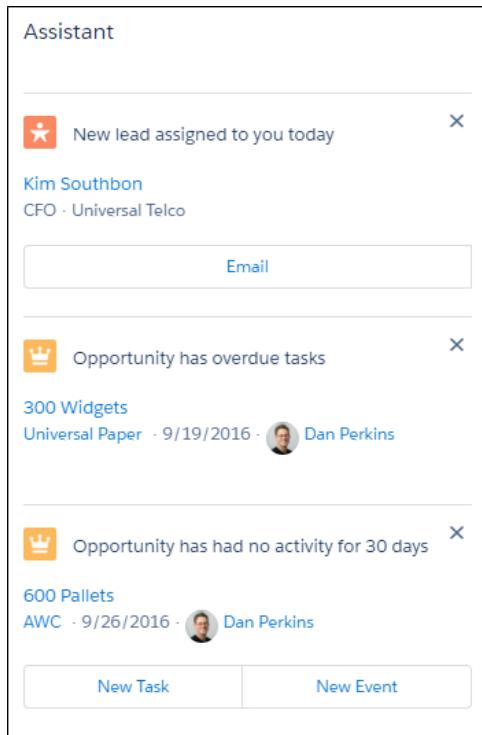
[Lightning Experience Home Permissions and Settings](#)

[View Important Updates with the Assistant](#)

## View Important Updates with the Assistant

Use the Assistant on the Home page in Lightning Experience to view important updates over the course of your day.

Click different leads or opportunities to go to the record's detail page.



### EDITIONS

Available in: Lightning Experience

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

The following updates appear in the Assistant:

- Leads assigned to you today
- Opportunities with overdue tasks
- Opportunities with no activity in 30 days
- Opportunities with no open activity
- Overdue opportunities

Opportunities are overdue if they're still open after the Close Date. These updates stop appearing if it's been over 8 days since the Close Date.

Up to 10 updates are shown at a time. Updates about leads appear before updates about opportunities. Opportunity updates are arranged in order of close date.

#### Note:

- If you have Einstein Activity Capture enabled, you won't see the updates about opportunities with no open activity or no activity in 30 days.
- The Assistant doesn't show tasks due today or overdue tasks that aren't tied to an opportunity. The Today's Tasks component is an alternative that's available on the Home page, and it shows a list of your tasks due today.

- If you don't have access to activities on opportunities or if the opportunity pipeline is off, you instead see recommendations for opportunities that have close dates over the next 90 days.

Buttons for different actions (such as **New Task**) automatically appear under most Salesforce configurations, but you may need to make some updates if you've customized global actions or publisher layouts.

Actions need to exist as global actions in order to appear in the Assistant. From Setup, enter *Global Actions* in the Quick Find box, then select **Global Actions**. Make sure the following actions are available. The Label can be anything, but we recommend something simple, like New Task, New Event, or Email.

**Table 1: Required Settings for Global Actions**

Allows user to	Action Type	Target Object	Name
Create a new task	Create a Record	Task	NewTask
Create a new event	Create a Record	Event	NewEvent
Send an email	Send Email	Outgoing Email	SendEmail (not required)

To display actions, they also need to be included in the related global publisher layouts. From Setup, enter *Publisher Layouts* in the Quick Find box, then select **Publisher Layouts**. Select the relevant publisher layout, and make sure the actions are included under the **Mobile & Lightning Actions** section.

#### SEE ALSO:

- [Lightning Experience Home Permissions and Settings](#)  
[Track Your Sales Performance](#)

## Organize Your Data

Salesforce stores much of your data, like account information, in individual *records*, and organizes the data within objects. You can view and update your records and run reports on your data.

#### [What's the Difference Between Standard and Custom Objects?](#)

Standard objects, such as accounts, cases, contacts, and opportunities, are included with Salesforce by default. Custom objects are based on standard objects, extend standard functionality, and store information that is unique to an org.

#### [Find and View Your Data](#)

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

#### [Update Your Data](#)

Much of your Salesforce data is stored in individual *records*, and organized within objects. For example, the Account object presents all of your account records. If the Acme company is one of your accounts, you'll have an account record for Acme.

#### [Analyze Your Data](#)

Analyze and visualize your data with reports and dashboards. Salesforce offers a powerful suite of reporting tools that work together to help you understand and act on your data.

#### [Note and Attachment Fields](#)

There are a number of useful fields available for notes and attachments in Salesforce. There are different fields available for notes taken with Notes, our enhanced note-taking tool, and notes taken with the old note-taking tool.

## What's the Difference Between Standard and Custom Objects?

Standard objects, such as accounts, cases, contacts, and opportunities, are included with Salesforce by default. Custom objects are based on standard objects, extend standard functionality, and store information that is unique to an org.

Your admin defines custom objects and their properties, such as custom fields, relationships to other types of data, page layouts, and a custom tab. If an admin created a tab for a custom object, click the custom object's tab to view the records.

### SEE ALSO:

[Find and View Your Data](#)

[Create and Update Records](#)

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

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

### USER PERMISSIONS

To view a custom object tab:

- Read on the custom object

To view custom object records:

- Read on the custom object

## Find and View Your Data

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

### [Find Your Records](#)

To view all standard and custom objects that are available to you in your org, click the plus icon (+). To see the records for a particular object, click the record's tab.

### [Work with List Views in Lightning Experience](#)

View, edit, and create records from a list. List views are a great way to sort, prioritize, and analyze the records that are most important to you.

### [Pin List Views in Lightning Experience](#)

Change an object's default list view with a pinned list. An object's pinned list loads as its default list view. The default pinned list for all objects is the Recently Viewed list.

### [Search List Views in Lightning Experience](#)

You can search for records in a list view using the list view search box. Click in the search box or use the keyboard shortcut g+f and enter your query. The list view search looks at all searchable fields, even if the corresponding columns aren't shown in the list view.

### [Sort List Views](#)

Lots of objects let you view records in lists, also called "list views". You can sort the records by one of the field columns. For example, you can sort the All Accounts list view by the Account Name field column, Billing State/Province field column, and others. You can also sort custom list views. Sorting is alphanumeric.

### [Print List Views](#)

To print standard and custom list views, ask your admin to enable list view printing.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

Available in: All Editions

### [Customize Your Data View](#)

Create customized list views to display records that meet your own criteria. You determine which records display by setting filters. All records that meet your filter criteria appear in your list view.

### [Work with Related Lists](#)

Records include details and links to other related records. View and perform actions on these related records with related lists.

### [Open Items You've Recently Viewed](#)

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

### [Use Kanban to Work with Graphical Views of Your Records](#)

Kanban views show records in a graphical way that helps you monitor your work and keep deals moving ahead. Kanban views are available for most objects, with exceptions such as tasks.

### [Change Your Working Division](#)

If your org uses divisions, you can change your working division from the Divisions field in the sidebar.

### [Change the Dashboard on Your Home Tab](#)

If your Home tab contains a dashboard snapshot, you can change the dashboard.

### [Considerations for List Views and Related Lists](#)

Consider these points when using list views and related lists.

## Find Your Records

To view all standard and custom objects that are available to you in your org, click the plus icon (+). To see the records for a particular object, click the record's tab.

The tabs you see depend on your permissions and how your administrator configured Salesforce. Let's say your company wanted to track product inventory. The Salesforce administrator could create custom objects called Inventory and Merchandise and add them as tabs.

### EDITIONS

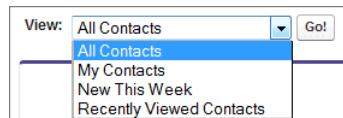
Available in: Salesforce Classic ([not available in all orgs](#) on page 9)

Available in: All Editions

You can [change the order](#) on page 109 of your tabs.

## Find Record Data from a Tab

From a standard or custom record tab, select a view and click **Go!**.



That action takes you to the *list view*, filtered by the view you selected.

Action	Name	Account Name	Title	Position	Phone	Email	Contact Owner
<a href="#">Edit</a>   <a href="#">Del</a>	Adams, Arnold	ABC Labs	IT Manager	IT	1-408-555-2122	arnold.adams@tra... mwils	
<a href="#">Edit</a>   <a href="#">Del</a>	Allen, Jack	Arbuckle Laborator...		Marketing	1-847-555-0557	jack.allen@training... psmit	
<a href="#">Edit</a>   <a href="#">Del</a>	Amos, Jon	Vandelay Industries	Sales Manager	Account Manager	1-713-555-2405	jon.amos@training... mwils	
<a href="#">Edit</a>   <a href="#">Del</a>	Anderson, Abby	Arbuckle Laborator...		IT	1-847-555-0590	abby.anderson@tr... psmit	
<a href="#">Edit</a>   <a href="#">Del</a>	Antonio, Cedric	Arbuckle Laborator...		IT	1-847-555-0512	cedric.antonio@tr... psmit	
<a href="#">Edit</a>   <a href="#">Del</a>	Buchner, Francis	ABC Labs	Account Manager	Account Manager	1-408-555-2124	francis.buchner@tr... mwils	

For example, if you select New This Week on the Contacts tab, the list view shows you the new contacts that were added this week.

## Use Related Lists to Find Record Data

On many records, below the main page sections, look for related lists. They identify records that are associated with the record you're currently viewing. For example, an account record probably has a related list of contacts at that account.



**Note:** Which records you can view and update depends on your user profile, user permissions, and sharing settings. Work with your administrator to make sure that you have access to the records and data you need.

### SEE ALSO:

- [Find Objects and Apps in Lightning Experience](#)
- [Find Your Way Around List Views in Lightning Experience](#)

## Work with List Views in Lightning Experience

View, edit, and create records from a list. List views are a great way to sort, prioritize, and analyze the records that are most important to you.



[Work with List Views in Lightning Experience \(English Only\)](#)

In a list view, you see only the data that you have access to. You can see records that you own, have read or write access to, or are shared with you. List views also include records owned by or shared with users in roles below you in the hierarchy. The fields you see depend on your page layout and field-level security settings.

### EDITIONS

Available in: Lightning Experience

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

This screenshot shows the Opportunities list view. Numbered callouts point to specific features:

- Opportunities dropdown menu.
- List View Controls menu.
- New button.
- Filter icon.
- View selection icons: Standard Table, Kanban, Tile, Split.
- Search bar.

OPPORTUNITY NAME ↑	ACCOUNT NAME	AMOUNT	CLOSE ...	STAGE	O ...
1 Burlington Textiles and Coat Fac...	Burlington Textiles Corp of Ame...	\$20,000.00	6/5/2019	Prospecting	AUser
2 Burlington Textiles Weaving Pla...	Burlington Textiles Corp of Ame...	\$235,000.00	11/16/2016	Closed Won	AUser

- Select a list view from the dropdown menu. Pin a list with to set it as your default (1).
- Edit, delete, or create a list view using the List View Controls menu (2).
- Create records directly from a list view (3).
- View a list in different ways. Visualize list view data using charts with and refine which records are displayed using filters with (4).
- Depending on the object, you can switch between the standard table view , the Kanban view , tile view , and split view (5).
- Search a list view for the data you need (6).

This screenshot shows the Accounts list view. Numbered callouts point to specific features:

- Accounts dropdown menu.
- List View Controls menu.
- New button.
- Filter icon.
- View selection icons: Standard Table, Kanban, Tile, Split.
- Search bar.

ACCOUNT NAME ↑	BILLING ...	PHONE	TYPE	ACCO...
1 <input type="checkbox"/> Burlington Textiles Corp of America	NC	(336) 222-7000	Customer - Direct	AUser
2 <input type="checkbox"/> Dickenson plc	KS	(785) 241-6200	Customer - Channel	AUser
3 <input type="checkbox"/> Edge Communications	TX	(512) 757-6000	Customer - Direct	AUser

- Edit a field directly from a list view with in the list view header or next to a record detail.
- Edit or delete a record by selecting the dropdown next to it.

Modify and create list views from your record home page with List View Controls . To change and reorder the columns displayed in a list view, select **Select Fields to Display**. Fields correspond to columns in the final list view.

This screenshot shows the 'Select Fields to Display' dialog box. It has two main sections: 'Available Fields' and 'Visible Fields'.

**Available Fields:**

- Account Site
- Closed
- Created By Alias
- Created Date
- Current Generator(s)
- Delivery/Installation St...
- Expected Revenue

**Visible Fields:**

- Opportunity Name
- Account Name
- Amount
- Close Date
- Stage
- Opportunity Owner Alias

Numbered callouts indicate the flow of selecting fields:

- Move from Available Fields to Visible Fields.
- Move from Visible Fields back to Available Fields.

Buttons at the bottom: Cancel and Save.

- Add fields to your list view (1).
- Reorder the columns in your list view (2). Columns appear from left to right in the order shown in Visible Fields.

### Improve List View Performance

Develop a list view maintenance strategy and speed up your list views by optimizing their filters.

#### Default List View Filters

See the default list views and filters for commonly used objects.

## Improve List View Performance

Develop a list view maintenance strategy and speed up your list views by optimizing their filters.

To make sure that performance doesn't degrade over time, develop a strategy and governance process on how to manage your Salesforce org's list views. Ensure that these processes are easily repeatable.

- Segment your users into groups with specific analytics requirements and use cases.
- Use a centralized group to manage your org's analytical needs.
- Use a feedback process that allows the centralized group to create and manage new list views.
- Train your users on your overall management strategy.
- To manage your data growth, develop an archival process.
- Use a representative test group to simulate list view usage in production.

A list view's filters can have a significant impact on how it performs. Make your filters as specific as possible. The number of records in your org and the number of records a user has access to can also affect performance. If your list view returns over 2,000 records, use a report instead. List view results are truncated at 2,000 records, so a filter set that returns over 2,000 records spends extra time querying records it can't display. To improve your list view's performance and reduce the number of records returned in your queries, consider these tips.

- Use the EQUALS operator instead of the CONTAINS operator.
- Use the AND statement instead of the OR statement.
- Use start date, end date, and relative date filters.
- Limit the scope of the filters to an individual or their team.
- Limit record access to only the necessary users and profiles.
- Reduce the number of fields displayed.

#### SEE ALSO:

[Improve Speed and Performance in Lightning Experience](#)

## Default List View Filters

See the default list views and filters for commonly used objects.

 **Note:** The Recently Viewed list view is the default pinned list for all objects.

## EDITIONS

Available in: Lightning Experience

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

## Accounts

**All Accounts**

Filter by Owner: All accounts

**My Accounts**

Filter by Owner: My accounts

**New Last Week**

Filter by Owner: All accounts

Created Date: equals LAST WEEK

**New This Week**

Filter by Owner: All accounts

Created Date: equals THIS WEEK

**Platinum and Gold SLA Customers**

Filter by Owner: All accounts

**Recently Viewed**

n/a

**Recently Viewed Accounts**

Filter by Owner: Recently Viewed

## Campaigns

**All Active Campaigns**

Filter by Owner: All campaigns

Active: equals True

**My Active Campaigns**

Filter by Owner: My campaigns

Active: equals True

**Recently Viewed**

n/a

## Cases

**All Closed Cases**

Filter by Owner: All cases

Closed: equals True

**All Open Cases**

Filter by Owner: All cases

Closed: equals False

**My Cases**

Filter by Owner: My Cases

**My Open Cases**

Filter by Owner: My cases

Closed: equals False

**Recently Viewed**

n/a

**Recently Viewed Cases**

Filter by Owner: Recently Viewed

Contacts

**All Contacts**

Filter by Owner: All contacts

**Birthdays This Month**

Filter by Owner: All contacts

Birthdate: equals THIS MONTH

**My Contacts**

Filter by Owner: My contacts

**New Last Week**

Filter by Owner: All contacts

Created Date: equals LAST WEEK

**New This Week**

Filter by Owner: All contacts

Created Date: equals THIS WEEK

**Recently Viewed**

n/a

**Recently Viewed Contacts**

Filter by Owner: Recently Viewed

Leads

**All Open Leads**

Filter by Owner: All leads

Lead Status: does not contain closed

**My Unread Leads**

Filter by Owner: My leads

Unread By Owner: equals True

**Recently Viewed**

n/a

**Recently Viewed Contacts**

Filter by Owner: Recently Viewed

**Today's Leads**

Filter by Owner: All leads

Created Date: equals TODAY

**View - Custom 1**

Filter by Owner: All leads

**View - Custom 2**

Filter by Owner: All leads

## Opportunities

**All Opportunities**

Filter by Owner: All opportunities

**Closing Next Month**

Filter by Owner: All opportunities

Closed: equals False

Close Date: equals NEXT MONTH

**Closing This Month**

Filter by Owner: All opportunities

Closed: equals False

Close Date: equals THIS MONTH

**My Opportunities**

Filter by Owner: My opportunities

**New Last Week**

Filter by Owner: All opportunities

Created Date: equals LAST WEEK

**New This Week**

Filter by Owner: All opportunities

Created Date: equals THIS WEEK

**Opportunity Pipeline**

Filter by Owner: My opportunities

Close Date: greater or equal LAST 3 MONTHS

**Private**

Filter by Owner: All opportunities

Private: equals True

**Recently Viewed**

n/a

**Recently Viewed Accounts**

Filter by Owner: Recently Viewed

**Won**

Filter by Owner: All opportunities

Closed: equals True

Won: equals True

## Pin List Views in Lightning Experience

Change an object's default list view with a pinned list. An object's pinned list loads as its default list view. The default pinned list for all objects is the Recently Viewed list.



**Note:** These steps work in Lightning Experience. If you see the App Launcher icon (⋮) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.

1. To pin a list view, click . When you select that object, the pinned list view loads as the default list view.

### EDITIONS

Available in: Lightning Experience

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

OPPORTUNITY NAME	ACCOUNT NAME	AMOUNT	CLOSE DATE	STAGE	OBJECT
Burlington Textiles Weaving Plant Generator	Burlington Textiles Corp of America	\$235,000.00	3/21/2016	Closed Won	AUser
Dickenson Mobile Generators	Dickenson plc	\$15,000.00	3/21/2016	Qualification	AUser
Edge Emergency Generator	Edge Communications	\$75,000.00	3/21/2016	Closed Won	AUser
Edge Emergency Generator	Edge Communications	\$35,000.00	3/21/2016	Id. Decision Makers	AUser
Edge Installation	Edge Communications	\$50,000.00	3/21/2016	Closed Won	AUser
Edge Portable Generators	Edge Communications	\$75,000.00	4/19/2018	Proposal/Price Quote	AUser
Edge SLA	Edge Communications	\$60,000.00	3/21/2016	Closed Won	AUser
Edge Standby Generators	Edge Communications	\$50,000.00	4/4/2018	Negotiation/Review	AUser

A icon indicates a pinned list. To pin a different list, select a different list view and pin it instead.



**Note:** Pinned lists are per user and don't sync between browsers.

When creating record list views in Experience Cloud sites using Experience Builder, picking a default list view value other than Default overrides the user's pinned list. To let users set their own pinned lists, leave the list view as Default. Otherwise, users see whatever list view was set as the default, even if they have a pinned list.

If you clear your browser's cache, the pin list returns to the default view.

## Search List Views in Lightning Experience

You can search for records in a list view using the list view search box. Click in the search box or use the keyboard shortcut g+f and enter your query. The list view search looks at all searchable fields, even if the corresponding columns aren't shown in the list view.

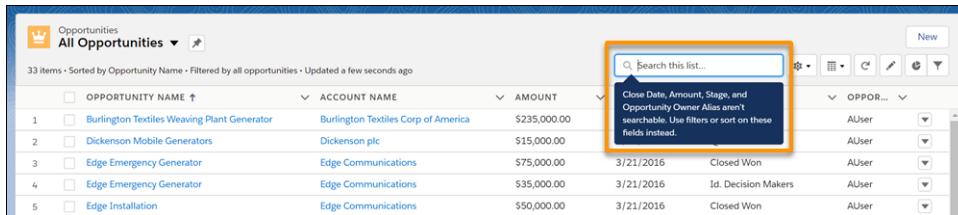
When you search a list view, only the first 2,000 records in the list are searched. If you can't find your record, try a more specific search or modify your filters or sorting. For example, your accounts list view contains 8,000 records. You search for an account that starts with Z, but that account isn't in the search results. To find the account you want, sort the Account Name field from Z to A so that the account beginning with Z falls in the first 2,000 records listed. You can also add filters to make the list view more specific.

When you search a list view, spell correction is applied to your search terms. To disable spell correction on a term, surround the term with quotation marks. For example, spell correction causes searches for the word Parish to also return results for Paris. To get results for only Parish, search for Parish.

 **Note:** You can add the search bar to the List View component in the Lightning App Builder.

Some restrictions apply when you search a list view:

- Depending on the object your viewing, certain fields aren't searchable, but you can still filter or sort on those fields. Want to see which fields aren't searchable? Place your cursor in the list view search box and a tool tip shows you the list of unsearchable fields. If you aren't getting the search results that you expect, check the tooltip.



The screenshot shows a list view of Opportunities. A tooltip is displayed over the search bar, stating: "Close Date, Amount, Stage, and Opportunity Owner Alias aren't searchable. Use filters or sort on these fields instead." The tooltip has a yellow border and a small arrow pointing towards the search bar.

	OPPORTUNITY NAME	ACCOUNT NAME	AMOUNT	CLOSE DATE	STAGE	OWNER ALIAS
1	Burlington Textiles Weaving Plant Generator	Burlington Textiles Corp of America	\$235,000.00	3/21/2016	Closed Won	ALUser
2	Dickenson Mobile Generators	Dickenson plc	\$15,000.00	3/21/2016	Id. Decision Makers	ALUser
3	Edge Emergency Generator	Edge Communications	\$75,000.00	3/21/2016	Closed Won	ALUser
4	Edge Emergency Generator	Edge Communications	\$35,000.00	3/21/2016	Closed Won	ALUser
5	Edge Installation	Edge Communications	\$50,000.00	3/21/2016	Closed Won	ALUser

- Generally, formula fields and lookup fields aren't searchable.
- Search doesn't find partial strings in a field label unless the string is at the beginning of the label or the string follows a space. This rule applies to strings of words and numbers. For example:
  - A search for the word commun finds Edge Communications, but a search for the string dge or cation doesn't.
  - A search for the number 12 finds Leads Report 12 but not Leads Report-12.
- Your admin can configure translated values for data labels and picklist values using Translation Workbench. If your org uses a non-English UI, search the list view using the English term. Don't use the non-English term. For example, your admin configures the English word low to be translated to the French word basse. In the French UI, the list view shows basse, but if you search on basse, no records are found. To find the record, search on low.
- Searching a recently viewed list doesn't show results in the recently viewed order.

### SEE ALSO:

[I Know a Record Exists—Why Can't I Find It?](#)

[How Does Search Break Up Information?](#)

### EDITIONS

Available in: Lightning Experience

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

### USER PERMISSIONS

To search a list view:

- Read on the records in the list

## Sort List Views

Lots of objects let you view records in lists, also called “list views”. You can sort the records by one of the field columns. For example, you can sort the All Accounts list view by the **Account Name** field column, **Billing State/Province** field column, and others. You can also sort custom list views. Sorting is alphanumeric.

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

### Editions

Available in: both Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

Available in: **All** editions

### User Permissions

To sort a list view:

- Read on the records in the list

## Print List Views

To print standard and custom list views, ask your admin to enable list view printing.

1. In Lightning Experience, click **Printable View** from a list. In Salesforce Classic, click the print icon  at the top of the list view you want to print.

You can print list views for these objects:

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

Printable View isn’t available for Events, Tasks, the Recently Viewed lists, or for related lists. Search results or related list quick filters aren’t used when generating the printable view.



**Note:** If the Printable View button doesn’t appear on a supported object, try disabling and re-enabling printable view. From Setup, select **Object Manager**, then select the object. In the left pane, select **Search Layouts for Salesforce Classic**. The printable view button is in the List View layout.

### Editions

Available in: Salesforce Classic and Lightning Experience

Available in: **All** editions

### User Permissions

To print a list view:

- Read on the records in the list

## Customize Your Data View

Create customized list views to display records that meet your own criteria. You determine which records display by setting filters. All records that meet your filter criteria appear in your list view.

### [Create a List View](#)

Create a list view to view specific records for an object.

### [Create a List View Chart in Lightning Experience](#)

Create a chart to visualize list view data. There are three types of charts: vertical bar, horizontal bar, and donut. For any list view chart, you can change the data display to another type, if desired. When you create a list view chart for an object, such as Opportunities or Leads, the chart is associated with the object. The chart is available for any list view that you have permission to see for that object, except the Recently Viewed list.

### [Edit a List View Chart in Lightning Experience](#)

Refine or update your custom list view charts to make sure that you're seeing the most meaningful data visualizations. There are three types of charts: vertical bar, horizontal bar, and donut. For any list view chart, you can change the data display to another type, if desired.

### [Edit List View Filters](#)

Refine or update your list views to make sure that you're seeing the most relevant records. To change which records display in a list view, edit the list view filters.

### [Delete a List View](#)

Get rid of list views you don't need anymore.

## SEE ALSO:

[Trailhead: Work with List Views](#)

## Create a List View

Create a list view to view specific records for an object.

### [Create a Custom List View in Salesforce Classic](#)

Create a list view to see a specific set of contacts, documents, or other object records. For example, create a list view of accounts in your state, leads with a specific lead source, or opportunities above a particular amount. You can also create views of contacts, leads, users, or cases to use for mass email recipient lists.

### [Create or Clone a List View in Lightning Experience](#)

Create a list view to see an infinitely scrollable list of records that meet your filter criteria.

## Create a Custom List View in Salesforce Classic

Create a list view to see a specific set of contacts, documents, or other object records. For example, create a list view of accounts in your state, leads with a specific lead source, or opportunities above a particular amount. You can also create views of contacts, leads, users, or cases to use for mass email recipient lists.



**Note:** These steps work in Salesforce Classic. If you see the App Launcher icon (⋮) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.

1. Click **Create New View** at the top of any list page or in the Views section of any tab home page.



**Note:** If you don't see **Create New View**, you don't have the "Create and Customize List Views" permission. Contact your Salesforce admin to request it.

2. Enter the view name. The view name is shown in the views dropdown list.

The screenshot shows a dialog box titled "Step 1. Enter View Name". It contains two input fields: "View Name" with the value "MyAccountView" and "View Unique Name" with the value "MyAccountView". There is also a small "i" icon next to the unique name field.

3. Enter a unique view name. The API and managed packages use this unique name.

The unique name must be unused in both public and private list views. Private list views are only searchable if you have access to them.

4. Specify your filter criteria. If you want more filter fields, click **Add Filter Logic...** and then **Add Row**. You can have up to 10 fields in your filter criteria.

Usually, you filter by additional fields. For example, this image shows a list view that displays only active accounts in the org whose Billing City is equal to "San Francisco."

The screenshot shows a dialog box titled "Step 2. Specify Filter Criteria". It has a "Filter By Owner" section with "All Accounts" selected. Below it is a "Filter By Additional Fields (Optional)" section. The filter criteria are as follows:

Field	Operator	Value	Logic
Billing City	equals	San Francisco	AND
Active	equals	Yes	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

At the bottom, there is a link "Add Filter Logic..."



**Note:** Entering illogical filter criteria, such as `someDate <= null`, can cause unexpected behavior in a list view. When you use a list view in a more strict context, such as with a Visualforce standard list controller, illogical filter criteria can cause errors.

5. Select the fields you want to display on the list view.

## Editions

Available in: Salesforce Classic ([not available in all orgs](#) on page 9)

Available in: **All** Editions

## User Permissions

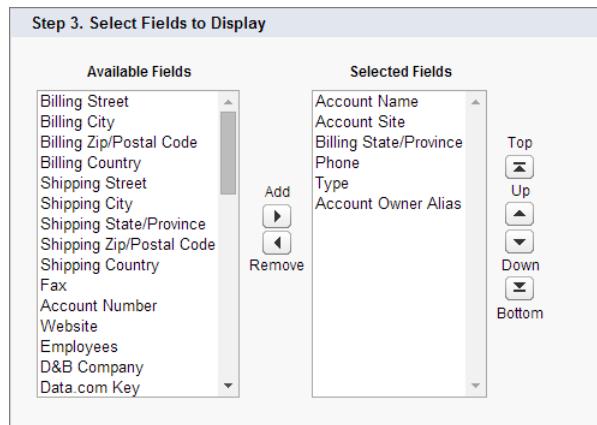
To create custom list views:

- Read on the type of record included in the list AND Create and Customize List Views

To create, edit, or delete public list views:

- Manage Public List Views

The default fields are automatically selected. From the fields that are in your page layout, you can display up to 15 different fields in your view.



When you select a long text area field, the list view displays up to 255 characters.

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

-  **Example:** Here's what your list view can look like when you're done:

New Account						
Action	Account Name	Account Site	Billing State/Prov...	Phone	Type	Account Owner Alias
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	Acme Inc.	San Francisco	California	(415) 555-4585	Customer - Direct	AUser
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	Cake LLC	San Francisco	California	(415) 555-1145	Customer - Direct	AUser
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	Generic Co.	San Francisco	California	(415) 555-6363	Technology Partner	AUser

You can change the number of records displayed per page using the dropdown on the lower-left corner of the list view.

As a Salesforce admin or a user with the “Manage Public List View” permission, you can hide the list view, so only you can see it. Click **Edit** next to the list view name. Select **Visible to certain groups of users**. Choose the type of group or role from the dropdown list, select the group or role from the list, then click **Add**.

Enterprise, Unlimited, Performance, and Developer Edition users can give access to a public group or role, including all users below that role.

 **Note:** List views are visible to your Experience Cloud site users with Customer Community Plus, Partner Community, Lightning Platform Starter, and Lightning Platform Plus licenses, if the **Visible to all users** setting is enabled for views of objects in site user profiles. To make list views visible only to your Salesforce users, select **Visible to certain groups of users**. Then share the view with the All Internal Users group or a selected set of internal groups and roles.

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

When you enable digital experiences, list views shared with the Roles and Internal Subordinates sharing group are automatically shared with the Roles, Internal, and Portal Subordinates group instead. If you don't want external users to access these list views, update your sharing settings.

## Create or Clone a List View in Lightning Experience

Create a list view to see an infinitely scrollable list of records that meet your filter criteria.

 **Note:** These steps work in Lightning Experience. If you see the App Launcher icon (⋮) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.

Actions you can take for list views are available in the List View Controls menu ⚙.

1. Under List View Controls, select **New**. Or, click **Clone** to make a copy of the current list view.
2. Give your list a name and unique API name.
3. Choose who can see this list view: just you, or all users, including Partner and Customer Portal users.
4. Click **Save**. The Filters panel appears.
5. Click **Show me**, then select **All objects** or **My Objects**.
6. Click **Done**.
7. Add and set filters to view only the records that meet your criteria. You have different options depending on the field you want to filter and the operator you choose.
  - a. Click **Add Filter**.
  - b. Select the field to filter, an operator, and a value.

Depending on the type of field you selected, you can either select a value or enter one of your own. Filters support values only between the minimum and maximum for a signed 32-bit integer, or between -2,147,483,648 and 2,147,483,648. A value outside of this range disables that filter.

- c. Click **Done**.

 **Note:** Entering illogical filter criteria, such as `someDate <= null`, can cause unexpected behavior in a list view. When you use a list view in a more strict context, such as with a Visualforce standard list controller, illogical filter criteria can cause errors.

8. To add logic that further refines which records appear in your list view, click **Filter Logic**. To reference filters in your logic statement, use the number assigned to each filter.

 **Important:** Include every filter number in your logic statement. You can't have filters that aren't referenced in the logic statement.

Operand	Definition
<b>AND</b>	Finds records that match both values. <b>1 AND 2</b>
<b>OR</b>	Finds records that match either value. <b>1 OR 2</b>
<b>NOT</b>	Finds records that exclude values. For example, Filter 1 is <b>Industry equals Biotechnology</b> . You set filter logic as <b>NOT 1</b> . Your report returns records that don't have Biotechnology as the Industry value.

## EDITIONS

Available in: Lightning Experience

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

## USER PERMISSIONS

To create list views:

- Read on the type of record included in the list AND Create and Customize List Views

To create, edit, or delete public list views:

- Manage Public List Views

Let's say a rep wants to see all opportunities created in July 2015 or later, that are either in late stages of negotiation or have high probability to close, or both. Here are the filters.

- a. Last Modified Date greater or equal 7/1/2015
- b. Stage contains Proposal/Price Quote, Negotiation/Review
- c. Probability greater or equal 50

Then the rep adds the logic statement: `1 AND (2 OR 3)`.



**Note:** NOT doesn't work with parenthetical expressions. For example, the expression `1 AND NOT (2 AND 3)` evaluates as `1 AND (NOT 2 AND 3)`. In the filter results, no records are returned when you'd expect to see some records.

9. Click **Save**. The view appears in the list view drop-down list so you can access it later. Pin a list view if you want it to load as the default list for that object.
10. Optionally, choose and order the columns in your list view.
  - a. From the List View Controls menu, **Select Fields to Display**.
  - b. Use the arrows to add, remove, and reorder your visible fields.
  - c. Click **Save**.

In list views, you see only the data that you have access to. You see records that you own or have read or write access to, and records shared with you. List views also include records owned by or shared with users in roles below you in the role hierarchy. You can see only the fields that are visible according to your page layout and field-level security settings.

To share a list view, select **Sharing Settings** from the **List View Controls** menu. From there, you can search through the roles in your org to find the groups you want to share your list view with.

OPPORTUNITY NAME	ACCOUNT NAME	AMOUNT	CLOSE DATE
1 Burlington Textiles Weaving Plant Generator	Burlington Textiles Corp of America	\$235,000.00	4/11/2016
2 Dickenson Mobile Generators	Dickenson plc	\$15,000.00	4/11/2016
3 Edge Emergency Generator	Edge Communications	\$75,000.00	4/11/2016
4 Edge Emergency Generator	Edge Communications	\$35,000.00	4/11/2016
5 Edge Installation	Edge Communications	\$50,000.00	4/11/2016
6 Edge SLA	Edge Communications	\$60,000.00	4/11/2016
7 Express Logistics Portable Truck Generators	Express Logistics and Transport	\$80,000.00	4/11/2016
8 Express Logistics SLA	Express Logistics and Transport	\$120,000.00	4/11/2016
9 Express Logistics Standby Generator	Express Logistics and Transport	\$220,000.00	4/11/2016
10 GenePoint Lab Generators	GenePoint	\$60,000.00	4/11/2016
11 GenePoint SLA	GenePoint	\$30,000.00	4/11/2016

When you enable digital experiences, list views shared with the Roles and Internal Subordinates sharing group are automatically shared with the Roles, Internal, and Portal Subordinates group instead. If you don't want external users to access these list views, update your sharing settings.

#### SEE ALSO:

[Filter Reports by Values](#)

## Create a List View Chart in Lightning Experience

Create a chart to visualize list view data. There are three types of charts: vertical bar, horizontal bar, and donut. For any list view chart, you can change the data display to another type, if desired. When you create a list view chart for an object, such as Opportunities or Leads, the chart is associated with the object. The chart is available for any list view that you have permission to see for that object, except the Recently Viewed list.

-  **Note:** These steps work in Lightning Experience. If you see the App Launcher icon (⋮) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.

1. On an object home page, select a list view with data you want to visualize.
2. Click .
3. In the Charts panel that appears, click .
4. Select **New Chart**.  
A dialog box appears.
5. Enter a chart name.
6. Select a chart type: vertical bar, horizontal bar, or donut.
7. Select the aggregate type, aggregate field, and grouping field.

The aggregate type specifies how the field data is calculated: by sum, count, or average. The aggregate field specifies the type of data to calculate. The grouping field labels the chart segments.

8. To view your chart, click **Save**.

Chart data isn't automatically refreshed when you change list views. To see the latest chart data, manually refresh the list view with .

-  **Example:** Your sales team wants to compare accounts by number of employees to focus prospecting efforts on large corporations. One of the reps creates a horizontal bar chart by selecting **Sum** as the aggregate type, **Employees** as the aggregate field, and **Account Name** as the grouping field. The chart shows the number of employees at each account by account name.

## EDITIONS

Available in: Lightning Experience

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

## USER PERMISSIONS

To create list view charts:

- Read on the type of record included in the list AND Create and Customize List Views

To see list view charts:

- Read on the type of record included in the list

## Edit a List View Chart in Lightning Experience

Refine or update your custom list view charts to make sure that you're seeing the most meaningful data visualizations. There are three types of charts: vertical bar, horizontal bar, and donut. For any list view chart, you can change the data display to another type, if desired.

 **Note:** These steps work in Lightning Experience. If you see the App Launcher icon (⋮) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.

1. On an object home page, click .
  2. In the Charts panel that appears, select the name of one of your custom charts.
  3. Click .
  4. Select **Edit Chart**.
- A dialog box appears.
5. Make your changes to the chart name, chart type, aggregate type, aggregate field, or grouping field.
- The aggregate type specifies how the field data is calculated: by sum, count, or average. The aggregate field specifies the type of data to calculate. The grouping field labels the chart segments.
6. To view your edited chart, click **Save**.

 **Note:** You can't edit standard or preconfigured charts. You can only edit charts that you create. You can't delete list view charts.

## Edit List View Filters

Refine or update your list views to make sure that you're seeing the most relevant records. To change which records display in a list view, edit the list view filters.

### [Edit List View Filters in Salesforce Classic](#)

To change a list view's filters, edit the list.

### [Edit List View Filters in Lightning Experience](#)

Edit filters on a list view from List View Controls, or click  to access the Filters panel.

## EDITIONS

Available in: Lightning Experience

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

## USER PERMISSIONS

To edit list view charts:

- Read on the type of record included in the list AND Create and Customize List Views

## Edit List View Filters in Salesforce Classic

To change a list view's filters, edit the list.

-  **Note:** These steps work in Salesforce Classic. If you see the App Launcher icon (⋮) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.

1. Click **Edit** next to the list view name.

If you see **Clone** instead of **Edit**, you don't have permission to edit this list view. Use **Clone** to clone the list view, save it under a different name and then edit the cloned list view.

2. In **Specify Filter Criteria**, change your **Filter By Owner** selection, if desired. Add or change the **Field**, **Operator**, or **Value** selections in **Filter By Additional Fields**.
3. Click **Save** to apply your edited filters to the list view.

All users with access to the list view see the results of your saved changes.

### Editions

Available in: **All** Editions

### User Permissions

To edit list views:

- Read on the type of record included in the list  
AND Create and Customize List Views

To create, edit, or delete public list views:

- Read on the type of record included in the list  
AND Create and Customize List Views  
AND Manage Public List Views

## Edit List View Filters in Lightning Experience

Edit filters on a list view from List View Controls, or click ⏪ to access the Filters panel.

-  **Important:** These steps work in Lightning Experience. If you see the App Launcher icon (⋮) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.

Actions you can take for list views are available in the List View Controls menu ⚙️. Some list views have predefined filter scopes and can't be filtered. For example, the SOQL query for a generic Team list view or the Recently Viewed list view doesn't allow further filtering of the query results.

1. From List View Controls, select **Edit List Filters**. Alternatively, click ⏪ .

 **Note:** If you see **Clone** in the controls instead of **Edit List Filters**, you don't have permission to edit this list view. Select **Clone** to clone a list view, save it under a different name, and select sharing settings. Then edit the filters for the cloned list view, if needed.

2. Edit, remove, or add filters to view only the records that meet your filter criteria. You have different options depending on the field you want to filter and the operator you choose.
3. From the Filter by dropdown menu, select an operator. For example, choose **equals**, **starts with**, or **excludes**.

4. For Value, make a selection or enter a value, then click **Done**.

Filters support values only between the minimum and maximum for a signed 32-bit integer, or between -2,147,483,648 and 2,147,483,648. A value outside of this range disables that filter.

5. Adjust your filter logic if needed. The filter logic statement can't reference a filter number that doesn't exist.

### Editions

Available in: Lightning Experience

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

### User Permissions

To edit list views:

- Read on the type of record included in the list  
AND Create and Customize List Views

To create, edit, or delete public list views:

- Read on the type of record included in the list  
AND Create and Customize List Views  
AND Manage Public List Views



**Note:** NOT doesn't work with parenthetical expressions. For example, the expression `1 AND NOT (2 AND 3)` evaluates as `1 AND (NOT 2 AND 3)`. In the filter results, no records are returned when you'd expect to see some records.

6. To apply the edited filters and update the current list view, click **Save**.

If you want to create a list view based on the filter changes you've made, click **Save As** instead.

Anyone with access to the list sees the results of your saved changes.



**Example:** You want to display a set of opportunities on a board rather than in a grid, but the list view includes records with different record types. The Opportunities board can only display list views with records of a single record type. To make the view displayable on a board, edit the filters on your list view. On the Filters panel, select **Add Filter**. Choose **Opportunity Record Type** and the **equals** operator, then input the value of the record type you want. Your edited list view can now be displayed on the board.

#### SEE ALSO:

[Filter Operators Reference](#)

[Relative Date Filter Reference](#)

## Delete a List View

Get rid of list views you don't need anymore.

### [Delete a List View in Salesforce Classic](#)

You can delete a custom view when you no longer need it.

### [Delete a List View in Lightning Experience](#)

You can delete a list view when you no longer need it.

### Delete a List View in Salesforce Classic

You can delete a custom view when you no longer need it.



**Note:** These steps work in Salesforce Classic. If you see the App Launcher icon (⋮) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.

1. Select a custom list view.
2. Click **Edit**.
3. Click **Delete**.

#### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#) on page 9)

Available in: **All** Editions

#### USER PERMISSIONS

To delete public list views

- Manage Public List Views

## Delete a List View in Lightning Experience

You can delete a list view when you no longer need it.

 **Note:** These steps work in Lightning Experience. If you see the App Launcher icon (⋮) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.

1. Select a list view.
2. Click ⚙ to access List View Controls.
3. Select **Delete**.

### Editions

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

### User Permissions

To delete public list views

- Manage Public List Views

## Work with Related Lists

Records include details and links to other related records. View and perform actions on these related records with related lists.

### Work with Related Lists on Records in Salesforce Classic

On Salesforce records, links and details for associated records are grouped within related lists. Some related lists let you perform common tasks for the related object, like create records or attach files.

### Work with Related Lists on Records in Lightning Experience

Records in Salesforce include details and links to other related records. Some related lists let you perform common tasks for the related object, like create records, or attach files.

## Work with Related Lists on Records in Salesforce Classic

On Salesforce records, links and details for associated records are grouped within related lists. Some related lists let you perform common tasks for the related object, like create records or attach files.

For example, the Lead record offers a number of related lists, including Open Activities, which lists open activities and key activity fields. On this related list, you can create a new task, a new activity, or a new meeting request. When a task related to the lead is closed, a link to that task appears in the Lead record's Activity History related list, which displays the same key fields as Open Activities, and offers other common tasks.

### Editions

Available in: Salesforce Classic (not available in all orgs on page 9)

Available in: All editions

The screenshot shows the Lead Detail page for 'Denise Arlen'. At the top right, there's a 'Customize Page' button with a red box around it (labeled 3). Below the header, there's a row of social sharing icons. Under the lead's name, there are links for 'Approval History', 'Open Activities', 'Activity History', 'HTML Email Status', and 'Campaign History' (labeled 2). A 'Lead Detail' section follows, containing fields for Lead Owner (Norah Logan), Name (Denise Arlen), Company (GrowthCo, Inc.), Title (Buyer), Lead Status (Open), Phone (+1.415.901.7000), Email (darlen@growthco.com), and Rating. Below this is a large red box enclosing three related lists: 'Approval History' (with a red box around the 'Submit for Approval' button labeled 1), 'Open Activities' (with buttons for 'New Task', 'New Event', and 'New Meeting Request'), and 'Activity History' (with columns for Action, Subject, Task, Due Date, Assigned To, and Last Modified Date/Time, showing entries for 'Meet and Greet + Demo' and 'Send quote').

It's easy to arrange and access related lists. Here's how.

- Scroll the page to find the related list you need (1).
- If related list hover links (2) are enabled in your organization, click a link to view the list in a pop-up.
- Click **Customize Page** (3) to select and arrange the available related lists you want to see.

The related lists you can view and use depend on:

- Your user permissions
- User interface and page layout customizations made by your Salesforce administrator
- Personal customizations you can make

#### SEE ALSO:

[Customize Related Lists](#)

### Work with Related Lists on Records in Lightning Experience

Records in Salesforce include details and links to other related records. Some related lists let you perform common tasks for the related object, like create records, or attach files.

When related information is located in the main region on a record, cards display on the Related tab (1). When related lists are located in the narrow sidebar region on a record, cards are grouped on the sidebar (2). Where related list cards appear on the page is highly configurable by object and may be different for your org.

#### EDITIONS

Available in: Lightning Experience

Available in: All editions

The screenshot displays the Salesforce interface for managing accounts. At the top, the account record for "GenePoint" is shown with basic information like Type (Customer - Channel), Phone (650) 867-3450, Website (www.genepoint.com), Account Owner (Admin User), Account Site, and Industry (Biotechnology). Below this, the "Related" section contains three cards:

- Contacts:** Shows one contact named Edna Frank with the title VP, Technology, email efrank@genepoint.com, and phone (650) 867-3450. A yellow circle labeled "1" is positioned above this card.
- Opportunities:** Shows three opportunities: GenePoint Standby Generator (Closed Won, \$85,000.00), GenePoint Lab Generators (Id. Decision Makers, \$60,000.00), and GenePoint SLA (Closed Won, \$30,000.00). A yellow circle labeled "2" is positioned above this card.
- Activity & Chatter:** Displays a list of upcoming tasks and activities, including a call with Edna Frank on Oct 31, 2018, and an email with her on Oct 17, 2018. It also shows past activities, such as a meeting with her on Oct 10, 2018.

Below the related list cards, the main page area shows the "Prospecting" stage of an opportunity record for "Pyramid Emergency Generators" owned by "Admin User". The opportunity details include an amount of \$100,000.00, expected revenue of \$10,000.00, close date of 3/21/2016, and a next step of "Prospecting". Other fields include lead source (Phone Inquiry), type (Lead), and various tracking numbers.

On the right side of the opportunity record, there are four related list cards:

- Products (0):** Shows Stage History (1) with details: Stage Prospecting, Amount \$100,000.00, Probability (%) 10%, Expected Revenue \$10,000.00, Close Date 3/15/2013, Last Modified By Admin User, and Last Modified 4/10/2018 5:37 PM.
- Notes & Attachments (0):** Includes a file upload section with the placeholder "Upload Files" or drop files.
- Contact Roles (0):** Shows zero contact roles assigned to this opportunity.

- Related list buttons (1) are located in the upper-right corner of each related list card. If there are multiple buttons, use the pull-down menu to access them.
- Each item in a related list card includes a link (2) that opens the related record.
- Record-specific actions (3) are located in the pull-down menu next to each related record.
- When related list cards are in a wide region on the page, each card displays up to six records. In a narrow region, related list cards display up to three records. To see the full list of related records, select **View All** (4).

**Opportunities (4)**

Edge SLA      2

Stage: Won  
Amount: \$60,000.00  
Close Date: 3/21/2016

Edge Emergency Generator

Stage: Id. Decision Makers  
Amount: \$35,000.00  
Close Date: 3/21/2016

Edge Emergency Generator

Stage: Closed Won  
Amount: \$75,000.00  
Close Date: 3/21/2016

Edge Installation

Stage: Closed Won  
Amount: \$50,000.00  
Close Date: 3/21/2016

**Opportunities**

4 items • Sorted by Close Date • Updated a few seconds ago

OPPORTUNITY NAME	STAGE	AMOUNT	CLOSE DATE
1 Edge SLA	Closed Won	\$60,000.00	3/21/2016
2 Edge Emergency Generator	Closed Won	\$75,000.00	3/21/2016
3 Edge Emergency Generator	Id. Decision Makers	\$35,000.00	3/21/2016
4 Edge Installation	Closed Won	\$50,000.00	3/21/2016

Selecting **View All** opens the full related list. From there, you can add quick filters to the related list with **▼**. Related list quick filters act similarly to list view filters except they aren't saved, persist only throughout your current session, and can't be shared.

**Note:** Quick filters aren't supported in all related lists. Unsupported lists include, but aren't limited to, the Activity History, Open Activities, Assets, File, Other Related People, and Attachments related lists. Quick filters also aren't available for formula fields. For Enterprise Territory Management users, quick filters are available only for Accounts and only in the Assigned Territories and Users in Assigned Territories related lists.

Account: Edge Communications

Opportunities

6 items • Sorted by Close Date • Updated 2 minutes ago

OPPORTUNITY NAME	STAGE	AMOUNT	CLOSE DATE
1 Edge Portable Generators	Proposal/Price Quote	\$75,000.00	4/19/2018
2 Edge Standby Generators	Negotiation/Review	\$50,000.00	4/4/2018
3 Edge SLA	Closed Won	\$60,000.00	3/21/2016
4 Edge Emergency Generator	Closed Won	\$75,000.00	3/21/2016
5 Edge Emergency Generator	Id. Decision Makers	\$35,000.00	3/21/2016
6 Edge Installation	Closed Won	\$50,000.00	3/21/2016

**Filters**

- Opportunity Name
- Stage: Prospecting, Qualification, Needs Analysis
- Amount: Min, Max
- Close Date: Start, End

The related lists you can view and use depend on:

- Your user permissions
- User interface and page layout customizations made by your Salesforce administrator
- Personal customizations you can make

 **Note:** A manual page refresh is sometimes required in order for your related lists to show the latest changes. A manual page refresh is needed if:

- You create, update, or delete a related record with an Apex controller.
- You create, update, or delete a related record with a flow.
- Another user creates, updates, or deletes a related record.
- Emails are sent but not showing up in the related list.

#### SEE ALSO:

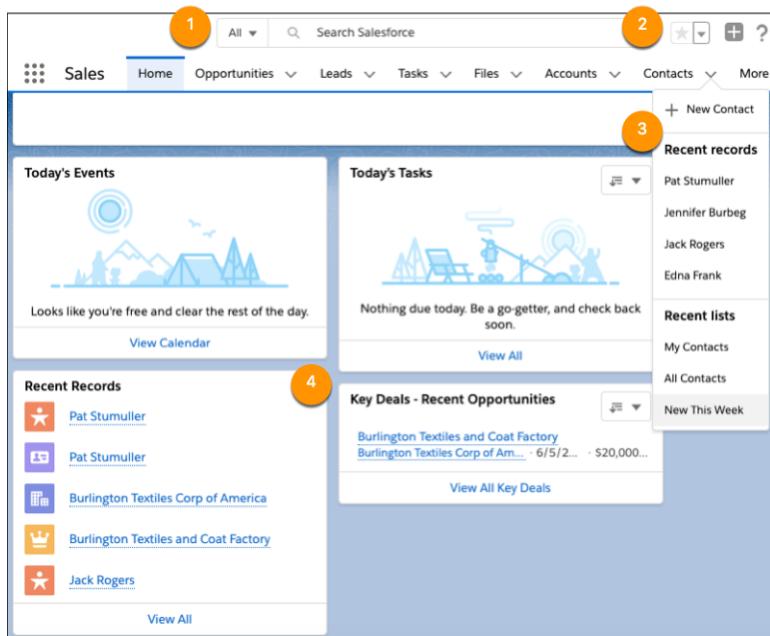
[Customize Related Lists](#)

[Find Your Way Around Related Lists in Lightning Experience](#)

## Open Items You've Recently Viewed

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

### Lightning Experience



### EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

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

- View items you've recently searched for when you click in the search box (1).
- In the header, access your favorite pages by clicking the dropdown beside the star icon (2).
- In the navigation bar, see your recently accessed records for any item by selecting the dropdown next to the item name (3).

- From the home page, click the name of a recent item in the Recent Records component (4).

## Salesforce Classic



- The Recent Items section of the Salesforce sidebar lists up to 10 items that you've most recently added, edited, or viewed.

To open an item's detail or edit page, click its link. To view more information about an item, hover your mouse over the link. If you don't see any information, your admin didn't enable this feature.

## Use Kanban to Work with Graphical Views of Your Records

Kanban views show records in a graphical way that helps you monitor your work and keep deals moving ahead. Kanban views are available for most objects, with exceptions such as tasks.

### [Set Up a Kanban View](#)

Arrange a kanban view to show a graphical view of records in a list view. Each kanban view is based on a list view, and kanban view settings are applied separately for each list view.

### [Work in a Kanban View](#)

Narrow the records you want to focus on by searching and filtering a kanban view, and view records by record type. Update records by dragging, or edit a card without leaving the kanban view. If your Salesforce admin has set up key fields and guidance, you see them in the details panel. If you're viewing opportunities, alerts help you move deals ahead.

### [Considerations for Using Kanban Views](#)

If you use kanban views, review considerations for using them with certain objects and other features.

### [Considerations and Guidelines for Administering Kanban](#)

If your users work with kanban views, review considerations and guidelines for setup and customization.

## SEE ALSO:

### [Set Up a Kanban View](#)

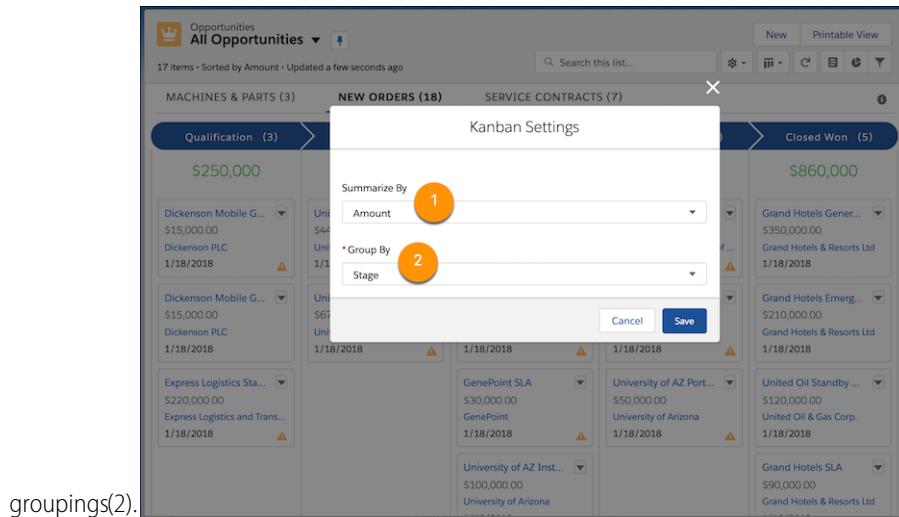
### [Considerations for Using Kanban Views](#)

## Set Up a Kanban View

Arrange a kanban view to show a graphical view of records in a list view. Each kanban view is based on a list view, and kanban view settings are applied separately for each list view.

- In a kanban view, click  , and then select **Kanban Settings**.

Kanban settings control the amount or number total in each column heading (1) and the column



groupings(2).

- Summarize each column by a key number or amount, such as opportunity amount or expected revenue.

In Summarize By, select a numeric or currency field, or omit column summaries by selecting **None**.

- Group your records into columns representing the progress you want to track.

In Group By, select a field such as Stage or Opportunity Owner.

Kanban views don't show records without a value in the selected Group By field.

- Click **Save**.

### SEE ALSO:

[Create or Clone a List View in Lightning Experience](#)

[Considerations for Using Kanban Views](#)

## EDITIONS

Available in: Lightning Experience

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

## USER PERMISSIONS

To create list views:

- Read on the type of record included in the list AND Create and Customize List Views

To create, edit, or delete public list views:

- Manage Public List Views

To edit Kanban settings:

- Edit on the associated list view

## Work in a Kanban View

Narrow the records you want to focus on by searching and filtering a kanban view, and view records by record type. Update records by dragging, or edit a card without leaving the kanban view. If your Salesforce admin has set up key fields and guidance, you see them in the details panel. If you're viewing opportunities, alerts help you move deals ahead.

1. In a list view, click and select **Kanban** .

Toggle between a kanban view and the corresponding list view any time.

2. Zero in on the records you want to track.

- If your records are assigned to two or more record types, click to view each type.
- To narrow the view by keyword, search the list.
- To narrow the view by field or record owner, click and set the filters you want.

MACHINES & PARTS (3)	NEW ORDERS (16)	SERVICE CONTRACTS (?)	Proposal (3)	Negotiation (3)	Closed Won (4)
\$250,000 Dickenson Mobile G... \$15,000.00 Dickenson PLC 1/18/2018	\$1,115,000 United Oil Emergenc... \$440,000.00 United Oil & Gas Corp. 1/18/2018	\$155,000 Edge Emergency Ge... \$75,000.00 Edge Communications 1/18/2018	\$555,000 Burlington Textiles W... \$235,000.00 Burlington Textiles Corp of ... 1/18/2018	\$770,000 Grand Hotels Gener... \$350,000.00 Grand Hotels & Resorts Ltd 1/18/2018	
Dickenson Mobile G... \$15,000.00 Dickenson PLC 1/18/2018	United Oil Plant Stan... \$675,000.00 United Oil & Gas Corp. 1/18/2018	Edge Installation \$50,000.00 Edge Communications 1/18/2018	United Oil Installatio... \$270,000.00 United Oil & Gas Corp. 1/18/2018	Grand Hotels Emerg... \$210,000.00 Grand Hotels & Resorts Ltd 1/18/2018	
Express Logistics Sta... \$220,000.00 Express Logistics and Trans... 1/18/2018		GenePoint SLA \$30,000.00 GenePoint 1/18/2018	University of AZ Port... \$50,000.00 University of Arizona 1/18/2018	United Oil Standby ... \$120,000.00 United Oil & Gas Corp. 1/18/2018	
				University of AZ SLA \$90,000.00 University of Arizona	

3. Move a record to the next column by dragging the card.

MACHINES & PARTS (3)	NEW ORDERS (14)	SERVICE CONTRACTS (8)
\$365,000 Dickenson Mobile Generators \$15,000.00 Dickenson PLC 1/18/2020	\$1,115,000 United Oil Emergency Generators \$440,000.00 United Oil & Gas Corp. 1/18/2018	\$155,000 Edge Emergency Generator \$75,000.00 Edge Communications 1/18/2018
Dickenson Mobile Generators \$130,000.00 Dickenson PLC 1/18/2020	United Oil Plant Standby Genera... \$675,000.00 United Oil & Gas Corp. 1/18/2018	Edge Installation \$50,000.00 Edge Communications 1/18/2018
Express Logistics Standby Gener... \$220,000.00 Express Logistics and Transport 1/18/2020		GenePoint SLA \$30,000.00 GenePoint 1/18/2018
		GenePoint SLA \$30,000.00 GenePoint 1/18/2018
		United Oil Standby Generators \$120,000.00 United Oil & Gas Corp. 1/18/2018
		Grand Hotels Generator Installat... \$350,000.00 Grand Hotels & Resorts Ltd 1/18/2018
		Grand Hotels Emergency Genera... \$210,000.00 Grand Hotels & Resorts Ltd 1/18/2018
		United Oil Standby Generators \$120,000.00 United Oil & Gas Corp. 1/18/2018

4. Show or hide the details panel by clicking . You can edit key fields inline, without leaving the kanban view. If your Salesforce admin has configured key fields and guidance for the step, the panel includes that information.

## EDITIONS

Available in: Lightning Experience

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

## USER PERMISSIONS

To create kanban views:

- Read on the type of record included in the view
- AND
- Create and Customize List Views

To create, edit, or delete public list views:

- Manage Public List Views

The screenshot shows a kanban view of opportunities. A specific opportunity card for 'Dickenson Mobile Generators' is selected and expanded into a detailed view modal. The modal displays the following information:

- Account ID:** Dickenson PLC
- Close Date:** 1/18/2020
- Amount:** \$15,000.00
- Key Fields:**
  - Account Name: Dickenson PLC
  - Amount: \$15,000.00
  - Close Date: 1/18/2020
  - Forecast Category: Pipeline
  - Next Step: Send quote by the end of the week
- Guidance for Success:** Qualify the service and confirm budget.

In a kanban view of opportunities, hover over an alert for a tip on moving the deal ahead, such as creating a task.

The screenshot shows a kanban view of opportunities. A tooltip appears over an alert icon on a card for 'Dickenson Mobile Generators'. The tooltip contains the following text:

No open activities.  
Take action to keep this deal moving.

Options listed:

- New Task
- New Event

#### SEE ALSO:

[Considerations for Using Kanban Views](#)

## Considerations for Using Kanban Views

If you use kanban views, review considerations for using them with certain objects and other features.

### All Objects

#### Editing

- If you don't have Edit access to a record, you can't drag its card to a different kanban column.
- In the kanban details panel, you can't change a record's record type or transfer it to a different owner. To edit those fields, navigate to the record or, to transfer ownership, use the kanban card.
- You can't perform mass actions in a kanban view.

#### Currency

- If your company uses multiple currencies in Salesforce, kanban views show amounts in your personal currency.
- You can't use the Currency field to group records in a kanban view.

### Contracts

- You can't activate a contract in a kanban view.
- Kanban views don't show columns for the standard contract status of Activated.
- You can't group contracts by the Owner Expiration Notice field in a kanban view.

### Knowledge

- You can only group Knowledge articles by owner in a kanban view. Grouping by the other standard knowledge fields isn't supported.

### Leads

- You can't convert a lead in a kanban view.
- Converted leads are hidden in kanban views.

### Opportunities

- You can't group opportunities by the Forecast Category field.
- Kanban cards on opportunities show alerts for overdue tasks, no open activities, and no activity in the last 30 days.
- Closed Lost opportunities are hidden in kanban views.

### SEE ALSO:

[Work in a Kanban View](#)

### EDITIONS

Available in: Lightning Experience

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

## Considerations and Guidelines for Administering Kanban

If your users work with kanban views, review considerations and guidelines for setup and customization.

All Objects

### Display and Editing

- Kanban views show up to 200 cards. Kanban cards show up to four fields.
- The fields at the top of the details panel in kanban views are the first four fields defined in the compact layout.
- Users can move cards in kanban views even if their access to the field used for column grouping is read-only.
- In the kanban details panel, users can't change a record's record type or owner, regardless of whether the path includes those fields.
- Suppose that the selected Group By and Summarize By fields are in a page layout assigned to a record type that the user can't access. The kanban view doesn't show records assigned to that record type.

### Subtabs

A subtab is created for a record type if both of the following conditions apply:

- The Group By and Summarize By fields are included in a page layout assigned to a record type that the user can access.
- At least one record is assigned to the record type.

### Column Summaries

Users can't create column summaries from rollup summary or formula fields.

### Picklist Fields and Values

Kanban views don't show columns that are based on inactive picklist fields or records associated with inactive picklist values.

### Path Configurations Exposed in Kanban Views

- 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.
- 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.
- Whichever celebration frequency you select, the animation is triggered once until the page is reloaded. For example, suppose that you select Always, and a kanban user moves two records to the column that triggers the animation. The animation plays only the first time the user moves a record.
- Celebrations don't work on the lead status Converted.

Opportunities

Kanban cards on opportunities show alerts for overdue tasks, no open activities, and no activity in the last 30 days. Activity alerts in kanban views aren't customizable. If the links New Event and New Task aren't displayed in activity alerts, do the following.

1. Add a Create a Record global action for events and tasks. Give the actions these exact names: *NewEvent* and *NewTask*. Label them New Event and New Task.
2. Assign a record type to each global action. New Event and New Task actions are each supported for only one record type.

### EDITIONS

Available in: Lightning Experience

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

3. Add the actions to Lightning Experience Actions.

#### SEE ALSO:

[Work in a Kanban View](#)

[Considerations and Guidelines for Creating Paths](#)

## Change Your Working Division

If your org uses divisions, you can change your working division from the Divisions field in the sidebar.

Divisions segment your organization's data into logical sections, making searches, reports, and list views more meaningful.

- Select the division you want to work in from the Divisions field on the sidebar.

 **Example:** Let's say your org has set up divisions for sales areas. You can change your working division to a particular sales area and create a report to show the opportunities for just that division. Divisions are useful for organizations with large amounts of data.

#### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#) on page 9)

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

## Change the Dashboard on Your Home Tab

If your Home tab contains a dashboard snapshot, you can change the dashboard.

1. Click **Customize Page** in the Dashboard section of the Home tab.
2. Search for a dashboard and select a different dashboard from the drop-down list.
3. Click **Refresh** to refresh the data in your dashboard.

#### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#) on page 9)

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

## Considerations for List Views and Related Lists

Consider these points when using list views and related lists.

### General

#### List Views

- List views can't be sorted by encrypted fields.
- List views don't automatically refresh after inline edits.
- Your current locale determines a list view's sort order.
- You can't sort list views for the Users object if you have more than 2 million Salesforce users.
- Text fields are sorted one character at a time, so text fields containing numbers can appear out of order. For example, Unit 1,000 comes before Unit 999 because 1 is before 9.
- Checkboxes appear only on lists with mass actions or inline editing. To enable inline editing, edit your list view filters so the list contains only one record type.
- Sometimes all the results for a set of filters are too large to calculate and display in a reasonable time period. Use more filters and more restrictive criteria so there are fewer records to check.
- Some list views support caching, which can show stale data in certain situations. Refresh the page to get the most up-to-date data.

#### Related Lists

Some related lists support caching, which can show stale data in certain situations. Refresh the page to get the most up-to-date data.

## Salesforce Mobile App

Not every Lightning Experience feature is in the Salesforce mobile app. Consider these differences.

### List Views

- Creating list views or editing existing list views isn't supported.
- Editing a record's field in a list view isn't available. Instead, users can open the record then tap the **Edit** action.
- Selecting multiple records in list views isn't supported.
- Mass actions, which allow you to apply an action to multiple records at the same time, aren't available.
- List views aren't automatically updated. To see a new record, refresh the list by pulling down on the page.
- Kanban and split view aren't supported.

### Related Lists

- Related lists display the first four fields that are defined in the Related List section on an object's page layout. The number of fields shown can't be increased.
- Related lists aren't automatically updated. To see a new record, refresh the list by pulling down on the page.
- Some related lists aren't available in the mobile app, including:
  - Content Deliveries
  - External Sharing
  - Related Content
- List buttons aren't supported for some related lists, including:
  - Open Activities
  - Activity History
  - Approval History
  - Contact Roles
  - Partners
- The Notes and Attachments related list isn't fully supported. There are several issues, including:
  - Attachments added in the full Salesforce site aren't guaranteed to open in the app, even if they appear in the related list. We recommend using Files instead. Documents that are uploaded to the Files tab in the full site are then viewable.
  - You can't add or delete notes or attachments from the related list. But you can create a note and relate it to a record, using the Note ( ) action in the action bar. This action is not available for all objects, depending on how your administrator configures Notes.
  - Notes and attachments on child records don't appear on the parent record's related list.
- Uploads using Files related lists aren't supported.
- If a related list is sorted by a text area field, it doesn't display any records.

### SEE ALSO:

[Considerations for Inline Editing in a List View in Lightning Experience](#)

## Update Your Data

Much of your Salesforce data is stored in individual *records*, and organized within objects. For example, the Account object presents all of your account records. If the Acme company is one of your accounts, you'll have an account record for Acme.

### Create and Update Records

Creating and updating records are standard procedures for most people who use Salesforce. There are various ways to create and update records in Salesforce.

#### Print Records

You can print Salesforce records from most detail pages.

#### Clone Records

Create a record by making a copy of a similar record. When you clone certain records, you can also clone related records.

#### Change a Record's Owner

You can give ownership of a record to another user as long as that user has at least Read permission for the type of record being transferred.

#### Organize Records with Tags and Topics

Topics are words or phrases that you can associate with Salesforce records to organize them around common themes. Tags are words or short phrases that you can associate with most Salesforce records to describe and organize their data in a personalized way.

#### Record Translated Names

Use local name fields to store translated names for accounts, contacts, or leads.

## Create and Update Records

Creating and updating records are standard procedures for most people who use Salesforce. There are various ways to create and update records in Salesforce.

### EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

Available in: **All** Editions

#### Create Records from Object Home Pages

Quickly create a record from an object's home page.

#### Create Records in Feeds

If your administrator set up this action, you can create records in the feed on the home page, the Chatter tab, and record detail pages. Publishers on different feeds offer different actions.

#### Create Records with Quick Create

With Quick Create, you can create records from the home pages for leads, accounts, contacts, opportunities, and custom objects.

#### Create a Record in Lightning Experience

Create Salesforce records for opportunities, leads, tasks, notes, accounts, and contacts. Some objects (such as Account) have special *guidelines and considerations* for you to be aware of, but the *process* of creating a record is similar for all.

#### Create Records from the Sidebar

Use the Create New drop-down list in the Sidebar to create a record.

#### Update Records

Many Salesforce objects offer the convenience of inline editing for records. Updating custom object records is similar to updating standard object records. Whether you can access and change a custom object record, depends on your permissions.

#### Update Records Inline from a List View in Lightning Experience

Conveniently edit fields on records directly from a list view.

### Update Records

Many Salesforce objects offer the convenience of inline editing for records. Updating custom object records is similar to updating standard object records. Whether you can access and change a custom object record, depends on your permissions.

### Delete Records

For some kinds of objects, deleting one record affects other, related records.

### Recycle Bin

All users can view and restore records in their own Recycle Bin. If you have admin permissions, you can access and manage your own Recycle Bin and the org Recycle Bin, including permanently deleting records.

### Formats for Currency, Dates, Times, Names, and Phone Numbers

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

## Create Records from Object Home Pages

Quickly create a record from an object's home page.

1. Click the object for the kind of record you want to create. For example, click Accounts if you want to create an account record.
2. Click **New**.
3. Select a record type if you're prompted.
4. Enter values in the fields.



**Tip:** Salesforce Help includes field definitions for most objects. Search the help for the object name + "fields". For example, if you're creating or editing an account record, look up "Account Fields" in Salesforce Help.

5. Save your changes, when you finish entering values for your new record. If you navigate away from the page before clicking **Save**, you lose your changes.

### EDITIONS

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

Available in: All editions

### USER PERMISSIONS

To create records:

- Create on the object for the kind of record you're creating

## Create Records in Feeds

If your administrator set up this action, you can create records in the feed on the home page, the Chatter tab, and record detail pages. Publishers on different feeds offer different actions.

1. In the publisher, click the quick action that corresponds to the kind of record you want to create.

For example, to add a contact to an account, navigate to the account's detail page and select **Create Contact**.

2. Enter values in the fields. Fields with a red bar ( | ) are required fields.

Salesforce Help includes field definitions for most objects. Search the help for the object name + "fields". For example, if you're creating or editing an account record, look up "Account Fields" in Salesforce Help.

3. When you finish entering values for your new record, click **Create**.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: All editions

### USER PERMISSIONS

To create records:

- Create on the object for the kind of record you're creating

## Create Records with Quick Create

With Quick Create, you can create records from the home pages for leads, accounts, contacts, opportunities, and custom objects.

You can also create accounts from the Account lookup field results list on the Quick Create form on contacts, leads, and opportunities. Validation rules don't apply when you create records with Quick Create.

1. Click the tab for the kind of record you want to create. To create an account while you create a contact, lead, or opportunity, click the  icon next to the Account field in the Quick Create form you're using.
2. Enter values in the fields. Fields with a red bar () are required fields. Salesforce Help includes field definitions for most objects. Search the help for the object name + "fields". For example, if you're creating or editing an account record, look up "Account Fields" in Salesforce Help.
3. Click **Save**.

## Create a Record in Lightning Experience

Create Salesforce records for opportunities, leads, tasks, notes, accounts, and contacts. Some objects (such as Account) have special *guidelines and considerations* for you to be aware of, but the process of creating a record is similar for all.

 **Note:** This information is for Lightning Experience. If you see the App Launcher icon () on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.

You can create records in different ways in Lightning Experience.

- To create records from any Salesforce page, select the item you want in the navigation menu, then click **New** in the list view.
- To create records from an existing record, click **New** for the item you want. For example, let's say you're viewing a contact record and want to create a note about the contact—click **New** in the Notes section of the contact page.

## Create Records from the Sidebar

Use the Create New drop-down list in the Sidebar to create a record.

1. From the Create New drop-down list in the sidebar, select the type of record you want to create. The new record page immediately displays in the appropriate tab or the Upload a File dialog box displays if you selected **File**.
2. Fill in the fields.
3. Click **Save** or **Upload to My Files** if you selected **File**.

### Editions

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: All editions

### User Permissions

To create records:

- Create on the object for the kind of record you're creating

### Editions

Available in: Lightning Experience

Available in: **All** Editions

### Editions

Available in: Salesforce Classic ([not available in all orgs](#) on page 9)

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

## Update Records

Many Salesforce objects offer the convenience of inline editing for records. Updating custom object records is similar to updating standard object records. Whether you can access and change a custom object record, depends on your permissions.

Not all fields on all objects can be edited inline. To find out whether a field supports inline editing, hover over it, and look for a pencil icon (

1. Find and open the record you want to edit.

2. Click **Edit**.

3. Enter or edit values in the fields.



**Tip:** Salesforce Help includes field definitions for most objects. Search the help for the object name + "fields". For example, if you're creating or editing an account record, look up "Account Fields" in Salesforce Help.

4. Save your changes, when you finish entering or editing values.

If your edit is unsuccessful and returns an insufficient access error, contact your admin to check the sharing settings on the object.

## Update Records Inline from a List View in Lightning Experience

Conveniently edit fields on records directly from a list view.

Not all fields on records in a list view can be edited inline. To find out whether a field supports inline editing, hover over it and look for the pencil . Non-editable cells have a lock . Inline editing doesn't work for list views that contain multiple record types. To make inline edits for objects with multiple record types, first filter by a single record type.

As always, you can edit only the records that you have access to.

To edit fields in one row of a list view:

1. From the list, hover over the cell to edit, and then click . Or, double-click the cell.
2. Make your change in the editable cell or cells.  
A **Save** button appears at the bottom of the list view.
3. Click **Save**.

If other people make inline edits to the same fields on a record simultaneously, only the most recent edit is saved.

### Considerations for Inline Editing in a List View in Lightning Experience

Consider these points when editing fields on records directly from a list view in Lightning Experience. These considerations also apply when editing records in a multiline layout in Lightning Experience.

### Editions

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

Available in: All editions

### User Permissions

To edit records:

- Edit on the object for the kind of record you're editing

### Editions

Available in: Lightning Experience

Available in: All Editions

### User Permissions

To edit fields on records:

- Edit on the object for the kind of record you're editing

## Considerations for Inline Editing in a List View in Lightning Experience

Consider these points when editing fields on records directly from a list view in Lightning Experience. These considerations also apply when editing records in a multiline layout in Lightning Experience.

### General

Not all fields on records in a list view or multiline layout view can be inline edited. To find out whether a field supports inline editing, hover over it and look for the pencil . Non-editable cells have a lock . When making inline edits in a list view, required fields can't be left blank.

- If a list view or multiline view contains more than one record type, it can't be inline edited. To enable inline editing, edit your list view filters so it contains only one record type.
- Inline edit doesn't apply to components in the small region.
- You can inline edit in Recently Viewed or Team list views that are predefined to contain only one record type. You can also edit tasks on the tasks object home page even though they're not in a list view.
- You can't inline edit in split view.

### EDITIONS

Available in: Lightning Experience

Available in: All editions

### Fields

These fields and field types aren't inline editable.

- Built-in fields like Record ID or Created Date (never editable from the user interface)
- Compound fields including Name, address fields, and geolocation fields. To inline edit names, use the First Name and Last Name fields.
- Controlling or dependent picklists
- Custom date/time fields
- Encrypted text fields
- For orgs with person accounts enabled, if your list view is filtered by the Person Account record type, the Account Name field isn't inline editable. If your list view is filtered by the Business Account record type, Account Name is inline editable. If your list view includes multiple record types, no fields are inline editable.
- Formula fields
- Standard fields of type date/time, auto number, rollup summary, record type, master-detail, long text area, rich text, checkbox, or hierarchy
- Fields that aren't on the page layout

These fields aren't inline editable, depending on the object.

### Campaign

- Parent Campaign

### Contact

- Contract Status

### Document

- All fields

### Event

- All fields

## Lead

- Lead Status

## Opportunity

- Amount
- Expected Revenue
- Forecast Category
- Probability
- Quantity

## Price Book

- Active Field
- Description
- Price Book Name

## Task

- Name
- Priority
- Private
- Related To
- Reminder Settings

## Update Records

Many Salesforce objects offer the convenience of inline editing for records. Updating custom object records is similar to updating standard object records. Whether you can access and change a custom object record, depends on your permissions.

Not all fields on all objects can be edited inline. To find out whether a field supports inline editing, hover over it, and look for a pencil icon (✏️).

1. Find and open the record you want to edit.

2. Click **Edit**.

3. Enter or edit values in the fields.



**Tip:** Salesforce Help includes field definitions for most objects. Search the help for the object name + "fields". For example, if you're creating or editing an account record, look up "Account Fields" in Salesforce Help.

4. Save your changes, when you finish entering or editing values.

If your edit is unsuccessful and returns an insufficient access error, contact your admin to check the sharing settings on the object.

## EDITIONS

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

Available in: All editions

## USER PERMISSIONS

To edit records:

- Edit on the object for the kind of record you're editing

## Delete Records

For some kinds of objects, deleting one record affects other, related records.

Before you delete a record, check whether there are related records. For example, if you delete an account or contact, all associated assets are also deleted.

1. Find and open the record you want to delete.
2. Click **Delete**.

### Editions

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

Available in: All editions

### User Permissions

To delete records:

- Delete on the object for the kind of record you're deleting

## Recycle Bin

All users can view and restore records in their own Recycle Bin. If you have admin permissions, you can access and manage your own Recycle Bin and the org Recycle Bin, including permanently deleting records.

### [View and Restore Your Recycle Bin in Lightning Experience](#)

Access your deleted records in the Lightning Experience Recycle Bin. The Recycle Bin is a list view that allows you to sort and filter to find the records you need.

### [Manage the Recycle Bin in Lightning Experience](#)

As an admin, you have access to your own Recycle Bin and the Salesforce org's Recycle Bin. You can view, restore, and permanently delete records in the Org Recycle Bin and your own Recycle Bin. Use list view functionality to sort and filter to find the records you need.

### [View, Restore, and Manage the Recycle Bin in Salesforce Classic](#)

The Recycle Bin contains items that were deleted. Salesforce admins can see all deleted data across the entire org. The Recycle Bin is available in the left sidebar on the Home page.

### [Considerations for Restoring Records from the Recycle Bin](#)

Know what happens to a record's associations when you restore it from the Recycle Bin.

### Editions

Available in: both Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

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

## SEE ALSO:

[Data Access and Views: What's Different or Not Available in Lightning Experience](#)

## View and Restore Your Recycle Bin in Lightning Experience

Access your deleted records in the Lightning Experience Recycle Bin. The Recycle Bin is a list view that allows you to sort and filter to find the records you need.

1. To access your Recycle Bin, from the App Launcher, find and open it, or add it to your navigation bar.

RECORD NAME	TYPE	DELETED BY	DELETED DATE
1 Acme - 1,200 Widgets	Opportunity	User	7/23/2019 11:14 AM
2 Andy Smith	Lead	User	7/23/2019 11:15 AM
3 Sarah Loehr	Lead	User	7/23/2019 11:15 AM
4 Leanne Tomlin	Contact	User	7/23/2019 11:15 AM
5 Geoff Minor	Contact	User	7/23/2019 11:16 AM

2. To restore records, select them and click **Restore**.

### SEE ALSO:

- [Open Another App in Lightning Experience](#)
- [Personalize the Navigation Bar in Lightning Experience](#)
- [Find and View Your Data](#)
- [Create or Clone a List View in Lightning Experience](#)

## EDITIONS

Available in: Lightning Experience

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

## USER PERMISSIONS

To view and restore your deleted records:

- Read on the records in the Recycle Bin

## Manage the Recycle Bin in Lightning Experience

As an admin, you have access to your own Recycle Bin and the Salesforce org's Recycle Bin. You can view, restore, and permanently delete records in the Org Recycle Bin and your own Recycle Bin. Use list view functionality to sort and filter to find the records you need.



**Note:** Records in the Recycle Bin don't count against your Salesforce org's storage usage. However, Salesforce uses your storage limit to determine the maximum number of records allowed in your Recycle Bin. Your Recycle Bin can contain 25 times your MB storage capacity as records. For example, an org with a storage allocation of 2,000MB (2GB) can have 50,000 records in the Recycle Bin:  $25 \times 2,000 = 50,000$  records.

- To access the Recycle Bin, from the App Launcher, find and select it, or add it to your navigation bar. Or, add the Recycle Bin tab for your org in the Lightning App Builder.

	RECORD NAME ↑	TYPE	DELETED BY	DELETED DATE
1	Acme - 1,200 Widgets	Opportunity	TAdmin User	7/23/2019 11:14 AM
2	Andy Smith	Lead	TAdmin User	7/23/2019 11:15 AM
3	Geoff Minor	Contact	TAdmin User	7/23/2019 11:16 AM
4	Leanne Tomlin	Contact	TAdmin User	7/23/2019 11:15 AM
5	Sarah Loehr	Lead	TAdmin User	7/23/2019 11:15 AM

- Select the Recycle Bin that you want to access (1).

	RECORD NAME ↑	TYPE	DELETED BY	DELETED DATE
1	My Recycle Bin			7/23/2019 11:14 AM
2	Andy Smith	Lead	TAdmin User	7/23/2019 11:15 AM
3	Sarah Loehr	Lead	TAdmin User	7/23/2019 11:15 AM
4	Leanne Tomlin	Contact	TAdmin User	7/23/2019 11:15 AM
5	Geoff Minor	Contact	TAdmin User	7/23/2019 11:16 AM

- Select the items you want to restore or permanently delete, and click **Restore** (2) or **Delete** (3).
- To permanently delete all items in the org recycle bin, click **Empty Org Recycle Bin** (4).

A window displays confirming that you want to empty the Recycle Bin.



**Note:** You can have only one empty process running at a time. The processing time varies depending on the number of records there are in your org's Recycle Bin. From Setup, in the Quick Find box, enter *View Setup Audit Trail*, and then select **View Setup Audit Trail** to check the status of completed empty processes.

## SEE ALSO:

- [Customize Lightning Apps with the Lightning App Builder](#)
- [Considerations for Restoring Records from the Recycle Bin](#)

## Editions

Available in: Lightning Experience

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

## User Permissions

To view and restore your deleted records:

- Read on the records in the Recycle Bin

To view and restore records deleted by other users:

- Modify All Data

To restore deleted public tags:

- Tag Manager

To permanently delete records in the Recycle Bin:

- Modify All Data

## View, Restore, and Manage the Recycle Bin in Salesforce Classic

The Recycle Bin contains items that were deleted. Salesforce admins can see all deleted data across the entire org. The Recycle Bin is available in the left sidebar on the Home page.

### View Items in the Recycle Bin

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



**Note:** Records in the Recycle Bin don't count against your org's storage usage. However, Salesforce uses your storage limit to determine the maximum number of records allowed in your Recycle Bin. Your Recycle Bin can contain 25 times your MB storage capacity as records. For example, an org with a storage allocation of 2,000MB (2GB) can have 50,000 records in the Recycle Bin:  $25 \times 2,000 = 50,000$  records.

### Search for Items in the Recycle Bin

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



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

3. Click **Search**.

### Restore Items in the Recycle Bin

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

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

- Parent accounts (as specified in the `Parent Account` field on an account)
- Indirect account-contact relationships (as specified on the Related Accounts related list on a contact or the Related Contacts related list on an account)
- Parent cases (as specified in the `Parent Case` field on a case)
- Master solutions for translated solutions (as specified in the `Master Solution` field on a solution)
- Managers of contacts (as specified in the `Reports To` field on a contact)
- Products related to assets (as specified in the `Product` field on an asset)
- Opportunities related to quotes (as specified in the `Opportunity` field on a quote)
- All custom lookup relationships
- Relationship group members on accounts and relationship groups, with some exceptions

### Editions

Available in: Salesforce Classic ([not available in all orgs](#) on page 9)

Available in: all editions, except **Database.com**

### User Permissions

To view and recover your deleted records:

- Read on the records in the Recycle Bin

To view and recover records deleted by other users:

- Modify All Data

To recover deleted public tags:

- Tag Manager

To purge the Recycle Bin:

- Modify All Data

- Tags
- An article's categories, publication state, and assignments

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

## Purge the Recycle Bin

Deleted records remain in the Recycle Bin for 15 days, and can be restored during that time. To permanently remove your deleted items before the 15-day period, administrators and users with the "Modify All Data" permission, can click **Empty your Recycle Bin** or **Empty your organization's Recycle Bin**. After 15 days, deleted items are purged from the Recycle Bin, and once purged, they can't be recovered.

### Considerations for Restoring Records from the Recycle Bin

Know what happens to a record's associations when you restore it from the Recycle Bin.

When you restore a record, Salesforce restores the record associations for some relationships.

- Parent accounts (as specified in the `Parent Account` field on an account)
- Indirect account-contact relationships (as specified on the Related Accounts related list on a contact or the Related Contacts related list on an account)
- Parent cases (as specified in the `Parent Case` field on a case)
- Master solutions for translated solutions (as specified in the `Master Solution` field on a solution)
- Managers of contacts (as specified in the `Reports To` field on a contact)
- Products related to assets (as specified in the `Product` field on an asset)
- Opportunities related to quotes (as specified in the `Opportunity` field on a quote)
- All custom lookup relationships
- Relationship group members on accounts and relationship groups, with some exceptions
- Tags
- An article's categories, publication state, and assignments

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

### Editions

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

## Formats for Currency, Dates, Times, Names, and Phone Numbers

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

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

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. View the date/time format used in the read-only `Created By` field. This is the format you should use for entering dates and times in Salesforce fields.

### Editions

Available in: Lightning Experience and Salesforce Classic

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

## Currency

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

-  **Tip:** In Salesforce Classic, when you enter a monetary amount (or any other type of number), you can use the shortcuts **k**, **m**, or **b** to indicate thousands, millions, or billions. For example, when you enter **50k** it appears as **50,000**. Uppercase shortcuts are also supported. In Lightning Experience, you can use the same shortcuts, in addition to **t** to indicate trillions. However, these shortcuts do not work for filter criteria.

## Dates and Times

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

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

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

-  **Tip:** Consider the following shortcuts in Salesforce Classic.

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

## Phone Numbers

When you enter phone numbers in various phone fields, Salesforce preserves whatever phone number format you enter. However, if your Locale is set to English (United States) or English (Canada), 10-digit phone numbers and 11-digit numbers that start with "1" are formatted as **(800) 555-1212** when you save the record.

-  **Tip:**

- If you do not want the parentheses-space-hyphen formatting ((**800**) **555-1212**) for a 10- or 11-digit number, enter a "+" before the number. For example: **+49 8178 94 07-0**.
- If your 10- and 11-digit phone numbers have Salesforce's automatic format, you might need to enter the parentheses when specifying filter conditions. For example: **Phone starts with (415)**.

## Print Records

You can print Salesforce records from most detail pages.

- In Salesforce Classic, click the **Printable View** link located in the upper right corner of most detail pages.
- In console apps for Salesforce Classic, click the print icon  to open a record's printable view.
- In Lightning Experience, click **Printable View** in the action menu ▾.

If you previously customized the Salesforce Mobile and Lightning Experience Actions section of a page layout, you have to manually add Printable View to that section for it to appear.

## Clone Records

Create a record by making a copy of a similar record. When you clone certain records, you can also clone related records.

1. Open a record, and select the **Clone** or **Clone with Related** action.

Clone with Related isn't available in the Salesforce mobile app.

Suppose that the record type of the cloned record isn't available in your profile or permission sets. If multiple record types are available, choose the type you want. Otherwise, your default record type is applied.

2. If you selected Clone with Related, select the related records that you want to carry over to the new record. Click **Next**.

- The related records that you select can't total more than 999.
- Related records are cloned in batches of up to 200. For example, if you clone a record with 500 related records, it's cloned in three batches. Validation rules, Apex triggers, and workflow are applied separately to each batch.
- If a related record includes a custom field configured to contain a unique value, you must delete the value before cloning the record.

3. Enter or change other information in the new record.

### 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.

4. Save the new record.

### SEE ALSO:

[Considerations for Cloning Opportunities](#)

[Considerations for Cloning Products](#)

[Cloning Campaigns with Related Records](#)

## EDITIONS

Clone action available in Lightning Experience, Salesforce Classic ([not available in all orgs](#) on page 9), and the Salesforce mobile app in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Clone with Related action available in Lightning Experience in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## USER PERMISSIONS

To clone a record with or without related records:

- Create on the object  
AND  
Read on the record you're cloning

## Change a Record's Owner

You can give ownership of a record to another user as long as that user has at least Read permission for the type of record being transferred.

1. On the record detail page, click the link to change the owner.  
If you don't see the link, you don't have permissions to change record ownership.
2. Enter or select a new owner. In organizations where the Salesforce Customer Portal or partner portal is enabled, you can filter the results that appear on the user lookup dialog. Select either a queue or group of users from the **Owner** or **Assigned To** drop-down list.



### Note:

- You can only enter or select users who have permission to own the record.
- External users trying to edit record ownership can't filter by user type.

3. To notify the new owner, select the **Send Notification Email** checkbox.

The "From" email address displayed in the notification is your return email address set in your email settings.

For cases in Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, the **Case Assigned Template** setting specified in Support Settings determines the email text. For other records, the email text is generated automatically and cannot be customized.

4. Depending on your user permissions and the type of object you're transferring, you can select which related items to transfer.
5. Save your changes.

If your organization-wide default sharing for an object is set to Private, you see an error after changing the owner of a record for that object. The error occurs because you no longer have access to the record. This error is safe to ignore.

### SEE ALSO:

[Considerations for Changing a Record's Owner](#)

## Considerations for Changing a Record's Owner

When you change a record's owner, some items that are related to the record are also transferred to the new owner.

**Note:** Automatic triggers that change record ownership can affect which object details users see. In some cases, a user can enter information that is then immediately hidden from them if an automatic trigger changes the object's owner.

**Important:** Workflow rules that update owners *don't* also transfer associated items. To ensure transfer, click **Change** next to the owner's name in a record and make your transfer selections.

Record	Transferred Items
Account	<ul style="list-style-type: none"> <li>• Contacts related to the account are transferred to the new owner automatically.</li> <li>• The account owner's open opportunities are transferred automatically. To transfer open opportunities owned by others,</li> </ul>

### Editions

Available in: Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

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

### User Permissions

To transfer single records:

- Transfer Record

### Editions

Available in: Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

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

Record	Transferred Items
	<p>select <b>Transfer open opportunities owned by others</b>. When you select this option, ownership of those opportunities is transferred regardless of your access to them.</p> <ul style="list-style-type: none"><li>To transfer the account owner's closed opportunities to the new account owner, select <b>Transfer account owner's closed opportunities</b>. Closed opportunities owned by others aren't transferred.</li><li>Contracts with a status of Draft or In Approval are transferred automatically. The new owner has read-only access to contracts with a status of Activated.</li><li>Orders with a status of Draft, with or without a transferring contract, are transferred automatically. The new owner has read-only access to orders with a status of Activated.</li><li>To transfer the owner's open cases, select <b>Transfer account owner's open cases</b>. To transfer all the owner's cases, open and closed, select <b>Transfer all of this account owner's cases</b>.</li><li>The owner's attachments and notes taken with the classic note-taking tool are transferred automatically.</li><li>The owner's open activities are transferred automatically. Closed activities aren't transferred.</li><li>To keep account team members with an account when the owner is changed, select <b>Keep account team</b>. To delete the team, deselect this option.</li><li>To keep opportunity team members with an opportunity when the account owner is changed, select <b>Keep opportunity teams with transferred opportunities</b>. To delete the team, deselect this option.</li><li>To transfer the account owner's closed cases to the new account owner when the account owner is changed, select <b>Transfer account owner's closed cases</b>.</li><li>In Salesforce Classic only, divisions are transferred to the new account owner's division when you select <b>Change division</b>.</li></ul>
Campaign	<ul style="list-style-type: none"><li>Attachments</li><li>Open activities that are owned by the original record owner</li></ul>
Case	<ul style="list-style-type: none"><li>Notes taken with the classic note-taking tool</li><li>Attachments</li><li>Open activities that are owned by the original record owner. Closed activities aren't transferred.</li></ul>
Contact	<ul style="list-style-type: none"><li>Notes taken with the classic note-taking tool</li><li>Open activities that are owned by the original contact owner. Closed activities aren't transferred.</li><li>Attachments</li></ul>
Contract	<ul style="list-style-type: none"><li>Notes taken with the classic note-taking tool</li><li>Attachments</li><li>Open activities that are owned by the original record owner</li></ul>

Record	Transferred Items
	<ul style="list-style-type: none"><li>Orders with Draft status</li></ul>
Custom object	<ul style="list-style-type: none"><li>Open activities that are owned by the original record owner (Salesforce Classic only)</li><li>Notes taken with the classic note-taking tool (Salesforce Classic only)</li><li>Attachments (Salesforce Classic only)</li></ul>
Knowledge	<ul style="list-style-type: none"><li>Changing an article's ownership is available in Lightning Experience only.</li><li>To change ownership, select <b>Change Owner</b> either from a Knowledge list view of draft articles or a draft article's Knowledge home record.</li><li>When you change the ownership of a draft article from a Knowledge home record, you can also change the ownership of its archived and published versions at the same time.</li><li>You can change the ownership of multiple draft articles at once from a Knowledge list view.</li><li>Ownership can be changed to a queue and to a user.</li><li>Anyone in a queue can act as the article's owner.</li><li>A user can only change an article's ownership if their profile permissions allow it.</li></ul>
Lead	<ul style="list-style-type: none"><li>Notes taken with the classic note-taking tool</li><li>Attachments</li><li>Open activities that are owned by the original record owner (except when you change lead ownership using the <b>Assign using active assignment rule</b> checkbox)</li></ul>
Opportunity	<ul style="list-style-type: none"><li>Open activities that are owned by the current opportunity owner are transferred. Closed activities aren't transferred.</li><li>When you transfer ownership of a related account, you have the option to transfer open opportunities owned by others. This option transfers ownership of all of those opportunities, regardless of your access to them.</li><li>Opportunity team members only when the <b>Keep Opportunity Team</b> option is selected. When opportunity teams are transferred, opportunity splits and any notes on splits are preserved and split percentages are assigned to the new owner.</li><li>Notes taken with the classic note-taking tool are transferred.</li><li>Attachments are transferred.</li></ul>
Order	<ul style="list-style-type: none"><li>Open tasks</li><li>Future events</li><li>Items aren't transferred if either the original or new owner is a member of a queue.</li></ul>

 **Note:** You can't transfer events to which you have been invited and don't own.

#### SEE ALSO:

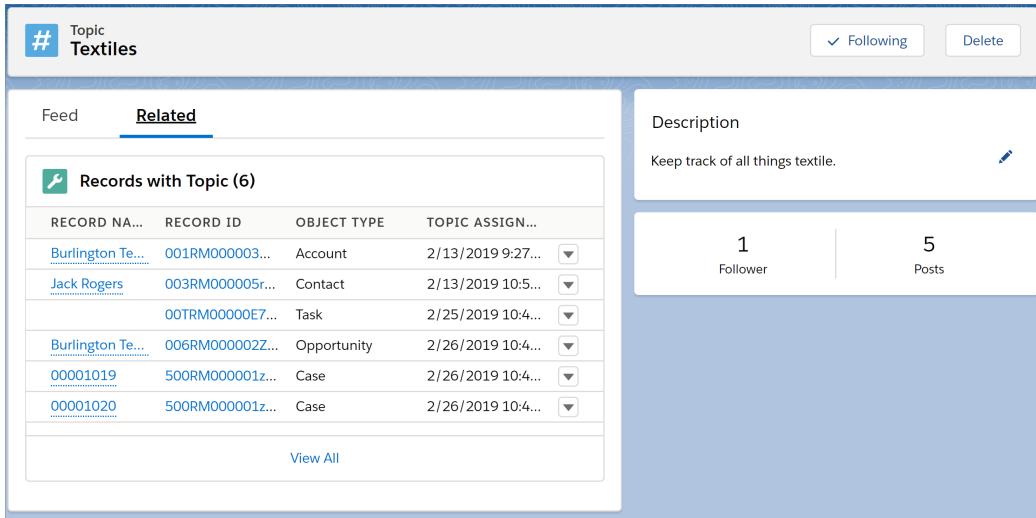
[Change a Record's Owner](#)  
[Lightning Knowledge User Access](#)

## Organize Records with Tags and Topics

Topics are words or phrases that you can associate with Salesforce records to organize them around common themes. Tags are words or short phrases that you can associate with most Salesforce records to describe and organize their data in a personalized way.

In Lightning Experience, you can see all the records with a topic on the Related tab of the topic detail page. In Salesforce Classic, Chatter must be enabled to access the Records tab of the topic detail page. Let's say you added the topic *Textiles* to several textile-related records, including accounts, contacts, and opportunities. You could then view the related records together on the Records tab (in Salesforce Classic) or the Related tab (in Lightning Experience) of the Textiles topic page.

Here's an example topic detail page in Lightning Experience, with the Related tab showing records with the topic.



Record Name	Record ID	Object Type	Topic Assigned
Burlington Te...	001RM000003...	Account	2/13/2019 9:27...
Jack Rogers	003RM000005r...	Contact	2/13/2019 10:5...
	00TRM00000E7...	Task	2/25/2019 10:4...
Burlington Te...	006RM00000Z...	Opportunity	2/26/2019 10:4...
00001019	500RM000001z...	Case	2/26/2019 10:4...
00001020	500RM000001z...	Case	2/26/2019 10:4...

Admins can enable or disable topics for most objects, including custom objects.

### [Add and Remove Topics from Records in Lightning Experience](#)

Add topics to records to organize the records around common themes and view them on topic detail pages.

### [Add Topics to Records in Salesforce Classic](#)

Add topics to quickly organize records around common themes, retrieve them in list views, and (with Chatter) view them on topic detail pages.

### [Remove Topics from Records in Salesforce Classic](#)

Remove a topic from a record if it no longer applies.

## EDITIONS

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

Available in: All editions

### Tag Records

Use tags to group records from various objects by a common theme. Add tags in search criteria to make finding information fast and intuitive.

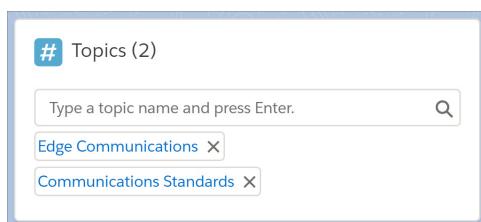
### Remove Tags from Records

## Add and Remove Topics from Records in Lightning Experience

Add topics to records to organize the records around common themes and view them on topic detail pages.

Your admin must add the Topics component to Lightning record pages before you can add and remove topics from records.

- Note:** All topic names are public and appear in search results, but the visibility of records that have topics isn't affected.
- In the topic editor, start typing your text. As you type, you can pick a topic from the list of suggestions or keep typing to create your own unique topic. Press Enter to add the topic to the record.  
Closing square brackets ([]) aren't supported in topic names. Other punctuation, symbols, and separators are supported.



Records can have up to 100 topics.

Topics on records become links to topic detail pages. If Chatter is enabled, the Feed tab on the topic detail page shows posts and comments with the topic. Whether Chatter is enabled or not, the Related tab shows records with the topic. Topics on posts on a record aren't automatically added to a record's topics; you must add the topics to the record. Topics are added to a file automatically when the topics are added to:

- A post with the file attachment
  - Comments on a post with the file attachment
  - In the Topics component, click X next to a topic name to remove it from a record.
- Removing a topic unassigns the topic from the record but doesn't delete the topic. Before you remove a topic from a record, consider whether someone else added it; they could be using the topic to track the record.

### EDITIONS

Available in: Lightning Experience

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

### USER PERMISSIONS

To add new topics to a record

- Read and Edit on the record  
AND  
Create Topics

To add existing topics to a record

- Read and Edit on the record  
AND  
Assign Topics

To remove topics from a record

- Read and Edit on the record  
AND  
Assign Topics

## Add Topics to Records in Salesforce Classic

Add topics to quickly organize records around common themes, retrieve them in list views, and (with Chatter) view them on topic detail pages.

Topics for objects must be enabled before you can add topics to records of that object type.

 **Note:** All topic names are public and appear in search results, but this doesn't affect the visibility of records that have topics.

- On the top of the record detail page under the record name, click **Click to add topics**. If the record already has topics, click **Topics**.

### Editions

Available in: Salesforce Classic (not available in all orgs)

Available in: All editions

### User Permissions

To add topics to a record:

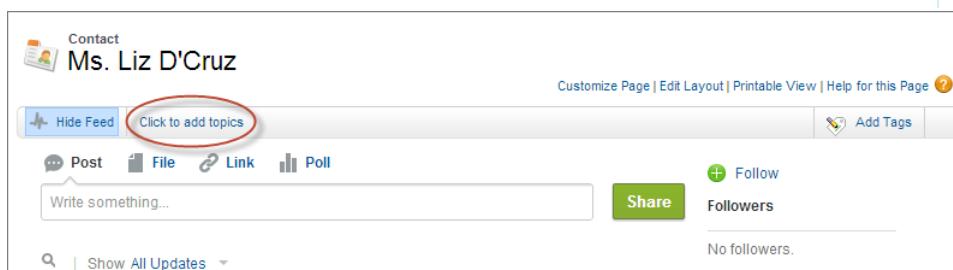
- Read and Edit on the record

AND

Assign Topics to add existing topics

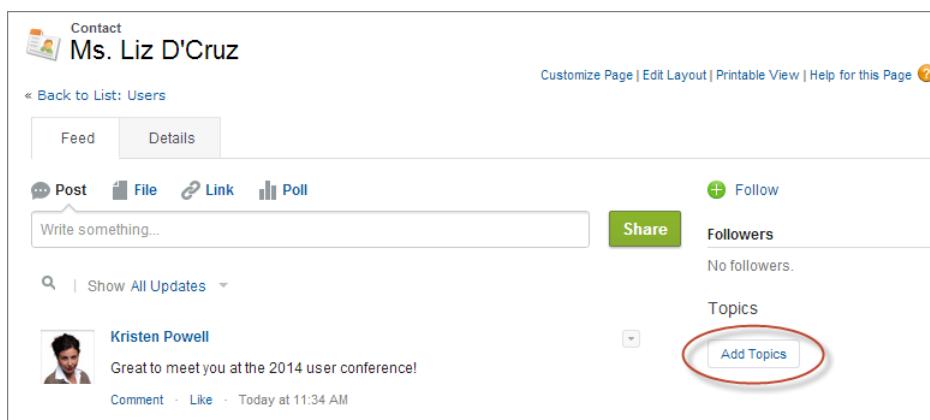
OR

Create Topics to add new topics



The screenshot shows a Contact record detail page for 'Ms. Liz D'Cruz'. At the top, there's a 'Hide Feed' button, a 'Click to add topics' button (which is circled in red), and a 'Customize Page | Edit Layout | Printable View | Help for this Page' link. Below the header are standard sharing and social media buttons: Post, File, Link, Poll, Add Tags, Share, Follow, and Followers (which shows 'No followers.'). A text input field says 'Write something...'. At the bottom left is a search bar and a 'Show All Updates' link. The main content area displays a post from 'Kristen Powell' with the text: 'Great to meet you at the 2014 user conference!' and a timestamp 'Today at 11:34 AM'.

If your administrator enabled feed-based layouts, click **Add Topics** in the sidebar of the feed view.



This screenshot shows the same Contact record detail page as above, but with a feed-based layout. The 'Add Topics' button in the sidebar is circled in red. The rest of the interface is identical to the first screenshot, including the header buttons, sharing options, and the post from Kristen Powell.

2. In the topic editor, start typing your text. As you type, you can pick a topic from the list of suggestions, or keep typing to create your own unique topic. To add more than one topic, type a comma after each topic.

Commas (,) and closing square brackets ([] ) automatically end a topic. Other punctuation, symbols, and separators are supported in topic names.

Records can have up to 100 topics.

3. When you're done adding topics, click **Done** or press **Enter**.

You can now use topics you add to records to filter your list views. If your administrator enabled Chatter, topics added to records become links to topic detail pages, where the Records tab shows all associated records. While you can enable topics for tasks, the Records tab is not supported for tasks. Topics on posts on a record aren't automatically added to a record's topics; you must add the topics to the record. Topics are added to a file automatically when the topics are added to the post with the file attachment or to comments on the post with the file attachment.

## Remove Topics from Records in Salesforce Classic

Remove a topic from a record if it no longer applies.

Removing topics doesn't delete them. Before you remove a topic from a record, consider whether someone else added it; they may be using the topic to track the record.

1. On the top of the record detail page, click **Topics**.
2. Click  next to the topic you want removed from the record.
3. Click **Done** or press ENTER.

Removing a topic from a record removes the record from any list views using that topic as a filter. If Chatter is enabled, the record is also removed from the Records tab of the topic detail page.

### Editions

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: All editions

### User Permissions

To remove topics from a record:

- Read and Edit on the record
- AND
- Assign Topics

## Tag Records

Use tags to group records from various objects by a common theme. Add tags in search criteria to make finding information fast and intuitive.

1. On the top right corner of the record detail page, click **Add Tags** or **Edit Tags**.
2. In the **Personal Tags** or **Public Tags** text boxes, enter comma-separated lists of the tags that you want to associate with the record.

Tags can only contain letters, numbers, spaces, dashes, and underscores, and must contain at least one letter or number. As you enter new tags, up to 10 tags that have already been defined are displayed as auto-complete suggestions. The list of suggestions changes to show only those tags that match the prefix you have entered.

There are limits on the number of personal and public tags you can create and apply to records. If you exceed the number of tags, any new tags you add aren't saved. Go to the Tags page and delete infrequently used tags.



**Example:** For example, you could tag contacts and leads you met at a conference with the phrase *User Conference 2011*. You can then search for the *User Conference 2011* tag and click that tag in search results to retrieve those records.

## Remove Tags from Records

1. On the top right corner of the record detail page, click **Edit Tags**.
2. Next to the **Personal Tags** or **Public Tags** text boxes, click **[X]** next to the tag that you want to remove.
3. Save your changes.

If the tag that you removed is the last instance of the tag, the tag is deleted from your organization completely. If other records use the tag, the tag still appears in search results and the Tags page.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#) on page 9)

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

### USER PERMISSIONS

To edit tags on a record:

- Read on the record

To rename or delete public tags:

- Tag Manager

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#) on page 9)

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

### USER PERMISSIONS

To edit tags on a record:

- Read on the record

## Record Translated Names

Use local name fields to store translated names for accounts, contacts, or leads.

For example, you can store the name of an account in the default language in your Salesforce org and the account's or user's language. The following fields can have corresponding local names:

Standard Field	Local Name Field
Account Name	Account Name (Local)
Contact: First Name	Contact: First Name (Local)
Contact: Middle Name	Contact: Middle Name (Local)
Contact: Last Name	Contact: Last Name (Local)
Lead: Company	Lead: Company Name (Local)
Lead: First Name	Lead: First Name (Local)
Lead: Middle Name	Lead: Middle Name (Local)
Lead: Last Name	Lead: Last Name (Local)

### Editions

Available in: Salesforce Classic ([not available in all orgs](#) on page 9)

Business accounts available in: **All** Editions except **Database.com**

Person accounts available in **Enterprise, Performance, Unlimited, and Developer** Editions

Local names do not affect the user's language settings. Depending on your page layout settings, they can both be displayed on the detail or edit page.

-  **Note:** When viewed from a report, empty local name fields display different values depending on whether the report is standard or custom. If the local name field is empty:
- Standard reports display the value from the standard name field. So if `First Name (Local)` is empty, the value for `First Name` is displayed.
  - Custom reports display an empty value. So if `First Name (Local)` is empty, the field is displayed empty.

## Analyze Your Data

Analyze and visualize your data with reports and dashboards. Salesforce offers a powerful suite of reporting tools that work together to help you understand and act on your data.

Here's a quick intro to running, sorting, filtering, and visualizing your data.

### Run a Report

Reports give you access to the data your organization has accumulated over time, enabling you to make informed decisions.

### Sort Report Results

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

### Filter Your Report

Does your report give you more data than you need? Use filters to pare down your report until it only shows the data that you want.

### Create Filters that Use Special Picklist Values

Use special picklist values for your search criteria. These special picklists have values of either `True` or `False`.

### Filter Operators Reference

The operator in a filter is like the verb in a sentence. Operators specify how filter criteria relate to one another. Refer to this list of filter operators when setting filters on list views, reports, dashboards, and some custom fields.

### Visualize Your Data with Dashboards

Create a *dashboard* to show data from your report with a visual component, for example a pie chart.

## Run a Report

Reports give you access to the data your organization has accumulated over time, enabling you to make informed decisions.

To run a report, find it on the Reports tab and click the report name. Most reports run automatically when you click the name.

1. Click the Reports tab.
2. Find the report you want to run and click the report name.

If you're already viewing a report, click **Run Report** to run it.

### EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

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

### USER PERMISSIONS

To run reports:

- Run Reports

To schedule reports:

- Schedule Reports

To create, edit, and delete reports:

- Create and Customize Reports

AND

Report Builder

## Sort Report Results

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

- To reverse the sort order, click the column heading a second time.
- If the floating report header is enabled for your organization, sort behavior is slightly different. When users sort data by clicking a floating report heading, the report refreshes and redirects users to the beginning of report results.
- In a report with multiple grouping levels, you can sort by the summary value that defines each grouping.

For example, take an Opportunities report that's grouped by type of business. Each `Type` grouping is in turn grouped by `Stage`, and each `Stage` grouping is grouped by `Lead Source`. Now you can sort the `Type` groupings by amount, the `Stage` grouping by stage, and the `Lead Source` grouping by record count.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

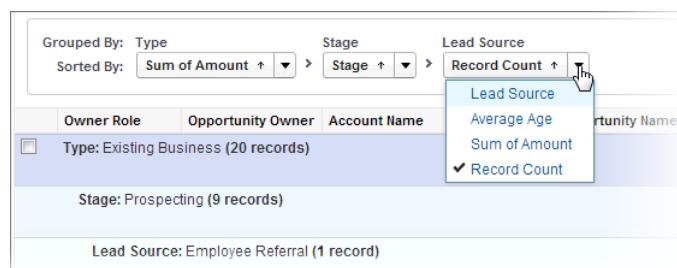
Available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Available in: Enhanced Folder Sharing and Legacy Folder Sharing

### USER PERMISSIONS

To sort report results:

- Legacy Folder Sharing**  
Run Reports
- Enhanced Folder Sharing**  
Run Reports



## Filter Your Report

Does your report give you more data than you need? Use filters to pare down your report until it only shows the data that you want.

Let's say you have a report of Accounts with fields like State and Annual Revenue. The report already has these filters:

- State includes California, Arizona, Nevada
- Annual Revenue greater than 1000000

These two filters return results for all accounts located in California, Arizona, and Nevada that generate an annual revenue greater than \$1,000,000. Now you also want to filter by industry, specifically, the Banking industry. Here's how you do that.

### Filter a Report in Lightning Experience

1. On the Reports tab, click a report to open it.
2. Click **Edit**.
3. Select the **Filters** tab.
4. Click **Add Filter** and select a Field Filter from the list. In our account filter example, you'd select **Industry**. Which filters are available in your organization depends on the fields that your administrator set up for account records.
5. Select an operator for the filter and type the filter value in the next field. In our account filter example, you'd select **equals** and type *Banking*.
6. Click **Apply**.

### Filter a Report in Salesforce Classic

1. On the Reports tab, click a report to open it.
2. Click **Customize**.
3. Click **Add** and select a Field Filter from the list.  
A new filter row appears below the other two filters.





4. Click  next to the filter field and select a filter.  
In our account filter example, you'd select **Industry**. Which filters are available in your organization depends on the fields that your administrator set up for account records.
5. Select an operator for the filter and type the filter value in the next field.  
In our account filter example, you'd select **equals** and type *Banking*.
6. Click **Save**.

Now your report shows Banking industry Accounts in California, Arizona, and Nevada with an annual revenue above \$1,000,000.00.

### Editions

Available in: both Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

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

### User Permissions

To create, edit, and delete reports:

- Create and Customize Reports  
AND  
Report Builder

To create custom list views:

- Read on the type of record included in the list

To create, edit, or delete public list views:

- Manage Public List Views

## Create Filters that Use Special Picklist Values

Use special picklist values for your search criteria. These special picklists have values of either `True` or `False`.

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

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

These are the available fields and their values:

Special Picklist Field	Value	Description
Accounts and contacts: <code>Is Person Account</code>	<code>True</code>	The account is a person account. Your administrator could have customized the name of this field. This field displays as the person account icon (  ).
	<code>False</code>	The account is a business account.
Accounts, leads, and opportunities: <code>Partner Account</code>	<code>True</code>	The account is a partner account, or the lead or opportunity owner is a partner user.
	<code>False</code>	The account is not a partner account or the lead or opportunity owner is not a partner user.
Activities: <code>All-day</code>	<code>True</code>	Applies only to events, not tasks. The event is marked as an all day event.
	<code>False</code>	The event has a specific time.
Activities: <code>Closed</code>	<code>True</code>	Applies only to tasks, not events. The task has been closed, that is, the task <code>Status</code> field has a "Closed" value.
	<code>False</code>	Task is still open.
Activities: <code>Event Invitation</code> (Only for reports)	<code>True</code>	Applies only to events, not tasks. The event is the meeting invite sent to another user for a multi-person event.
	<code>False</code>	The event is the original multi-person event assigned to the event host.
Activities: <code>Task</code>	<code>False</code>	Activity does not have a green sheet.
	<code>True</code>	Activity is a task, not an event.
Campaigns: <code>Active</code>	<code>True</code>	Campaign is active and can be chosen from various campaign picklists.
	<code>False</code>	Campaign is inactive.

### EDITIONS

Available in: Salesforce Classic (not available in all orgs on page 9)

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

<b>Special Picklist Field</b>	<b>Value</b>	<b>Description</b>
Cases: Closed	True	The case is closed, that is, the case <code>Status</code> field has a "Closed" value.
	False	Case is still open.
Cases: Escalated	True	Case has been automatically escalated via your org's escalation rule.
	False	Case has not been escalated.
Cases: New Self-Service Comment	True	Case has a new comment added by a Self-Service user.
	False	Case does not have a new Self-Service comment.
Cases: Open (Only for reports)	True	The case is open, that is, the case <code>Status</code> has a value that is not equivalent to "Closed."
	False	Case has been closed.
Cases: Self-Service Commented	True	Case has a comment added by a Self-Service user.
	False	Case does not have a Self-Service comment.
Contacts: Do Not Call	True	The contact cannot be included in a call recipient list.
	False	The contact can receive calls.
Contacts: Email Opt Out	True	The contact cannot be included in a mass email recipient list.
	False	The contact can receive mass email.
Contacts: Fax Opt Out	True	The contact cannot be included in a fax recipient list.
	False	The contact can receive faxes.
Contacts: Self-Service Active (Only for reports)	True	The contact is enabled to log in to your Self-Service portal.
	False	The contact is not enabled for Self-Service.
Leads: Converted (Only for reports)	True	The lead has been converted.
	False	The lead has not been converted.
Leads: Do Not Call	True	The lead cannot be included in a call recipient list.
	False	The lead can receive calls.
Leads: Email Opt Out	True	The lead cannot be included in a mass email recipient list.
	False	The lead can receive mass email.
Leads: Fax Opt Out	True	The lead cannot be included in a mass fax recipient list.
	False	The lead can receive faxes.
Leads: Unread	True	The lead has not yet been viewed or edited by the owner since it was assigned to that user.

Special Picklist Field	Value	Description
	False	The lead has been viewed or edited at least once by the owner since it was assigned.
Opportunities: Closed	True	The opportunity is closed, that is, the <code>Stage</code> field has a value of the type Closed/Won or Closed/Lost.
	False	The opportunity is still open.
Opportunities: Has Products	True	Products have been added to the opportunity.
	False	Products have not been added to the opportunity.
Opportunities: Is Split	True	The opportunity has revenue or overlay splits.
	False	The opportunity does not have revenue or overlay splits.
Opportunities: Primary (Only for Partner Opportunities report)	True	The partner for the opportunity has been marked as the primary partner.
	False	The partner for the opportunity has not been marked as the primary partner.
Opportunities: Private	True	The opportunity owner has checked the <code>Private</code> box on the opportunity edit page.
	False	The <code>Private</code> box on the opportunity is not checked.
Opportunities: Won	True	The opportunity is closed and won, that is, the <code>Stage</code> field has a value of the type Closed/Won.
	False	The opportunity has not been won. The <code>Stage</code> field may have a value of the type Open or Closed/Lost.
Products: Active	True	Product is active and can be added to opportunities in Enterprise, Unlimited, and Performance Edition orgs.
	False	Product is inactive and cannot be added to opportunities.
Product: Has Quantity Schedule	True	Product has a default quantity schedule.
	False	Product does not have a default quantity schedule.
Product: Has Revenue Schedule	True	Product has a default revenue schedule.
	False	Product does not have a default revenue schedule.
Solutions: Visible in Self-Service Portal	True	The solution has been marked <code>Visible in Self-Service Portal</code> and is visible to Self-Service portal users.
	False	Solution is not marked <code>Visible in Self-Service Portal</code> and is not visible to Self-Service portal users.
Solutions: Reviewed	True	The solution has been reviewed, that is, the solution <code>Status</code> field has a “Reviewed” value.
	False	Solution is not reviewed.

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



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

## Filter Operators Reference

The operator in a filter is like the verb in a sentence. Operators specify how filter criteria relate to one another. Refer to this list of filter operators when setting filters on list views, reports, dashboards, and some custom fields.

Operator	Uses
equals	Use for an exact match. For example, "Created equals today."
less than	Use for results that are less than the value you enter. For example, "Quota less than 20000" returns records where the quota field ranges from 0 to 19,999.99.
greater than	Use when you want results that exceed the value you enter; for example, "Quota greater than 20000" returns records where the quota amount begins at 20,000.01.
less or equal	Use for results that match or are less than the value you enter.
greater or equal	Use for results that match or exceed the value you enter.
not equal to	Shows results that don't have the value you enter. This operator is useful for eliminating empty fields. For example, "Email not equal to <blank>."
<p> <b>Note:</b> If evaluating more than one value, none of the specified values can exist on the record. For example, if you specify not equal to A &amp; C, only records where the value is neither A nor C are returned.</p>	
contains	Use for fields that include your search string, but sometimes also include other information. For example, "Account contains California" would find California Travel, California Pro Shop, and Surf California. Keep in mind

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

## Visualize Your Data with Dashboards

### USER PERMISSIONS

To create dashboards:

#### **Legacy Folder Sharing**

Run Reports AND Manage Dashboards

#### **Enhanced Folder Sharing**

Run Reports AND Create and Customize Dashboards

To edit and delete dashboards you created:

#### **Legacy Folder Sharing**

Run Reports AND Manage Dashboards

#### **Enhanced Folder Sharing**

Run Reports AND Create and Customize Dashboards

To edit and delete dashboards you created in public folders:

#### **Legacy Folder Sharing**

Run Reports AND Manage Dashboards

#### **Enhanced Folder Sharing**

Edit My Dashboards

To edit and delete dashboards you didn't create in public folders:

#### **Legacy Folder Sharing**

Run Reports, Manage Dashboards AND View All Data

#### **Enhanced Folder Sharing**

Manage Dashboards in Public Folders

To create, edit, and delete dynamic dashboards:

#### **Legacy Folder Sharing**

Manage Dynamic Dashboards

#### **Enhanced Folder Sharing**

Manage Dynamic Dashboards

### EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#) on page 9) and Lightning Experience

Available in: **Essentials**, **Group** (View Only), **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Available in: both Legacy Folder Sharing and Enhanced Folder Sharing

Create a *dashboard* to show data from your report with a visual component, for example a pie chart.

Let's say you have a report that shows Banking industry Accounts in California, Arizona, and Nevada with an annual revenue above \$1,000,000.00. Now you want to visualize this report for your team with a pie chart. Here's how you do that.

1. In Lightning Experience, click the Dashboards tab. Or, in Salesforce Classic, click the Reports tab.
2. Click **New Dashboard**.
3. In Lightning Experience, click **+ Component**. Then, select a report, and display it as a donut chart. Or, in Salesforce Classic, click the pie chart icon in the Components tab and drag it to one of the columns in the layout. Then, click the **Data Sources** tab and expand the report list, find your report, and drag and drop it on the pie chart.
4. Add a title for your chart.
5. Click **Save**.

## Note and Attachment Fields

There are a number of useful fields available for notes and attachments in Salesforce. There are different fields available for notes taken with Notes, our enhanced note-taking tool, and notes taken with the old note-taking tool.

### Fields for Notes

 **Note:** In the Salesforce mobile app and Lightning Experience, there are additional fields for relating multiple records to the note.

Field	Description
Body	Text of the note. Can hold up to 50 MB of data.
Title	Subject of note. Maximum of 200 characters.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)), Lightning Experience, and all versions of the Salesforce mobile app

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

### Fields for the Old Note-Taking Tool

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

### Fields for Attachments

#### Attachment Fields

Field	Description
Description	Description of the uploaded file. Maximum of 500 characters.
File Name	Name of the uploaded file.
Private	Checkbox to indicate that the attachment is only accessible to the person who created or attached it and to administrators. For administrators to view private attachments, they need the "View All Data" permission; to edit them, they need the "Modify All Data" permission.
Share With Connections	Checkbox to indicate that the attachment is shared with connections when the parent record is shared. This checkbox is only available if Salesforce to Salesforce is enabled, the parent record is shared, and the attachment is public.
Size	Size of the uploaded file.

## Brand Your Org in Lightning Experience

Rally your team around your brand and important initiatives, like a new product launch, with a set of custom brand images and colors in your org. We call them *themes*. You can choose one of the built-in Salesforce themes, or create your own custom themes with just a few clicks.

1. From Setup, enter *Themes and Branding* in the Quick Find box, then select **Themes and Branding**.
2. View, preview, and activate an existing theme, or click **New Theme** to create your own.

Keep these considerations in mind when working with themes:

- Only one theme can be active at a time, and a theme applies to your entire org.
- By default, orgs use the built-in Lightning Blue theme.
- You can create up to 300 custom themes, but you can't modify or clone the built-in themes provided by Salesforce.
- Themes don't apply to Salesforce Classic or to mobile.
- Chatter External users see the built-in Lightning Blue theme only.
- Even if you haven't selected the option to override themes in the App Manager, your app's brand image and color always override the Lightning Lite and Lightning Blue themes.
- For optimum visibility, we use an accessible version of your brand colors. To use your own colors in links and branded buttons, select the **Override accessibility brand color** checkbox. You can't override accessible brand colors in the Global Navigation Divider and status and flow components.



**Warning:** Selecting the **Override accessibility brand color** checkbox can cause accessibility issues in some areas of the UI. This can make text harder to read.

### SEE ALSO:

[Create Lightning Apps](#)

## Try New Features with the Lightning Extension for Chrome

Are you an early adopter of the latest and greatest technology ... or do you want to become one? With the Lightning Extension for your browser, you can gain access to the latest Lightning features and try them before everyone else.

The Lightning Extension is a browser extension that lets us roll out new features on a continuous basis, outside of our normal release cycle.

### What features are available?

The initial release of the Lightning Extension contains these new features.

- The Component Customization feature lets you declutter record and home pages by hiding components with the icon in the header.
- The Link Grabber feature makes all Lightning links open in a single browser tab.

### I only want my users to have access to certain features. Can I disable some of the features offered in the Lightning Extension?

Yes. To disable features, from Setup, in the Quick Find box, enter *Lightning Extension*, and then select **Lightning Extension**. From there, you can control access to individual features, or access to the extension itself. Changes can take up to 24 hours to take effect.

### EDITIONS

Available in: Lightning Experience

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

[Component Customization FAQ](#)

Hide components in home and record pages on a per-app basis.

[Link Grabber FAQ](#)

Save time every time you open a Lightning link. Makes all Lightning links open in a single browser tab.

**SEE ALSO:**

*External Link:* Download the Lightning Extension from the Chrome Web Store

[Create a Support Case](#)

[Component Customization FAQ](#)

[Link Grabber FAQ](#)

## Component Customization FAQ

Hide components in home and record pages on a per-app basis.

**How do I use the Component Customization feature?**

Click  on the header to edit a record or home page. To hide a component, select the component you want to hide, and click the **Component Visibility** toggle in the customization panel.

The screenshot shows the Salesforce Lightning Extension for Chrome interface. At the top, there's a header with the opportunity name 'GenePoint Standby Generator'. Below it, the opportunity details are listed: Account Name 'GenePoint', Close Date '3/21/2016', Amount '\$85,000.00', and Opportunity Owner 'Admin User'. A navigation bar with arrows and a refresh icon is at the top right. To the right of the main content area, there are several sidebar panels:

- Products (0)**
- Stage History (1)**
  - Stage: Closed Won
  - Amount: \$85,000.00
  - Probability (...): 100%
  - Expected Rev...: \$85,000.00
  - Close Date: 3/15/2013
  - Last Modified...: Admin User
  - Last Modified: 4/10/2018 5:37 PM
- Notes & Attachments (0)**

The main content area contains tabs for Activity, Details, and Chatter. The Activity tab is active, showing options to Log a Call, New Task, New Event, or Email. A text input field says 'Recap your call...' and a blue 'Add' button is visible. Below this is a section for 'Next Steps' with a note: 'No next steps. To get things moving, add a task or set up a meeting.' There's also a 'Past Activities' section with a note: 'No past activity. Past meetings and tasks marked as done show up here.' A 'Load More Past Activities' button is at the bottom.

#### SEE ALSO:

[Try New Features with the Lightning Extension for Chrome](#)

[External Link: Download the Lightning Extension from the Chrome Web Store](#)

## Link Grabber FAQ

Save time every time you open a Lightning link. Makes all Lightning links open in a single browser tab.

### How does the Link Grabber work?

The Link Grabber takes all Lightning links and opens them in a single browser tab. For standard navigation apps, this means that the content that's currently open in your app is replaced with the content from the link. For Lightning console apps, that means that the link opens in a new workspace tab in your current console session.

**Is this feature related to the Lightning Console Extension?**

The Lightning Console Extension is the standalone version of the Link Grabber. Turning on the Link Grabber automatically disables the Lightning Console Extension. If you continue to use the Link Grabber feature, we recommend uninstalling the Lightning Console Extension.

## SEE ALSO:

[Try New Features with the Lightning Extension for Chrome](#)[\*External Link:\* Download the Lightning Extension from the Chrome Web Store](#)

# INDEX

## A

Accessibility

screen reader [45](#)

tips [45](#)

Apps

opening [69, 71](#)

Assistant

Lightning Experience  
[122](#)

assistant [122](#)

## C

Calendar

Home tab [120](#)

## H

Home tab

calendar section [120](#)

Home tab (*continued*)

My Tasks section [120](#)

## K

Keyboard shortcuts

in Lightning Experience [58](#)

in Salesforce Classic [57](#)

## P

Pages

detail [68](#)

## S

Salesforce administrator

can't see features [87](#)

Setup

navigating to [86](#)

Quick Find [86](#)

user [104, 109, 120, 178](#)