

**Glossary:** This glossary defines terms that appear throughout Salesforce.

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<b>Salesforce Term</b>	<b>Definition</b>	<b>Current Term</b>
Account	An organization, company, or school that we want to track. For example, a high school. Accounts can be affiliated with <a href="#">contacts</a> .	
Activity	An event or task – a call you have logged or an email you have sent. Activity can be related to multiple <a href="#">accounts</a> and <a href="#">records</a> .	Person Comment Detail (SIS) Team Interactions (Talisma) Full History (HelpSpot)
Affiliated Accounts	Links <a href="#">contacts</a> with organizations ( <a href="#">accounts</a> ). Like <a href="#">relationships</a> , but an affiliation is a specific relationship set between a contact and an account. Ex. A contact, Betty Buckeye, is a current student at Hilliard Rome High School. The link to connect Betty to Hilliard is called an affiliation. Once that link is made, Hilliard Rome High School is an affiliated account to Betty.	
@Mention	A reference to someone; used to collaborate. An @mention (or at mention) is the @ symbol followed by a person's name. When you @mention someone, the <a href="#">post</a> or comment displays in their <a href="#">feed</a> and they are emailed a notification.	@Mention (Microsoft Teams or Slack)
App	Short for "application." A collection of components that address a specific office's need.	
Campaign	An initiative such as an advertisement or mail. Conducted to generate awareness of a broad topic.	Mailers (Talisma)
Case	An inquiry or issue that documents all items related to that issue. Includes a detailed description of a customer's	Interaction (Talisma) Request (HelpSpot) Person Comment Entry (SIS)

	problem, or question. Cases are used to track and solve issues.	
Case Hierarchy	Parent and child cases. Relating cases will link them together and designate one case as a parent and a child case, resulting in a hierarchy. See definition for <a href="#">related case</a> .	
Case Origin	The inquiry source: This field is used to identify where the cases come from, usually by phone, email, or in-person.	
Chatter	A collaboration tool in Salesforce. A way to share updates with colleagues, get assistance on records or stay up to date on recent events. Chatter <a href="#">posts</a> are organized in a feed.	
Contact	Contacts are people who have an <a href="#">affiliation</a> to the university. A contact could be prospective student, current student, parent, university staff/faculty, guidance counselor, alum, etc. A contact is considered an <a href="#">object</a> and stores information about that person. Contacts can be linked to one another to create a relationship, and contacts can be linked to other accounts to create an <a href="#">affiliation</a> .	Contacts (Talisma) Customer (HelpSpot)
Email Template	A form email that communicates a standard message. These are created by the university and can be written in text, HTML, or a custom format.	Canned response (Talisma) Quick response (HelpSpot)
Field	Structures inside of an <a href="#">object</a> container, which stores the specific attributes or information of the object. A field is a single piece of data. Example of fields include a phone number on a <a href="#">contact</a> or the case origin picklist on a <a href="#">case</a> .	Spreadsheets (Microsoft Excel) See " <a href="#">Object</a> "

Global Search	Displays search results from across the community. The results are based on search terms entered in the search bar. Allows you to search almost every <a href="#">field</a> in every <a href="#">record</a> of Salesforce.	
Note	Used to centralize activity on a singular <a href="#">case</a> and to document subsequent interactions within a singular case.	Private note (HelpSpot)
Object	A container for the <a href="#">record/field</a> information on a certain person, place, or thing that data is being stored on. Think of an object as a tab on a spreadsheet, with each record being a row, and each field being a column. <a href="#">Accounts</a> and <a href="#">contacts</a> are examples of objects.	Spreadsheets (Microsoft Excel) See " <a href="#">Record</a> " and " <a href="#">Field</a> "
Org	Short for "organization." This is your instance of Salesforce where all of OSU's data, configuration, and customization lives. You log in to access it.	
Persona	Used to provide individualized recruitment information. Personas are where additional information about a <a href="#">contact</a> is stored, specifically, information pertaining to a slice of their life at the university. The only two persona <a href="#">objects</a> that currently exist are Student Recruitments, which holds all information relating to recruitment effort, and the Student object, which houses FYE success assessment data and some orientation information .	
Post	Content published to the <a href="#">chat</a> ter feed.	
List view	Allows you to see a filtered list of <a href="#">records</a> , such as <a href="#">contacts</a> , <a href="#">accounts</a> , and <a href="#">cases</a> .	Folders (HelpSpot) Workspace (Talisma)

Queue	A grouping of <a href="#">cases</a> waiting to be processed or claimed. Items within a larger queue can be distributed to specific team members.	Inbox or My Queue (HelpSpot) My Workspace (Talisma) AOCC Unassigned (Talisma)
Quick text	Create personal, predefined messages to insert into emails, chats, tasks, events, and more. Standard text only, hyperlinks will not work.	Auto text (Talisma)
Record	A collection of <a href="#">fields</a> that store information about a specific item of a specific type. For example, "John Smith" and all his bio/demo information make up a <a href="#">contact record</a> . Hilliard Rome High School is an example of an <a href="#">account record</a> .	Spreadsheets (Microsoft Excel) See " <a href="#">Object</a> "
Record Detail Page	A page that includes details about a <a href="#">record</a> (such as an <a href="#">account</a> or <a href="#">contact</a> ). Examples of details include contact information and OSU Identifiers.	Properties (Talisma)
Related Case	Users can link <a href="#">cases</a> and create a relationship between them. One case would be the parent, and the other would be considered a child, creating a <a href="#">case hierarchy</a> . Related cases could be utilized to link two cases about the same issue, or cases that need to be worked on by different areas. For example, a BL counselor might be working with a student and that inquiry is documented on a case, and then the counselor creates a related case to send a request to Financial Aid to take action, for example, to reoffer loans.	SFA Revision List, Registrar Action Request, Bursar Action Request, Operation HelpSpot ticket (SharePoint)
Relationships	A relationship between two contacts, so you can associate their <a href="#">records</a> with one another.	

Reports	Returns a set of <a href="#">records</a> that meet certain criteria and displays the information in an organized way. Reports can be filtered, grouped, and displayed graphically as a chart.	
Task	Scheduled reminders to follow up on something. Tasks can be linked to records, such as individual cases, or can just be used as personal to-dos.	Follow-up Sticky Notes Private ticket (HelpSpot) Reminders (Outlook)
Touchpoints	Engagement across all channels (phone, email, in-person, etc.)	Person Comment Detail (SIS) Team Interactions (Talisma) ID search (HelpSpot)
Topics	Words or phrases you can associate with <a href="#">records</a> or <a href="#">posts</a> to organize them around a common topic. Topics are shared across all offices, but if used within a private <a href="#">chat</a> group, then will not be visible to everyone.	Hashtag #