Organistation Setup

1. Setup->company information
2. Setup->Data storage

Middle Names and Suffixes appear along with full person names, except:

- Activities (includes new Events, new Tasks, and shared activity lookup search results)
- Calendar (includes meeting invitations and the 'Scheduled Meetings' section on the Home tab)
- Campaigns (includes 'Campaign Member' lists)
- Chatter
- Cloud Scheduler
- Data.com records
- Forecasts (includes the Collaborative Forecasting page)
- Opportunities (includes opportunity stage history, the 'Opportunity Sharing Detail' page, and the 'Opportunity Split Edit' page)
- Price Books (includes Price Book history)
- The fields 'Middle name' and 'Suffix' are not present in the list of fields in the "Object Manager" and are only displayed upon creation and editing of records.

DATA TRANSLATION

1. Enable Data Translation for Name and Description fields on the Product and Category objects.
    a. From Setup, enter Company Information in the Quick Find box and select **Company Information**.
    b. In the Organization Detail section, click **Edit**.
    c. Select **Enable Data Translation**.
    d. Save your changes.
2. Enable Data Translation for custom fields through the Translation tab within Product.
    a. From Setup, enter Data Translation Settings in the Quick Find box and select **Data Translation Settings**.
    b. Select an object to enable data translation for its custom fields. Only objects that support data translation are listed.

c. Select the custom fields you want to make available for data translation. Data translation can only be enabled on custom fields with a type of Text, Text Area, Text Area (Long), Text Area (Rich), and URL.
d. Save your changes.
3. Add supported languages to the Store page layout if you want to offer products in more than one language.
a. From Setup, go to Object Manager and enter Store in the Quick Find box.
b. Go to **Store | Page Layouts | Store Layout**.
c. From the Fields menu, drag the Supported Language and Default Language fields on to the Store page layout.
d. Save your changes.
4. Set up languages for your site if you want a multilingual site associated with your store.

Set Up Your Company in Salesforce

Use the Company Information page in Setup to track what's important about your company's organization in Salesforce. You can also manage your licenses and entitlements. This page contains the information that was provided when your company signed up with Salesforce.

REQUIRED EDITIONS AND USER PERMISSIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** editions

USER PERMISSIONS NEEDED	
To view company information:	View Setup and Configuration
To change company information:	Modify All Data

Manage Information About Your Company

The Company Information page shows all the important information about your company (listed here in alphabetical order). The page also includes the user and feature licenses purchased for your organization.

FIELD	DESCRIPTION

Address	Street address of the organization. Up to 255 characters are allowed in this field.
Admin Newsletter	Allow administrators in your organization to choose whether they want to receive administrator-targeted promotional emails from Salesforce.
API Requests, Last 24 Hours	The total number of API requests issued by the organization in the last 24 hours. The maximum number of requests depends on your Edition.
City	City in which organization is located. Up to 40 characters are allowed in this field.
Corporate Currency	The currency in which the organization's corporate headquarters reports revenue. Serves as the basis for all currency conversion rates. Only for organizations that use multiple currencies.
Country	Country portion of user's address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.
Created By	User who signed up the organization, including creation date and time. (Read only)
Currency Locale	The country or geographic region in which the organization is located. The setting affects the format of currency amounts. For single currency organizations only
Default Language	The default language that is selected for new users in the organization. This setting determines the language used for the user interface text and help. In all editions except Personal Edition and Database.com, individual users can separately set the language for their own login, which overrides the organization setting. In Group Edition,

	this field is called Display Language. This setting also determines the language in which all customizations—such as custom fields, tabs, and user interface options—are stored. For customizations, individual users' language settings don't override this setting. If you edit or clone existing filter criteria, check that this setting matches the default language that was configured when the filter criteria was originally set. Otherwise, the filter criteria can be evaluated differently than expected.
Default Locale	The default country or geographic region that is selected for new users in the organization. This setting determines the format of dates, times, and names in Salesforce. In Contact Manager, Group, Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, individual users can set their personal locale, which overrides the organization setting. In Group Edition, this field is called Locale.
Default Time Zone	Primary time zone in which the organization is located. A user's individual Time Zone setting overrides the organization's Default Time Zone setting. Note: Organizations in Arizona typically select "Mountain Standard

	Time," and organizations in parts of Indiana that don't follow Daylight Savings Time usually select "Eastern Standard Time."
Division	Group or division that uses the service, for example, PC Sales Group. Up to 40 characters are allowed in this field.
Fax	Fax number. Up to 40 characters are allowed in this field.
Fiscal Year Starts In	If using a standard fiscal year, the starting month and year for the organization's fiscal year. If using a custom fiscal year, the value is "Custom Fiscal Year."
Hide Notices About System Downtime	Select this checkbox to prevent advance notices about planned system downtime from displaying to users when they log in to Salesforce.
Hide Notices About System Maintenance	Select this checkbox to prevent advance notices about planned system maintenance from displaying to users when they log in to Salesforce.
Modified By	User who last changed the company information, including modification date and time. (Read only)

Newsletter	Allow users in your organization to choose whether they want to receive user-targeted promotional emails from Salesforce.
Organization Edition	Edition of the organization, such as Developer Edition or Enterprise Edition.
Organization Name	Name of the organization. Up to 80 characters are allowed in this field.
Phone	Main phone number at organization. Up to

	40 characters are allowed in this field.
Primary Contact	Person who is main contact or administrator at the organization. You can enter a name, or select a name from a list of previously defined users. Up to 80 characters are allowed in this field.
Restricted Logins, Current Month	Number of restricted login users who have logged in during the current month. This value resets to zero at the beginning of each month. The maximum number of restricted login users for the organization is in parentheses.
Salesforce Licenses	Number of Salesforce user accounts that can be defined for access to the service. This number represents the Salesforce user licenses for which the organization is billed, if charges apply.
Salesforce Organization ID	Code that uniquely identifies your organization to Salesforce.
State/Province	State or province portion of user's address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.
Streaming API Events, Last 24 Hours	The total number of Streaming API events used by the organization in the last 24 hours. The maximum number of events depends on your edition.
Zip	Zip or postal code of the organization. Up to 20 characters are allowed in this field.
Used Data Space	Amount of data storage in use. The value is expressed as a measurement (for example, 500 MB) and as a percentage of the total amount of data storage available (for example, 10%).

Used File Space	Amount of file storage in use. The value is expressed as a measurement (for example, 500 MB) and as a percentage of the total amount of file storage available (for example, 10%).

Configure User Interface Settings

Modify your org's user interface by enabling or disabling these settings.

REQUIRED EDITIONS AND USER PERMISSIONS

Available in: both Salesforce Classic and Lightning Experience
The user interface settings vary according to which Salesforce edition you have.

USER PERMISSIONS NEEDED

To modify user interface settings: Customize Application

User Interface Settings

Enable Collapsible Sections

Collapsible sections let users collapse or expand sections on their record detail pages by using the arrow icon next to the section heading. When enabling collapsible sections, verify that your section headings are displayed for each page layout. Sections remain expanded or collapsed until the user changes the settings for that tab. If your org has enabled record types, Salesforce remembers a different setting for each record type.

Show Quick Create

The Quick Create area on a tab home page allows users to create a record quickly with minimal information. It displays by default on the tab home pages for leads, accounts, contacts, and opportunities. You can control whether the Quick Create area is displayed on all relevant tab home pages.

NOTE : The Show Quick Create setting also affects whether users can create records from within the lookup dialog. Creating records in the lookup dialog is available only if Quick

Create is available for your chosen record type. In addition, users always need the appropriate "Create" permission to use Quick Create even though it displays for all users.

Enable Hover Details

Hover detail displays an interactive overlay containing record details. Details appear when users hover over a link to that record in the Recent Items list on the sidebar, or in a lookup field on a record detail page. Users can quickly view information about a record before clicking to view or edit the record. The record's mini page layout determines which fields are included in the hover details. Users can't customize which fields appear. This option is enabled by default.

NOTE : To view hover details for a record, users need the appropriate sharing access, and field-level security access for the fields in the mini page layout.

Enable Related List Hover Links:

Related list hover links display at the top of record detail pages and custom object detail pages in Setup. Users can hover over a related list link to display the list and its number of records in an interactive overlay. Users quickly view and manage the related list items from the overlay. Users can also click a related list hover link to jump to the related list without having to scroll down the page. This option is enabled by default.

Enable Separate Loading of Related Lists:

When enabled, users see primary record details immediately. As the related list data loads, users see a progress indicator. Separate loading can improve performance on record detail pages for orgs with large numbers of related lists. This option applies only to Salesforce Classic and is disabled by default. The options for separately loading related lists don't apply to Visualforce pages, the Self-Service portal, or other pages for which you can't control the layout.

Enable Separate Loading of Related Lists of External Objects:

When enabled, related lists of external objects are loaded separately from primary record details and related lists of standard and custom objects. External objects behave similarly to custom objects, except that they map to data that's stored outside your Salesforce org. It can take a while to retrieve data from an external system, depending on the network latency and availability of the external system. This option applies only to Salesforce Classic and is enabled by default. The options for separately loading related lists don't apply to Visualforce pages, the Self-Service portal, or other pages for which you can't control the layout.

Enable Inline Editing:

Inline editing lets users quickly edit field values, right on a record's detail page. This option is enabled by default and applies to all users in your org.

NOTE : To enable enhanced lists for profiles in particular, select Enhanced Profile List Views in User Management Settings.

Enable Enhanced Lists:

Enhanced lists give you the ability to quickly view, customize, and edit list data to speed up your daily productivity. When enabled with the Enable Inline Editing setting, users can also edit records directly from the list, without navigating away from the page. This option is enabled by default.

NOTE : To enable enhanced lists for profiles in particular, Enable Enhanced Profile List Views available in User Management Settings.

Enable the Salesforce Classic 2010 User Interface Theme:

This option isn't related to Lightning Experience. In this case, "Salesforce Classic" refers to the newer version of Salesforce Classic, which is the interface that immediately precedes Lightning Experience. Enabling this option turns on the updated Salesforce Classic look and feel. Disabling it turns on the Salesforce Classic 2005 user interface theme —the classic, classic Salesforce interface.

WARNING: Some features, like Chatter, require the Salesforce Classic 2010 user interface theme. Disabling this theme automatically disables Chatter in both Salesforce Classic and Lightning Experience.

Only users with supported browsers see the Salesforce Classic.

Salesforce Classic isn't supported in portals or on the Console tab.

Disable Navigation Bar Personalization in Lightning Experience:

When selected, users can't add or reorder the items included in the navigation bar for any app. However, Salesforce recommends disabling navigation personalization per app instead.

From Setup in Lightning Experience, go to the App Manager. For the desired app, select App Options. Select Disable end user personalization of nav items in this app. This option applies only to Lightning Experience.

Enable Tab Bar Organizer:

The Tab Bar Organizer arranges tabs in the main tab bar to prevent horizontal scrolling of the page. The Organizer dynamically determines how many tabs can display based on the width of the browser window. It puts tabs that extend beyond the browser's viewable area into a dropdown list.

Note the following limitations:

- The Tab Bar Organizer isn't available with the partner portal or Customer Portal.
- The Tab Bar Organizer is only available with the Salesforce Classic. Orgs using the Salesforce Classic can enable the feature, but it isn't available to users until the newer theme is also enabled.
- The Tab Bar Organizer isn't available on Internet Explorer 6.

Enable Printable List Views:

Printable list views let users easily print list views. If it's enabled, users click the Printable View link from any list view to open a new browser window, displaying the list view in a print-ready format. The link is located next to the Help for this Page link in the colored title bar of the page.

Enable Spell Checker on Tasks and Events:

Available in all editions. Enables the Check Spelling button when users create or edit tasks or events. The spell checker analyzes the Description field on events and the Comments field on tasks.

Enable Customization of Chatter User Profile Pages:

Enables administrators to customize the tabs on the Chatter user profile page. This includes adding custom tabs or removing default tabs. If disabled, users see the Feed and Overview tabs only.

Change Default Display Density Setting in Lightning Experience

This option isn't related to Salesforce Classic, Experience Builder sites, or the Salesforce mobile apps. The display density controls field label alignment and the amount of space between page elements. Decide what the default is for your org on the Density Settings setup page. Users can choose their own display density at any time. You can't override a user's display density setting. Depending on which edition of Salesforce you have, your org's default display setting varies. Two settings are available. The Comfy setting places the labels on the top of fields and has more space between page elements. Compact is a denser view with labels to the left of fields and less space between page elements.

Disable Lightning Experience Transition Admin Reminders

Salesforce displays a reminder every 45 days to admins (users with Modify All Data and Customize Application user permissions) working in Salesforce Classic with the countdown to the auto-activation of the Turn on Lightning Experience critical update. The reminder continues repeating until the admin turns on Lightning Experience or the update auto-activates. Salesforce also displays a series of suggested actions to admins in orgs where Lightning Experience isn't turned on to help prepare orgs for when the Turn on Lightning Experience Critical Update is activated. When this setting is selected, the countdown reminder and the series of recommended actions don't appear for any of the org's admins.

Enable ICU formats for en_CA locale

After enabling ICU language and locale formats through a critical update, this setting also enables them for the English (Canada) locale.

Sidebar Settings

Enable Collapsible Sidebar

The collapsible sidebar enables users to show or hide the sidebar on every page that normally includes it. When enabled, the collapsible sidebar is available to all users in your org, but each user can choose how to display the sidebar. Users can leave the sidebar visible, or they can collapse it and show it only when needed by clicking the edge of the collapsed sidebar.

NOTE: Call center users don't see incoming calls if they collapse the sidebar.

TIP: If your org uses divisions, we recommend that you keep the sidebar pinned and visible so you always have access to the Divisions dropdown list.

Show Custom Sidebar Components on All Pages

If you have custom home page layouts that include components in the sidebar, this option makes the sidebar components available on all pages for all org users. If you only want certain users to view sidebar components on all pages, grant those users the “Show Custom Sidebar On All Pages” permission.

NOTE: If the Show Custom Sidebar Components on All Pages user interface setting is selected, the Show Custom Sidebar On All Pages permission is not available.

Calendar Settings

Enable Home Page Hover Links for Events

This option affects only Salesforce Classic. Enables hover links in the calendar section of the Home tab. On the Home tab, users can hover the mouse over the subject of an event to see the details of the event in an interactive overlay. This option is enabled by default. This checkbox only controls the Home tab; hover links are always available on other calendar views.

The fields available in the event detail and edit overlays are defined in a mini page layout.

NOTE: If you create all day events, we recommend adding the All Day Event field to the events mini page layout.

Enable Drag-and-Drop Editing on Calendar Views:

This option affects only Salesforce Classic. You can’t disable drag-and-drop in Lightning Experience. Enables dragging of events on single-user, daily and weekly calendar views. Dragging allows users to reschedule events without leaving the page. This option is enabled by default.

NOTE: Calendar views can load less quickly when this checkbox is enabled.

Enable Click-and-Create Events on Calendar Views

This option affects only Salesforce Classic. Lets users create events on day and weekly calendar views by double-clicking a specific time slot and entering event details in an interactive overlay. The fields available in the event detail and edit overlays are defined in a mini page layout.

Recurring events and multi-person events aren’t supported for click-and-create events on calendar views.

Enable Drag-and-Drop Scheduling on List Views

This option affects only Salesforce Classic. Lets users create events associated with records by dragging records from list views to weekly calendar views and entering event details in an interactive overlay. This option is disabled by default. The fields available in the event detail and edit overlays are defined in a mini page layout.

Enable Hover Links for My Tasks List:

This option affects only Salesforce Classic. Enables hover links for tasks in the My Tasks section of the Home tab and on the calendar day view. This option is enabled by default. Users can hover the mouse over the subject of a task to see the details of that task in an interactive overlay.

Your administrator can configure the information presented on these overlays.

Enable Japanese Imperial Calendar for the Japanese Locale:

This option affects Lightning Experience and the Salesforce mobile app. Enables the Japanese imperial calendar for users who use the Japanese locale.

Setup Settings

Enable Enhanced Page Layout Editor

When enabled, the enhanced page layout editor replaces the current interface for editing page layouts with a feature-rich WYSIWYG editor that includes several improvements.

Enable Streaming API

Enables Streaming API, which lets you receive notifications for changes to data that match a SOQL query that you define in a secure and scalable way. This field is selected by default. If your Salesforce edition has API access and you don't see this checkbox, contact Salesforce.

Enable Dynamic Streaming Channel Creation

Enables dynamic channel creation when using the generic streaming feature of Streaming API. When enabled, generic streaming channels get dynamically created when clients subscribe, if the channel hasn't already been created. This field is selected by default. If your Salesforce edition has API access and you don't see the checkbox, contact Salesforce.

Enable "Delete from Field History" and "Delete from Field History Archive" User Permissions

Enables the user permissions that allow you to delete field history and field history archive records. This field isn't selected by default.

Enable Custom Object Truncate:

Enables truncating custom objects, which permanently removes all the records from a custom object while keeping the object and its metadata intact for future use.

Enable Improved Setup User Interface:

When disabled, users with Salesforce Classic access their personal settings from the Setup menu. When enabled, users with Salesforce Classic access their personal settings from the My Settings menu, accessible from the username menu. The Setup link is also moved from the username menu to the App Menu. If you change this setting, be sure to notify all users in your org.

Enable Advanced Setup Search (Beta):

When enabled, users can search for Setup pages, custom profiles, permission sets, public groups, roles, and users from the sidebar in Setup. When disabled, users can search for Setup pages only.

NOTE

- Advanced Setup Search is in beta; it's production quality but has known limitations.
- Some searchable items (such as permission sets) aren't available in some editions. Users can't search for items that aren't included in their edition.

Advanced Settings
Activate Extended Mail Merge

Enables Extended Mail Merge for your org. When selected, the **Mass Mail Merge** link is available in the Tools area on the home pages for accounts, contacts, and leads. Also, single mail merges requested from the Activity History related list on a record are performed using Extended Mail Merge functionality.

Before users create mail merge documents using Extended Mail Merge, admins must set up the feature. First, from Setup, in the Quick Find box, enter User Interface, and then select **User Interface**. Under the Advanced section, select Enable Extended Mail Merge. Admins can indicate whether they want all users' mail merge documents to be saved to Salesforce Documents, or only documents over 3 MB. After the feature is enabled, admins must create mail merge templates in Microsoft® Word, and upload mail merge templates to Salesforce.

Always save Extended Mail Merge documents to the Documents tab

Mail merge documents generated using Extended Mail Merge are added to the user's documents folder on the Documents tab, rather than delivered as email attachments. Users are sent confirmation emails when their mail merge requests have completed. Those emails include links for retrieving generated documents from the Documents tab. These documents count against your org's storage limits.

FISCAL YEAR

Setup->Company Setting ->Fiscal year

Define Your Fiscal Year

Specify a fiscal year that fits your business needs.

REQUIRED EDITIONS AND USER PERMISSIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience
Available in: **All** Editions except for **Database.com**.

USER PERMISSIONS NEEDED

To define or edit fiscal years: Customize Application

If your fiscal year follows the Gregorian calendar, but does not start in January, you can define a standard fiscal year with a different starting month. If your fiscal year follows a different structure from the Gregorian calendar, you can define a custom fiscal year that meets your needs.

Whether you use a standard fiscal year or a custom fiscal year, you define individual fiscal years one time. These fiscal year definitions allow you to use these fiscal periods throughout Salesforce including in reporting, opportunities, and forecasting.

TIP As a best practice, update product schedules whenever a custom fiscal year is created or changed.

Standard Fiscal Years

Standard fiscal years follow the Gregorian calendar, but can start on the first day of any month of the year.

Custom Fiscal Years:

Some companies break down their fiscal years, quarters, and weeks into custom fiscal periods based on their financial planning requirements. Salesforce allows you to flexibly define these periods using custom fiscal years. For example, you can create a 13-week quarter represented by three periods of four, four, and five weeks, rather than calendar months.

If you use a common fiscal year structure, such as 4-4-5 or a 13-period structure, you can rapidly define a fiscal year. Just specify a start date and choose an included template. If the fiscal year structure you need is not among the templates, you can easily modify a template to suit your business. For example, if you use three fiscal quarters per year (a trimester) rather than four, delete or modify quarters and periods to meet your needs.

Your custom fiscal periods can be named based on your standards. For example, a fiscal period could be called "P2" or "February."

Fiscal years can be modified any time. For example, you can add an extra week to synchronize a custom fiscal year with a standard calendar in a leap year. Changes to fiscal year structure take effect immediately upon being saved. If you use forecasting, Salesforce recalculates your forecasts when you save changes to a fiscal year.

Considerations for Enabling Custom Fiscal Years

Before enabling custom fiscal years, consider these key points.

- After you enable custom fiscal years, you can't disable the feature. However, to revert to standard fiscal years, you can define custom fiscal years that follow the same Gregorian calendar structure as the Salesforce standard fiscal years.
- Fiscal year definitions are not automatically created. Define a custom fiscal year for each year you do business.
- Enabling or defining custom fiscal years impacts your forecasts, reports, and quotas.
- When you define the first custom fiscal year, all existing forecasts, forecast history, and forecast adjustments from the year's first period forward are deleted. Forecasts for periods before the first custom fiscal year are not deleted and can be accessed as usual.

- When you define a new custom fiscal year, any existing forecasts, forecast history, forecast adjustments, and quotas for the corresponding standard fiscal year are lost.
- You can't use fiscal period columns in opportunity, opportunity with product, or opportunity with schedule reports.
- Opportunity list views don't include a fiscal period column.
- When custom fiscal years are enabled, you can't use the FISCAL_MONTH(), FISCAL_QUARTER(), or FISCAL_YEAR() date functions in SOQL.

- Set the Fiscal Year
  If your company follows the Gregorian calendar year but you want to change the fiscal year start month, use standard fiscal years. If your company does not observe a standard fiscal year, you can enable custom fiscal years, which define a more complex fiscal year structure.

- Customize the Fiscal Year Structure
  If your custom fiscal year needs a different structure than one available from the templates, modify the details of your custom fiscal year definition.

- Customize the Fiscal Year Labels
  Customize the labels of your fiscal years in two ways: Naming schemes and prefix choices or fiscal year picklist customization.

- Choosing a Custom Fiscal Year Template

- Define a Custom Fiscal Year
  Set up your company's custom fiscal years to fit your company's calendar. If you define a custom fiscal year and want to change it, edit the existing fiscal year definition.

Fiscal Year to start planing for sale forecasting and Report Dashboard

Fiscal year

1. Standard Fiscal Year - It follow georgian calender. But can you change the month
2. Custom Fiscal Year

Define a Custom Fiscal Year

Set up your company's custom fiscal years to fit your company's calendar. If you define a custom fiscal year and want to change it, edit the existing fiscal year definition.

REQUIRED EDITIONS AND USER PERMISSIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: All Editions except for Database.com.

USER PERMISSIONS NEEDED

To change your fiscal year: Customize Application

Before defining a custom fiscal year, enable custom fiscal years. See Set the Fiscal Year for more information.

Before defining or editing any custom fiscal years, be aware of its impact on forecasting, reports, and other objects by reviewing Define Your Fiscal Year.

Custom fiscal years cannot be deleted.

Define a New Custom Fiscal Year

1. From Setup, click Company Profile | Fiscal Year.
2. Click New. The Custom Fiscal Year template dialog opens.

3. Choose a template and click Continue to close the Custom Fiscal Year template dialog. For more information on the templates, see Choosing a Custom Fiscal Year Template.
4. Set the fiscal year start date, the fiscal year name, and choose the week start day. You can also add a description for the fiscal year.

NOTE : For the first custom fiscal year, the Fiscal Year Start Date and the Week Start Date are automatically set to today's date and day of week. If you already defined a custom fiscal year, the start dates are set to the day after the last end date of your custom fiscal years.

To change other than the start date, year name, or week start day, see Customize the Fiscal Year Structure.

5.To review the fiscal year definition, click Preview.If it is correct, close the preview and click Save to save your fiscal year, or Save & New to save your fiscal year and define another fiscal year.

If your company uses forecasting, creating the first custom fiscal year deletes any quotas and adjustments in the corresponding and subsequent standard fiscal years.

Edit a Custom Fiscal Year

1. **From Setup, click Company Profile | Fiscal Year.**
2. **Click a defined fiscal year name to review the details. Close the fiscal year preview to continue.**
3. **Click Edit for the fiscal year you want to edit.**
4. **Change the Fiscal Year Start Date, the Fiscal Year Name, Description, or Week Start Day.**
5. **Sometimes changing the Fiscal Year Start Date causes this fiscal year to overlap with the previous fiscal year or create a gap between the fiscal years. In this case, the end date of the previous fiscal year is changed to the day before the start of this fiscal year.**

6. If changing the end date causes this fiscal year to overlap the next fiscal year, or create a gap between the fiscal years, the start date of the next fiscal year changes to the day after the end of this fiscal year.

Starting with month : It mean that year next end moth
ending with Month:

Enable Data Translation

Manage Multiple Currencies
Your organization can set up the ability to use multiple currencies in opportunities, forecasts, quotes, reports, and other data.

REQUIRED EDITIONS AND USER PERMISSIONS

- Available in: both Salesforce Classic (not available in all
- orgs) and Lightning Experience
- Available in: Group, Professional, Enterprise,
- Performance, Unlimited, Developer, and Database.com
- Editions

USER PERMISSIONS NEEDED

- To view currencies: View Setup and Configuration
- To change currencies:Customize Application
- Enable multiple currencies for your organization.
- To designate your corporate currency, from Setup, enter Manage Currencies in the Quick Find box, then select Manage Currencies, and then click Change Corporate.
- To activate more currencies for your organization, click New in the Active Currencies related list.
- To use dated exchange rates, enable advanced currency management.
- Set conversion rates for new currencies. See Edit Conversion Rates. If you have enabled advanced currency management, see Editing Dated Exchange Rates.

CURRENCY MANAGEMET

Using Multiple Currencies

International organizations can use multiple currencies in opportunities, forecasts, reports, quotes, and other currency fields. The administrator sets the "corporate currency," which reflects the currency of the corporate headquarters. The administrator also maintains the list of active currencies and their conversion rates relative to the corporate currency. The active currencies represent the countries in which the organization does business. Only active currencies can be used in currency amount fields.

Each user has a personal currency, which is used as the default currency in quotas, opportunities, quotes, and reports. Users can also create opportunities and enter amounts using other active currencies.

All standard and custom object records with currency fields have a field that specifies the currency to use for all amount fields in that record. (Click Edit to display this editable Currency field on a record.) For example, you can set the Account Currency to "USD-U.S. Dollars" so that the Annual Revenue shows in dollars for one of your American accounts. All currency amounts are displayed in the default currency of the record. Administrators can choose whether to also display, in parentheses, the user's personal currency if it is different from the currency of the record. When you change the default currency of a record, currency amounts are not converted. They display the new currency code.

NOTE : If your organization uses advanced currency management, the opportunity close date determines which conversion rate to use when displaying currency amounts.

Amounts in reports are shown in their original currencies, but can be displayed in any active currency. You can change the currency used for report totals by selecting a currency from Show | Currencies. The default value is your personal currency. For any amount, you can choose to display the Converted column—for example, Annual Revenue Converted—which shows amounts in the currency you select.

Custom formula fields are not tied to any particular currency. If the result of a formula field is a currency amount, it displays in the currency of the associated record. This rule is also true for cross-object formulas that reference merge fields with different currencies, and formulas in workflow rules and approval processes. However, workflow rules and approval processes that use filters instead of formulas convert all currency values to the corporate currency.

If currency fields are referenced in Apex, you can't disable multiple currencies for your organization. For example, if Apex code references the Account Currency field (represented as CurrencyIsoCode in the code), you can't disable multiple currencies.

- Enable Multiple Currencies
- Before your organization can use multiple currencies, the feature must be turned on.
- Considerations for Enabling Multiple Currencies
- Enabling multiple currencies introduces permanent changes in your organization. Before proceeding, be aware of these implications to ensure a smooth transition for your organization.
- Activate and Deactivate Currencies
- For orgs with multiple currencies, specify which currencies are supported by activating or deactivating currencies.
- About Advanced Currency Management
- Edit Dated Exchange Rates
- Add, view, change, or delete dated exchange rates.

To enable multiple currencies in your organization:

- Familiarize yourself with the implications of enabling multiple currencies.
- In Setup, enter Company Information in the Quick Find box, then select Company Information and click Edit. Ensure that your selected currency locale is the default currency that you want to use for current and future records. Enable Activate Multiple Currencies, and then save your changes.

Considerations for Enabling Multiple Currencies

Enabling multiple currencies introduces permanent changes in your organization. Before proceeding, be aware of these implications to ensure a smooth transition for your organization.

REQUIRED EDITIONS

- After enabled, multiple currencies can't be disabled for your organization.
- If multiple currencies is enabled, field-to-field filters in reports don't support currency fields, like amount.
- Upon enablement, existing records are stamped with a default currency code that you provide in your enablement request. For example, if your organization contains records using USD and EUR, switch them all to the same default currency before enablement. Support for this type of conversion is also available as a Salesforce paid implementation service.
- Standard and custom objects, such as Account, Lead, Case, Opportunities, Opportunity Products, Opportunity Product Schedules, and Campaign Opportunities, have currency fields that support multiple currencies. Reports related to these objects and fields also support multiple currencies. By default, page layouts for these objects have multi-currency-compatible fields in which you can specify the currency for the record. Typically, these fields are available only when creating a record or editing an existing record. The selected currency is used for the primary amount field.
- After enablement, the number of decimal places defined in a custom currency field is ignored. Instead set decimal places per currency through Manage Currencies in Setup.
- After enablement, the primary currency displays as usual and, optionally, a secondary currency amount appears in parentheses. The primary currency is typically the default corporate currency, unless it's overridden at the record level. The amount shown in parentheses is the user's personal default currency, calculated based on the conversion rate settings defined in your organization. To control whether the converted currency amount appears, enable or disable parenthetical currency conversion from the Manage Currencies page.
- In reports, the primary currency reflects either the default corporate currency or the currency selected for the record. The secondary currency reflects the personal default currency of the user running the report, or the currency specified in the report criteria.
- Users can specify a personal default currency on their personal information page. If parenthetical currency conversion is enabled, the personal default currency displays as the secondary currency amount (converted amount). Changing the personal default currency updates the converted amount in real time.
- After a currency is added to an organization's list of supported currencies, it can't be deleted from the administrator's list of currencies, even when it's

deactivated. The presence of inactive currencies in the administrator's list is a cosmetic issue that doesn't affect end users. A deactivated currency isn't visible to end users, but remains visible to administrators. Salesforce recommends that you keep this issue in mind during testing and use only those currencies that you eventually plan to use in your organization.

- After enablement, all currency fields display the ISO code of the currency before the amount. For example, $100 displays as USD 100.
- By default, all converted amounts in your organization rely on the current conversion rates defined for your organization. Conversion rates must be set and updated manually. Changing the exchange rate automatically updates converted amounts on all records, including on closed opportunities.
- You can opt to use dated exchange rates by using advanced currency management to track historical exchange rates. Advanced currency management allows you to maintain a list of exchange rates by date range. Converted currency amounts on opportunities display based on the specified Close Date, regardless of the opportunity stage. If the Close Date changes to a different exchange rate period, changing the Close Date impacts converted amounts.

Business Hour

7 day and 24 hr For Cases For Working Hour

Setting business hours lets you apply specific time zones and locations to:

- Milestones in entitlement processes
- Entitlement processes
- Cases
- Case escalation rules

You can also make the Business Hours field available on the Case Layout page so that your support agents can set the times a support team is available to work on the case. By default, business hours are set 24 hours, seven days a week in the default time zone specified in your organization's profile.

Additionally, users with the "Customize Application" permission can add business hours to escalation rules so that when the details of a case match the criteria of an escalation rule, the case is automatically updated and escalated with the times and location on the rule. For example, a case updated with Los Angeles business hours escalates only when a support team in Los Angeles is available.

To set business hours:

1. From Setup, enter Business Hours in the Quick Find box, then select **Business Hours**.
2. Click **New Business Hours**.
3. Type a name for the business hours.

   We recommend using a name that will remind users of a location or time zone when they view business hours on a case, entitlement process, or milestone. For example, if your business hours are for a support center in San Francisco, you could use the name San Francisco Business Hours.

4. Click Active to allow users to associate the business hours with cases, escalation rules, milestones, and entitlement processes.
5. Optionally, click Use these business hours as the default to set the business hours as the default business hours on all new cases.

   Default business hours on cases can be updated with business hours on escalation rules if the cases match escalation rule criteria and the rule is set to override business hours.

6. Choose a time zone to associate with the business hours in the Time Zone drop-down list.
7. Set your business hours for each day of the week.
   - If your support team is available during the entire day every day of the week, select the 24 hours checkbox.
   - Choose the start and end times for the business hours. If the time you want isn't available, click the field and type it in.
   - Leave the business hours start and end times blank and the 24 hours checkbox deselected to indicate that the support team is not available at all that day.
8. Click **Save**.

After you have set business hours, you can associate them with:

- Escalation rules, so that when the details of a case match the criteria of an escalation rule, the case is updated and escalated with the business hours on the rule.
- Holidays, so that business hours and any escalation rules associated with business hours are suspended during the dates and times specified in holidays.
- Milestones, in entitlement processes so that business hours can change with the severity of a case.
- Entitlement processes, so that you can use the same entitlement process for cases with different business hours.

- Holidays
- language

- Active currencies represent countries in which your org does business. Only active currencies can be entered in opportunities, forecasts, and other items. Once you activate a currency, you can never permanently delete it.
- Inactive currencies are currencies that your org no longer uses. You can have existing records that use inactive currencies, but you can't enter new amounts that use inactive currencies.

To activate new currencies:

1. From Setup, enter Manage Currencies in the Quick Find box, then select Manage Currencies.
2. Click New in the Active Currencies related list.
3. Select a currency. Currencies are alphabetized using their ISO currency code.
4. Enter the conversion rate relative to your corporate currency.
5. Specify the number of decimal places to display for amounts in this currency.
6. Click Save.

About Advanced Currency Management

To activate a currency from the list of inactive currencies, click Activate next to the currency.

Advanced currency management allows you to manage dated exchange rates within opportunities using Salesforce. Dated exchange rates allow you to map a conversion rate to a specific date range. For example, the exchange rate on January 1 was 1 USD to 1.39 AUD, but on February 1, it changed to 1 USD to 1.42 AUD. Your opportunities that closed between January 1 and February 1 use the first exchange rate (1 = 1.39), while opportunities that closed after February 1 used the second exchange rate (1 = 1.42).

Dated exchange rates are defined using a start date and a conversion rate. Each rate is in effect until either the end of time or the day before the next start date for that currency. The time between one start date and the next start date is called the exchange rate date range. These ranges can be as small as a day and as large as all time.

To enable or disable advanced currency management, see Enabling or Disabling Advanced Currency Management.

When advanced currency management is first enabled, your existing exchange rates automatically become the first set of dated exchange rates. These rates are valid for all time, until you define another set of exchange rates. For more information, see Editing Dated Exchange Rates.

If you disable advanced currency management, all currency conversions use the static conversion rate. See Edit Conversion Rates.

Advanced Currency Management Considerations

- Dated exchange rates are used for opportunities, opportunity products, opportunity product schedules, campaign opportunity fields, opportunity splits, and reports related to these objects and fields. Dated exchange rates are not used in forecasting, currency fields in other objects, or currency fields in other types of reports. Dated exchange rates are also not used when calculating formula fields with a formula return type of "Currency."
- Organizations with advanced currency management support roll-up summary fields between two advanced currency management objects. For example, roll-up summary fields are supported from an opportunity line item object to its opportunity object, because both are advanced currency management enabled. However, if you enable advanced currency management, you can't create roll-up summary fields that calculate currency on the opportunity object rolling up to the account object. You also can't filter on the opportunity currency field on the account object. All existing currency-related roll-up summary fields on the opportunity object that summarize objects that don't support dated exchange rates are disabled and their values are no longer calculated. If your organization enables advanced currency management, delete any currency roll-up summary fields using opportunities and accounts or opportunities and custom objects.

- Campaign opportunity fields use dated exchange rates when calculating the amount in the campaign currency. However, they don't use dated exchange rates when converting those amounts to the user currency.
- Cross-object formulas always use the static conversion rate for currency conversion.
- If advanced currency management is enabled, you can't bind Visualforce pages that use <apex:inputField> or <apex:outputField> components to currency fields that support advanced currency management.
- Enable or Disable Advanced Currency Management

To deactivate a currency, click Deactivate next to the currency. You can't deactivate the corporate currency. Deactivating a currency does not alter amounts in items that use that currency. However, you can no longer enter new amounts using the inactive currency.

Enable or Disable Advanced Currency Management

To enable advanced currency management:

- Enable multiple currencies for your organization. For more information, see Manage Multiple Currencies.
- From Setup, enter Manage Currencies in the Quick Find box, then select Manage Currencies.
- Click Enable.

When prompted, select Yes, I want to enable Advanced Currency Management and click Enable.
When advanced currency management is first enabled, your existing exchange rates automatically become the first set of dated exchange rates. These rates are valid for all time, until you define another set of exchange rates.

To disable advanced currency management:

- From Setup, enter Manage Currencies in the Quick Find box, then select Manage Currencies.
- Click Disable.
- When prompted, select Yes, I want to disable Advanced Currency Management and click Disable.

If you disable advanced currency management, all currency conversions use the static conversion rate. See Edit Conversion Rates.

When advanced currency management is enabled, Visualforce <apex:inputField> and <apex:outputField> components cannot display currency fields.

To add new dated exchange rates:

1. From Setup, enter Manage Currencies in the Quick Find box, then select **Manage Currencies**.
2. Click **Manage Dated Exchange Rates**.
3. Click **New Exchange Rates**.
4. Enter the date that the exchange rates go into effect.
5. Enter the exchange rates.

   NOTE The exchange rates default to the current exchange rate. If you do not want to set a new exchange rate for a currency, delete the exchange rate (leave the field blank).

6. Click **Save** to save the new dated exchange rates.

To view existing dated exchange rates:

1. From Setup, enter Manage Currencies in the Quick Find box, then select **Manage Currencies**.
2. Click **Manage Dated Exchange Rates**.
3. Select the date range you want to view either by entering the date and clicking **Go!**, or by selecting **Previous Range** or **Next Range.**

To delete a dated exchange rate for a particular currency:

1. From Setup, enter Manage Currencies in the Quick Find box, then select **Manage Currencies**.
2. Click **Manage Dated Exchange Rates**.
3. Click the name of the currency you want to edit.
4. Click **Del** for the date range you want to delete.

If the date range you want is not displayed, enter it in the Show all rates with start dates between fields and click **Go!**.

To edit your dated exchange rates for a particular currency:

1. From Setup, enter Manage Currencies in the Quick Find box, then select **Manage Currencies**.
2. Click **Manage Dated Exchange Rates**.
3. Click the name of the currency you want to edit.
4. Click **Edit** for the date range you want to edit. If the date range you want is not displayed, enter it in the Show all rates with start dates between fields and click **Go!**.
5. Edit the exchange rate, setting it to the new value for the date range, and click **Save**.

CALENDAR SETTING

Step 6: Go to Calendar Access and select how you would like to share this new calendar.

- Full Access – There are no restrictions on viewing, planning, and adding new events to the calendar.
- Show Details – It enables people to see details about upcoming calendar events.
- Show Details and Add Events – It enables people to see details and add new events to the calendar.
- Hide Details – It enables people to see if the given times are available in the calendar. Exact details about the event are hidden.
- Hide Details and Add Events – Event information is not visible; however, users can include new calendar events.