
Learn Salesforce Basics

Salesforce, Winter '15



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LEARN SALESFORCE BASICS

Welcome, Salesforce Users

Welcome to Salesforce! This documentation, designed for users and administrators, introduces Salesforce and its key concepts, provides an overview of products and editions, and guides you through setting yourself up as a user. You'll also find information about common tasks you'll perform in Salesforce—like using basic Chatter features, running reports, or searching Salesforce for the information or records you need.

To learn how to log in and personalize Salesforce, see [Getting Started as a New User](#).

EDITIONS

Available in all editions

Get to Know Salesforce Products

What's New in Salesforce?

Current Release

Learn about the newest features for sales, support, marketing, and Chatter users, as well as enhancements to the platform. You can also visit the [Winter '15 community page](#).

Our release notes include complete details about new features, as well as implementation tips and best practices.

- [Winter '15 Release Notes](#)
- [Salesforce for Outlook Release Notes](#)
- [Force.com Connect for Office Release Notes](#)
- [Force.com Connect Offline Release Notes](#)
- [Force.com Connect for Outlook Release Notes](#)
- [Database.com Release Notes](#)

Past Releases

Our archive of release notes includes details about features we introduced in previous releases.

- [Summer '14 Release Notes](#)
- [Spring '14 Release Notes](#)
- [Winter '14 Release Notes](#)
- [Summer '13 Release Notes](#)
- [Spring '13 Release Notes](#)
- [Winter '13 Release Notes](#)
- [Summer '12 Release Notes](#)
- [Spring '12 Release Notes](#)

- [Winter '12 Release Notes](#)
- [Summer '11 Release Notes](#)
- [Spring '11 Release Notes](#)
- [Winter '11 Release Notes](#)
- [Summer '10 Release Notes](#)
- [Spring '10 Release Notes](#)
- [Winter '10 Release Notes](#)
- [Summer '09 Release Notes](#)
- [Spring '09 Release Notes](#)
- [Winter '09 Release Notes](#)
- [Summer '08 Release Notes](#)
- [Spring '08 Release Notes](#)
- [Winter '08 Release Notes](#)
- [Summer '07 Release Notes](#)
- [Spring '07 Release Notes](#)
- [Force.com Mobile 7.0 for BlackBerry Release Notes](#)
- [Force.com Mobile 6.1 for Windows Mobile 5 Release Notes](#)
- [Winter '07 Release Notes](#)
- [Summer '06 Release Notes](#)
- [Winter '06 Release Notes](#)
- [Force.com Mobile 6.0 Release Notes](#)
- [Summer '05 Release Notes](#)
- [Winter '05 Release Notes](#)
- [Summer '04 Release Notes](#)

Product Overview

Welcome to the award-winning cloud-computing service—designed to help you manage your customer relationships, integrate with other systems, and build your own applications. 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.

Force.com Platform

The Force.com platform is the first platform as a service (PaaS), enabling developers to 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.

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

EDITIONS

Your Salesforce edition determines which features and functionality you can access. To find out which edition you’re using, look at the browser tab or title.

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.

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](#).

Key Concepts and Terms

As you're getting up to speed with Salesforce, it's helpful to learn some key concepts and terms. They'll come up frequently as you interact with the product, our documentation, and our service professionals. The concepts here will help you understand how Salesforce works. And the terms will help you understand some of its main components.

EDITIONS

Available in: **All Editions**

Concepts

Concept	Definition
Cloud	A Salesforce name for a loose federation of features that help you accomplish certain types activities, such as selling products, supporting your customers, or collaborating with your coworkers. Two common examples you'll come across 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.
Trust	<p>A Salesforce term for its companywide commitment to building and delivering the most secure, fast, and reliable cloud-based service available.</p> <p>Created to enhance customer success, <code>trust.salesforce.com</code> is a systems status website giving Salesforce customers and the community access to real-time and historical system performance information and updates, 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>

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 Call Center. You can customize the standard apps to match the way you work.

Term	Definition
Edition	One of several bundles of Salesforce products and services, each geared toward a different set of business needs. All Salesforce editions share the same look and feel, but they vary by feature, functionality, and pricing.
Object	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 will have multiple, specific records. Salesforce comes with lots of standard objects, but you can create custom objects, as well.
Organization	A deployment of Salesforce that has a defined set of licensed users. Your organization includes all of your data and applications.
Record	A collection of fields that store information about a specific item of a specific type (represented by an object), such as a contact, an account, or an opportunity. For example, you might 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 releases are identified by season—Winter, Spring, and Summer—along with the calendar year. <i>Example:</i> Winter '13. For every Salesforce release, the Salesforce release notes include new features and products that are generally available or in beta release, plus 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.
Salesforce	The company name.

Editions

Salesforce Edition Overview

Salesforce offers several bundles of its products and services, each geared toward a different set of business needs.

These bundles, called *editions*, all share the same look and feel, but they vary by feature, functionality, and pricing. For example, a feature that is available in Professional Edition for an additional fee may be included in Enterprise Edition. You might choose to start with a more basic edition, then upgrade later as you grow your business.

For a comparison chart of editions and their features, see the [Salesforce Pricing and Editions page](#).



Note: The Salesforce Help describes all generally available features, including those that are not available in all editions. To find out whether a feature is available in your edition: search for the feature in the help, then check out the “Available in:” table at the top of any topic you find for that feature.

SEE ALSO:

[Salesforce Mobile Products Overview](#)

EDITIONS

Your Salesforce edition determines which features and functionality you can access. To find out which edition you’re using, look at the browser tab or title.

Contact Manager Edition

Salesforce

Contact Manager 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 also provides straightforward and easy-to-use customization options. For more information about Contact Manager features, visit the [Salesforce Pricing & Editions page](#).

SEE ALSO:

[Salesforce Edition Overview](#)

Group Edition

Salesforce Group Edition is designed for small businesses and workgroups with a limited number of users. Group Edition users can manage their customers from the start of the sales cycle through closing the deal to providing customer support and service. Group Edition offers access to accounts, contacts, opportunities, leads, cases, dashboards, and reports. For more information about Group Edition features, visit the [Salesforce Pricing & Editions page](#).

SEE ALSO:

[Salesforce Edition Overview](#)

Developer Edition

Salesforce

Developer Edition provides access to the Force.com platform and API. It allows developers to extend the Salesforce system, integrate with other applications, and develop new tools and applications. Developer Edition provides access to many of the features available with [Enterprise Edition](#).

Salesforce does not provide technical support for Developer Edition. You can solicit help from the developer community message boards available to registered users via the Force.com developer website - developer.salesforce.com. Documentation for Developer Edition is available from the [Technical Library](#).

SEE ALSO:

[Salesforce Edition Overview](#)

Personal Edition



Note: Personal Edition isn't available to new organizations. Existing organizations that have already set up Personal Edition continue to have access. In addition, Personal Edition organizations that signed up after June 2009 don't have access to opportunities.

Personal 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.

SEE ALSO:

[Salesforce Edition Overview](#)

Professional Edition

Salesforce Professional Edition is designed for businesses who need full-featured CRM functionality. Professional Edition includes straightforward and easy-to-use customization, integration, and administration tools to facilitate any small- to mid-sized deployment. For more information about Professional Edition features, visit the [Salesforce Pricing & Editions page](#).

SEE ALSO:

[Salesforce Edition Overview](#)

[Expansion Pack and Unlimited Apps Pack](#)

Enterprise Edition

Salesforce Enterprise Edition is designed to meet the needs of large and complex businesses. In addition to all of the functionality available in Professional Edition, Enterprise Edition organizations get advanced customization and administration tools that can support large-scale deployments. Enterprise Edition also includes access to the Web services API so you can easily integrate with back-office systems. For more information about Enterprise Edition features, visit the [Salesforce Pricing & Editions page](#).

SEE ALSO:

[Salesforce Edition Overview](#)

[Expansion Pack and Unlimited Apps Pack](#)

Unlimited Edition

Salesforce Unlimited Edition is Salesforce's solution for maximizing CRM success and extending that success across the entire enterprise through the Force.com platform. Unlimited Edition customers benefit from new levels of platform flexibility for managing and sharing all of their information on demand.

Unlimited Edition includes all Enterprise Edition functionality plus Premier Support, full mobile access, unlimited custom apps, increased storage limits, and more. For more information about Unlimited Edition features, visit the [Salesforce Pricing & Editions page](#).

SEE ALSO:

[Salesforce Edition Overview](#)

Performance Edition

Performance Edition is Salesforce's solution that combines CRM and the Force.com platform with Data.com, Work.com, Identity, Live Agent, Salesforce Knowledge, and additional sandbox functionality.

Performance Edition is designed for customers that need to drive amazing growth, achieve new levels of customer satisfaction, and maximize sales and service success in the social and mobile world. Performance Edition includes all Unlimited Edition functionality plus clean, targeted lead and customer data from Data.com, coaching and feedback tools from Work.com, 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. For more information about Performance Edition features, visit the [Salesforce Pricing & Editions page](#).

SEE ALSO:

[Salesforce Edition Overview](#)

Database.com Edition

Database.com Edition

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 user, you're already using Database.com when you're performing tasks such as creating custom objects, managing security, or importing data with the Force.com platform and API.

A standalone version of Database.com is available for developers who want to create applications that leverage other languages, platforms, and devices.

There is no Database.com-specific documentation. Instead, you use the Salesforce documentation and a [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 online help, release notes, workbooks, and developer guides for APIs, Apex, SOQL, and SOSL.

SEE ALSO:

[Salesforce Edition Overview](#)

Database.com Feature List

The list of Salesforce features also available in Database.com. Use this list in combination with the feature Edition tables to find topics in the Salesforce help that also apply to Database.com.

The Salesforce features listed here are those that are also available in Database.com. The features are organized by general product area. Some features are only available through the API. These are noted where they appear.

EDITIONS

Available in:

- Database.com

Administration

- Audit Trail
- Company Information
- Delegated Administrator and Login As
- Enhanced Profile Management
- Field-Level Security
- Login History
- Mass Transfers
- New Profile UI
- Permission Sets
- Profiles

Apex (Libraries are available only for features supported in Database.com.)

API

- API Clients
- Bulk API
- Data Loader

- Metadata API
- Chatter REST API
- Web Services API Data Replication
- Web Services API Reads
- Web Services API Writes

Application Lifecycle Management

- Change Sets

Chatter

- Ability to stop following records that you own in Chatter
- At Mentions (API only)
- Chatter Activity and Influence
- Customize Chatter settings
- Feed Tracking
- Feeds
- Files (API only)
- Group Layouts
- Group Trigger and Group Member Triggers
- Groups
- Hashtags and Topics
- Publisher Actions
- Rich Link Previews in Feed
- Triggers for Feed Comments and Feed Items

Content**Custom Settings****Customer Domains****Data**

- Ability to mass transfer records of custom objects
- Data Loader

Declarative App Builder and Custom Schema**Custom Objects and Fields**

- Customforce
- Formula Fields
- Rich Text Area
- Roll-up Summary Fields
- Validation Rules

Developer Tools

- Force.com IDE

Divisions**Enhanced Profile User Interface**

- Enabling
- Field Level Security
- Field/Object Perms
- Object and Tab settings – Objects only
- Search
- System Perms
- Viewing and editing app perms
- Viewing and editing Login Hours
- Viewing and editing Login IP Ranges
- Viewing and editing Service Provider Access
- Viewing Profile Lists

Field Accessibility (for custom objects)

Field Dependency Matrix

Fileforce

Localization and Globalization

- Multi-Currency
- Timezones

My Personal Information

- Change My Password
- Editing personal information
- Granting Login Access (Send Activation Link button)

Offline

- Force.com Flex Desktop applications
- Force.com Flex Web applications

Permission Sets

- Ability to search permissions
- Viewing, Editing, and Creating

Profile List Views

- Creating
- Editing

Restricting Logins

- Hours and IP Ranges on Profiles

Sandbox

- Developer SandboxSandbox (for an additional fee)
- Full Copy Sandbox (for an additional fee)
- Setup Only Sandbox (for an additional fee)

Search

- Personal Tags

- Public Tags

Security

- Connected Apps (OAuth)
- Encrypted Custom Fields
- General Security
- Identity Feature
- Inbound Single Sign-On
- Password and Login Policies
- Retrieving forgotten passwords

Single Sign-On**Sharing**

- Apex Managed Sharing
- Criteria Based Sharing Rules
- High Volume Portal User
- Ownership Based Sharing Rules
- Public Groups
- Queues
- Role Hierarchy
- Sharing Model and Manual Sharing

Topics

- Topic and TopicAssignment Triggers

User Setup

- Creating and editing Personal and Public Groups
- Send Activation Link

Users

- Expiring Passwords
- Manage Users
- Managing Roles
- Monitoring User Events (logins and training)
- Resetting Passwords
- Role Fields
- Role List page
- Set Up Password Expiration
- Setting Login Restrictions

Viewing the Public Group Related List**Weekly Export****Workflow**

- Outbound messages (as both immediate and time-dependent actions)
- Time-Based Workflow (Workflow Queue)

- Workflow Field Updates and Outbound Messages
- Workflow rules

Expansion Pack and Unlimited Apps Pack

Expansion Pack for Professional Edition

For Professional Edition, you can purchase Expansion Pack units to increase app, tab, and object limits. Each Expansion Pack unit corresponds to a user license in your organization.

Unlimited Apps Pack for Enterprise Edition

For Enterprise Edition, you can purchase Unlimited Apps Pack units to increase app, tab, and object limits, as well as the maximum number of API calls and data storage capacity. Each Unlimited Apps Pack unit corresponds to a user license in your organization.

Adding Pack Units

Expansion pack and Unlimited Apps Pack units are available for Sales Cloud, Service Cloud, Force.com, and Site.com-Only users. An organization can be upgraded only once with Expansion Pack or Unlimited Apps Pack. If your organization needs higher app limits than what the pack provides, we recommend upgrading your organization's edition. To add Expansion Pack or Unlimited Apps Pack units, contact your Salesforce representative.

Salesforce Mobile Products Overview

Salesforce provides several mobile apps to keep you connected and productive, no matter where you are.

Product	Description	Supported Salesforce Editions	Supported Mobile Devices	Offline Support?
Salesforce1	<p>Access and update Salesforce data from an interface that's optimized for navigating and working on your touchscreen mobile device.</p> <p>You can view, edit, and create records, manage your activities, view your dashboards, and use Chatter. Salesforce1 supports many standard objects and list views, all of your organization's custom objects, the integration of other mobile apps, and many of your organization's</p>	<p>Free for customers using:</p> <ul style="list-style-type: none"> • Contact Manager Edition • Personal Edition • Group Edition • Professional Edition • Enterprise Edition • Unlimited Edition • Performance Edition • Developer Edition 	<ul style="list-style-type: none"> • Android phones • Apple iPad • Apple iPhone • BlackBerry Z10 (mobile browser app only) • Windows 8.1 phones (Beta support, mobile browser app only) 	<p>Limited</p> <p>Files that you mark for offline access are cached and available for viewing when there's no network connection.</p>

Product	Description	Supported Salesforce Editions	Supported Mobile Devices	Offline Support?
	Salesforce customizations, including Visualforce tabs and pages.			
SalesforceA	<p>Manage users and view information for Salesforce organizations from your smartphone.</p> <p>Deactivate or freeze users, reset passwords, unlock users, edit user details, and assign permission sets.</p> <p>This app is restricted to users with the "Manage Users" permission.</p>	<p>Free for customers using:</p> <ul style="list-style-type: none"> • Contact Manager Edition • Group Edition • Professional Edition • Enterprise Edition • Unlimited Edition • Performance Edition • Developer Edition 	<ul style="list-style-type: none"> • Android phones • Apple iPhone • Apple iPod Touch 	No
Salesforce Classic	<p>You can view your dashboards, run simple reports, log calls and emails, keep track of your activities, and create, edit, and delete records. Most standard Sales objects and some Service objects are available. And if you're using the full version, custom objects and configurations are also supported.</p>	<p>A free, limited version is available for all Salesforce customers except for Database.com organizations</p> <p>Full version requires mobile licenses and is available for:</p> <ul style="list-style-type: none"> • Professional Edition • Enterprise Edition • Unlimited Edition • Performance Edition • Developer Edition 	<ul style="list-style-type: none"> • Android phones and tablets • Apple iPhone • BlackBerry smartphones 	Yes
Chatter Mobile for BlackBerry	<p>Collaborate in Chatter from your mobile device without having to use a browser.</p> <p>You can monitor your feed, post updates and comments, and upload photos, files, and links. You can also email, call, or text people directly from their Chatter</p>	<p>Free for customers using:</p> <ul style="list-style-type: none"> • Group Edition • Professional Edition • Enterprise Edition • Unlimited Edition 	<ul style="list-style-type: none"> • BlackBerry smartphones 	No

Product	Description	Supported Salesforce Editions	Supported Mobile Devices	Offline Support?
	profiles. And the app gives you instant notifications to keep you up-to-date on important activities.			
Mobile Dashboards for iPad	<p>Access your dashboards and their source reports from your iPad.</p> <p>You can see any dashboard you have access to, as well as view individual dashboard components, highlight their values, and drill into reports for each. You can also email a dashboard or component to others, and post and comment on dashboard Chatter feeds.</p>	<p>Free for customers using:</p> <ul style="list-style-type: none"> Enterprise Edition Unlimited Edition Developer Edition Any organization with REST API enabled 	<ul style="list-style-type: none"> Apple iPad 	<p>Limited</p> <p>Dashboards and reports that you access from the app are cached and available for offline viewing only.</p>

SEE ALSO:

[Salesforce Classic Overview](#)[Salesforce Touch Overview](#)[Salesforce Edition Overview](#)

Security Basics

Read-Only Mode Overview (PILOT)

At salesforce.com, we recognize that you need to access your data at a moment's notice—even during our planned maintenance windows. Read-Only Mode helps you avoid business interruptions by giving you read-only access to Salesforce during planned maintenance.

When Salesforce is in Read-Only Mode, you can view your data, but:

- You can't add, edit, or delete data.
- Certain Salesforce features are not available. For example:
 - You won't receive activity reminders.
 - The Recent Items list doesn't update.
 - You can run new or existing reports, but new reports can't be saved.
 - Dashboards can't be refreshed.

- Chatter is read-only.

You'll receive an error message if you try to make any updates to your data.

Planned maintenance windows vary in length depending on the level of maintenance needed. For a schedule of upcoming maintenance, see trust.salesforce.com.



Note: Read-Only Mode is currently available through a pilot program. For information on enabling this feature in your organization, contact salesforce.com.

Security FAQ

- [How can I be sure my data is secure in Salesforce?](#)
- [How can I be sure my data won't be lost?](#)
- [How can I be assured my data will be kept private?](#)
- [Can I automatically back up my data in Salesforce?](#)
- [Does Salesforce use my data for internal purposes?](#)
- [What happens when the system goes down?](#)

How can I be sure my data is secure in Salesforce?

When you log in, the URLs used to access your data are all preceded with `https://` instead of `http://`, which indicates that a secure connection has been established. Furthermore, whenever your password is changed or reset, or when you log in from a computer you have not used to access Salesforce before, you may have to activate your computer to successfully log in to Salesforce. Activating your computer allows Salesforce to verify your identity and prevent unauthorized access.

How can I be sure my data won't be lost?

We back up your data with a variety of methods to ensure that your organization does not experience any data loss. Every transaction is stored to RAID disks in real-time with archive mode enabled, allowing the database to recover all transactions prior to any system failure. Every night all data is backed up to a separate backup server and high speed automatic tape library. The backup tapes are cloned as an additional precautionary measure, and the cloned tapes are transported to an off-site, fireproof vault twice a month. In addition, the facility that stores our servers is architecturally designed to withstand catastrophic events and earthquakes up to 8.0 on the Richter scale.

How can I be assured my data will be kept private?

We are committed to keeping your data private and secure. For a greater understanding of the legal obligations Salesforce adheres to regarding data privacy, refer to the Privacy Statement, as well as the Terms of Use agreement. You can view both items by clicking the relevant link below the copyright at the bottom of any page.

Can I automatically back up my data in Salesforce?

Yes, weekly export service provides you with `.CSV` files of all objects and attachments within Salesforce. You can set up this service to automatically perform a data export each week.

Does Salesforce use my data for internal purposes?

No. As outlined in the Privacy Statement, Salesforce does not review, share, distribute, print, or reference your data except as provided in the Salesforce Terms of Use, or as may be required by law. For exact information, refer to the Privacy Statement, as well as the Terms of Use agreement. You can view both items by clicking their links below the copyright at the bottom of any page.

What happens when the system goes down?

Salesforce builds redundancy into all systems to minimize system failures that could be perceived as customer outages. All components are proactively monitored and managed so faults are detected before system outages. While there may occasionally be system outages due to issues beyond our control, we employ numerous escalation procedures to notify the proper personnel in the event of a system outage, and remedy issues as quickly as possible.

Updates

Checking for Desktop Client Updates

Desktop clients such as Connect for Outlook and Connect Offline integrate Salesforce with your PC. Your administrator controls which desktop clients you are allowed to install.

If you have access to see Home tab alerts, and you've logged in to a client in the past, you'll see an alert banner on your Home tab when a new version of a client is available.

You can also see which clients are installed on your computer and check for updates on your own. Just follow these steps.

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
 - If you clicked **Setup**, select **Desktop Integration > Check for Updates**.
 - If you clicked **My Settings**, select **Desktop Add-Ons > Check for Updates**.
3. From the table, review the names and version numbers of available desktop clients.
4. If you are using Internet Explorer, click the correct desktop client and then click **Install Now** to install a client. If you are using another browser such as Mozilla Firefox, click **Download Now** to save the installer file to your computer. Then double-click the saved file to run the installer program.

After you install the update, you'll continue to see the alert banner on your Home tab until you log in through the newly updated client.

SEE ALSO:

[Viewing Messages and Alerts](#)

EDITIONS

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

USER PERMISSIONS

To view client update alerts:

- "On, updates w/alerts"

OR

"On, must update w/alerts"

on your profile

Get Started with Salesforce

Getting Started as a New User

New to Salesforce? Set yourself up as a new user so you can start using the application right away.

Wondering where to start with Salesforce? Complete these steps first:

1. [Log in for the first time.](#)
2. [Find your personal settings.](#)
3. If your organization uses Chatter, [set up your Chatter profile.](#)
4. If your organization doesn't use Chatter, [edit your personal information.](#)

SEE ALSO:

[Getting Around in Salesforce](#)

[Getting Started with Your Records](#)

EDITIONS

Available in: **All** Editions;
Chatter available in: **Group, Professional, Enterprise, Performance, Unlimited, Contact Manager,** and **Developer** Editions

Logging In for the First Time

When your administrator sets you up as a new user, you'll receive an email including your username and a link to your organization's Salesforce site.

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 into the site automatically.
3. The site prompts you to set a password and choose a question and answer to verify your identity in case you forget your password.

If you have not received your login information, contact the Salesforce administrator at your organization.



Tip: After you have an established username, you can put your username at the end of the link for your site and bookmark it as a login hint for future logins. The following example places `username@company.com` in the user name field for the Salesforce login page.

```
https://login.salesforce.com/?login_hint=username@company.com
```

EDITIONS

Available in all editions

Setting Up Your Chatter Profile

Your Chatter profile communicates 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.**


EDITIONS

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Contact Manager
- Developer

 **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.

- 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 past experience, or projects you are currently working on.

- Click **Save All**.

SEE ALSO:

[Editing Your Personal Information](#)

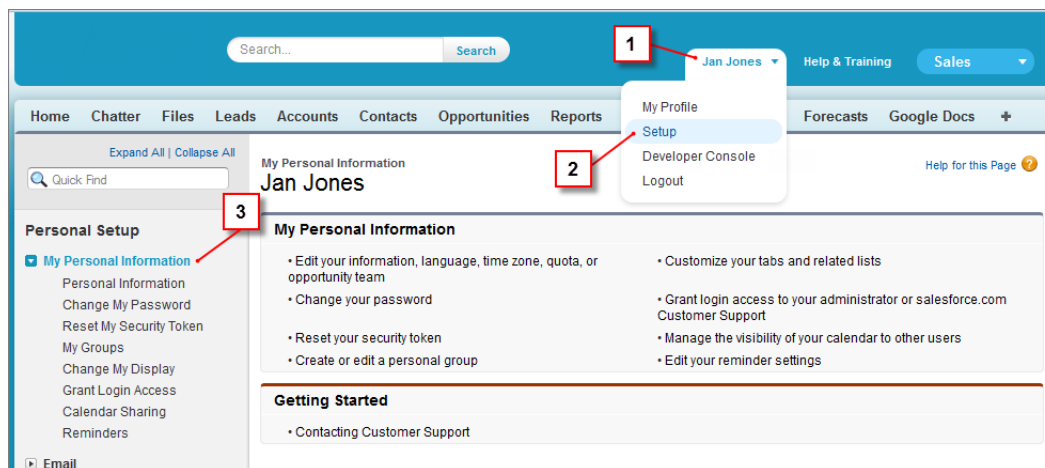
Finding Your Personal Settings

Salesforce includes personal settings options to help you personalize your experience. Depending on your organization, these settings are located in Personal Setup or My Settings.

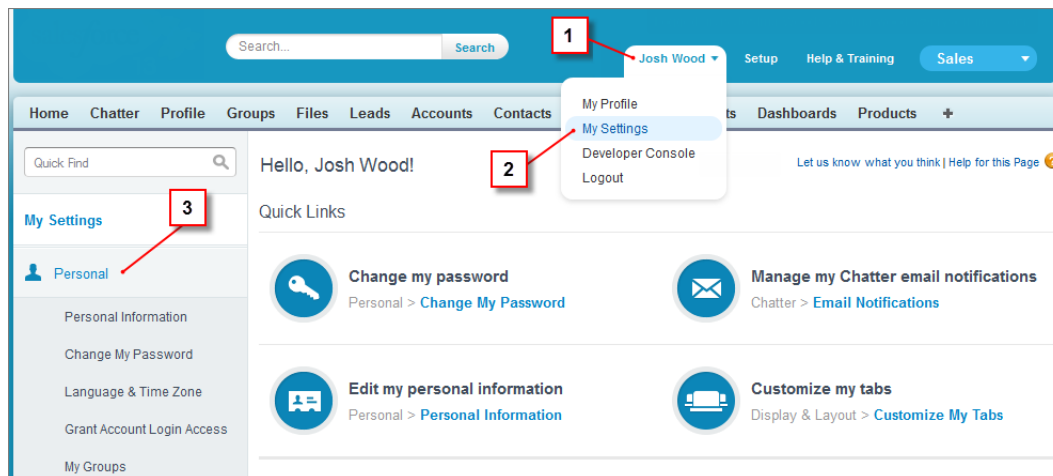
- At the top of any Salesforce page, click the down arrow next to your name.
Depending on your organization's user interface settings, you should see either **Setup** or **My Settings** in the menu.
- From the menu under your name, click **Setup** or **My Settings**.
- Do one of the following:
 - If 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: **All** editions except **Database.com**.



- 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.



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.

SEE ALSO:

[Finding the Setup Menu](#)

Editing Your Personal Information

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
 - If you clicked **Setup**, select **My Personal Information > Personal Information**.
 - If you clicked **My Settings**, select **Personal > Advanced User Details**.
3. To make changes, click **Edit**.

If you change your email address, a confirmation message will be sent to the new address. You must click the link provided in that message for the new email address to take effect. This process ensures system security.

4. Click **Save**.

SEE ALSO:

[Changing Your Password](#)

[Setting Up Your Chatter Profile](#)

EDITIONS

The available personal setup options vary according to which Salesforce Edition you have.

Getting Around in Salesforce

Learn to navigate basic areas of Salesforce to find your way around the app quickly.

Salesforce is a valuable tool—learning the interface and where it stores your info will help you make the most of your experience.

EDITIONS

Available in all editions

1. [Understand how Salesforce organizes your info.](#)
2. [Understand Salesforce pages.](#)
3. [Understand your Home tab.](#)
4. [Navigate object home pages.](#)
5. [Find the setup menu.](#)

SEE ALSO:

[Getting Started as a New User](#)

[Getting Started with Your Records](#)

Understanding How Salesforce Organizes Your Information

Salesforce groups your data into logical categories called objects. An object is a collection of fields named for the kind of information those fields capture. Commonly-used Salesforce objects include Contacts, Accounts, Cases, and Reports. For example, the Contacts object contains fields with information describing the people you do business with, such as their first names, last names, phone numbers, business titles, and the companies they work for.

There are two types of Salesforce objects.

- *Standard* objects are included with the Salesforce license your company purchases. These are the most commonly-used objects.
- *Custom* objects are created to meet your company's business needs.

Your organization's administrator can customize standard objects or create custom objects to support the type of work your company does or the industry you're in. For example, your organization may choose to create a custom object called "Bugs" to track their known product issues, or rename the standard object "Accounts" to "Clients" because this is how your organization refers to your customers.

In the Salesforce interface, you generally work with objects from their tabs. For example, the Opportunity object has an Opportunities tab. If you learn about an object from the Salesforce documentation but can't find it in the user interface, contact your administrator to find out whether the object is available to you. If your edition features objects and related tabs that you can't find documentation for, it may be because the object is custom. Contact your administrator to learn how to use it.

SEE ALSO:

[Navigating Object Home Pages](#)

Understanding Salesforce Pages

Salesforce apps are made up of tabs and pages. Standard objects such as Accounts, Contacts, and Leads, and other features such as Chatter typically have tabs, and from a tab, you navigate through pages to interact with the features you're using. For example, if you want to create an account record, you'll click the Accounts Tab, and land on the Accounts Home page. Click **New** to open the Account Edit page where you'll enter information for the account. Click **Save**, and you'll see the Account's Detail page. Return to the Accounts Home page and the new account is listed.

Salesforce tabs can have multiple types of pages, including Home, Edit, and Detail pages, and you can create list views for some objects. Chatter has one primary page type: a feed. And Data.com has a search interface. Dashboards and reports have their own page styles, as well.

Your system administrator typically sets up page layouts for standard objects and enables the navigation features your organization can use, but interacting with Salesforce is easier if you understand the most common page elements for the most frequently used objects. They include:

1. A *tag* bar, where you can view and add tags for a record.

2. A *feed*, where you can add and view comments about a record.
3. A *sidebar*, where you can do things like search and quickly create new records.
4. *Sections* for the record, with key fields and links.
5. *Related lists*, which group and display links to other records associated with the one you're viewing. You can change the order of related lists on your page.
6. Various *links* that help you move around the page or go to different pages or external sites.

Let's look at these elements on an account detail page.

The screenshot shows the Salesforce Account Detail page for 'Salesforce.com, Inc.'. The page layout includes a top navigation bar, a left sidebar, a main content area, and a bottom section for related lists. Numbered callouts highlight the following elements:

- 1:** The 'Public: 5K Employees' link in the top right corner of the account header.
- 2:** The 'Recycle Bin' link in the left sidebar under 'Custom Links'.
- 3:** The 'Recycle Bin' link in the left sidebar under 'Messages and Alerts'.
- 4:** The 'Address Information' section, which includes 'Billing Address' and 'Shipping Address'.
- 5:** The 'System Information' section, which includes 'Created By' and 'Last Modified By'.
- 6:** The 'Contacts' related list table, which displays a list of contacts associated with the account.

Account Detail

Account Owner: Holly Sparks (Change)

Phone: +1.415.901.7000

Address Information

Billing Address: 1 Market St 300, San Francisco, CA 94105-5188, United States

Shipping Address

System Information

Created By: Holly Sparks, 11/17/2012 2:50 PM

Last Modified By: Holly Sparks, 11/17/2012 2:50 PM

Contacts

Action	Contact Name	Title	Email	Phone
Edit Del	Sean Alpert	Director, Product Marketing	salpert@salesforce.com	+1.415.836.8353
Edit Del	David Austin	Director, Online Marketing Rypple	daustin@salesforce.com	+1.415.371.7463
Edit Del	Mike Booth	Technical Product Marketing Manager	mbooth@salesforce.com	+1.415.836.2410

Open Activities

No records to display

SEE ALSO:

[Tags Overview](#)

[Understanding the Salesforce Sidebar](#)

[Navigating Object Home Pages](#)

[Home Tab Overview](#)

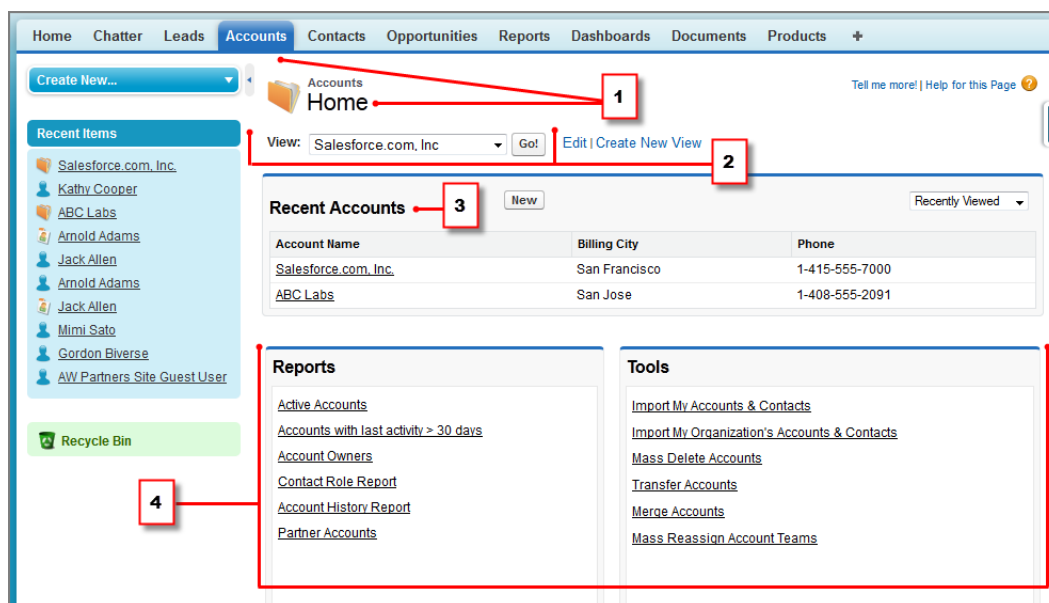
Navigating Object Home Pages

In the desktop application, commonly-used objects are found by clicking on their tabs, which appear at the top of your screen. Other Salesforce features, such as Home and Chatter, also have tabs.




To work with your data, click an object's tab. For instance, to access account information for the customers you work with, click the Accounts tab. Here you find:

1. The name of the object and type of data you are viewing. In this case, Accounts.
2. *List View* options. A list view narrows your accounts to a specific set (for example, you can choose to view All Accounts or just Recently Viewed Accounts).
3. A list of recently-accessed records. Here, Recent Accounts. This list is visible for every standard and custom object and can't be customized.
4. Links to other features you may want to use next.



Home Tab Overview

From the Home tab, you can:

- Create a Chatter post (if your organization uses Chatter)
- View dashboard snapshots
- View your tasks and calendar
- Search the feed ()

You can also use the sidebar components, such as Create New, Recent Items, and Custom Links, that you'll also see on other Salesforce pages. Your Home tab layout, sidebar components, and links are enabled and configured by your administrator.

Alert banners may appear on the Home tab to let you know when updates are available for desktop clients such as Connect for Outlook and Connect Offline.

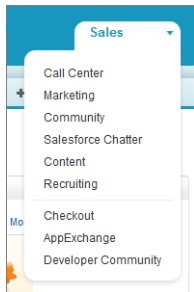
SEE ALSO:

[Navigating Object Home Pages](#)

Opening a Different Salesforce App

To use features available in a different Salesforce app than the one you have open, you need to open the other app. You can have one app open at a time, and the app you have open will open the next time you log on to Salesforce.

To open an app: In the upper-right corner of any Salesforce page, select the app you want from drop-down app menu.



Finding the Setup Menu

Depending on your organization's user interface settings, you access the Setup menu from the drop-down menu under your name or from the user interface header.

Salesforce includes many options for setting up, maintaining, and customizing your organization. Your organization may also have options for building, packaging, and distributing your own apps. These options are all available via the Setup menu. If you're a Salesforce administrator or developer, you'll use the Setup menu frequently. Your organization's user interface settings determine how everyone in your organization accesses this menu.

1. Look at the top of any Salesforce page.

EDITIONS

The available tabs and options in the Create New drop-down list vary according to which permissions you have and which Salesforce edition you are using.

EDITIONS

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

USER PERMISSIONS

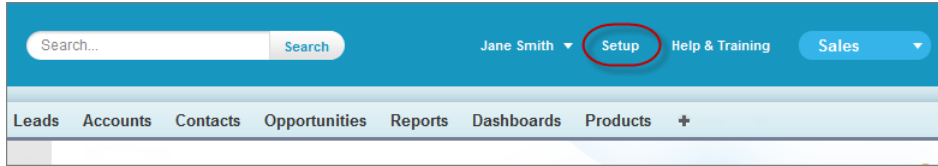
To use an app:

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

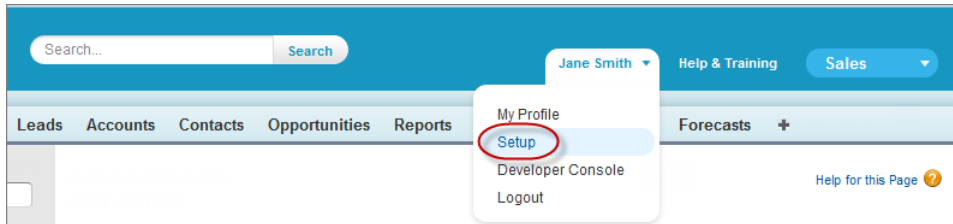
EDITIONS


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

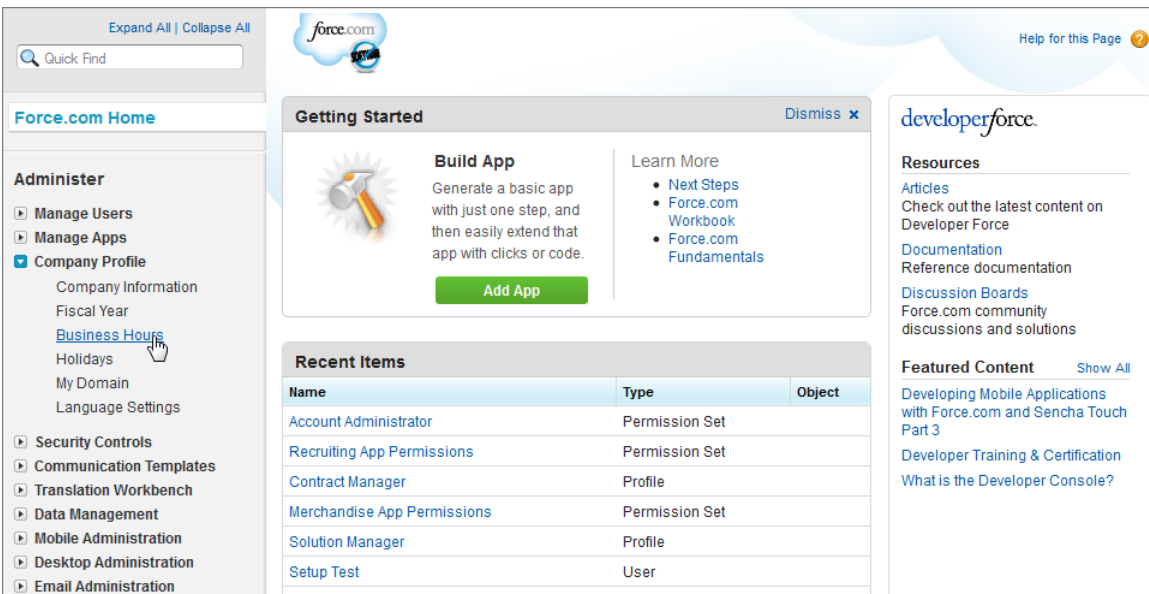
- If you see **Setup** in the user interface header, click it.




- If you don't see **Setup** in the header, click your name, then select **Setup**.



- In the Setup menu that appears on the left side of the page, click  next to a menu to expand it, then click the menu 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 Language Settings page, type *Lang* in the **Quick Find** box.

SEE ALSO:

[Finding Your Personal Settings](#)

Getting Started with Your Records

New users might need to view, edit, or delete existing records that have been imported into Salesforce, or learn to create new ones.

These tasks explain how to begin working with your data.

- [Find and view your records and data](#)
- [Edit your records](#)
- [Create new records](#)
- [Open items you've recently viewed](#)
- [Deleting your records](#)
- [New user tips](#)

Now that you've learned how to work with your records, you might want to explore more advanced Salesforce features. We recommend reviewing the **Downloadable User Guides, Tip Sheets and User Guides**, and **Online Training** videos found on the [Salesforce Success Communities Help & Training](#) site.

EDITIONS

Available in all editions

Finding and Viewing Records and Data

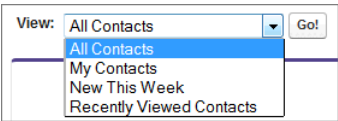
Use tabs, search, or lists to look at your data.

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.

When you're working with records, it's important to remember that the types of records you can create, view, edit, and delete are determined by administrator settings, such as a user profile or permission set. Your access to individual records may be determined by other configurations, such as sharing settings. And your access to fields on types of records may be controlled by field-level security. Work with your administrator to make sure you have access to the records and data you need.

There are a few easy ways to find and view your records.

- From a tab, such as Accounts or Contacts, start from the default view and click **Go!** or select a different view.



The resulting page you see is called a *list view*.

EDITIONS

Available in: All Editions

New Contact		Add to Campaign		A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All																							
<input type="checkbox"/>	Action	Name ↑	Account Name	Title	Position	Phone	Email	Contact Owner																			
<input type="checkbox"/>	Edit Del	Adams, Arnold	ABC Labs	IT Manager	IT	1-408-555-2122	arnold.adams@tra...	mwils																			
<input type="checkbox"/>	Edit Del	Allen, Jack	Arbuckle Laborator...		Marketing	1-847-555-0557	jack.allen@training...	psmit																			
<input type="checkbox"/>	Edit Del	Amos, Jon	Vandelay Industries	Sales Manager	Account Manager	1-713-555-2405	jon.amos@training...	mwils																			
<input type="checkbox"/>	Edit Del	Anderson, Abby	Arbuckle Laborator...		IT	1-847-555-0590	abby.anderson@tr...	psmit																			
<input type="checkbox"/>	Edit Del	Antelo, Coddie	Arbuckle Laborator...		IT	1-847-555-0542	coddie.antelo@tr...	psmit																			
<input type="checkbox"/>	Edit Del	Buchner, Francis	ABC Labs	Account Manager	Account Manager	1-408-555-2124	francis.buchner@tr...	mwils																			
1-25 of 80 0 Selected << Previous Next >> Chat																											

- Search for a record using keywords, such as a name or address stored in the record. Use the search bar in the banner displayed on most pages.
- On many records, below the main page sections, look for related lists, which 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.

SEE ALSO:

[Understanding Salesforce Pages](#)[Understanding Your Administrator's Role](#)

Creating Records

Creating records is standard procedure for most Salesforce users. While some objects (such as Account) have special *guidelines and considerations* you need to be aware of, the *process* of creating a record is similar for all.

Depending on how your administrator has set up your Salesforce organization, you can create records in a few different ways.

- [From object tabs](#)
- [In feeds on the home page, Chatter tab, and record detail pages](#)
- [With the Create New drop-down list in the sidebar](#)
- [With Quick Create](#)

SEE ALSO:

[Editing Records](#)[Deleting Records](#)[Guidelines for Entering Currency, Dates, Times, and Phone Numbers](#)[Adding Notes to Records](#)[Attaching Files to Records](#)

EDITIONS

Available in all editions

Editing Records

1. Make sure you're aware of any guidelines for the kind of record you're editing. The Salesforce help will tell you.
2. Find and open the record you want to edit.
3. Click **Edit**.
4. Enter or edit values in the fields. Required fields are identified with a red bar (|).



Tip: Most objects have field definitions in the Salesforce help. Just search the help for the object name + "fields". For example, if you're creating or editing an account record and want to know more about your options in the `Industry` drop-down list, look up "Account Fields" in the help.

EDITIONS

Available in all editions

USER PERMISSIONS

To edit records:

- "Edit" on the object for the kind of record you're editing

5. When you finish entering or editing values, click **Save**.

SEE ALSO:

[Creating Records](#)
[Guidelines for Entering Currency, Dates, Times, and Phone Numbers](#)
[Guidelines for Editing Records with the Inline Editor](#)
[Editing Records Directly From Enhanced Lists](#)
[Adding Notes to Records](#)
[Attaching Files to Records](#)
[Checking Your Spelling](#)

Deleting Records

Deleting records is standard procedure for most Salesforce users. When you delete a record, it's moved to the Recycle Bin, which you can empty.

For some kinds of objects, deleting one record affects other, related records. For example, if you delete an account or contact, all associated assets are also deleted.

1. Make sure you're aware of the effects (if any) of deleting the kind of record you want to delete. The Salesforce help will tell you.
2. Find and open the record you want to delete.
3. Click **Delete**.
The record is moved to the Recycle Bin. Empty the Recycle Bin to complete the deletion process.



Tip: If you delete a record by mistake, you can "undelete" it from the Recycle Bin. Good as new!

SEE ALSO:

[Using the Recycle Bin](#)
[Deleting Notes and Attachments from Records](#)

Opening 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.

To open any item's detail or edit page, just click its link.



Tip: If your organization has enabled hover details, you can hover your mouse over any item in the Recent Items list to view key information about the record before clicking into that record's detail or edit page.



Note: Your Recent Items may show fewer than 10 items if you have recently deleted any of your recently viewed items. Likewise, the Recent lists on the tab home pages (for example, the Recent Leads list) may show fewer than 10 or 25 items if you have recently deleted items.

EDITIONS

Available in all editions

USER PERMISSIONS

To delete records:

- "Delete" on the object for the kind of record you're deleting

EDITIONS

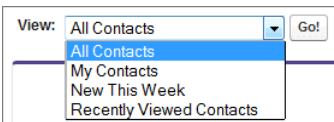
Available in: **All Editions**

Tips for New Users

Learn the tips you need to be a fast, productive Salesforce user on day one.

New users should keep these tips in mind:

- When you click on an object to find your data, you won't see a full list of your existing records—Salesforce keeps those 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: All Editions

- Related lists* are links featured at the bottom of object pages. Related lists provide quick access to other related objects that you might want to visit next. This feature adds a lot of value, because it gives you fast access to information you likely need next. It means less navigation and can speed up your workflow. In the Accounts object, your related lists might look 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: <http://www.ABCLabs.net>

Prospect Rating: Warm

▼ Sales Region

Region Zone

▼ Additional Information

Type	Customer	Employees	120
Industry	Biotechnology	Annual Revenue	USD 7,500,000.00

▼ Support Plan Information

Has Support Plan: ☒ Support Plan Expiration Date: 7/2/2014

Description:

▼ Address Information

Billing Address	Shipping Address
54 Park Drive San Jose, CA 95035 USA	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.

- If you read or hear about a feature that you don't see in your own interface, don't worry. Your administrator can customize it to meet your organization's needs. If your administrator hasn't enabled help for the customization, contact them.
- Our help and training materials might mention a feature that your company hasn't enabled, or that your permissions profile doesn't allow you to see. If you believe this feature should be in your interface, or might help you in your job, 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 spend a lot of time updating the fields in a record and then to navigate away from that screen without saving. Make a habit of seeking out the save button before clicking away through another page element.

SEE ALSO:

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

[Understanding Your Administrator's Role](#)

Why Can't I See Some Features?

Because Salesforce is highly customizable, you might not have access to all of the product features.

You might learn about new Salesforce features in our help documentation and training videos. However, sometimes you'll find you can't access these through your interface. This might happen for several reasons:

- You may need to adjust your custom page views or install external apps to enable the feature.
- Your permissions and access settings for some features are limited.
- Your company customized Salesforce so that some standard objects and fields have different names, or created their own custom objects and fields.
- The feature you're looking for isn't offered in the Salesforce edition that your company uses.

EDITIONS

Available in: All editions

SEE ALSO:

[Understanding Your Administrator's Role](#)

Understanding Your Administrator's Role

Salesforce administrators are Salesforce users who work at your organization but have additional system administration duties. Administrators are responsible for setting up Salesforce for their organizations and making sure it runs smoothly. They are assigned the System Administrator permissions profile, so they can add and configure users and aid user productivity by customizing Salesforce with custom objects, workflows, validation rules, reports, and more.

All organizations have at least one administrator, but larger ones may have more. Your administrator's role can be as simple or as complex as your company's size and structure. In smaller organizations, the administrator might be someone who also uses Salesforce the way other users do: to sell products or provide customer service, for example.

There are many Salesforce features and items (such as those detailed in the *Learn Salesforce Basics* documentation) that you can modify yourself to suit your own needs. But in some cases, you might want to work with your administrator to help you get the most out of Salesforce. Here are a few examples.

- You can't find or use a tab, field, or feature you heard about during training.
- You need a custom workflow to find out when a case is closed.
- You need a custom approval process to sign off on employee expenses.
- You need help creating a custom report for your sales region.
- You need a user permission that's not granted as part of your user profile.
- You have questions about your own or others' access to records.
- You get an error message that tells you to contact your administrator for help or more information.

How you contact your administrator, and under what circumstances, depends on your company's internal business policies and practices.

SEE ALSO:

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

[Granting Login Access](#)

Define Personal Information and Preferences

Activating Your Computer

Verify your identity and prevent unauthorized access by activating your computer with Salesforce.



[Watch a Demo](#) (1:29 minutes)

You might be prompted to enter a token (also called a verification code) when you log into Salesforce to activate your computer. Computer activation allows Salesforce to verify your identity and prevent unauthorized access to the service whenever your password is changed or reset, or when you log in from a computer you have not previously used to access Salesforce.

EDITIONS

Password policies available in: **All Editions**

1. When prompted, select how you would like to receive the token. Make sure to keep your login page open:

SMS Text Message

If your administrator enabled SMS-based identity confirmation, this is the default option. You're prompted to enter your mobile phone number when logging into Salesforce. Adding your phone number here verifies your mobile number and enables this option when you're challenged.



Note: Administrators can also enter users' mobile numbers and pre-verify them. If `Enable SMS-based identity confirmation` is set when an administrator enters a mobile number for a user, or when a mobile number is set from an API using the `User` object, the mobile number is automatically considered verified. If `Enable SMS-based identity confirmation` is not set, the new mobile phone number is not considered verified. "Verified" means that Salesforce will not ask the user to verify a mobile phone number at login, and that Salesforce will use the number to send the user a verification code when necessary for SMS-based identity confirmation.

Mobile Authenticator App

If you added a time-based token to your account, you can use this changing, time-based token stored in the mobile authenticator app to confirm your identity. Select this option when prompted during login.

Email

If you opted out of mobile verification and haven't added a time-based token, this is the default option. Click **Email me a verification code** when prompted during login. Salesforce sends an activation email to the email address specified on your user detail page. The code can be used for up to 24 hours from the time you requested the verification code.

2. Enter the token or verification code in your open login page.
3. Click **Validate and Log In**.

SEE ALSO:

[Adding a Time-Based Token](#)


Adding a Time-Based Token

You can add a time-based token to your account to use a mobile authenticator app to activate your computer.

Once you add a time-based token to your account, you'll be prompted to enter the changing token stored in the mobile app whenever Salesforce needs to confirm your identity, such as when you log in from an unknown IP address.

EDITIONS

Available in all editions

 **Note:** If you have the “Two-Factor Authentication for User Interface Logins” permission, you must enter this token every time you log into Salesforce through the user interface. If you have the “Two-Factor Authentication for API Logins” permission, you must enter this token to access the service instead of the standard security token.

1. Download the [supported authenticator app](#) for the type of mobile device you’re using.
2. From your user detail page in Salesforce, click **Add** next to **Time-Based Token**.
3. For security purposes, you’re prompted to log into your account.
4. Scan the QR code with the authenticator app on your mobile device.
Alternatively, you can manually enter your username and the key displayed when you click **Can’t scan the QR code?** into the app.
5. Enter the token generated from the mobile app into the **Token** field in Salesforce.
The authenticator app generates a new token every 30 seconds.
6. Click **Verify and Add**.

SEE ALSO:

[Activating Your Computer](#)

Editing Your Personal Information

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
 - If you clicked **Setup**, select **My Personal Information > Personal Information**.
 - If you clicked **My Settings**, select **Personal > Advanced User Details**.

3. To make changes, click **Edit**.

If you change your email address, a confirmation message will be sent to the new address. You must click the link provided in that message for the new email address to take effect. This process ensures system security.

4. Click **Save**.

SEE ALSO:

[Changing Your Password](#)

[Setting Up Your Chatter Profile](#)

EDITIONS

The available personal setup options vary according to which Salesforce Edition you have.

Changing Your Password


Change or reset your password for better protection, even if you’ve forgotten your current password.

We recommend changing your password periodically to protect the privacy of your data. If your administrator specifies that user passwords expire on a periodic basis, you’ll be prompted to change your password at the end of each period.

If you lose your password, you can click the **Forgot your password?** link on a failed login page to receive a new password via email.

EDITIONS

Available in all editions

 **Note:** If you have the “User Single Sign-On” permission, only an administrator can reset your password. Contact your administrator for assistance.

After you log in, you can change your current password.

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
 - If you clicked **Setup**, select **My Personal Information** > **Change My Password**.
 - If you clicked **My Settings**, select **Personal** > **Change My Password**.
3. Enter the password information requested.
4. Click **Save**.

SEE ALSO:

[Retrieving Forgotten Passwords](#)

[Resetting Your Security Token](#)


[Activating Your Computer](#)

Changing Your Security Question

If you forget your password and need to reset it, you may be required to answer a security question that you previously chose.

EDITIONS

Available in all editions

 **Note:** If you don't see the Change My Password option, you might be a single sign-on user. Contact your administrator for assistance.

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
 - a. If you clicked **Setup**, select **My Personal Information** > **Change My Password**.
 - b. If you clicked **My Settings**, select **Personal** > **Change My Password**.
3. Enter your current password.
4. Next to Question, select a question to answer if you're required to verify your identity due to a lost password.
5. Next to Answer, enter your answer to the question.
6. Click **Save**.

Editing Your Language and Locale Settings

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
 - If you clicked **Setup**, select **My Personal Information** > **Personal Information**, then click **Edit**.
 - If you clicked **My Settings**, select **Personal** > **Language & Time Zone**.

EDITIONS

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

3. 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.
4. Click **Save**.

Editing Email Settings

To alter email settings that apply to all outbound emails you send from within the application:

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left side of the page, select **Email > My Email Settings**.
3. Make your changes.



Note: In Personal and Developer Editions, a Salesforce-specific tag line is added below your personal signature on all outbound emails.

EDITIONS

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

Sharing Your Calendar

You can grant access to other users, personal and public groups, roles, or roles and subordinates to view your calendar.

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
 - If you clicked **Setup**, click **My Personal Information > Calendar Sharing**.
 - If you clicked **My Settings**, click **Calendars & Reminders > Calendar Sharing**.
3. Click **Add** to share your calendar with others.
4. Use the arrows to add or remove users, roles, or groups to your calendar.
5. Use the **Calendar Access** drop-down list to specify how you want to share your calendar. Select one of the following:

EDITIONS

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

Option	Description
Hide Details	Others can see whether given times are available, but cannot see any other information about the nature of events in the calendar.
Hide Details and Add Events	Others can see whether given times are available, but cannot see details of events. Other users can insert events in the calendar.
Show Details	Others can see detailed information about events in the calendar.
Show Details and Add Events	Others can see detailed information about events in the calendar and can insert events in the calendar.

Option	Description
Full Access	Others can see detailed information about events in the calendar, insert events in the calendar, and edit existing events in the calendar.

6. Click **Save**.

The available `Calendar Access` options vary depending on the organization-wide calendar sharing level set by your administrator. Only choices that make your calendar access less restrictive are available. Calendar sharing settings affect the visibility of items on a calendar, but do not give access to event detail pages.



Note: Regardless of whether your organization's sharing settings specify using hierarchies, activities associated with a record are still visible to users above the activity's assignee in the role hierarchy.

Setting Record Type Preferences

Set an option to automatically insert your default record type when creating new records. Using this setting, you can bypass the page prompting you to select a record type. If you have several different record types available to you, you may prefer to be prompted to select a record type every time you create a new record.

- At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
- From the left pane, select one of the following:
 - If you clicked **Setup**, click **My Personal Information > Record Type Selection**.
 - If you clicked **My Settings**, click **Display & Layout > Set Default Record Types**.
- Check any box to automatically select the default record type when creating records of that type. Any unchecked boxes indicate that you prefer to be prompted to select a record type.
- Click **Save**.



Note: The Record Type Selection option may not be available because your organization is not using record types or multiple record types are not available for a particular tab. Individual checkboxes are only offered when you have more than one record type available for a tab.

If your organization uses person accounts, note that checking the `Account` box on this page causes one default record type selection for all types of accounts. It is not possible to set separate default record type selections for business accounts and person accounts. If you work with both types of accounts, leave the box blank.

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Get Set up for the Way You Work

Browsers

Supported Browsers

Learn about the browsers we support for the full Salesforce site.



Important: Beginning Summer '15, we'll discontinue support for Microsoft® Internet Explorer® versions 7 and 8. For these versions, this means that some functions may no longer work after this date. Salesforce Customer Support will not investigate issues related to Internet Explorer 7 and 8 after this date.

To see the mobile browsers that are supported for the Salesforce1 app, check out [Requirements for Using the Salesforce1 App](#) on page 152.

Browser	Comments
Microsoft® Internet Explorer® versions 7, 8, 9, 10, and 11	<p>If you use Internet Explorer, we recommend using the latest version that Salesforce supports. Apply all Microsoft software updates. Note these restrictions.</p> <ul style="list-style-type: none"> • The full Salesforce site is not supported in Internet Explorer on touch-enabled devices for Windows. Use the Salesforce1 mobile browser app instead. • The Salesforce1 Setup page and the Salesforce1 Wizard require Internet Explorer 9 or later. • The HTML solution editor in Internet Explorer 11 is not supported in Salesforce Knowledge. • The Compatibility View feature in Internet Explorer isn't supported. • The Metro version of Internet Explorer 10 isn't supported. • Internet Explorer 6 and 7 aren't supported for login hints for multiple accounts. • Internet Explorer 7 and 8 aren't supported for the Developer Console or the Data Import Wizard. • Internet Explorer 7 isn't supported for Open CTI. • Internet Explorer 7 and 11 aren't supported for Salesforce CRM Call Center built with CTI Toolkit version 4.0 or higher. • Internet Explorer 7 isn't supported for Force.com Canvas. • Internet Explorer 7 isn't supported for Salesforce console features that require more advanced browser performance and recent Web technologies. The console features not available in Internet Explorer 7 include: <ul style="list-style-type: none"> – The Most Recent Tabs component – Multiple custom console components on sidebars – Vertical auto-sizing for stacked console components in sidebars – Font and font color for console components' Button CSS – Multi-monitor components – The resizable highlights panel – The full-width feed option on feed-based page layouts

Browser	Comments
	<ul style="list-style-type: none"> Internet Explorer 7 and 8 aren't supported for Community Templates for Self-Service. Internet Explorer 7 and 8 have performance issues when Multi-Line Edit in Opportunity Splits is used. Community Templates for Self-Service supports Internet Explorer 9 and above for desktop users and Internet Explorer 11 and above for mobile users. Internet Explorer 7, 8, and 9 aren't supported for Salesforce Analytics Cloud. <p>For configuration recommendations, see Configuring Internet Explorer on page 37.</p>
Mozilla® Firefox®, most recent stable version	<p>Salesforce makes every effort to test and support the most recent version of Firefox.</p> <ul style="list-style-type: none"> Mozilla Firefox is supported for desktop users only for Community Templates for Self-Service. <p>For configuration recommendations, see Configuring Firefox on page 37.</p>
Google Chrome™, most recent stable version	<p>Google Chrome applies updates automatically; Salesforce makes every effort to test and support the most recent version. There are no configuration recommendations for Chrome. Chrome isn't supported for the Add Google Doc to Salesforce browser button or the Console tab (the Salesforce console is supported).</p>
Apple® Safari® versions 5.x and 6.x on Mac OS X	<p>There are no configuration recommendations for Safari. Apple Safari on iOS isn't supported for the full Salesforce site.</p> <ul style="list-style-type: none"> Safari isn't supported for the Salesforce console. Safari isn't supported for Salesforce CRM Call Center built with CTI Toolkit versions below 4.0. Safari isn't supported for Salesforce Analytics Cloud.

Recommendations and Requirements for All Browsers

- For all browsers, you must enable JavaScript, cookies, and TLS 1.0.
- Salesforce recommends a minimum screen resolution of 1024 x 768 for the best possible user experience. Screen resolutions smaller than 1024 x 768 may not display Salesforce features such as Report Builder and Page Layout Editor properly.
- For Mac OS users on Apple Safari or Google Chrome, make sure the system setting `Show scroll bars` is set to **Always**.
- Some third-party Web browser plug-ins and extensions can interfere with the functionality of Chatter. If you experience malfunctions or inconsistent behavior with Chatter, disable all of the Web browser's plug-ins and extensions and try again.

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

- Internet Explorer is the only supported browser for:
 - Standard mail merge
 - Installing Salesforce Classic on a Windows Mobile device
 - Connect Offline
- Firefox is recommended for the enhanced page layout editor.

- Browser requirements also apply for uploading multiple files on Chatter.

Discontinued or Limited Browser Support

As of Summer '12, Salesforce discontinued support for Microsoft® Internet Explorer® 6. Existing features that have previously worked in this browser may continue to work through 2014. Note these support restrictions.

- Internet Explorer 6 isn't supported for:
 - Answers
 - Chatter
 - Chatter Answers
 - Cloud Scheduler
 - Enhanced dashboard charting options
 - Enhanced profile user interface
 - Forecasts
 - Global search
 - Joined reports
 - Live Agent
 - Quote Template Editor
 - Salesforce console
 - Salesforce Knowledge
 - Schema Builder
 - Site.com
 - Territory Management 2.0
 - The new user interface theme

Internet Explorer 7 isn't supported for Site.com and Chatter Messenger. For systems running Microsoft Windows XP, Internet Explorer versions 7 and 8 with the latest security patches are supported for Chatter Answers.

Getting Plug-ins for Viewing Documentation and Online Training Courses

Download the plug-ins you need to view Salesforce PDF documentation and online training courses.

- **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: **All** Editions except **Database.com**

Learning Keyboard Shortcuts

Use keyboard shortcuts to work efficiently in Salesforce.

In addition to the standard keyboard shortcuts available with your Web browser, Salesforce supports these keyboard shortcuts.

- Press ALT plus any number between 0 and 9 to highlight an item in the Recent Items list in the sidebar. For example, press ALT+1 to highlight the first item in the list, ALT+2 to highlight the second item, and so on. Pressing ALT+0 highlights the tenth item in the list.

EDITIONS

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



Note: If you're using Mozilla® Firefox®, press SHIFT+ALT plus a number to automatically display the item you highlighted. If you're using Mozilla Firefox on a Mac, press CTRL plus a number. If you're using Microsoft® Internet Explorer®, press ALT plus a number and then press Enter to display the highlighted item.

- If your organization has enabled the collapsible sidebar, press ALT+S to open or close the sidebar. Opening the sidebar using ALT+S automatically places your cursor in the Search box.

Configuring Internet Explorer

If you use Internet Explorer, we recommend using the latest version that Salesforce supports. Apply all Microsoft software updates.

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

EDITIONS

Available in all editions

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:

- Do not select the `Do not save encrypted pages to disk` option.
- Select `Use TLS 1.0`, `Use TLS 1.1`, and `Use TLS 1.2`. For best results, make sure that `Use SSL 2.0` and `Use SSL 3.0` are disabled.



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 may decrease performance.

SEE ALSO:

[Supported Browsers](#)

Configuring Firefox

To ensure Salesforce works optimally with Firefox, you'll need to do a few configurations to the browser.

Salesforce makes every effort to test and support the most recent version of Firefox.

EDITIONS

Available in all editions

Required Settings

Make sure Firefox can accept cookies.

1. Click **Tools > Options**.
2. Go to the Privacy panel.
3. For the Firefox will option, select **Use custom settings for history**
4. Select the **Accept cookies from sites** option.
5. Select the **Accept third-party cookies** option.
6. For the Keep until option, select **they expire**.
7. Click **OK**.

Advanced Settings

Optionally, configure advanced caching preferences to maximize performance.

1. Type `about:config` in the browser's location bar, and then 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. Change how the browser retains common resources across requests by setting the following 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
network.http.use-cache	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 may 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.

SEE ALSO:

[Supported Browsers](#)

Understanding Your Access to UI Elements, Records, and Fields

Your administrator can customize many different areas to secure your company's data. Additionally, users in Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations can control the access that other users have to their data by sharing records individually with colleagues.

To determine whether you can access data, review this table:

EDITIONS

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

Action	Access Needed
To view a tab:	<ul style="list-style-type: none"> You must have the "Read" permission on the records within that tab. Make sure you have customized your personal display to show the tab.
To view a record:	<ul style="list-style-type: none"> Make sure you have the "Read" permission on the type of record you want to view. Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations can set a sharing model that determines the access users have to records they do not own. Depending on your sharing model, the owner may need to share the record with you if you are not the owner of the record or above the owner in the role hierarchy. Enterprise, Unlimited, Performance, and Developer Edition organizations can use territory management to grant access to accounts, opportunities, and cases.
To view a field:	<ul style="list-style-type: none"> Make sure you have the "Read" permission on the type of record for the field. For Enterprise, Unlimited, and Performance Edition organizations, check the field-level security; your field-level security settings may prevent you from seeing the field. Check your page layout; depending on your page layout settings, you may see some fields and not others.
To edit a field:	<ul style="list-style-type: none"> Make sure you have the "Edit" permission on the type of record for the field. For Enterprise, Unlimited, and Performance Edition organizations, check the field-level security; your field-level security settings may set a field to "Read-Only."

Action	Access Needed
	<ul style="list-style-type: none"> Check your page layout; page layouts can set fields to read only.
To view a related list:	<ul style="list-style-type: none"> Make sure you have the “Read” permission on the type of records displayed in the related list. Check your page layout; depending on your page layout settings, you may see some fields and not others.
To view a button or link:	<ul style="list-style-type: none"> Make sure you have the necessary permission to perform the action. Buttons and links only display for users who have the appropriate user permissions to use them.

SEE ALSO:

[Granting Access to Records](#)[Viewing Which Users Have Access to Your Records](#)[Record Access Levels](#)

Customizing Your Display

You can customize your Salesforce display through your personal settings.

- [Customize which tabs display in your app and in what order](#)
- [Customize what displays on your pages](#)

EDITIONS

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

Customizing Your Tabs

Specify which tabs display when you log in, or if you have multiple apps, which tabs display in each app.

- At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
- From the left pane, select one of the following:
 - If you clicked **Setup**, select **My Personal Information** > **Change My Display**, and click **Customize My Tabs**.
 - If you clicked **My Settings**, select **Display & Layout** > **Customize My Tabs**.
- 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.

- If desired, add each tab you want to display and change the display order of the tabs you've selected.

EDITIONS

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

5. Click **Save**.

SEE ALSO:

[Customizing Your Pages](#)

Customizing Your Pages

Specify the related lists that appear in detail pages.

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. Do one of the following:
 - If you clicked **Setup**, from the left pane, select **My Personal Information** > **Change My Display**. Select an object from the drop-down list, and click **Customize My Pages**.
 - If you clicked **My Settings**, from the left pane, select **Display & Layout** > **Customize My Pages**. Select an object from the drop-down list, and click **Customize Page**.

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.

3. Click **Save**.

SEE ALSO:


[Customizing Your Tabs](#)

EDITIONS

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

Adding Tabs for Frequently Used Items

The Salesforce user interface is composed of tabs, which serve 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 () that appears 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.
3. Click **Customize My Tabs**.
4. In the **Custom App** dropdown, 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 will appear in that app only.
5. Use the **Add** and **Remove** arrows to move tabs from the Available Tabs list to the Selected Tabs list. Use the **Up** and **Down** arrows to change the order of the tabs.

EDITIONS

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

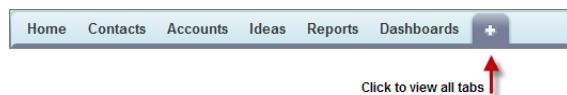
6. Click **Save**.
7. If you added a tab to an app you're not actively using, open that app to see your new tab.

SEE ALSO:

[Viewing Available Salesforce Tabs](#)

Viewing Available Salesforce Tabs

To view all the tabs available to you in Salesforce, click the plus icon (+) next to the main tabs.



EDITIONS

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

Using this page, you can:

- Click any of the tab names to quickly jump to that tab.
- If you have multiple apps, use the **View** drop-down list to see each app's logo and included tabs.
- Click **Customize My Tabs** to change how tabs display on your screen.

SEE ALSO:

[Adding Tabs for Frequently Used Items](#)

Accessibility

Accessibility Standards Overview

Learn about the standards 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. To help meet our goal of universal design, Salesforce 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.

Our [Voluntary Product Accessibility Template \(VPAT\)](#) is a tool used to document a product's conformance with the accessibility standards under Section 508 of the Rehabilitation Act and includes an accessibility assessment of our products.

EDITIONS

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

General Accessibility Requirements

Consider these requirements when using Salesforce.

- JavaScript support must be available and turned on.
- After a specified period of inactivity, a session timeout popup window automatically displays, prompting you to log out or continue working. Your administrator can set this time interval or disable it altogether. Your browser must allow pop-ups in Salesforce; otherwise you won't receive a warning about the upcoming timeout.
- Pilot and Beta features may not be accessible.

Recommended Browsers

For general accessibility testing, Salesforce uses the most current version of Mozilla® Firefox® and Microsoft® Internet Explorer® on Windows®, and Apple® Safari® on OS X®.

Contacting Salesforce with Accessibility Concerns

To access documentation and knowledge base articles or to contact customer support, click the **Help & Training** link at the top of any page.

To report any accessibility concerns or to request an alternate format of any document, send an email to accessibility@salesforce.com.



Note: Customer support is not available for Personal and Developer Edition users. In addition, knowledge base access is not available for Developer Edition users. All users are welcome to contact accessibility@salesforce.com in English with any accessibility-related queries.

Accessibility Mode Overview

Learn how accessibility mode changes your experience using Salesforce.

Salesforce includes an alternate user interface mode that lets users with assistive devices, such as speech recognition software and screen readers, work with Salesforce more effectively. Most new features are designed with accessibility in mind and are inherently accessible in the standard mode. However, you may find that accessibility mode better suits your needs, particularly when using speech recognition or screen reading software to create reports and dashboards or interact with list views.

Accessibility mode includes the full functionality of Salesforce with the modifications detailed here to create a better experience for users with assistive devices.

EDITIONS

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.
- Drop-down menus include a **Go** button that you select to navigate to the option you choose in the drop-down list.
- Menu buttons are rendered as a drop-down list with a **Go** button.
- Overlay pages are rendered as separate pop-up 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 drop-down menu.
- The **Edit Columns** link on the Manage Members page, accessible via the Manage Members drop-down on a campaign detail page, becomes a drop-down button. The Edit Columns overlay is replaced by a standard setup page.
- 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** drop-down list on a Chatter group displays as a **Chatter Email Settings** link that opens your settings for receiving Chatter email.

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** drop-down 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 community



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.

Enable Accessibility Mode

Optimize your experience using Salesforce with assistive devices, such as speech recognition software and screen readers, by enabling accessibility mode.

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:

EDITIONS

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

- If you clicked **Setup**, select **My Personal Information** > **Personal Information**, then click **Edit**.
- If you clicked **My Settings**, select **Display & Layout** > **Accessibility**.

3. Select **Accessibility Mode**.

4. Click **Save**.

SEE ALSO:

[Recommendations for Salesforce Accessibility](#)

Recommendations for Salesforce Accessibility

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

Here are some recommendations to help you work with Salesforce.

- [Sighted Keyboard Users](#)
- [Screen Reader Users](#)
- [Deaf or Hearing Impaired Users](#)
- [Specific Color Users](#)
- [Low-Vision Users Who Need Magnification](#)

SEE ALSO:

[Enable Accessibility Mode](#)

EDITIONS

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

Sighted Keyboard Users

These Salesforce features help ensure an accessible experience.

- Accessibility Mode helps you work more effectively with Salesforce, particularly reports, dashboards, and list views. See [Accessibility Mode Overview](#) on page 43 for more information.
- 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 up as headings rather than fieldset and legend elements for grouping 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 enhanced listviews in Standard Mode only) to aid identification of headers for each cell.
 - Lists provided in the main content area are marked up 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 generally bypasses the navigational menus before the main content area, greatly reducing the number of tab presses that would otherwise be required to reach the main content area of the page.
- Keyboard focus is placed inside of dialog boxes when they open and will remain 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 may be disabled until you select a specific option.

Screen Reader Users

Salesforce on-demand applications are designed to take advantage of the latest features of the most widely used screen reading software. Although you might find that many browser and screen reader combinations work well, we recommend you use the most current versions of Mozilla® Firefox® and JAWS® or NVDA with Salesforce.

These Salesforce features help ensure an accessible experience:

- Accessibility Mode helps you work more effectively with Salesforce, particularly reports, dashboards, and list views. See [Accessibility Mode Overview](#) on page 43 for more information.
- Important images have text alternatives equivalent to the purpose of the image; non-important images have empty text equivalents or are implemented through CSS. Images showing detailed information are also links to source data. For example, Dashboards contain charts and graphs that are visual in nature. To access the report data used to generate the chart or graph, simply select the dashboard component.



Note: The underlying report may contain additional data than what is represented in the dashboard component. In addition, the underlying report may contain some data that you don't have access to view due to sharing settings.

- These elements are identified in our page markup to help you interact with them.
 - Headings are marked up as headings rather than fieldset and legend elements for grouping 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 enhanced listviews in Standard Mode only) to aid identification of headers for each cell.
 - Lists provided in the main content area are marked up 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 generally bypasses the navigational menus before the main content area, greatly reducing the number of tab presses that would otherwise be required to reach the main content area of the page.
- Keyboard focus is placed inside of dialog boxes when they open and will remain 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 may be disabled until you select a specific option.

In addition, we recommend you enable these personalized web settings in your screen reader:

- Set pages to refresh automatically.
- Turn on live region update announcements.
- Set text links to show titles. This setting ensures the screen reader announces information provided through a link's title attribute, such as a warning that a new window will open.
- Set headings to announce Headings and Levels. Heading markup is used to provide context as well as navigation.
- Add common signs, such the @ (at) sign for mentioning people in Chatter posts and comments, to your screen reader dictionary to customize how they're announced by default.

Deaf or Hearing Impaired Users

Salesforce provides video demos hosted on YouTube. To view synchronized captions for videos, click `Watch on YouTube.com` in the bottom-right corner of embedded videos.

Specific Color Users

Browser and operating system settings don't change the colors displayed within images, and 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, you may need 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, simply select the dashboard component.



Note: The underlying report may contain additional data than what is represented in the dashboard component. In addition, the underlying report may contain some data that you don't have access to view due to sharing settings.

Low-Vision Users Who Need Magnification

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

These elements are identified in our page markup. You can alter the styles for these elements to help you identify them.

- Headings are marked up as headings rather than fieldset and legend elements for grouping 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 enhanced listviews in Standard Mode only) to aid identification of headers for each cell.
- Lists provided in the main content area are marked up as lists.

Setup FAQs

View and Display FAQ

- [What languages does Salesforce support?](#)
- [Why can't I see some buttons and links?](#)
- [Why can't I view Salesforce popup windows such as lookup dialogs and the Help & Training window?](#)
- [Why did my data disappear when I pressed the Backspace key while editing a record?](#)
- [Can I change or delete the drop-down list of entries that appears when I edit a text field?](#)

What languages does Salesforce support?

Salesforce offers three levels of language support: [fully supported languages](#), [end user languages](#), and [platform-only languages](#). All languages are identified by a two-character language code (such as `en`) or a five-character *locale* code (such as `en_AU`).

 **Note:** Setting a default locale is different from setting a default language.

Aside from the three levels of language support for Salesforce features, documentation, and application development tools, there are two ways you can actually localize your organizations. First, the Translation Workbench: The Translation Workbench lets you specify languages you want to translate, assign translators to languages, create translations for customizations you've made to your Salesforce organization, and override labels and translations from managed packages. Everything from custom picklist values to custom fields can be translated so your global users can use all of Salesforce in their language.

If your custom application uses a small number of Salesforce's standard tabs and fields, you can translate them by renaming tab and field labels.

Fully Supported Languages

You can change the language for all features, including Help, to one of the following fully supported languages from Setup by clicking **Company Profile > Company Information > Edit**.

- 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`
- Swedish: `sv`
- Thai: `th`

 **Note:**

- Spanish (Mexico) falls back to Spanish for customer-defined translations.
- Even though the Salesforce interface is fully translated to Thai, Help remains 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 Setup and Help. When you specify an end user language, labels and Help that aren't translated display in English instead.

- Arabic: `ar`
- Bulgarian: `bg`
- Czech: `cs`
- English (UK): `en_GB`
- Greek: `el`
- Hebrew: `iw`
- Hungarian: `hu`
- Indonesian: `in`
- Polish: `pl`
- Portuguese (Portugal): `pt_PT`
- Romanian: `ro`
- Slovak: `sk`
- Turkish: `tr`
- Ukrainian: `uk`
- Vietnamese: `vi`

Platform-Only Languages

Platform-only languages are used when you want to localize custom functionality (apps) that you've built on the Salesforce platform. With platform-only languages you can localize the custom labels, custom objects, and field labels in situations where Salesforce doesn't provide any default translations.

Platform-only languages are available in all of the places where you can select a language in the application, however, when you select a platform-only language all labels in the application still default to English. You can translate all customizations made to Salesforce into a platform-only language, and you can use renaming to provide translations for standard field names on most objects. Informative text and non-field label text isn't translatable.

When you specify a platform-only language, labels for standard objects and fields fall back to English except: English (Australia), English (India), English (Malaysia), and English (Philippines) fall back to English (UK); German (Austria) and German (Switzerland) fall back to German; French (Canada) falls back to French; Romanian (Moldova) falls back to Romanian; Montenegrin falls back to Serbian (Latin); and Portuguese (Portugal) falls back to Portuguese (Brazil).

- Albanian: `sq`
- Armenian: `hy`
- Basque: `eu`
- Bosnian: `bs`
- Bengali: `bn`
- Croatian: `hr`
- English (Australia): `en_AU`
- English (Canada): `en_CA`
- English (India): `en_IN`

- English (Malaysia): en_MY
- English (Philippines): en_PH
- Estonian: et
- French (Canada): fr_CA
- Georgian: ka
- German (Austria): de_AT
- German (Switzerland): de_CH
- Hindi: hi
- Icelandic: is
- Irish: ga
- Latvian: lv
- Lithuanian: lt
- Luxembourgish: lb
- Macedonian: mk
- Malay: ms
- Maltese: mt
- Romanian (Moldova): ro_MD
- Montenegrin: sh_ME
- Romansh: rm
- Serbian (Cyrillic): sr
- Serbian (Latin): sh
- Slovenian: sl
- Tagalog: tl
- Tamil: ta
- Urdu: ur
- Welsh: cy

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 nor do they see the **Del** link on an opportunity related list.

Why can't I view Salesforce popup windows such as lookup dialogs and the Help & Training window?

If your browser's popup blocker settings are configured for maximum security, you won't be able to view any popup windows within Salesforce—even those that provide necessary functionality such as the calendar popup for choosing a date on an activity, lookup dialogs for selecting a record, the Help & Training window, and more.

To test your popup settings:

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.

2. From the left pane, select one of the following:
 - If you clicked **Setup**, select **My Personal Information > Reminders**.
 - If you clicked **My Settings**, select **Calendars & Reminders > Reminders**.

3. Click **Preview Reminder Alert**

To allow popup windows for Salesforce, add Salesforce as a trusted site within your browser's popup blocker settings. Consult the online 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 did my data disappear when I pressed the Backspace key while editing a record?

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, making it appear that your data has been lost. 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 drop-down list of entries that appears when I edit a text field?

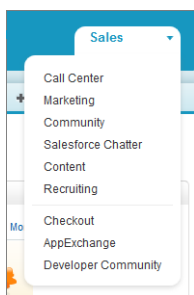
No. These auto-complete entries that appear when you are editing certain text fields are a feature of Internet Explorer. The browser remembers text you have entered previously and provides a list of those entries for you to automatically complete the field. If you would like to turn this feature off, 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.

Navigate Salesforce

Opening a Different Salesforce App

To use features available in a different Salesforce app than the one you have open, you need to open the other app. You can have one app open at a time, and the app you have open will open the next time you log on to Salesforce.

To open an app: In the upper-right corner of any Salesforce page, select the app you want from drop-down app menu.



EDITIONS

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 set.

Using the App Launcher

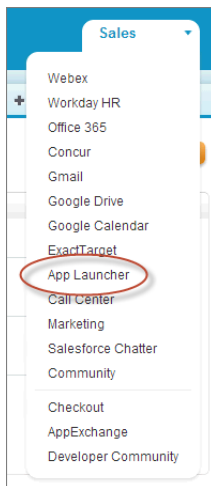
The App Launcher presents icons for all of the current user's standard apps and connected apps in a single tab.

The App Launcher presents logos that link to your connected apps and standard apps, all from one tab in Salesforce. Users must be assigned a profile or permission set with "Use Identity Features" enabled and the App Launcher set to **Visible** to see it. Then, it appears as an app in the Force.com App Menu.

Administrators using the System Administrator profile automatically have access to the App Launcher (Administrators using profiles cloned from the System Administrator profile do not).

Users must have access to a standard app or connected app for it to appear in the App Launcher. In addition, the connected app must have a valid Start URL.

Select the App Launcher on any Salesforce page from the drop-down app menu.



In the App Launcher, click an installed app icon to launch the app.

EDITIONS

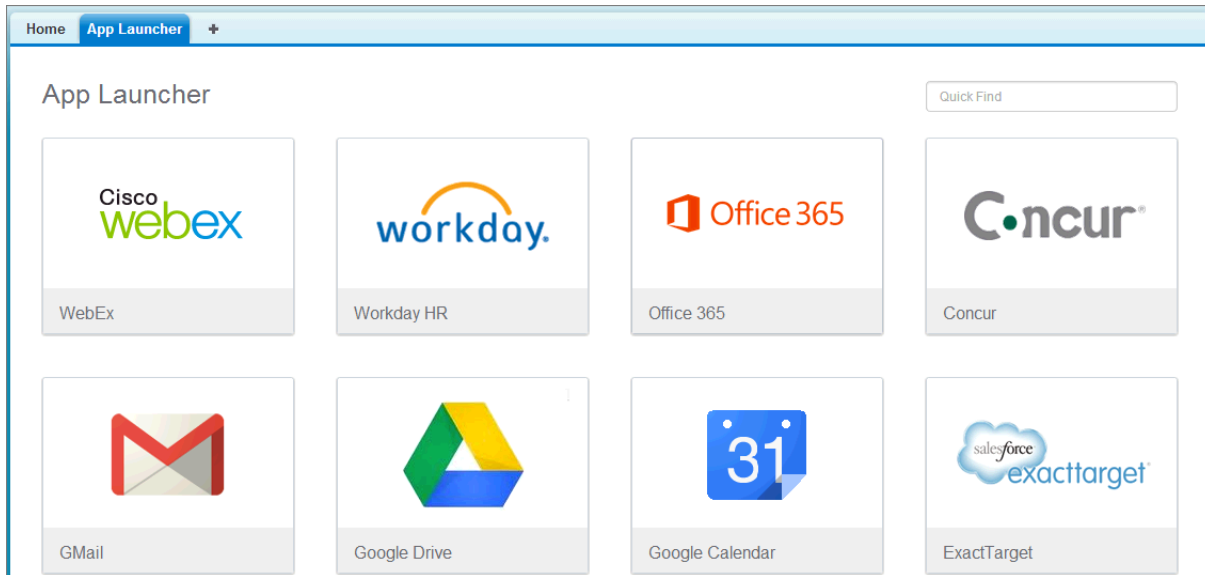
Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To see the App Launcher:

- "Use Identity Features"



Understanding Salesforce Pages

Salesforce apps are made up of tabs and pages. Standard objects such as Accounts, Contacts, and Leads, and other features such as Chatter typically have tabs, and from a tab, you navigate through pages to interact with the features you're using. For example, if you want to create an account record, you'll click the Accounts Tab, and land on the Accounts Home page. Click **New** to open the Account Edit page where you'll enter information for the account. Click **Save**, and you'll see the Account's Detail page. Return to the Accounts Home page and the new account is listed.

Salesforce tabs can have multiple types of pages, including Home, Edit, and Detail pages, and you can create list views for some objects. Chatter has one primary page type: a feed. And Data.com has a search interface. Dashboards and reports have their own page styles, as well.

Your system administrator typically sets up page layouts for standard objects and enables the navigation features your organization can use, but interacting with Salesforce is easier if you understand the most common page elements for the most frequently used objects. They include:

1. A *tag* bar, where you can view and add tags for a record.
2. A *feed*, where you can add and view comments about a record.
3. A *sidebar*, where you can do things like search and quickly create new records.
4. *Sections* for the record, with key fields and links.
5. *Related lists*, which group and display links to other records associated with the one you're viewing. You can change the order of related lists on your page.
6. Various *links* that help you move around the page or go to different pages or external sites.

Let's look at these elements on an account detail page.

The screenshot displays the Salesforce user interface. The top navigation bar includes tabs for Home, Chatter, Profile, Groups, Files, Leads, Accounts, Contacts, Data.com, Opportunities, Reports, Dashboards, and Products. The left sidebar contains a 'Create New...' button, 'Recent Items' (listing Salesforce.com, Inc., Mike Booth, Sean Alpert, David Austin, and Holly Sparks), 'Custom Links', 'Messages and Alerts', and a 'Recycle Bin'. The main content area shows the profile of 'Salesforce.com, Inc.' with a feed, a 'Followers' section, and an 'Account Detail' section. Below the account detail is a description of the company, followed by 'Address Information' and 'System Information' sections. At the bottom, there is a 'Contacts' table and an 'Open Activities' section.

Numbered callouts highlight specific features:

- 1: 'Edit Tags' and 'Public: 5K Employees' buttons in the top right of the profile feed.
- 2: 'Recent Items' list in the sidebar.
- 3: 'Recycle Bin' link in the sidebar.
- 4: 'Address Information' section in the account detail.
- 5: 'Contacts' table in the account detail.
- 6: 'Back to List: Accounts' and navigation links (Contacts, Open Activities, Activity History, Opportunities, Cases, Partners, Notes & Attachments) in the account detail.

Action	Contact Name	Title	Email	Phone
Edit Del	Sean Alpert	Director, Product Marketing	salpert@salesforce.com	+1.415.836.8353
Edit Del	David Austin	Director, Online Marketing Rypple	daustin@salesforce.com	+1.415.371.7463
Edit Del	Mike Booth	Technical Product Marketing Manager	mbooth@salesforce.com	+1.415.836.2410

SEE ALSO:

- [Tags Overview](#)
- [Understanding the Salesforce Sidebar](#)
- [Navigating Object Home Pages](#)
- [Home Tab Overview](#)

Understanding the Salesforce Sidebar

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

- [Search](#)
Use the header search box, if you don't have sidebar search.

EDITIONS

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

- The [Tags](#) link and Recent Tags drop-down list
- The [Divisions](#) drop-down list
- The [Create New](#) drop-down list
- A Calendar shortcut to your last used calendar view
- The [Recent Items](#) list
- [Messages and Alerts](#)
- [Custom Links](#)
- A shortcut to the [Recycle Bin](#)

The options in your sidebar vary depending on the features you have enabled and whether your administrator has customized the page layout.

Showing and Hiding the Collapsible Sidebar

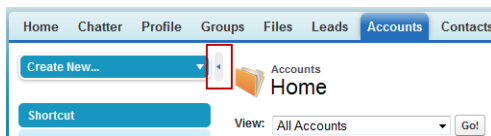
If your administrator has enabled the Collapsible Sidebar, you can show or hide the sidebar as needed.

 **Note:** Call center users won't see incoming calls if they collapse the sidebar.

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

EDITIONS

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



Working with Related Items Directly from the Record You're Viewing

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 creating new records or attaching 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.

The related lists you can view and use are determined by:


- Your user permissions
- User interface and page layout customizations made by your Salesforce administrator
- Personal customizations you can make






It's easy to arrange and access related lists. Here's how.


EDITIONS

Available in: **All** editions

Groups Files **Leads** Accounts Contacts Opportunities Reports Dashboards Products +


 **Denise Arlen** 3 Cus

 Show Feed

« Back to List: Leads 2 Approval History [0] | Open Activities [0] | Activity History [2] | HTML Email Status [0] | Campaign H

Lead Detail Edit Delete Convert Clone Find Duplicates

Lead Owner	 Norah Logan [Change]	Lead Status	Open
Name	Denise Arlen	Phone	+1.415.9
Company	GrowthCo, Inc.	Email	darlen@
Title	Buyer	Rating	

Address Information

Edit | Delete | Convert | Clone | Find Duplicates

Approval History Submit for Approval 1

No records to display

Open Activities New Task New Event New Meeting Request

No records to display

Activity History Log a Call Mail Merge Send an Email View All

Action	Subject	Task	Due Date	Assigned To
Edit Del	Meet and Greet + Demo	<input type="checkbox"/>	1/2/2014 12:00 PM	Norah Logan
Edit Del	Send quote	<input checked="" type="checkbox"/>	1/2/2014	Linda Valero

1. Scroll the page to find the related list you need.
2. If related list hover links are enabled in your organization, click a link to view the list in a pop-up.
3. Click **Customize Page** to select and arrange the available related lists you want to see.

Opening 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.

To open any item's detail or edit page, just click its link.



Tip: If your organization has enabled hover details, you can hover your mouse over any item in the Recent Items list to view key information about the record before clicking into that record's detail or edit page.



Note: Your Recent Items may show fewer than 10 items if you have recently deleted any of your recently viewed items. Likewise, the Recent lists on the tab home pages (for example, the Recent Leads list) may show fewer than 10 or 25 items if you have recently deleted items.


EDITIONS

Available in: **All Editions**

Working with Enhanced Lists

Enhanced lists give you the ability to quickly view, customize, and edit list data to speed up your daily productivity. They must first be enabled by your administrator for you to take advantage of them.


Enhanced lists allow you to:

- Navigate through the list results by clicking the first page icon (<<), **Previous**, **Next**, or the last page icon (>>) at the bottom of the list.
- Jump to a specific page of results by entering a number in the text box in the lower right corner, and then pressing ENTER.
- Create a new view by clicking **Create New View**. Edit, delete or refresh the current view by clicking **Edit**, **Delete**, or , respectively.
- Change the number of records displayed per page. Click ▼ in the lower left corner of the list and select the desired setting. You can view 10, 25, 50, 100, or 200 records at a time. When you change this setting, you return to the first page of list results.

Changing your preference for the number of records displayed per page applies to all lists in all Salesforce apps, not just the one currently displayed. In addition, if you change your preference to 200, a message warns you of possible performance degradation.

- Change the width of a column by dragging the right side of the column heading with your mouse. Any changes you make to column widths are specific to that list only, and are preserved when you next view the list.

If you add or remove columns from a list, any column width customizations for that list are discarded automatically.

- Change the order in which a column is displayed by dragging the entire column heading with your mouse to the desired position. If you have permission to edit the list definition, your changes are automatically saved for all users who see the list. If you do not have permission to edit the list definition, your changes are discarded when you navigate away from the page.
- Change the number and order of columns displayed by clicking **Edit** next to the list drop-down in the upper left corner.
- If your administrator has enabled inline editing for your organization, edit single records directly from the list by double-clicking on individual field values. If your administrator has granted you the "Mass Edit from Lists" permission, you can also edit up to 200 records at a time.
- On account, contact, and lead list views, click the  **Open Calendar** link at the bottom of the page to display a weekly view of a calendar underneath the list. Then, you can drag a record from the list to a time slot on the calendar to quickly create an event associated with the record. Note that your administrator controls the availability of the Drag-and-Drop Scheduling feature.

EDITIONS

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

USER PERMISSIONS

To use inline editing in an enhanced list:

- "Mass Edit from Lists"

Navigating Long Lists

Many list pages in Salesforce include the following tools for managing a large amount of data:

- To show a filtered list of items, select a predefined list from the **View** drop-down list, or click **Create New View** to define your own custom views.

To edit or delete any view you created, select it from the **View** drop-down list and click **Edit**.

- At the top of a list, click a letter to show items that correspond to that letter, or click **Other** to show items whose names begin with numbers or symbols. Click **All** to display all items that match the criteria of the current view.
- To sort list view items by the data in a particular column, click that column's heading. This sorts text data alphabetically and numerical data in ascending order. Dates are sorted with the most recent date first. To reverse the sort order, click the column heading a second time.



Note: You can sort by any custom field except multi-select picklists. User list views are not sorted for organizations with more than two million users. Organizations with more than 2 million users can contact salesforce.com to reenableView sorting.

- Click the **Previous Page** or **Next Page** link to go to the previous or next set of items in the current view.
- At the bottom of a list, click the **fewer** or **more** link to decrease or increase the number of items per page.

In some related lists with many items, the following links are available:

- Click **Show [number] more** to increase the number of items in the list.
- Click **Go to list** to display a secondary page of the entire related list.

EDITIONS

Available in all editions

Changing Your Working Division

You can change which records you are viewing by selecting the division you are currently working in.

You can change the division you are working in at any time and override the default division you were originally assigned for some searches and reports.

- From the Divisions field in the sidebar, select the division you want to work in.



Note: Records you create are assigned to your default division, not to your working division. You can explicitly set a division other than your default division when you create the record.

EDITIONS

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer


SEE ALSO:

[Using Divisions in Search and List Views](#)

Manage Your Work from the Home Tab

Home Tab Overview

From the Home tab, you can:

- Create a Chatter post (if your organization uses Chatter)
- View dashboard snapshots
- View your tasks and calendar
- Search the feed ()

You can also use the sidebar components, such as Create New, Recent Items, and Custom Links, that you'll also see on other Salesforce pages. Your Home tab layout, sidebar components, and links are enabled and configured by your administrator.

Alert banners may appear on the Home tab to let you know when updates are available for desktop clients such as Connect for Outlook and Connect Offline.

SEE ALSO:

[Navigating Object Home Pages](#)

EDITIONS

The available tabs and options in the Create New drop-down list vary according to which permissions you have and which Salesforce edition you are using.

Changing Your Home Tab Dashboard

Your administrator can create customized Home tab pages that display customized components such as a dashboard snapshot or your company logo. If your Home tab contains a dashboard snapshot, you can change the dashboard settings.


Click **Customize Page** in the Dashboard section of the Home tab if yours contains a dashboard. Use this page to select a different dashboard to display on the Home tab. Click **Refresh** to refresh the data in your dashboard.

EDITIONS

Available in:


- Professional
- Enterprise
- Performance
- Unlimited
- Developer

Using Your Tasks and Calendar on the Home Page

 **Note:** The My Tasks and Calendar sections display on the Home page if they are included as components on your Home page layout.

From the Home page, you can view, create, and edit tasks and events. If you have Salesforce for Outlook, Connect for Outlook or Connect for Lotus Notes installed, you may be able to sync your Outlook or Lotus Notes records with Salesforce so they appear in the My Tasks and Calendar sections.

In the My Tasks section, you can:



- Click **New** to create a task.
- View a list of tasks assigned to you. Up to fifteen tasks can be displayed; to view all your tasks, click **View More**.
 identifies tasks that are part of a recurring series.
- Choose a time frame from the drop-down list to change which tasks display.

EDITIONS



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

- Assign unresolved emails to related records; to view all your unassigned emails, click **My Unresolved Items**.
- If your organization has enabled hover links for the My Tasks list, hover your mouse over the subject of a task to see the details of the task in an overlay. Alternatively, click the subject of a task to open the detail page of that task.
- Click **X** to close a task.

In the Calendar section, you can:

- Click **New Event** to create a new event.
- Click the Scheduled Meetings subtab to view a list of the events you have scheduled for the next seven days. This tab displays a maximum of 50 events per day.
 -  identifies events that are part of a recurring series.
 -  identifies events with invitees. Multi-person events aren't available in Personal Edition.
 - If your organization has enabled home page hover links for events, hover your mouse over the subject of an event to display the details of the event in an interactive overlay. Alternatively, click the subject of an event to open the detail page of that event.
- Click the Requested Meetings subtab to view meetings you have requested but not confirmed. This tab displays a maximum of 100 requested meetings.
 - Click the subject of the meeting to open its detail page where you can cancel and reschedule the meeting.
 - The Responses column shows the number of invitees that have responded to your meeting request.
 - Once you confirm a meeting, it appears on the Scheduled Meetings subtab.

If the Requested Meetings subtab doesn't appear, ask your Salesforce administrator to add it to the Calendar section.

- View a small calendar of the current month. To change which month appears, click  and .
- Navigate to different views of your calendar and click the icons underneath the small monthly calendar as appropriate.

Viewing Custom Links on the Home Tab

This section appears on the Home tab depending on your customized home page layout.

The Custom Links section of the Home tab contains links to websites or Salesforce pages that are useful for everyone in your organization. Your administrator sets which links appear in this section.

EDITIONS

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

Viewing Messages and Alerts

The Messages and Alerts section of the Home tab sidebar displays announcements customized by your organization's administrator. The Messages and Alerts section is not available in Personal Edition.

SEE ALSO:

[Checking for Desktop Client Updates](#)

EDITIONS

Available in:

- Contact Manager
- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

Manage Relationships and Data with Records

View and Share Records

Finding and Viewing Records and Data

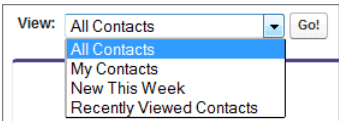
Use tabs, search, or lists to look at your data.

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.

When you're working with records, it's important to remember that the types of records you can create, view, edit, and delete are determined by administrator settings, such as a user profile or permission set. Your access to individual records may be determined by other configurations, such as sharing settings. And your access to fields on types of records may be controlled by field-level security. Work with your administrator to make sure you have access to the records and data you need.

There are a few easy ways to find and view your records.

- From a tab, such as Accounts or Contacts, start from the default view and click **Go!** or select a different view.



The resulting page you see is called a *list view*.

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All							
Action	Name ↑	Account Name	Title	Position	Phone	Email	Contact Owner
Edit Del	Adams, Arnold	ABC Labs	IT Manager	IT	1-408-555-2122	arnold.adams@tra...	mwils
Edit Del	Allen, Jack	Arbuckle Laborator...		Marketing	1-847-555-0557	jack.allen@training...	psmit
Edit Del	Amos, Jon	Vandelay Industries	Sales Manager	Account Manager	1-713-555-2405	jon.amos@training...	mwils
Edit Del	Anderson, Abby	Arbuckle Laborator...		IT	1-847-555-0590	abby.anderson@tr...	psmit
Edit Del	Antonia, Cade	Arbuckle Laborator...		IT	1-847-555-0513	cade.antonio@tra...	psmit
Edit Del	Buchner, Francis	ABC Labs	Account Manager	Account Manager	1-408-555-2124	francis.buchner@tr...	mwils

- Search for a record using keywords, such as a name or address stored in the record. Use the search bar in the banner displayed on most pages.
- On many records, below the main page sections, look for related lists, which 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.

SEE ALSO:

- [Understanding Salesforce Pages](#)
- [Understanding Your Administrator's Role](#)


EDITIONS

Available in: All Editions

Viewing and Editing Google Docs, Notes, and Attachments

You can create, view, and edit notes and add attachments from the Notes and Attachments related list on selected detail pages such as accounts, contacts, leads, opportunities, and products. You can also add attachments from the Attachments related list on selected detail pages such as cases, solutions, and campaigns.

If Chatter is enabled for your organization, files posted to a feed on a record are added to the record's Notes and Attachments related list as feed attachments. You can preview (if available), download, and delete feed attachments from the Notes and Attachments related list, but you can't edit them. You can view feed attachment details by clicking on the title of the file.

 **Note:** If the Add Google Docs to Salesforce service is enabled in your organization, the Notes and Attachments related list is entitled Google Docs, Notes & Attachments, and the Attachments related list is entitled Google Docs & Attachments.

- To view the contents of a note, click the title of the note.
- To view the details of all notes, attachments, or Google docs, click **View All**.

 **Note:** The **View All** button only displays up to 2,000 items in a related list.

- To view the details of an attachment, click the title of the file and then select the link on the Attached File detail page. To view the details of a feed attachment, click the title of the file.
- To edit a note or the title of an attachment, click **Edit** and make the changes you want. You can't edit the attached file directly and you can't edit feed attachments.
- To create a new Google doc, choose **New Document**, **New Spreadsheet**, or **New Presentation** from the **Add Google Doc** drop-down button.
- To associate an existing Google doc with the Salesforce record, choose **Add Existing** from the **Add Google Doc** drop-down button.
- To edit the title or URL of a Google doc, click **Edit**.
- To delete a Google doc from the related list, click **Del**. This action removes the document's association with the record but does not delete the document in Google Apps.
- To view and modify the Google doc, click **View**.

Consider the following when working with notes, attachments, and Google docs:

- To access a Google doc from a record detail page, the doc must be shared with your Google Apps account.
- When a file is attached to a record's Chatter feed it's added to the Notes and Attachments related list as a feed attachment. The file size limit for Chatter feed attachments is 2 GB.
- All notes and attachments added to contacts and opportunities roll up under the associated account as well.
- You cannot edit a note or attachment unless you also have access to edit the record associated with it.
- To delete a note or attachment, you must be the owner of the note or attachment or an administrator with the "Modify all Data" permission. Note ownership is determined by the owner field. Attachment ownership is determined by the created by field.
- Record owners (except Portal users) can delete attachments on records.
- Notes and attachments marked as private via the **Private** checkbox are accessible only to the person who attached them and administrators. For administrators to view private notes and attachments, they need the "View All Data" permission; to edit or delete them, they need the "Modify All Data" permission.
- The Notes and Attachments related list includes files from Salesforce CRM Content when they are posted to a Chatter feed on a record. However, the Notes and Attachments related list does not include Salesforce CRM Content files that only exist in Salesforce CRM Content. If your organization has Salesforce CRM Content enabled, you can add the Related Content related list to the detail pages for accounts, contacts, leads, opportunities, cases, products, or custom objects.

EDITIONS

Notes and attachments are available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Google Docs available in all editions

- Click **Preview** next to a feed attachment to display a preview of the file. Not all files can be previewed, such as encrypted files, password-protected files, copy-protected PDFs, unknown file types, and any file larger than 25 MB. For files that can't be previewed, the **Preview** option isn't available on feeds or list views, and files appear as generic file type icons in the feed. Some Microsoft Office 2007 features don't display correctly in previews.
- If Chatter is enabled for your organization, feed attachments are included in the Notes and Attachments related list. Portal users can download feed attachments, but can't preview, edit, or delete them.

SEE ALSO:

[Adding Notes to Records](#)

Granting Access to Records

Users can manually grant other users access to certain kinds of records, including accounts, contacts, and leads. In some cases, granting access to one record includes access to all its associated records. This method of granting access is also known as a manual share. For example, if you grant another user access to an account, the user will automatically have access to all the opportunities and cases associated with that account.

To grant access to a record, you must be one of these.

- The record owner
- A user in a role above the owner in the hierarchy (if your organization's sharing settings control access through hierarchies)
- Any user granted "Full Access" to the record
- An administrator

To grant access to a record using a manual share:

1. Click **Sharing** on the record you want to share.
2. Click **Add**.
3. From the **Search** drop-down list, select the type of group, user, role, or territory to add.

Depending on the data in your organization, your options can include:

Type	Description
Managers Groups	All direct and indirect managers of a user.
Manager Subordinates Groups	A manager and all direct and indirect reports who he or she manages.
Public Groups	All public groups defined by your administrator.
Personal Groups	All personal groups defined by the record owner. Only the record owner can share with his or her personal groups.
Users	All users in your organization. Does not include portal users.
Roles	All roles defined for your organization. This includes all of the users in each role.

EDITIONS


Sharing for accounts and contacts is available in:

Professional, Enterprise, Performance, Unlimited, and Developer Editions


Sharing for campaigns, cases, custom object records, leads, and opportunities is available in **Enterprise, Performance, Unlimited, and Developer** Editions

Sharing for custom objects is available in **Database.com**

Type	Description
Roles and Subordinates	All of the users in the role plus all of the users in roles below that role in the hierarchy. Only available when no portals are enabled for your organization.
Roles and Internal Subordinates	All roles defined for your organization. This includes all of the users in the specified role plus all of the users in roles below that role, excluding partner portal and Customer Portal roles.
Roles and Internal and Portal Subordinates	Adds a role and its subordinate roles. Includes all of the users in that role plus all of the users in roles below that role. Only available when a partner or Customer Portal is enabled for your organization. Includes portal roles and users.
Territories	For organizations that use territory management, all territories defined for your organization, including all users in each territory.
Territories and Subordinates	For organizations that use territory management, all users in the territory plus the users below that territory.

 **Note:** In organizations with over 2,000 users, roles, and groups, if your query doesn't match any items in a particular category that category won't show up in the Search drop-down menu. For example, if none of your group names contain the string "CEO," after searching for "CEO" you'll notice the Groups option no longer appears in the drop-down. If you enter a new search term, all of the categories will still be searched even if they don't appear in the list. You can repopulate the drop-down by clearing your search terms and pressing **Find**.

4. Choose the specific groups, users, roles, or territories who should have access by adding their names to the Share With list. Use the **Add** and **Remove** arrows to move the items from the Available list to the Share With list.
5. Choose the [access level](#) for the record you are sharing and any associated records that you own.

 **Note:**

- If you're sharing an opportunity or case, those you share it with must also have at least "Read" access to the associated account (unless you are sharing a case via a case team). If you also have privileges to share the account itself, those you share it with are automatically given "Read" access to the account. If you do not have privileges to share the account, you must ask the account owner to give others "Read" access to it.
- `Contact Access` is not available when the organization-wide default for contacts is set to Controlled by Parent.
- For sharing rules that specify access for associated object records, the given access level applies to that sharing rule only. For example, if an account sharing rule specifies Private as the access level for associated contacts, a user may still have access to associated contacts via other means, such as organization-wide defaults, the "Modify All Data" or "View All Data" permission, or the "Modify All" or "View All" permission for contacts.

6. When sharing a forecast, select `Submit Allowed` to enable the user, group, or role to submit the forecast.
7. Select the reason you're sharing the record so users and administrators can understand.

8. Click **Save**.

SEE ALSO:

[Editing or Deleting Record Access](#)

[Understanding Your Access to UI Elements, Records, and Fields](#)

[Viewing Which Users Have Access to Your Records](#)

[Record Access Levels](#)

Editing or Deleting Record Access

Edit or remove access to a record.

Manual shares are deleted automatically if the record owner is changed or if they are no longer needed, such as when the organization-wide defaults or sharing rules grant a similar or wider access than the manual share.

To edit or delete access to a record:

1. Open the record for which you want to edit or delete.
2. Click **Sharing** on the record.
3. Click **Edit** or **Del** next to the group, user, role, or territory whose access you want to modify or remove.

SEE ALSO:

[Granting Access to Records](#)

[Record Access Levels](#)

EDITIONS

Sharing for accounts and contacts is available in:

Professional, Enterprise, Performance, Unlimited, and Developer Editions

Sharing for campaigns, cases, custom object records, leads, and opportunities is available in **Enterprise, Performance, Unlimited, and Developer** Editions

Sharing for custom objects is available in **Database.com**

Viewing Which Users Have Access to Your Records

After you have granted access to a record you own, you can view a list of users who have access to the record and its related information and records, including their access level and an explanation. The list shows every user who has access that is greater than the organization-wide default settings.

For forecast sharing, the list shows whether the user can submit a forecast (in forecasting versions where sharing is available). High-volume portal users and Customer Portal super users are excluded from this list.



Note: For sharing rules that specify access for associated object records, the given access level applies to that sharing rule only. For example, if an account sharing rule specifies Private as the access level for associated contacts, a user may still have access to associated contacts via other means, such as organization-wide defaults, the “Modify All Data” or “View All Data” permission, or the “Modify All” or “View All” permission for contacts.

1. Click **Sharing** on the desired record.
2. Click **Expand List**.
3. Click **Why?** next to a user’s name to see the reason the user has access to the record.

EDITIONS

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

If there are multiple reasons with different access levels, the user is always granted the most permissive access level.

The possible reasons are:

Reason	Description
Account Sharing Rule	The user has access via an account sharing rule created by the administrator.
Account Sharing	The user was granted access via the Sharing button on the associated account.
Account Team	The user is a member of the account team.
Account Territory	The account has been assigned to a territory to which the user has access.
Account Territory Rule	The user has access via an account territory sharing rule created by the administrator.
Administrator	The user has the “Modify All Data” or “View All Data” administrative permission, or the “Modify All” or “View All” object permission.
Associated Portal User or Role	The portal user or any role above the portal user's role has access to the account for which the portal user is a contact.
Associated Record Owner or Sharing	The user owns or has sharing access to a contact or contract associated with the account. Click the link to view which associated records the user owns or has been given sharing access to.
Associated Record Sharing	The user is a member of a share group that has access to a contact or contract that's associated with the account owned by high-volume portal users.
Campaign Sharing Rule	The user has access via a campaign sharing rule created by the administrator.
Case Sharing Rule	The user has access via a case sharing rule created by the administrator.
Contact Sharing Rule	The user has access via a contact sharing rule created by the administrator.
Delegated Forecast Manager	A user has access to forecast data that was granted via the Sharing button on the forecast (in forecasting versions where sharing is available).
Forecast Manager	A user has access due to being a forecast manager in the forecast hierarchy.
Group Member	The user has access via a group, such as a Managers Group or Manager Subordinates Group.
Lead Sharing Rule	The user has access via a lead sharing rule created by the administrator.

Reason	Description
Manager of Territory Member	The user has a subordinate in the role hierarchy who is assigned to the territory with which the account is associated.
Manual Sharing	The user has access that was granted via the Sharing button on the record.
Manual Territory Sharing	The account has been manually assigned to a territory to which the user has access.
Opportunity Sharing Rule	The user has access via an opportunity sharing rule created by the administrator.
Owner	The user owns the record, or the user is a member of the queue that owns the record or above the queue member in the role hierarchy.
Portal Share Group	The user is a member of a share group that has access to records owned by high-volume portal users.
Related Portal User	The portal user is a contact on the case.
Role Above Owner or Shared User (Portal Only)	The user's role is above the role of a portal user who has access to the record via ownership or sharing.
Sales Team	The user is a member of the opportunity sales team.
View All Forecasts Permission	The user has the "View All Forecasts" permission.

SEE ALSO:

[Understanding Your Access to UI Elements, Records, and Fields](#)[Granting Access to Records](#)[Record Access Levels](#)

Record Access Levels

When you share records with other users, you can assign them different levels of access to the records.

The available access levels are:

Access Level	Description
Full Access	User can view, edit, delete, and transfer the record. User can also extend sharing access to other users; however, the user cannot grant Full Access to other users.
Read/Write	User can view and edit the record, and add associated records, notes, and attachments to it.
Read Only	User can view the record, and add associated records to it. They cannot edit the record or add notes or attachments.
Private	User cannot access the record in any way.



Note: If you encounter an error when selecting the Full Access option, you no longer have the permission to set full access on records. Contact your administrator to determine if this access is necessary.

SEE ALSO:

[Understanding Your Access to UI Elements, Records, and Fields](#)

[Viewing Which Users Have Access to Your Records](#)

Creating Custom List Views

You can create new list views to see a specific set of records such as contacts, documents, or campaigns. 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.

To edit or delete any view you created, click **Edit** next to the View drop-down list. Administrators, and users with the “Manage Public List Views” permission, can also edit or delete public views and some of the standard Salesforce views. Users without the “Manage Public List Views” permission see the **Clone** link instead of **Edit** so they can clone a public or standard view.

To create a new view, 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 administrator to request it.

1. Enter **View Name**

Enter the name to appear in the View drop-down list.

EDITIONS

Sharing for accounts and contacts is available in:

Professional, Enterprise, Performance, Unlimited, and Developer Editions

Sharing for campaigns, cases, custom object records, leads, and opportunities is available in **Enterprise, Performance, Unlimited, and Developer** Editions

Sharing for custom objects is available in **Database.com**

EDITIONS

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”

2. If you have the “Customize Application” permission, enter a unique name to be used by the API and managed packages.

3. Specify Filter Criteria

Filter by Owner

These options vary depending on the kind of record. In general, select **All . . .** or **My . . .** to specify the set of records to search. There may be additional options:

- Lead and case list views can be restricted by queue.
- Price book list views can be restricted by price book.
- Activity list views have several options.
- If your organization has territory management, account and opportunity list views can be restricted by **My Territories** or **My Territory Teams**. **My Territories** means records associated with territories to which you belong. **My Territory Teams** means records associated with either territories to which you belong or territories below you in the territory hierarchy.
- If your organization has case teams, case list views can be restricted by **My Case Teams**.
- If your organization has account teams, account list views can be restricted by **My Account Teams**.
- If your organization has opportunity teams, opportunity list views can be restricted by **My Opportunity Teams**.

Filter by Campaign

This option is available on these list views:

- Contacts home
- Leads home
- Mass email contacts
- Mass email leads
- Mass add campaign members wizard
- Mass update campaign members wizard

If you are editing a list view that is filtered by campaign, and do not have at least read access to the campaign, you will receive an error when attempting to save the list view.

Filter by Division

If your organization uses divisions to segment data and you have the “Affected by Divisions” permission, select the division that records in the list view must match. This option is disabled if you are not searching all records.

Select **--Current--** to show records in your current working division.

Filter by Additional Fields

Optionally, enter filter criteria to specify conditions that the selected items must match, for example, *Lead Source equals Web*. You can also use special date values in your filter criteria.



Note: When you select the **Created Date** field in a list view filter, the value you specify can only be a date and not a time. This restriction does not apply to other filters.

4. Select Fields to Display


The default fields are automatically selected. You can choose up to 15 different fields to display in your view. You can display only the fields that are available in your page layout. When you select a long text area field, up to 255 characters are displayed in the list view.

- a. To add or remove fields, select a field name, and click the **Add** or **Remove** arrow.
- b. Use the arrows to arrange the fields in the proper sequence.

5. Restrict Visibility

If you are an administrator or a user with the “Manage Public List Views” permission, specify whether everyone or just you can see the custom view. This option is not available in Personal Edition. To see a list view, users must also have the appropriate “Read” permission on the type of records within the list view.

Alternatively, Enterprise, Unlimited, Performance, and Developer Edition users can specify a public group, role, or role including all users below that role to see the custom view. To share the list view, select **Visible to certain groups of users**, choose the type of group or role from the drop-down list, select the group or role from the list below it, and click **Add**.


 **Note:** List views are visible to your customers in the Salesforce Customer Portal if the **Visible to all users** radio button is selected for views on objects assigned to Customer Portal users' profiles. To create list views that only your Salesforce users can see, select **Visible to certain groups of users**, and then share it with the All Internal Users group or a selected set of internal groups and roles.

When implementing a Customer Portal, create custom views that contain only relevant information for Customer Portal users, and then make those views visible to Customer Portal users by sharing them with the All Customer Portal Users group or a selected set of portal groups and roles.

6. Click **Save**. The view appears in the View drop-down list so you can access it later.

You can rename an existing list view and click **Save As** to save the criteria of the list view without altering the original view.


To navigate back to the last list page you viewed, click **Back to list** at the top of any detail page.

 **Note:** The information you see in list views is only the data to which you have access—either records you own or have read or read/write access to, records that have been shared to you, or records owned by or shared with users in roles below you in the role hierarchy. In addition, you can view only those fields that are visible in your page layout and field-level security settings. Archived activities are not included in activity list views. You can use the Activity History related list to view these activities.

Sorting List Views

Lots of objects let you view related records in lists, also called “list views”. If your list is long, or you want to print it, you might want to sort the records by one of the field columns. For example, the All Accounts list view can be sorted by the **Account Name** field column, **Billing State/Province** field column, and others. Custom list views can be sorted by their own field columns. Sorting is alphanumeric.

1. Open the list view.
2. Click the header for the field column you want to sort by.
An arrow appears, to tell you how the list is sorted: from the column's first record (↑) (alphanumerically) or its last (↓).

 **Note:** Starting in Spring '13, list views for the Users object in organizations that have more than two million users cannot be sorted.

EDITIONS

Available in all editions

USER PERMISSIONS

To sort a list view:


- “Read” on the records in the list

SEE ALSO:

[Creating Custom List Views](#)

Printing List Views

If printable list views are enabled for your organization, you can print standard list views and custom list views.

1. Go to the list view you want to print. For example: All Accounts on the Accounts tab.
2. Sort the contents of the list view if you want to.
3. Click .
4. In the new window, select the number of records you want to print—up to 1,000. (To print more than 1,000 records, run a report and then click **Printable View** on the report.)
5. Click **Print This Page**.

EDITIONS

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

USER PERMISSIONS

To print list views:

- “Read” on the records included in the list

Deleting List Views

To delete one of your custom views, select the view from the drop-down list and click the **Edit** link. At the top of the page, click the **Delete** button.

SEE ALSO:

[Creating Custom List Views](#)

EDITIONS

Available in: **All** Editions


Understanding Relative Date Values for Filter Criteria

When you create a list view that includes a filter for a range of dates, such as `Create Date` or `Last Update Date`, use one or more of the relative date values provided to specify the range.

For example, to create a custom view or report of accounts created the previous week, enter “Create Date equals LAST WEEK.” For relative date values with variables (such as “NEXT *N* DAYS”), substitute *N* with any number greater than zero.

Relative date values are not case-sensitive. You can use “LAST WEEK” or “last week.”

You can use multiple range values in a single field, separated by commas.


 **Note:** For Enterprise, Unlimited, Performance, Professional, and Developer Editions, the week is defined by the `Locale` drop-down list on your personal information page. For Contact Manager, Group, and Personal Editions, the week is defined by the `Locale` setting in the company profile . For example, when the `Locale` is US English, a week runs Sunday to Saturday, whereas with UK English, a week spans Monday to Sunday.

EDITIONS

Available in all editions

Relative Date Value	Range
YESTERDAY	Starts at 12:00:00 a.m. on the day before the current day and continues for 24 hours.
TODAY	Starts at 12:00:00 a.m. on the current day and continues for 24 hours.
TOMORROW	Starts at 12:00:00 a.m. on the day after the current day and continues for 24 hours.
LAST WEEK	Starts at 12:00:00 a.m. on the first day of the week before the current week and continues for seven days.

Relative Date Value	Range
THIS WEEK	Starts at 12:00:00 a.m. on the first day of the current week and continues for seven days.
NEXT WEEK	Starts at 12:00:00 a.m. on the first day of the week after the current week and continues for seven days.
LAST <i>n</i> WEEKS	Starts at 12:00:00 a.m. on the first day of the week that started <i>n</i> weeks before the current week, and continues up to 11:59 p.m. on the last day of the week before the current week.
NEXT <i>n</i> WEEKS	Starts at 12:00:00 a.m. on the first day of the week after the current week and continues for <i>n</i> times seven days.
<i>n</i> WEEKS AGO	Starts at 12:00:00 a.m. on the first day of the week that started <i>n</i> weeks before the start of the current week and continues for seven days.
LAST MONTH	Starts at 12:00:00 a.m. on the first day of the month before the current month and continues for all the days of that month.
THIS MONTH	Starts at 12:00:00 a.m. on the first day of the current month and continues for all the days of that month.
NEXT <i>n</i> MONTHS	Starts at 12:00:00 a.m. on the first day of the month after the current month and continues until the end of the <i>n</i> th month.
LAST <i>n</i> MONTHS	Starts at 12:00:00 a.m. on the first day of the month that started <i>n</i> months before the current month and continues up to 11:59 p.m. on the last day of the month before the current month.
<i>n</i> MONTHS AGO	Starts at 12:00:00 a.m. on the first day of the month that started <i>n</i> months before the start of the current month and continues for all the days of that month.
NEXT MONTH	Starts at 12:00:00 a.m. on the first day of the month after the current month and continues for all the days of that month.
LAST 90 DAYS	Starts at 12:00:00 a.m. 90 days before the current day and continues up to the current second. (The range includes today.)
NEXT 90 DAYS	Starts at 12:00:00 a.m. on the day after the current day and continues for 90 days. (The range does not include today.)
LAST <i>n</i> DAYS	Starts at 12:00:00 a.m. <i>n</i> days before the current day and continues up to the current second. (The range includes today.)
NEXT <i>n</i> DAYS	Starts at 12:00:00 a.m. on the next day and continues for the next <i>n</i> days. (The range does not include today.)
<i>n</i> DAYS AGO	Starts at 12:00:00 a.m. on the day <i>n</i> days before the current day and continues for 24 hours. (The range does not include today.)
LAST QUARTER	Starts at 12:00:00 a.m. on the first day of the calendar quarter before the current calendar quarter and continues to the end of that quarter.
THIS QUARTER	Starts at 12:00:00 a.m. on the first day of the current calendar quarter and continues to the end of the quarter.

Relative Date Value	Range
NEXT QUARTER	Starts at 12:00:00 a.m. on the first day of the calendar quarter after the current calendar quarter and continues to the end of that quarter.
LAST n QUARTERS	Starts at 12:00:00 a.m. on the first day of the calendar quarter n quarters ago and continues to the end of the calendar quarter before the current quarter. (The range does not include the current quarter.)
NEXT n QUARTERS	Starts at 12:00:00 a.m. on the first day of the calendar quarter after the current quarter and continues to the end of the calendar quarter n quarters in the future. (The range does not include the current quarter.)
n QUARTERS AGO	Starts at 12:00:00 a.m. on the first day of the calendar quarter n quarters before the current calendar quarter and continues to the end of that quarter.
LAST YEAR	Starts at 12:00:00 a.m. on January 1 of the year before the current year and continues through the end of December 31 of that year.
THIS YEAR	Starts at 12:00:00 a.m. on January 1 of the current year and continues through the end of December 31 of the current year.
NEXT YEAR	Starts at 12:00:00 a.m. on January 1 of the year after the current year and continues through the end of December 31 of that year.
n YEARS AGO	Starts at 12:00:00 a.m. on January 1 of the calendar year n years before the current calendar year and continues through the end of December 31 of that year.
LAST n YEARS	Starts at 12:00:00 am on January 1, $n+1$ years ago. The range ends on December 31 of the year before the current year.
NEXT n YEARS	Starts at 12:00:00 a.m. on January 1 of the year after the current year and continues through the end of December 31 of the n th year.
LAST FISCAL QUARTER	<p>Starts at 12:00:00 a.m. on the first day of the fiscal quarter before the current fiscal quarter and continues through the last day of that fiscal quarter. The fiscal quarter is defined in Setup at Company Profile > Fiscal Year.</p> <p> Note: None of the FISCAL literal date values are supported when creating mobile custom views.</p>
THIS FISCAL QUARTER	Starts at 12:00:00 a.m. on the first day of the current fiscal quarter and continues through the end of the last day of the current fiscal quarter. The fiscal quarter is defined in Setup at Company Profile > Fiscal Year .
NEXT FISCAL QUARTER	Starts at 12:00:00 a.m. on the first day of the fiscal quarter after the current fiscal quarter and continues through the last day of that fiscal quarter. (The range does not include the current quarter.) The fiscal quarter is defined in Setup at Company Profile > Fiscal Year .
LAST n FISCAL QUARTERS	Starts at 12:00:00 a.m. on the first day of the fiscal quarter n fiscal quarters ago and continues through the end of the last day of the previous fiscal quarter. (The range does not include the current fiscal quarter.) The fiscal quarter is defined in Setup at Company Profile > Fiscal Year .

Relative Date Value	Range
NEXT <i>n</i> FISCAL QUARTERS	Starts at 12:00:00 a.m. on the first day of the fiscal quarter after the current fiscal quarter and continues through the end of the last day of the <i>n</i> th fiscal quarter. (The range does not include the current fiscal quarter.) The fiscal quarter is defined in Setup at Company Profile > Fiscal Year .
<i>n</i> FISCAL QUARTERS AGO	Starts at 12:00:00 a.m. on the first day of the fiscal quarter <i>n</i> fiscal quarters before the current fiscal quarter and continues through the end of the last day of that fiscal quarter.
LAST FISCAL YEAR	Starts at 12:00:00 a.m. on the first day of the fiscal year before the current fiscal year and continues through the end of the last day of that fiscal year. The fiscal year is defined in Setup at Company Profile > Fiscal Year .
THIS FISCAL YEAR	Starts at 12:00:00 a.m. on the first day of the current fiscal year and continues through the end of the last day of the fiscal year. The fiscal year is defined in Setup at Company Profile > Fiscal Year .
NEXT FISCAL YEAR	Starts at 12:00:00 a.m. on the first day of the fiscal year after the current fiscal year and continues through the end of the last day of that fiscal year. The fiscal year is defined in Setup at Company Profile > Fiscal Year .
LAST <i>n</i> FISCAL YEARS	Starts at 12:00:00 a.m. on the first day of the fiscal year <i>n</i> fiscal years ago and continues through the end of the last day of the fiscal year before the current fiscal year. (The range does not include the current fiscal year.) The fiscal year is defined in Setup at Company Profile > Fiscal Year .
NEXT <i>n</i> FISCAL YEARS	Starts at 12:00:00 a.m. on the first day of the fiscal year after the current fiscal year and continues through the end of the last day of the <i>n</i> th fiscal year. (The range does not include the current fiscal year.) The fiscal year is defined in Setup at Company Profile > Fiscal Year .
<i>n</i> FISCAL YEARS AGO	Starts at 12:00:00 a.m. on the first day of the fiscal year <i>n</i> fiscal years ago and continues through the end of the last day of that fiscal year.

View and Share FAQ

How does the sharing model work?

In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, the administrator can define the default sharing model for your organization by setting organization-wide defaults. Organization-wide defaults specify the default level of access to records. For most objects, organization-wide defaults can be set to Private, Public Read Only, or Public Read/Write.

In environments where the sharing model for an object has been set to Private or Public Read Only, an administrator can grant users additional access to records by setting up a role hierarchy and defining sharing rules. Role hierarchies and sharing rules can only be used to grant additional access—they cannot be used to restrict access to records beyond what was originally specified with the sharing model through organization-wide defaults.

After restricting access using organization-wide defaults, users typically get access through one or more of these methods:

- Role hierarchy
- Sharing rules

- Manual sharing
- Implicit access (Accounts and associated child records)
- Teams (Account, Case, and Opportunity)

Which kinds of records can I print list views for?

If printable list views are enabled for your organization, you can print standard and custom list views for these kinds of records.

- Accounts
- Activities
- Campaigns
- Cases
- Contacts
- Contracts
- Custom objects
- Documents
- Leads
- Opportunities
- Permission sets
- Price books
- Profiles
- Products
- Reports
- Solutions

Create Records

Creating Records

Creating records is standard procedure for most Salesforce users. While some objects (such as Account) have special *guidelines and considerations* you need to be aware of, the *process* of creating a record is similar for all.

Depending on how your administrator has set up your Salesforce organization, you can create records in a few different ways.

- [From object tabs](#)
- [In feeds on the home page, Chatter tab, and record detail pages](#)
- [With the Create New drop-down list in the sidebar](#)

EDITIONS

Available in all editions

- [With Quick Create](#)

SEE ALSO:[Editing Records](#)[Deleting Records](#)[Guidelines for Entering Currency, Dates, Times, and Phone Numbers](#)[Adding Notes to Records](#)[Attaching Files to Records](#)

Creating Records from Object Tabs

Before you create a record, make sure you're aware of any guidelines for the kind of record you're creating.

1. Click the tab for the kind of record you want to create. You'll start from that object's Home page. For example, click the Accounts tab if you want to create an account record.
2. Click **New**.
3. Select a record type if you're prompted to.
4. Enter values in the fields. Required fields are identified with a red bar ().



Tip: Most objects have field definitions in the Salesforce help. Just search the help for the object name + "fields". For example, if you're creating or editing an account record and want to know more about your options in the `Industry` drop-down list, look up "Account Fields" in the help.

5. When you finish entering values for your new record, click **Save**, or click **Save & New** to save the current record and create another. If you navigate away from the page before clicking **Save**, you may lose your changes.

SEE ALSO:[Creating Records in Feeds](#)[Creating Records with Quick Create](#)[Creating Records](#)

Creating Records in Feeds

Depending on how your administrator has set up Salesforce, you may be able to create records in the feed on the home page, the Chatter tab, and record detail pages. Publishers on different feeds may have different actions available; check with your administrator for information on what you can do in each feed. Before you create a record, make sure you're aware of any guidelines for the kind of record you're creating.

1. In the feed in which you want to create a record, click the publisher action that corresponds to the kind of record you want to create.
2. Enter values in the fields. Required fields are identified with a red bar ().

EDITIONS

Available in all editions

USER PERMISSIONS

To create records:

- "Create" on the object for the kind of record you're creating

EDITIONS

Available in all editions

USER PERMISSIONS

To create records:

- "Create" on the object for the kind of record you're creating

Most objects have field definitions in the Salesforce help. Just search the help for the object name + “fields”. For example, if you’re creating or editing an account record and want to know more about your options in the `Industry` drop-down list, look up “Account Fields” in the help.

3. When you finish entering values for your new record, click **Create**.

A feed item for the record you’ve created appears:

- In the feed in which you created the record.
- As the first item in the feed for the new record itself.
- In your Chatter feed.
- In the Chatter feed of anyone who follows the record from which you created the new record. For example, if you create a contact from the record detail page for the account ABC Industries, anyone who follows ABC Industries will see a feed item for the contact record you created.

SEE ALSO:

[Creating Records from Object Tabs](#)

[Creating Records with Quick Create](#)

[Creating Records](#)

Creating Records Using the Create New Drop-Down List

The Create New drop-down list, available in the sidebar, provides options to create new records. To create a new record using the drop-down list:


1. 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

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.

Creating Records with Quick Create

If your administrator has enabled Quick Create, you can create records from the home pages for leads, accounts, contacts, and opportunities. 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 new 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. Required fields are identified with a red bar (). Most objects have field definitions in the Salesforce help. Just search the help for the object name + “fields”. For example, if you’re creating or editing an account record and want to know more about your options in the `Industry` drop-down list, look up “Account Fields” in the help.

EDITIONS

Available in all editions

USER PERMISSIONS

To create records:

- “Create” on the object for the kind of record you’re creating

3. Click **Save**.

SEE ALSO:


[Creating Records from Object Tabs](#)

[Creating Records in Feeds](#)

[Creating Records](#)

Selecting Picklist Values

In Salesforce, you may encounter a few different types of picklist fields.

- Standard picklists - Click the down arrow to select a single value.
- Multi-select picklists - Double click on any available value in one scrolling box to add that value to the selected scrolling box on the right. You can choose a single value or multiple values. To select values within a range, select the first value and click the last value in the range while holding down the SHIFT key; then, click the arrow to add selections to the chosen box.
- Dependent and controlling picklists work in conjunction with each other. The value chosen in the controlling picklist affects the values available in its dependent picklist. Both controlling and dependent picklists are indicated on edit pages by an  icon. Hover your mouse over the icon to display the name of the controlling or dependent picklist.

Guidelines for Entering Currency, Dates, Times, and Phone Numbers


Creating and editing records is easier if you understand a few guidelines and tips for the currency, date, time, and phone number fields you'll find in various records.

EDITIONS

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 organizations that use multiple currencies, the format and currency type are determined by the `Currency` field in the record you're creating or editing.

 **Tip:** 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`. 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:**

- Years appear and are saved as four digits, but you can enter the final two digits and Salesforce will determine 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 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. Week day 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), ten-digit phone numbers and eleven-digit numbers that start with "1" are automatically 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 ten- or eleven-digit number, enter a "+" before the number. For example: +49 8178 94 07-0.
- If your ten- and eleven-digit phone numbers have Salesforce's automatic format, you may need to enter the parentheses when specifying filter conditions. For example: *Phone starts with (415)*.

Adding Notes to Records

Enhance record information by adding notes. A note can contain up to 32 KB of data. If Spell Checker is enabled for your organization, you can check the body (but not the title) of your note. Any note you add from a contact or opportunity record will appear in the Notes and Attachments related list of that record, as well as in the related list for the account it is associated with.

1. Click **New Note** in the Notes and Attachments related list of a record. Enter a title and body text.
2. If Spell Checker is enabled for your organization, click **Check Spelling** to check the spelling of the note.
3. Click **Save**.

EDITIONS

Available in:

- Contact Manager
- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

SEE ALSO:

[Attaching Files to Records](#)

[Viewing and Editing Google Docs, Notes, and Attachments](#)

[Deleting Notes and Attachments from Records](#)

Attaching Files to Records

You can attach files—such as Microsoft® Office documents, Adobe® PDFs, and images and videos—to most kinds of Salesforce records. The size limit for an attached file is 25 MB when attached directly to the related list, including a file attached to a solution. The size limit for multiple files attached to the same email is 10 MB, with a maximum size of 5 MB per file.

1. Open the record
2. Click **Attach File**.
3. Click **Browse** and find the file you want to attach
4. Click **Attach File** to upload the file.
5. Click **Done** when the upload is finished



Note:

- When a file is attached to a record's Chatter feed it's added to the Notes and Attachments related list as a feed attachment. The file size limit for Chatter feed attachments is 2 GB.
- If the `Don't allow HTML uploads as attachments or document records` security setting is enabled for your organization, you cannot upload files with the following file extensions: `.htm`, `.html`, `.htt`, `.htx`, `.mhtm`, `.mhtml`, `.shtm`, `.shtml`, `.acgi`, `.svg`.

EDITIONS

Available in:

- Contact Manager
- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To attach files to records:

- "Edit" on the object

Note and Attachment Fields

Notes and attachments have the following fields, listed in alphabetical order.

Attachment Fields

Field	Description
Description	Description of the uploaded file.
File Name	Name of the uploaded file.
Private	Checkbox to indicate that the attachment is only accessible to the owner and 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.

EDITIONS

Available in:

- Contact Manager
- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

Note Fields	
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. Up to 80 characters are allowed in this field.

Checking Your Spelling

If Spell Checker is enabled for your organization, you can check your spelling in certain features where you enter text, such as emails, events, tasks, cases, notes, and solutions. Spell Checker does not support all the languages that Salesforce supports. For example, Spell Checker doesn’t support Thai, Russian, and double-byte languages, such as Japanese, Korean, or Chinese.

To check your spelling, just look for the **Check Spelling** button wherever you’re entering text.

EDITIONS

Available in all editions

Edit Records

Editing Records

1. Make sure you’re aware of any guidelines for the kind of record you’re editing. The Salesforce help will tell you.
2. Find and open the record you want to edit.
3. Click **Edit**.
4. Enter or edit values in the fields. Required fields are identified with a red bar (■).



Tip: Most objects have field definitions in the Salesforce help. Just search the help for the object name + “fields”. For example, if you’re creating or editing an account record and want to know more about your options in the **Industry** drop-down list, look up “Account Fields” in the help.

EDITIONS

Available in all editions

USER PERMISSIONS

To edit records:

- “Edit” on the object for the kind of record you’re editing

- When you finish entering or editing values, click **Save**.


SEE ALSO:

[Creating Records](#)
[Guidelines for Entering Currency, Dates, Times, and Phone Numbers](#)
[Guidelines for Editing Records with the Inline Editor](#)
[Editing Records Directly From Enhanced Lists](#)
[Adding Notes to Records](#)
[Attaching Files to Records](#)
[Checking Your Spelling](#)


Changing a Record's Record Type

Record types determine the picklist values that are available when you create or edit a record. When creating a record, you can choose the record type if you have different record types available and you have not set your record type preferences to bypass the record type selection page.

- Open the record.
- Click **Change** next to the `Record Type` field on a record detail page.

 **Note:** For campaign members, click **Change** next to the `Campaign Member Type` field on a campaign detail page. You must have the `Marketing User` user permission to change the campaign member type.

- Select a record type. The available record types are listed at the bottom of the page.
- Click **Continue**.
- Click **Save**.

 **Note:** If your organization uses person accounts, your administrator has configured two different kinds of record types for your organization's accounts: one for business accounts, and another for person accounts. You can change an account's record type only to another record type of the same kind. For example, you cannot change a person account record type to one designated for business accounts.

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer



USER PERMISSIONS



To change the record type for a record:

- "Edit" on the object

Editing Record Fields With the Inline Editor

Many Salesforce objects, including custom objects, offer the convenience of inline editing for records.

 **Tip:** 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 ().

- Within a record you're creating or editing, double-click within the field you want to define or edit. If the field offers Lookup to help you find the value you want, you'll see a magnifying glass icon ().
- Enter your text in the field or use Lookup to find the value you want. Click the undo icon () or delete your entry if you need to.
- Click **Save**.

EDITIONS

Available in all editions

USER PERMISSIONS

To edit records:

- "Edit" on the object for the kind of record you're editing

Guidelines for Editing Records with the Inline Editor

Tips for Saving Inline Edits

- Press **Enter** while your cursor is in a field's edit box to confirm the change for that field.
- Press **Enter** when no fields are in edit mode to save all edits to the record.

Limitations

- Inline editing isn't available in:
 - Accessibility mode
 - Setup pages
 - Dashboards
 - Customer Portal
 - Descriptions for HTML solutions
- The following standard checkboxes on case and lead edit pages are not inline editable:
 - Case Assignment (Assign using active assignment rules)
 - Case Email Notification (Send notification email to contact)
 - Lead Assignment (Assign using active assignment rule)
- The fields in the following standard objects are not inline editable.
 - All fields in Documents and Pricebooks
 - All fields in Tasks except for Subject and Comment
 - All fields in Events except for Subject, Description, and Location
 - Full name fields of Person Accounts, Contacts, and Leads. However, their component fields are, for example, First Name and Last Name.
- You can use inline editing to change the values of fields on records for which you have read-only access, either via field-level security or your organization's sharing model; however, Salesforce doesn't let you save your changes, and displays an insufficient privileges error message when you try to save the record.

EDITIONS

Inline editing settings available in: **All Editions** except **Database.com**

USER PERMISSIONS

To use inline editing:

- "Edit" on the object

Special Cases

- Inline editing is available on detail pages for all editable fields on edit pages, except for some fields on tasks, events, price books, and documents. To edit any of these, navigate to the edit page of a record, change the value of the field desired, and then click **Save**. The following table lists the objects that have inline editing restrictions on some of their fields. You may need special permissions to view some of these fields:

Object	Fields
All Objects	All fields are editable except long text area fields.
Opportunities	All fields are editable, except the following fields are only editable on detail pages (not on list views): <ul style="list-style-type: none"> – Amount – Stage

Object	Fields
	<ul style="list-style-type: none"> Forecast Category Quantity
Leads	All fields are editable, except <code>Lead Status</code> is only editable on detail pages (not on list views).
Cases	All fields are editable, except <code>Case Status</code> is only editable on detail pages (not on list views).
Contracts	All fields are editable, except <code>Contract Status</code> is only editable on detail pages (not on list views).
Events	Only the following fields are editable: <ul style="list-style-type: none"> Description Location Subject Type Custom fields
Tasks	Only the following fields are editable: <ul style="list-style-type: none"> Call Type Description Subject Type Custom fields
Documents	No fields are editable.
Pricebooks	No fields are editable.

Editing Records Directly From Enhanced Lists

If both inline editing and enhanced lists are enabled for your organization, you can edit records directly in a list. Editable cells display a pencil icon (✎) when you hover over the cell, while non-editable cells display a lock icon (🔒).



Warning: In enhanced list views, when different users make inline edits to the same fields on a record simultaneously, records are updated with the most recent edit, but we don't identify the conflict with a message.

If you have the "Mass Edit from Lists" permission, you can change the value for a common field in up to 200 records at a time for most kinds of records. Products must be edited one at a time.

To edit a single record from a list:

1. From the list, double-click the editable cell.
2. Enter the value you want.
3. Click **OK**.

EDITIONS

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

USER PERMISSIONS

To use inline editing in an enhanced list:

- "Mass Edit from Lists"

To mass edit records from a list:

1. Select the checkbox next to each record you want to edit. You can select records on multiple pages.
2. Double-click one of the cells you want to edit. Apply your edit to just one record or to every record you selected.

If you encounter any errors when trying to update records, a console window appears, showing the name of each record in error (if known), as well as an explanation. Click a record in the console window to open its detail page in a new window.



Note: To view the error console, you must have pop-up blockers disabled for the Salesforce domain.

Tips for Using Inline Editing with Lists

- Some standard fields don't support inline editing. For example, `Case Status`, `Opportunity Stage`, `Opportunity Amount`, `Opportunity Quantity` and `Lead Status`, and most Task and Event fields can only be edited from a record's edit page. For more information, see [Guidelines for Editing Records with the Inline Editor](#) on page 83.
- If your organization uses record types, inline editing with lists is only available when all of the records in the list are of the same record type. Therefore, you must specify a filter of `Record Type equals X`, where `X` is the name of a single record type (or blank for the master record type).
- You can't use inline editing on an enhanced list if your list view filter criteria contain an OR clause.
- For lists of activities, you must specify an additional filter of either `Task equals True` (for tasks) or `Task equals False` (for events) for inline editing to be available.
- If your organization is using Person Accounts:
 - You can't use inline editing to change Person Accounts from a Contact list. You can only inline edit them from an Account list.
 - You can only use inline editing on contacts associated to business accounts by specifying an additional filter of `Is Person Account EQUALS False` in your list criteria.

Delete Records

Deleting Records

Deleting records is standard procedure for most Salesforce users. When you delete a record, it's moved to the Recycle Bin, which you can empty.

For some kinds of objects, deleting one record affects other, related records. For example, if you delete an account or contact, all associated assets are also deleted.

1. Make sure you're aware of the effects (if any) of deleting the kind of record you want to delete. The Salesforce help will tell you.
2. Find and open the record you want to delete.
3. Click **Delete**.
The record is moved to the Recycle Bin. Empty the Recycle Bin to complete the deletion process.

EDITIONS

Available in all editions

USER PERMISSIONS

To delete records:

- "Delete" on the object for the kind of record you're deleting



Tip: If you delete a record by mistake, you can “undelete” it from the Recycle Bin. Good as new!

SEE ALSO:

[Using the Recycle Bin](#)

[Deleting Notes and Attachments from Records](#)

Deleting Notes and Attachments from Records

To delete a note or attachment, click **Del** next to the note or attachment in the Notes and Attachments related list or Attachments related list of a record. Deleted notes and attachments can be restored from the Recycle Bin.

To delete a file that was attached from a Chatter feed, click **Del** next to the feed attachment. This removes the file from all Chatter feeds where it's been shared and deletes the file from the Notes and Attachments related list. Restore the file by clicking on the Recycle Bin, selecting the file, and clicking **Undelete**. If the file was attached from your computer, a Chatter feed, group, or a Salesforce CRM Content library, deleting it from the Notes and Attachments related list also removes it from the post, but doesn't delete it from its original location.

SEE ALSO:

[Viewing and Editing Google Docs, Notes, and Attachments](#)

EDITIONS

Available in:

- Contact Manager
- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To delete a note or attachment:

- Owner of the parent record

OR

“Edit” or “Delete” on the parent record type

OR

“Modify All Data”

Records FAQ

Why is the record I'm trying to save being flagged as a duplicate? What can I do?

Your organization uses duplicate rules, which prevent users from creating duplicate records. Read the message to decide how to proceed.



Note: This release contains a beta version of Data.com Duplicate Management that is production quality but has known limitations. To provide feedback and suggestions, or for information on enabling this feature for your organization, contact your system administrator.

Here's what you'll see if the record you're trying to save is flagged as a possible duplicate.

EDITIONS

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

The screenshot shows the 'Account Edit' page for 'Salesforce.com, Inc.'. At the top, there are buttons: 'Save (Ignore Alert)', 'Save & New (Ignore Alert)', and 'Cancel'. Below these, a red alert message states: '6 Possible Duplicate Accounts Found. You're creating a duplicate record. We recommend you use an existing record instead.' Below the alert is a table with 5 rows of duplicate records. The table has columns: 'Account Name', 'Website', 'Last Modified By', and 'Last Modified Date'. All 'Account Name' and 'Website' fields are highlighted in red. Below the table is a 'Show All >>' link. At the bottom, the 'Account Information' section shows fields for 'Account Owner', 'Account Name', 'Parent Account', 'Data.com Key', 'Account Source', 'Phone', 'Fax', and 'Website'. The 'Account Name' and 'Website' fields are highlighted in red. Red numbers 1 through 5 are placed around the form with lines pointing to specific elements: 1 points to the alert message, 2 points to the table, 3 points to the 'Save (Ignore Alert)' button, 4 points to the table, and 5 points to the 'Account Information' section.

Account Name	Website	Last Modified By	Last Modified Date
Salesforce.com, Inc.	http://www.salesforce.com	Madison Riggsby	3/6/2014
Salesforce.com, Inc.	http://www.salesforce.com	Madison Riggsby	3/6/2014
Salesforce.com, Inc.	http://www.salesforce.com	Madison Riggsby	3/6/2014
Salesforce.com, Inc.	http://www.salesforce.com	Madison Riggsby	3/6/2014
Salesforce.com, Inc.	http://www.salesforce.com	Madison Riggsby	3/5/2014

Account Information

Account Owner: Madison Riggsby

Account Name: **Salesforce.com, Inc.**

Parent Account:

Data.com Key:

Account Source: Public Relations

Phone: (800) 154-7854

Fax: (415) 558-8874

Website: **<http://www.salesforce.com>**

1. A system-generated message tells you how many possible duplicates were found. The number includes only the records you have access to. If you don't have access to any of the records that are identified as possible duplicates, then this message won't include a number.
2. A custom alert written by whoever created the duplicate rule. Ideally, the alert should explain why you can't save the record and what you should do.
3. If the duplicate rule allows you to save a record despite it being a possible duplicate, the **Save (Ignore Alert)** button is present. If the duplicate rule blocks you from saving a record that is a possible duplicate, the **Save** button is present but the record cannot be saved successfully until you make the necessary changes to the record so it's no longer flagged as a possible duplicate.
4. The list of possible duplicates includes only records you have access to. The fields shown in the list include only fields you have access to (up to the first 7 fields that were compared and determined to match). A maximum of 5 records are displayed in this list, but if more than 5 duplicates were found, click **Show All >>** to see full list of records, up to 100. Records are listed in the order they were last modified. Go directly to one of the records in the list by clicking on its link.
5. The highlighted fields are the fields that were compared and determined to match.

What formats should I use for dates, times, and names in Salesforce?

The format used for dates, times, and names of people in Salesforce is determined by your `Locale` setting.

To find out what date/time format your `Locale` setting uses:

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
 - If you clicked **Setup**, select **My Personal Information > Personal Information**.
 - If you clicked **My Settings**, select **Personal > Advanced User Detail**.

3. 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.

How do I allow only certain users to share data?

If your Professional, Enterprise, Unlimited, Performance, or Developer Edition organization has a Private or Public Read Only sharing model, your administrator can still allow certain users to share information. Your administrator can create public groups and then set up sharing rules to specify that users in certain roles or groups will always share their data with users in another role or public group. Individual users can also create personal groups to give access to their own accounts, contacts, and opportunities.

Can an individual user control the sharing of records they own?

Yes. In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, all account owners are empowered to further extend the sharing on an account-by-account basis. For example, if the organization has a Private model, the Acme account owner can share this account and its related data to selected groups, or to individual users.

In Enterprise, Unlimited, Performance, and Developer Editions, opportunity owners can also extend the sharing for individual opportunities separately from account sharing.

You can use account, lead, case, and opportunity sharing to increase access to your data; you cannot restrict access beyond your organization's default access levels.

This type of sharing is called manual sharing, and is done by the **Sharing** button on the record detail page.

Can I transfer records to other users?

Yes, in Contact Manager, Group, Professional, Enterprise, Unlimited, Performance, and Developer Editions, you can transfer records you own.


If you're an administrator, you can transfer ownership of all leads or accounts and related data from one user to another. From Setup, click **Data Management** > **Mass Transfer Records**.

How do I print Salesforce records?

To print the details of a Salesforce record:

1. Click the **Printable View** link located in the upper right corner of most detail pages. A new browser window opens with the record displayed in a simple, print-ready format.
2. Optionally, collapse and expand individual sections in the printable view by clicking the triangles next to the section headings.
3. Optionally, click **Expand All** or **Collapse All** to show or hide all of the collapsible sections on the page. Related lists, such as the list of opportunities related to an account, are not collapsible.
4. Click **Print This Page** or use your browser's print function to send the page to a printer.



Note: On the Console tab, you can click the print icon () to open a record's printable view.

Monitor and Analyze Your Data

Run a Report

To run a report, find it on the Reports tab and click the report name. Most reports run automatically when you click the name. If you're already viewing a report, click **Run Report** to run it immediately or schedule a future run.

If you don't see any results, check the report for one of these conditions:

- The report didn't return any data. Check your filter criteria to make sure some data is returned.
- Due to field-level security, you don't have access to one of the groupings you selected.
- Your custom summary formula's context didn't match the chart settings. For example, if the formula is calculated for Industry, but the chart doesn't include Industry, no results are returned.
- Your values are out of the range of acceptable values. The maximum value allowed is 9999999999999999. The minimum value allowed is -9999999999999999.

If your report returns more than 2,000 records, only the first 2,000 records are displayed. To see a complete view of your report results, click **Export Details**.

If your report takes longer than 10 minutes to complete, Salesforce cancels the report. Try the following techniques to reduce the amount of data in your report:

- Filter for your own records, rather than all records.
- Limit the scope of the data to a specific date range.
- Exclude unnecessary columns from your report.
- Hide the report details.

EDITIONS

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

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"

Joined Reports

Add Filter Logic

Filter logic lets you specify conditions for your filters using logical operators.

To change the default AND relationship between each filter:

1. Click **Add > Filter Logic**.
2. Enter each filter line number, separated by an operator:

Operator	Definition
AND	Finds records that match both values.
OR	Finds records that match either value.
NOT	Finds records that exclude values.

SEE ALSO:

[Filter Operators](#)

[Filter on Blank Values](#)

[Filtering on Special Picklist Values](#)

Filter Operators

The operator in a filter is like the verb in a sentence. When you choose filter criteria, use an operator to specify the action you want the filter to take.

You can use the following operators when entering filter criteria 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 20k" 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 20k" 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 is especially useful for eliminating empty fields; for example, "Email not equal to <blank>."
contains	Use for fields that include your search string but might also include other information. For example, "Account contains california" would find California Travel, California Pro Shop, and Surf California. Keep in mind that if

EDITIONS

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

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"

Operator	Uses
	you enter a short search string, it may match on a longer word. For example, "Account contains pro" would find California Pro Shop and Promotions Corporation.
does not contain	<p>Eliminates records that do not contain the value you enter; for example, "Mailing Address Line 2 does not contain P. O. Box."</p> <p> Note: 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.</p>
starts with	Use when you know what your value starts with, but not the exact text. This is a narrower search term than "contains." For example, if you enter "Account starts with california" you would find California Travel and California Pro Shop, but not Surf California.
includes	<p>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.</p> <p>For example, if you enter "Interests includes hockey, football, baseball" you would find records that only have hockey selected as well as those that have two or three of the values entered. Results do not include partial matches of values.</p>
excludes	<p>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.</p> <p>For example, if you enter "Interests exclude wine, golf" your report lists records that contain any other values from that picklist, including those that are blank. Results do not include partial matches of values.</p>
between	<p>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.</p> <p>For example, if you enter "Number of Employees between 100 and 500," your results include accounts with 100 employees up to those with 499 employees. Accounts with 500 employees aren't included in the results.</p>
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.

Filter on Blank Values

Tips on filtering using blank values.

- When you use the "less than," "greater than," "less or equal," or "greater or equal" operators on fields that have numeric values, records with blank or "null" values are returned as if their value is zero (0). For example, if you create a workflow rule or a lead assignment rule for accounts with the criteria *Annual Revenue less than 100000*, account records match if their *Annual Revenue* is blank.

However, records with blank field values are not considered matches in report filters, custom list views, and account assignment rules (which assign accounts to territories).

EDITIONS

Available in all editions

- To limit results to records that are blank or contain “null” values for a particular field, choose the field and the “equals” or “not equal to” operators, leaving the third field blank. For example, *Amount equals* returns records with blank amount fields. You can search for blank values or other specified values at the same time. For example, *Amount equals 1,,2* returns records where the *Amount* is blank or contains the value “1” or “2”.


Filtering on Special Picklist Values

When creating filter criteria, you can use special picklist values for your search criteria. These are special picklists with 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*.

EDITIONS

The available fields vary according to which Salesforce Edition you have.

 **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: <i>Is Person Account</i>	<i>True</i>	The account is a person account. Note that your administrator may have customized the name of this field. This field displays as the person account icon ().
	<i>False</i>	The account is a business account.
Accounts, leads, and opportunities: <i>Partner Account</i>	<i>True</i>	The account is a partner account, or the lead or opportunity owner is a partner user.
	<i>False</i>	The account is not a partner account or the lead or opportunity owner is not a partner user.
Activities: <i>All-day</i>	<i>True</i>	Applies only to events, not tasks. The event is marked as an all day event.
	<i>False</i>	The event has a specific time.
Activities: <i>Closed</i>	<i>True</i>	Applies only to tasks, not events. The task has been closed, that is, the task <i>Status</i> field has a “Closed” value.
	<i>False</i>	Task is still open.
Activities: <i>Event Invitation</i> (Only for reports)	<i>True</i>	Applies only to events, not tasks. The event is the meeting invite sent to another user for a multi-person event.
	<i>False</i>	The event is the original multi-person event assigned to the event host.
Activities: <i>Task</i>	<i>False</i>	Activity does not have a green sheet.
	<i>True</i>	Activity is a task, not an event.
	<i>False</i>	Activity is an event.

Special Picklist Field	Value	Description
Campaigns: Active	True	Campaign is active and can be chosen from various campaign picklists, for example, in the campaign import wizards.
	False	Campaign is inactive.
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 organization'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: Email Opt Out	True	The contact cannot be included in a mass email recipient list.
	False	The contact may receive mass email.
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: Email Opt Out	True	The lead cannot be included in a mass email recipient list.
	False	The lead may receive mass email.
Leads: Unread	True	The lead has not yet been viewed or edited by the owner since it was assigned to that user.
	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: Primary (Only for Partner Opportunities report)	True	The partner for the opportunity has been marked as the primary partner.

Special Picklist Field	Value	Description
	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 organizations.
	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.
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.

Special Picklist Field	Value	Description
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.

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.

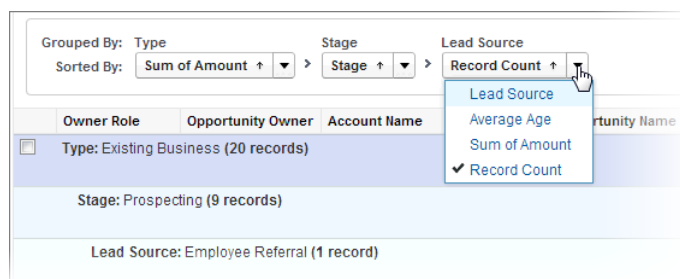
EDITIONS

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

USER PERMISSIONS

To sort report results:

- "Run Reports"



Visualizing Data with Dashboards

A *dashboard* shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or Visualforce pages. The components provide a snapshot of key metrics and performance indicators for your organization. Each dashboard can have up to 20 components.

Clicking the Dashboards tab displays the dashboard you viewed most recently. The top of the page shows the time the dashboard was refreshed last and the user whose permissions determine what data is visible on the dashboard.

Each component in a dashboard shows data from an underlying report. If you have access to the folder for the underlying source report, you can see the related dashboard component. Click a dashboard component or its elements to drill down to the source report, filtered report, record detail page, or other URL. If you drill down on a filtered component, the dashboard filters are applied to the source report.

Click **Go to Dashboard List** to view your dashboards. Find a dashboard using dashboard finder. Type a name in the `View Dashboard` field and choose a dashboard from the list of results. You can only see dashboards in folders you can access.

Follow a dashboard to get updates about the dashboard posted to your Chatter feed.

Find and Organize Information

Search

Search Overview



Note: Global search and feed search are automatically enabled when Chatter is enabled. However, enabling Chatter disables sidebar search and advanced search.

Search for Salesforce records and tags using:

Sidebar Search

From the sidebar search box you can search a subset of objects and fields. You can use wildcards and filters to refine your search.

Advanced Search

Click **Advanced Search...** in the sidebar to search a subset of objects in combination and more fields than sidebar search, including custom fields and long text fields such as descriptions, notes, and task and event comments. You can use wildcards, operators, and filters to refine your search.

EDITIONS

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To view and refresh dashboards:

- "Run Reports" AND access to dashboard folder

To create dashboards:

- "Run Reports" AND "Manage Dashboards"

To edit and delete dashboards you created:

- "Run Reports" AND "Manage Dashboards"

To edit and delete dashboards you didn't create:

- "Run Reports," "Manage Dashboards," AND "View All Data"

EDITIONS

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

Global Search



From the header search box you can search more objects than sidebar search and advanced search, including articles, documents, products, solutions, and Chatter feeds, files, groups, topics, and people. You can also search more fields than sidebar search, including custom fields, and long text fields such as descriptions, notes, and task and event comments. You can use wildcards, operators, and filters to refine your search. Global search keeps track of which objects you use and how often you use them, and arranges the search results accordingly. Search results for the objects you use most frequently appear at the top of the list.

Global search is not supported in a partner portal or Customer Portal.

Only users with [supported browsers](#) can use global search.

Contextual Feed Search

Global search is helpful when you want to look for information in feeds posts and comments across the organization. Use feed search

() to find information in a feed in a specific context. Click  above the feed to look for information in that feed. For example, use the feed search on a group's page to find information in that group. You can search for information in feeds on records, groups, topic pages, user profiles, and on the Chatter and Home tabs. A contextual feed search is helpful when you want to confirm if something was once discussed in that specific feed. You can search for hashtag topics, mentions, and files posted in the feed, or refine your search using wildcards, operators, and quotation marks to match on exact phrases.

Other Search Utilities

Some objects have unique search utilities on their tabs and can't be found using sidebar search nor advanced search. Either use the search tools on the object's tab or use global search if it's available for the object.

- Solutions
- Documents
- Products
- Articles
- Article Management (not available in global search)

 **Tip:** Your administrator can customize your Home tab to include the product, document, or solution search in the sidebar.

SEE ALSO:

[Tags Overview](#)

[Searching in Chatter](#)

How Search Works

Search uses custom algorithms, including natural language analysis (NLA) techniques such as tokenization, stemming (articles and files), and stopword lists, to return meaningful search results.

Tokenization breaks down all searchable text into smaller pieces at spaces, punctuation, and alphanumeric boundaries and stores them in search indexes. When you perform a search, your results include matches on the tokens in your search term. For example, a search for "web2lead" returns matches for "web", "2", and "lead".

Stemming is the process of reducing a word to its root form. With stemming, search can match expanded forms of a search term, as long as they are the same figure of speech. For example, a search for "run" matches "run", "running", and "ran", but not "runner".

Stopword lists contain words that are ignored in search terms for each supported language (for example, "the", "to", and "for"). These words are removed from the search and are not matched on to avoid irrelevant results.

EDITIONS

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

Search further refines matches based on:

- Proximity and frequency of search terms in an item
- Any search options you specify
- Pinned items on your search results page
- Item ownership
- Item popularity or importance determined by page views or the number of related lists
- Recent interaction with an item, for example if you view or edit a record

Two users performing the same search might have different search results, because searches are configured for the user performing the search. For example, if you own or recently viewed an item, its relevancy increases and the item moves higher in your search results.

How your search works depends on whether you're using [sidebar](#), [advanced](#), [global search](#), or [feed search](#).

SEE ALSO:

[Search Overview](#)

Searching in Salesforce

You can [change search options](#) before or after your search.

1. Enter your search terms in the sidebar or header search box.
2. Click **Search** (or **Go!** if you're using sidebar search).

EDITIONS

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

Tips for Searching in Salesforce

- Your search term must have two or more characters. Special characters, such as " ? * (), aren't included in the character count. For example, a search for *(a)* won't return any search results.
- Search isn't case-sensitive. For example, a search for *california* finds the same items as a search for *California*.
- Find phone numbers by entering part or all of a number. For example, to find *(415) 999-3434*, enter *4159993434*, *999*, or *3434*. To search for the last seven digits, you must enter the punctuation, such as *999-3434*.
- In Chinese, Japanese, and Korean, you can find a person by entering last name before first name, with a space separating the names; searching for *佐々木 律子* returns any person who has both the last name *佐々木* and first name *律子*.
- If you're using advanced search or global search, refine your search using [operators](#) such as AND, OR, and AND NOT.
- If you're using advanced search or global search, search for exact phrases by putting [quotation marks](#) around multiple keywords, for example, *"call john smith"* finds items with *call john smith*, but not items with *call john p. smith* or *john smith called*. If you're using sidebar search, your search string is automatically treated as a phrase search.
- Search for partially matching terms using [wildcards](#).
 - Asterisks match zero or more characters at the middle or end (not the beginning) of your search term. For example, a search for *john** finds items that start with *john*, such as *john*, *johnson*, or *johnny*. A search for *mi* meyers* finds items with *mike meyers* or *michael meyers*. If you're using sidebar search, an *** is automatically appended to the end of the search string.
 - Question marks match only one character in the middle or end (not the beginning) of your search term. For example, a search for *jo?n* finds items with the term *john* or *joan* but not *jon* or *johan*. If you're using global search, the *?* is removed from the end of your search term and isn't treated as a wildcard.

SEE ALSO:

[Search Overview](#)

Searchable Fields by Object

Each search type—sidebar, advanced, global, and lookup—queries a limited and unique set of fields for each object. We refer to these as *searchable fields*. Your search results for a particular object depend on two factors: the type of search you use and the searchable fields for that object.

For example, consider an account that contains "Acme" in its `Description` field. The `Description` field isn't queried by standard lookup search, but is queried by global search and enhanced lookup search with the **All Fields** option selected. So a search for "Acme" returns this account record only if you use global search and enhanced lookup search with the **All Fields** option selected, but not if you use standard lookup search.

A few things to note about searchable fields:

- Global search queries more fields per object compared to the other search types.
- By default, enhanced lookups query a limited set of fields, known as *Name* fields for each object. If your search for a record returns a large number of matches, such as a contact with a widely used name, you can instead query [all searchable fields](#) for that record to narrow your results. If available in the enhanced lookup search dialog, select **All Fields** and enter other search terms unique to the record, such as the contact's email address.
- Encrypted, formula, and lookup fields aren't searchable.
- Some objects can't be found by sidebar search or advanced search. Use global search or the search on the object's tab to find:
 - Articles
 - Chatter groups, files, topics, and people
 - Salesforce CRM Content
 - Documents
 - Price books
 - Products
 - Solutions



Note: When users search for a value contained in a field hidden from them by field-level security, search results include the record that contains the field, even if users can't see the field.

This table shows the types of search supported for each object. Follow the links to see the list of searchable fields for each object.

Object	Sidebar Search	Advanced Search	Global Search	Standard Lookup Search	Enhanced Lookup Search
Article			✓		
Attachment		✓	✓		
Business Account	✓	✓	✓	✓	✓
Campaign	✓	✓	✓	✓	
Calendar Event	✓	✓	✓		
Case	✓	✓	✓	✓	
Chatter Feed			✓		
Chatter Group			✓		

EDITIONS

The types of records you can search vary according to the edition you have.

Object	Sidebar Search	Advanced Search	Global Search	Standard Lookup Search	Enhanced Lookup Search
Community				✓	
Contact	✓	✓	✓	✓	✓
Salesforce CRM Content			✓		
Contract	✓	✓	✓	✓	
Contract Line Item	✓	✓	✓		
Custom Object	✓	✓	✓	✓	✓
D&B Company			✓		
Discussion				✓	
Document			✓	✓	
Entitlement	✓	✓	✓		
File			✓		
Idea	✓	✓	✓	✓	
Lead	✓	✓	✓	✓	
Note	✓	✓	✓		
Opportunity	✓	✓	✓	✓	✓
People			✓		
Person Account	✓	✓	✓	✓	✓
Price Book				✓	
Product			✓	✓	
Question	✓	✓	✓		
Quote	✓	✓	✓		
Report	✓	✓	✓		
Requested Meeting	✓	✓	✓		
Self-Service User				✓	
Service Contract	✓	✓	✓		
Solution			✓	✓	
Task	✓	✓	✓		
Topic			✓		

Object	Sidebar Search	Advanced Search	Global Search	Standard Lookup Search	Enhanced Lookup Search
User	✓	✓	✓	✓	✓

SEE ALSO:
[Search Overview](#)

Searchable Fields: Article

Neither sidebar search nor advanced search are designed to find articles. To find an article, use global search or the search tools in the sidebar on the Articles tab.

Searchable Fields	Sidebar Search	Advanced Search	Global Search	Articles Tab
All standard text fields			✓	✓
Body			✓	✓
File			✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)			✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone			✓	✓

EDITIONS

- Available in:
- Enterprise
 - Performance
 - Unlimited
 - Developer

SEE ALSO:
[Searchable Fields by Object](#)

Searchable Fields: Asset

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Asset Name	✓	✓	✓
Description		✓	✓
Serial Number	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

SEE ALSO:

[Searchable Fields by Object](#)

Searchable Fields: Attachment

Searchable Fields	Sidebar Search	Advanced Search	Global Search
File Name		✓	✓

The contents of attachments are not searchable.

SEE ALSO:

[Searchable Fields by Object](#)

EDITIONS

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

EDITIONS

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Contact Manager
- Developer

Searchable Fields: Business Account

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search—Name Fields	Global Search and Enhanced Lookup Search—All Fields
Account Name	✓	✓	✓	✓	✓
Account Name (Local)	✓	✓	✓	✓	✓
Account Number	✓	✓			✓
Account Site	✓	✓			✓
Billing Address		✓			✓
Description		✓			✓
D-U-N-S Number (This field is only available to organizations that use Data.com Prospector)					✓
Fax	✓	✓			✓
Phone	✓	✓			✓
Shipping Address		✓			✓
Ticker Symbol	✓	✓			✓
Website	✓	✓		✓	✓
All custom auto-number fields and custom fields	✓	✓			✓

EDITIONS

The available business account fields vary according to which Salesforce edition you have.

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search—Name Fields	Global Search and Enhanced Lookup Search—All Fields
that are set as an external ID (You don't need to enter leading zeros.)					
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓			✓

SEE ALSO:
[Searchable Fields by Object](#)

Searchable Fields: Campaign

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
Campaign Name	✓	✓	✓	✓
Description		✓		✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓		✓

EDITIONS

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓		✓

SEE ALSO:

[Searchable Fields by Object](#)

Searchable Fields: Case

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
Case		✓		✓
Comments				
Case Number (You don't need to enter leading zeros.)	✓	✓	✓	✓
Description		✓		✓
Subject	✓	✓		✓
Web Company (of person who submitted the case online)	✓	✓		✓
Web Email (of person who submitted the case online)	✓	✓		✓
Web Name (of person who submitted the case online)	✓	✓		✓
Web Phone (of person who submitted the case online)	✓	✓		✓
All custom auto-number fields and custom	✓	✓		✓

EDITIONS

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
fields that are set as an external ID (You don't need to enter leading zeros.)				
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓		✓

SEE ALSO:

[Searchable Fields by Object](#)

Searchable Fields: Chatter Feed

To find information in a feed, use global search or feed search. Neither sidebar search nor advanced search are designed to find information in Chatter feeds.



Note: Global search and feed search return matches for file or link names shared in posts, but not in comments.

Searchable Fields	Sidebar Search	Advanced Search	Global Search	Feed Search
@Name (where Name is a user name—for example, @Madison Rigsby)			✓	✓
Comment Body			✓	✓
Parent Record Name			✓	✓
Post Body			✓	✓
Poster Name			✓	✓

EDITIONS

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Contact Manager
- Developer

SEE ALSO:

[Searchable Fields by Object](#)

Searchable Fields: Chatter Group

Neither sidebar search nor advanced search are designed to find Chatter groups. To find a Chatter group, use global search or the search tools on the Groups tab. Global search results include archived groups.

Searchable Fields	Sidebar Search	Advanced Search	Global Search	Groups Tab
Description			✓	✓
Group Name			✓	✓

EDITIONS

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Contact Manager
- Developer

SEE ALSO:

[Searchable Fields by Object](#)

Searchable Fields: Community

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
Community Name			✓	

EDITIONS

Available in all editions

Searchable Fields: Contact

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search—Name Fields	Global Search and Enhanced Lookup Search—All Fields
Assistant	✓	✓			✓
Asst. Phone	✓	✓			✓
Department		✓			✓
Description		✓			✓
Email	✓	✓			✓
Fax	✓	✓			✓
First Name	✓	✓	✓	✓	✓

EDITIONS

The available fields vary according to which Salesforce edition you have.

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search—Name Fields	Global Search and Enhanced Lookup Search—All Fields
First Name (Local)	✓	✓	✓	✓	✓
Home Phone	✓	✓			✓
Last Name	✓	✓	✓	✓	✓
Last Name (Local)	✓	✓	✓	✓	✓
Mailing Address		✓			✓
Middle Name (beta)	✓	✓			
Middle Name (Local) (beta)	✓	✓			
Mobile	✓	✓			✓
Other Address		✓			✓
Other Phone	✓	✓			✓
Phone	✓	✓			✓
Suffix (beta)	✓	✓			
Title		✓			✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓			✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓			✓

SEE ALSO:

[Searchable Fields by Object](#)

Searchable Fields: Salesforce CRM Content

Neither sidebar search nor advanced search are designed to find content. To find content, use global search (results appear as files) or the search tools on the Content tab.

SEE ALSO:

[Searchable Fields by Object](#)

EDITIONS

Available in:

- Contact Manager
- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

Searchable Fields: Contract

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
Billing Address		✓		✓
Contract Name	✓	✓	✓	✓
Contract Number	✓	✓	✓	✓
Description		✓		✓
Shipping Address		✓		✓
Special Terms		✓		✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓		✓

EDITIONS

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓		✓

SEE ALSO:
[Searchable Fields by Object](#)

Searchable Fields: Contract Line Item

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Description		✓	✓
Name	✓	✓	✓

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions with the Service Cloud

SEE ALSO:
[Searchable Fields by Object](#)

Searchable Fields: Custom Object

Custom object records are searched only if there is a custom tab associated with the custom object. Users aren't required to add the tab for display.

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search—Name Fields	Global Search and Enhanced Lookup Search—All Fields
Name	✓	✓	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓			✓

EDITIONS

Available in:

- Contact Manager
- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search—Name Fields	Global Search and Enhanced Lookup Search—All Fields
All custom fields of type email and phone	✓	✓			✓
All custom fields of type text, text area, long text area, and rich text area		✓			✓

SEE ALSO:

[Searchable Fields by Object](#)

Searchable Fields: D&B Company

To have access to D&B Company records, your organization must have Data.com Premium Prospector or Data.com Premium Clean.

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Company Description			✓
D-U-N-S Number			✓
Facsimile Number			✓
Mailing Address			✓
Primary Address			✓
Primary Business Name			✓
Telephone Number			✓
Ticker Symbol			✓
URL			✓

EDITIONS

Data.com Prospector license available in: **Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

Data.com Clean license available in: **Professional, Enterprise, Performance,** and **Unlimited** Editions

SEE ALSO:

[Searchable Fields by Object](#)

Searchable Fields: Discussion

Discussions support only standard lookup searches.

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
Title			✓	

EDITIONS

Available in all editions

Searchable Fields: Document

To find a document, use global search or the **Find Document** button on the Documents tab. Neither sidebar search nor advanced search are designed to find documents.

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search	Documents Tab
Name			✓	✓	✓
Body				✓	✓
Keywords			✓	✓	✓
All standard text fields				✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)				✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone				✓	✓

EDITIONS

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

SEE ALSO:
[Searchable Fields by Object](#)

Searchable Fields: Entitlement

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Name	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions with the Service Cloud

SEE ALSO:

[Searchable Fields by Object](#)

Searchable Fields: File

Neither sidebar search nor advanced search are designed to find files. To find a file, use global search or the search tools on the Files tab.

Searchable Fields	Sidebar Search	Advanced Search	Global Search	Files Tab
Body			✓	✓
Description			✓	✓
Extension (such as ppt)			✓	✓
Name			✓	✓
Owner			✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)			✓	✓

EDITIONS

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Contact Manager
- Developer

Searchable Fields	Sidebar Search	Advanced Search	Global Search	Files Tab
All custom fields of type text, text area, long text area, rich text area, email, and phone			✓	✓

SEE ALSO:

[Searchable Fields by Object](#)

Searchable Fields: Idea

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
Comment		✓		✓
Description		✓		✓
Title	✓	✓	✓	✓

EDITIONS

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

SEE ALSO:

[Searchable Fields by Object](#)

Searchable Fields: Lead

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
Address		✓		✓
Company	✓	✓	✓	✓
Company (Local)			✓	
Company D-U-N-S Number (This field is only available to organizations that use Data.com Prospector)				✓
Description		✓		✓
Email	✓	✓		✓
Fax	✓	✓		✓

EDITIONS

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
First Name	✓	✓	✓	✓
First Name (Local)	✓	✓	✓	✓
Last Name	✓	✓	✓	✓
Last Name (Local)	✓	✓	✓	
Middle Name (beta)	✓	✓		
Middle Name (Local) (beta)	✓	✓		
Mobile	✓	✓		✓
Phone	✓	✓		✓
Suffix (beta)	✓	✓		
Title		✓		✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓		✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓		✓

SEE ALSO:

[Searchable Fields by Object](#)

Searchable Fields: Note

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Body		✓	✓
Title	✓	✓	✓

SEE ALSO:

[Searchable Fields by Object](#)

EDITIONS

Available in:

- Contact Manager
- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

Searchable Fields: Opportunity

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search—Name Fields	Global Search and Enhanced Lookup Search—All Fields
Description		✓			✓
Opportunity Name	✓	✓	✓	✓	✓
Account Name			✓		
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓			✓

EDITIONS

The available fields vary according to which Salesforce edition you have.

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search—Name Fields	Global Search and Enhanced Lookup Search—All Fields
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓			✓

SEE ALSO:
[Searchable Fields by Object](#)

Searchable Fields: People

Neither sidebar search nor advanced search are designed to find people; however, sidebar search and advanced search can be used to find users. See [Searchable Fields: User](#).

To find people, use global search or the search tools on the People tab.

Searchable Fields	Sidebar Search	Advanced Search	Global Search	People Tab
About Me			✓	
Email			✓	
First Name			✓	✓
Last Name			✓	✓
Name			✓	✓
Nickname			✓	✓
Phone			✓	
Record ID (15 character Record ID only)			✓	
Username			✓	
All custom auto-number fields and custom fields that are set as an external ID			✓	

EDITIONS

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Contact Manager
- Developer

Searchable Fields	Sidebar Search	Advanced Search	Global Search	People Tab
(You don't need to enter leading zeros.)				
All custom fields of type text, text area, long text area, rich text area, email, and phone			✓	



Note: Information in hidden fields on a profile is not searchable by other partners and customers in the community, but is searchable by users in the company's internal organization.

SEE ALSO:

[Searchable Fields by Object](#)

Searchable Fields: Person Account

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search—Name Fields	Global Search and Enhanced Lookup Search—All Fields
Account Name	✓	✓	✓	✓	✓
Account Name (Local)	✓	✓	✓	✓	✓
Account Number	✓	✓			✓
Account Site	✓	✓			✓
Assistant	✓	✓			✓
Assistant Phone	✓	✓			✓
Billing Address		✓			✓
Description		✓			✓
Email	✓	✓			✓
Fax	✓	✓			✓

EDITIONS

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

The available person account fields vary according to which Salesforce edition you have.

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search—Name Fields	Global Search and Enhanced Lookup Search—All Fields
Home Phone	✓	✓			✓
Mailing Address		✓			✓
Mobile	✓	✓			✓
Other Address		✓			✓
Other Phone	✓	✓			✓
Shipping Address		✓			✓
Ticker Symbol	✓	✓			✓
Title		✓			✓
Website	✓	✓		✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓			✓
All account and contact custom fields of type text, text area, long text area, rich text area, email, and phone		✓			✓

SEE ALSO:

[Searchable Fields by Object](#)

Searchable Fields: Price Book

Neither global search, sidebar search, nor advanced search are designed to find price books. To find a price book, use the **Price Books** area on the Products tab.

SEE ALSO:
[Searchable Fields by Object](#)

EDITIONS

- Available in:
- Professional
 - Enterprise
 - Performance
 - Unlimited
 - Developer

Searchable Fields: Product

Neither sidebar search nor advanced search are designed to find price books or products. To find a product, use global search or the **Find Products** area on the Products tab.

SEE ALSO:
[Searchable Fields by Object](#)

EDITIONS

- Available in:
- Professional
 - Enterprise
 - Performance
 - Unlimited
 - Developer

Searchable Fields: Question

The Answers tab in Salesforce lists all the questions posted to an answers community.

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Question Body		✓	✓
Question Title	✓	✓	✓
Reply Body		✓	✓

EDITIONS

- Available in:
- Enterprise
 - Performance
 - Unlimited
 - Developer

SEE ALSO:
[Searchable Fields by Object](#)

Searchable Fields: Quote

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Quote Name	✓	✓	✓
Quote Number	✓	✓	✓

EDITIONS

- Available in:
- Professional
 - Enterprise
 - Performance
 - Unlimited
 - Developer

SEE ALSO:
[Searchable Fields by Object](#)

Searchable Fields: Report

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Description	✓	✓	✓
Report Name	✓	✓	✓

EDITIONS

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

SEE ALSO:

[Searchable Fields by Object](#)

Searchable Fields: Self-Service User

Self-service users support only standard lookup searches.

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
First Name			✓	
Last Name			✓	

EDITIONS

Available in all editions

Searchable Fields: Service Contract

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Contract Number	✓	✓	✓
Description		✓	✓
Name	✓	✓	✓
Special Terms		✓	✓

EDITIONS

Available in: **Enterprise, Performance, Unlimited,** and **Developer** editions with Service Cloud

SEE ALSO:

[Searchable Fields by Object](#)

Searchable Fields: Solution

Neither sidebar search nor advanced search are designed to find solutions. To find a solution, use global search or the **Find Solution** button on the Solutions tab.

SEE ALSO:

[Searchable Fields by Object](#)

EDITIONS

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

Searchable Fields: Task, Calendar Event, and Requested Meeting

Archived activities aren't searchable.

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Comments (task and events only)		✓	✓
Subject	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

SEE ALSO:

[Searchable Fields by Object](#)

Searchable Fields: Topic

Neither sidebar search nor advanced search are designed to find topics. To find a topic, use global search.

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Description			✓
Name			✓

SEE ALSO:

[Searchable Fields by Object](#)

Searchable Fields: User

If you're using Chatter and searching for people, see [Searchable Fields: People](#).

EDITIONS

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

EDITIONS

Available in all editions

EDITIONS

The available fields vary according to which Salesforce edition you have.

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search—Name Fields	Global Search and Enhanced Lookup Search—All Fields
About Me		✓			✓
Email	✓	✓			✓
First Name	✓	✓	✓	✓	✓
Last Name	✓	✓	✓		
Middle Name (beta)	✓	✓			
Name	✓	✓	✓	✓	✓
Nickname	✓	✓			✓
Phone	✓	✓			✓
Record ID (15 character Record ID only)	✓	✓			✓
Suffix (beta)	✓	✓			
Username	✓	✓			✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓			✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓			✓

SEE ALSO:

[Searchable Fields by Object](#)

Tags that Show Up in Search

You can search for tags in sidebar, advanced, and global search.

SEE ALSO:

[Searchable Fields by Object](#)

EDITIONS

Available in all editions

Search Results

Your search results include items and tags that you have permission to view. How your results appear and how you can interact with them depends on whether you're using:

- Sidebar or advanced search
- Global search

Regardless of your search type, you can:

- Filter your search results
- Customize columns in your search results
- (Administrators only) Customize filters for all users' search results

EDITIONS

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

Search Results

The search results page displays items for each object, custom object, tag, and Chatter feed that you have permission to view.

From this page, you can:

- Jump directly to an object's results—click any object on the left side of the page.
The number of results for each object is displayed. For example, Contacts [25+] means there are more than 25 contacts that match your search criteria. If your search returns a large number of results for a particular object, click **Next Page** or **Previous Page** to view the results.
- Jump to Chatter Feed Search Results.
- View or edit items—click an item to open it or click **Edit**, if available.
- Refine your search results by clicking **Options...** below the search box or above the list of objects on the left hand side:

Choose which objects to search

In the Objects section, select the objects for which you want to return search results. If you don't select any objects, your search returns all possible objects. Select **All** or click **Clear All** to quickly select all or no objects.

Search only items you own

In the More Options section, select `Limit to items I own`.



Note: When `Limit to items I own` is selected, the search results don't return article, asset, idea, invoice, order, people, product, question, quote, and reply records because these records don't have owners.

Search for an exact phrase

In the More Options section, select `Exact phrase`. This is the same as using [quotation marks](#) around your search string.


Search within a division

If you have the Affected by Divisions permission, specify which divisions you want to search. If your organization uses divisions but you don't have the "Affected by Divisions" permission, your search results include records from all divisions.

EDITIONS

Available in all editions

- Click **Search**.

The search options you select are saved until you change them. Click  to clear your search terms.



Note: Chatter feed searches aren't affected by your search scope; Chatter feed search results include matches across all objects.

Search options aren't available to Chatter Free users.

- [Customize columns](#) in your search results.
- [Filter](#) your search results.

Sidebar Search

How Sidebar Search Works

How your sidebar search works depends on your search options, search terms, and the use of wildcards.

Search Options

Sidebar search searches only a subset of records and [fields](#), including name, phone, email, and standard address fields.

If the sidebar search drop-down list is available, you can limit your search to only tags or the records for a single object. If the sidebar search **Limit to items I own** checkbox is available, you can select this box to limit your search to records you own.

Search Terms

Searches are conducted as a *phrase search* and match terms in the exact sequence that they appear. For example, searching for *bob jones* returns items with *Bob Jones*, but not *Bobby Jones* or *Bob T Jones*. Likewise, searching for *acct!4* only returns items with *acct!4* in a single string.

Wildcards and Operators

You can use the * (asterisk) and ? (question mark) [wildcards](#) to refine results. Use * to match one or more characters, or ? to match a single character. An * is automatically appended to your search string. For example, searching for *bob jo* finds items with *Bob Jones* and *Bob Johnson*, and searching for *jo?n* finds items with *john* and *joan*. You can't use operators to refine results in sidebar search.

SEE ALSO:

[Search Overview](#)

EDITIONS

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

Changing Sidebar Search Options

Refine your search results by:

Choosing which objects to search

If the sidebar search drop-down list is available, you can limit your search to a single object. In the drop-down list, select the object you want. Select **Search All** to search across all objects.




Note: When all objects are selected, the search results don't return article, article management, content, document, product, and solution records. You can search for these records on their respective tabs.

EDITIONS

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

Searching only items you own

If the `Limit to items I own` checkbox is available, you can search only items you own, including case comments and reports that you created.

 **Note:** When `Limit to items I own` is selected, the search results don't return asset, idea, invoice, order, question, quote, reply, and user records because these records don't have owners.

Searching within a division

If you have the “Affected by Divisions” permission, specify which divisions you want to search. If your organization uses divisions but you don't have the “Affected by Divisions” permission, your search results include records in all divisions.

If you restrict your search options, the options you select appear under the search box on the Search Results page.

Using the Recycle Bin


The **Recycle Bin** link in the sidebar lets you view and restore recently deleted records for 15 days before they are permanently deleted. Your Recycle Bin record limit is 25 times the Megabytes (MBs) in your storage. For example, if your organization has 1 GB of storage then your limit is 25 times 1000 MB or 25,000 records. If your organization reaches its Recycle Bin limit, Salesforce automatically removes the oldest records if they have been in the Recycle Bin for at least two hours.

Viewing Items in the Recycle Bin

Choose **My Recycle Bin** from the drop-down list to view just the items you deleted. Administrators, and users with the “Modify All Data” permission, can choose **All Recycle Bin** to view all data that has been deleted for the entire organization. In Personal Edition, the **All Recycle Bin** option shows all of your deleted items.

Searching for Items in the Recycle Bin

1. Choose **My Recycle Bin** or **All Recycle Bin** from the drop-down list. Choosing **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**.

Restoring 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)
- Parent cases (as specified in the `Parent Case` field on a case)

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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”

- 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 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.

Purging the Recycle Bin

To permanently remove your deleted items prior to 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**.

SEE ALSO:

[Deleting Records](#)

Advanced Search

How Advanced Search Works

How your advanced search works depends on your search options, search terms, and the use of wildcards and operators.

Search Options

Advanced search searches more record types and [fields](#) than sidebar search, including attachments, custom fields, and long text fields such as descriptions, notes, and task and event comments.

Select `Limit to items I own`, if available, to limit your search to records you own, including case comments and reports that you created. Click **Advanced Search...** and choose one or more objects by which to limit your search. You can also restrict your search to divisions, if your organization uses them.

Search Terms

Search terms are treated as separate words and may be found in different searchable fields within a record. For example, searching for `bob jones` returns items with *Bob Jones*, as well as a contact named *Bob Smith* whose email address is *bsmith@jones.com*.

Search terms are separated by letter, number, and punctuation boundaries. For example, searching for `acct ! 4` returns items with *Acct*, *!*, and *4*, even if those terms are in separate places in the item.

Wildcards and Operators

You can use the `*` (asterisk) and `?` (question mark) wildcards to refine results. Use `*` to match one or more characters, or `?` to match a single character. For example, searching for `bob jo*` finds items with *Bob Jones* and *Bob Johnson*, and searching for `jo?n` finds

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items with *john* and *joan*. You can also use the AND, OR, AND NOT, () (parentheses), and " " (quotation marks) operators to refine results.

SEE ALSO:

[Search Overview](#)

Changing Advanced Search Scope

1. Click **Advanced Search...** in the sidebar.
2. Refine your search results by:

Searching only items you own

In the Advanced Options section, select `Limit to items I own`, if available.



Note: When `Limit to items I own` is selected, the search results don't return asset, idea, invoice, order, question, quote, reply, and user records because these records don't have owners.

Searching for an exact phrase

In the Advanced Options section, select `Exact phrase`. This is the same as using [quotation marks](#) around your search string.

Searching within a division

If you have the "Affected by Divisions" permission, specify which divisions you want to search. If your organization uses divisions but you don't have the "Affected by Divisions" permission, your search results include records in all divisions.

Choosing which objects to search

In the Scope section, select the objects for which you want to return search results. If you don't select any objects, your search returns all possible objects. Click **Select All** or **Deselect All** to quickly select all or no objects.



Note: When all objects are selected, the search results don't return article, article management, content, document, product, and solution records. You can search for these records on their respective tabs.

3. Click **Search**.

If you restrict your search scope, the scope you select appears under the search box on the Advanced Search Results page. Click **Advanced Search** under the search box to change your search scope again.

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Sidebar and Advanced Search Results

Your search results include related lists for items and tags that you have permission to view.

From this page you can:

- Click a related list item at the top of the page to jump directly to an object's results.
Objects with results are displayed in alphabetical order. The number of results for each object is displayed. For example, Contacts [25+] means there are more than 25 contacts that match your search criteria. If your search returns a large number of results for a particular object, click **Next Page** or **Previous Page** to view the results.
- Click a result to open it or click **Edit**, if available.
- Click **My Columns** (or, if you're an administrator, click **Customize... > My Columns**) to [customize columns](#) in your search results.
- Click **Show Filters**, if available, to [filter](#) your search results.
- Click **Advanced Search...**, if available, to [refine your search](#).

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Global Search

How Global Search Works

Global search searches more record types, including articles, documents, products, solutions, and Chatter feeds, files, groups, topics, and people. Global search also searches more field types, including custom fields and long text fields such as descriptions, notes, and task and event comments. Global search keeps track of which objects you use and how often you use them, and arranges the search results accordingly. Search results for the objects you use most frequently appear at the top of the list. If global search doesn't have enough information about which objects you use, you see results for all objects until it has more information.

How your global search works depends on your search options, search terms, and the use of wildcards and operators.

Search Options

[Search options](#) let you restrict your search to the records you own, if available; to exact phrase searches; and to divisions, if your organization uses them.

The search options you select are saved until you change them.



Note: Chatter feed searches aren't affected by your search scope; Chatter feed search results include matches across all objects.

Search options aren't available to Chatter Free users.

Search Terms

Search terms are treated as separate words and may be found in different searchable fields within a record. For example, searching for *bob jones* returns items with *Bob Jones*, as well as a contact named *Bob Smith* whose email address is *bsmith@jones.com*.

Search terms are separated by letter, number, and punctuation boundaries. For example, searching for *acct ! 4* returns items with *Acct, !*, and *4*, even if those terms are in separate places in the item.



Tip: If you'd like to conduct a phrase search to match multiple terms in the exact sequence that they appear, select **Exact phrase** in the Options or use quotations marks around your search terms.

Wildcards and Operators

You can use the * (asterisk) and ? (question mark) wildcards to refine results. Use * to match one or more characters, or ? to match a single character. For example, searching for *bob jo** finds items with *Bob Jones* and *Bob Johnson*, and searching for *jo?n* finds items with *john* and *joan*. You can also use the AND, OR, AND NOT, () (parentheses), and " " (quotation marks) operators to refine results.

SEE ALSO:

[Search Overview](#)

Changing Global Search Options

1. Click **Options...** next to the search box in the results page.

Search options aren't available to Chatter Free users.


2. Refine your search results by:
 - Selecting **Limit to items I own**, if available.

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 **Note:** When **Limit to items I own** is selected, the search results don't return article, asset, idea, invoice, order, people, product, question, quote, and reply records because these records don't have owners.

- Selecting **Exact phrase**. This is the same as using **quotation marks** around your search string.
- Searching within a division. If you have the "Affected by Divisions" permission, specify which divisions you want to search. If your organization uses divisions but you don't have the "Affected by Divisions" permission, your search results include records in all divisions.

3. Click **Save & Search**.

The search options you select are saved until you change them.

 **Note:** Chatter feed searches aren't affected by your search scope; Chatter feed search results include matches across all objects.

Global Search Results

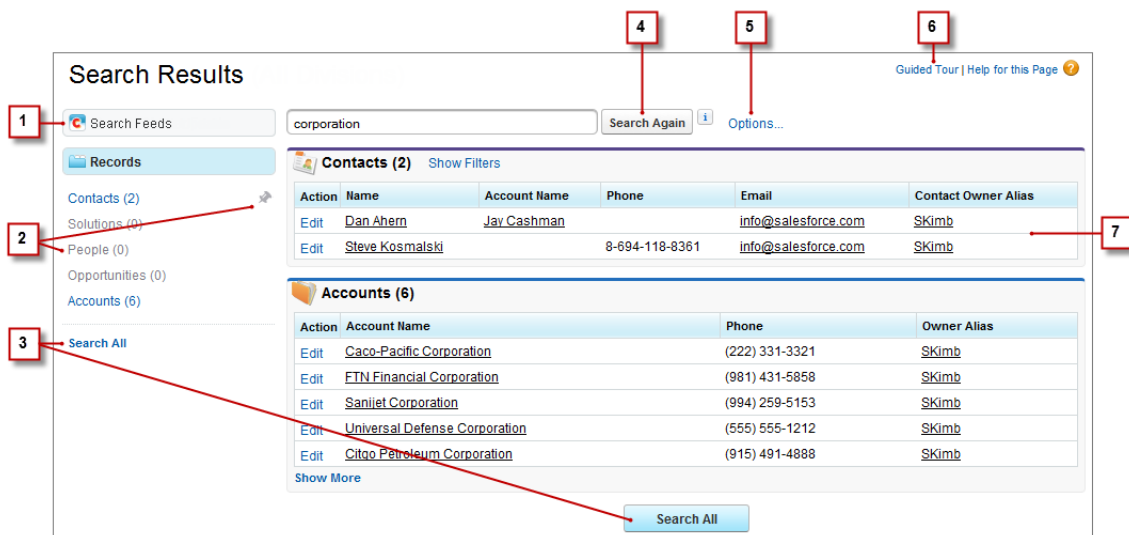
Watch a Demo:  [Using Smart Search](#)

Your search results include items and tags that you have permission to view. Global search keeps track of which objects you use and how often you use them, and arranges the search results accordingly. Search results for the objects you use most frequently appear at the top of the list. If global search doesn't have enough information about which objects you use, you see results for all objects until it has more information.

Custom object records are searched only if there is a custom tab associated with the custom object. Users aren't required to add the tab for display. If your Salesforce administrator has enabled and defined external objects that access SharePoint in your company, your search results may include matches for items in the SharePoint server.

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The screenshot shows the Salesforce Global Search Results interface. The search term "corporation" is entered in the search bar. The results are categorized into "Contacts (2)" and "Accounts (6)".

Contacts (2):

Action	Name	Account Name	Phone	Email	Contact Owner Alias
Edit	Dan Ahern	Jay Cashman		info@salesforce.com	SKimb
Edit	Steve Kosmowski		8-694-118-8361	info@salesforce.com	SKimb

Accounts (6):


Action	Account Name	Phone	Owner Alias
Edit	Caco-Pacific Corporation	(222) 331-3321	SKimb
Edit	FTN Financial Corporation	(981) 431-5858	SKimb
Edit	SaniJet Corporation	(994) 259-5153	SKimb
Edit	Universal Defense Corporation	(555) 555-1212	SKimb
Edit	Citgo Petroleum Corporation	(915) 491-4888	SKimb

Numbered callouts in the image:

1. Search Feeds (left sidebar)
2. Records (left sidebar)
3. Search All (bottom button)
4. Search Again (top right)
5. Options... (top right)
6. Guided Tour | Help for this Page (top right)
7. Contact Owner Alias (table header)

From this page you can:


1. Click **Search Feeds** at the top left of the page to see Chatter posts and comments that include your search terms.

 **Tip:** On the search results page for feeds, save the feed search to your favorites on the Chatter page by clicking **Add to Favorites**.

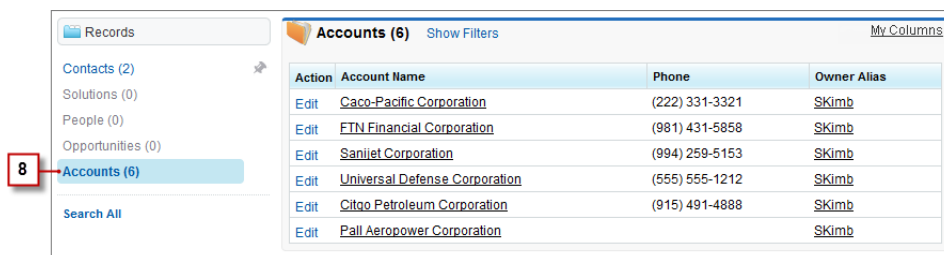
2. Quickly see which items (ordered by most frequent use) were searched.
 - Click any item to see only that item's results.
 - Hover over and pin important items to the top of your results to manually change the order. You can always unpin them later.
3. Click **Search All** at the bottom of the left side or under the related lists to do a one-time search across all items using your current search terms.

After clicking **Search All**, you can pin items that don't appear in your scope to the top of your search results. You can always unpin them later.

4. Use the search box in the page to search within your current view. For example, if you drill down to view Chatter feeds and then decide to search Chatter for something different, enter your new search terms and click **Search Feeds** to search across all Chatter posts and comments.



 **Note:** Search results for feeds include matches for file or link names shared in posts, but not in comments.

5. Click **Options...** to restrict your search to records you own, if available, to exact phrase searches, and to divisions, if your organization uses them.
6. Take a guided tour of the search results.
7. See up to five results for each item you searched.
 - Click a result to open it or click **Edit**, if available.
 - Click column headings to sort results in ascending or descending order.
 - Click **Show Filters**, if available, to [filter](#) your search results.
 - Click **Show More** to drill down to the full list of that item's results.





Action	Account Name	Phone	Owner Alias
Edit	Caco-Pacific Corporation	(222) 331-3321	SKimb
Edit	FTN Financial Corporation	(981) 431-5858	SKimb
Edit	Sanilet Corporation	(994) 259-5153	SKimb
Edit	Universal Defense Corporation	(555) 555-1212	SKimb
Edit	Citgo Petroleum Corporation	(915) 491-4888	SKimb
Edit	Pall Aeropower Corporation		SKimb

8. Drill down to a specific item's results, and then:
 - Click **Show Filters**, if available, to [filter](#) your search results.
 - Click **My Columns** (or, if you're an administrator, click **Customize... > My Columns**) to [customize columns](#) in your search results.

 **Tip:** To search the posts and comments in a specific feed, such as on a profile, on a record, or in a group, use the feed search () at the top of the feed.

Lookup Dialog Search

Salesforce objects often include *lookup fields* that allow you to associate two records together in a relationship. For example, a contact record includes an `Account` lookup field that associates the contact with its account.

Lookup fields appear with the  button on record edit pages. Clicking  opens a lookup search dialog that allows you to search for the record that you want to associate with the record you're editing. A *blank lookup* is performed when you click the lookup icon without entering a search term.

Salesforce provides two types of lookups.

Standard Lookups

All lookup fields use standard lookup search by default. In standard lookup searches, Salesforce queries a limited set of [searchable fields for each object](#). Search results contain up to 50 records at a time in alphabetical order. You can't sort, filter, or customize the columns in the search results.

Enhanced Lookups

If enabled by your administrator, Salesforce uses enhanced lookup search for account, contact, opportunity, user, and custom object lookup fields. Enhanced lookups offer more search capabilities compared to standard lookups:

- By default, enhanced lookups query a limited set of fields, known as *Name* fields for each object. If your search for a record returns a large number of matches, such as a contact with a widely used name, you can instead query [all searchable fields](#) for that record to narrow your results. If available in the enhanced lookup search dialog, select **All Fields** and enter other search terms unique to the record, such as the contact's email address.
- Enhanced lookup search queries are broken into separate search terms at alphabetic, numeric, and special character boundaries. For example, if you enter `ALL4ONE` in an enhanced lookup field, the resulting query searches for `ALL` and `4` and `ONE`. Consequently, entering `ALL and 4 and ONE` returns matches for `ALL4ONE`. Also, searching for `S&` returns fields containing both `S&` and `&S`.
- You can [sort and filter](#) the results of enhanced lookup searches. You can also [hide and reorganize](#) the columns that are displayed in the results window. If you perform a *blank lookup*—that is, you click the lookup icon without entering a search term—filters only apply to items in the most recently used list. Otherwise, filters apply to both this list and the resulting records of the lookup.



Note: In addition to user-controlled filters, administrators can create lookup filters on fields that are in a lookup, master-detail, or hierarchical relationship to limit the valid values in lookup dialog results for the field.

- Enhanced lookups return all records that match your search criteria and allow you to page through large sets of search results.



Note: Salesforce only returns matches for a custom object if your administrator has associated a custom tab with it. You don't have to add the tab for display.

When you perform a *blank lookup*, a list of all recently used records displays. Search results vary for some object types:

- For standard lookups of products and queues, the dialog shows an alphabetical listing of the first 50 records.
- For standard lookups of campaigns, the dialog shows the first 100 active campaigns.
- For the asset standard lookup on a case, the dialog shows all the assets tied to the contact on the case, if any.
- For standard or enhanced lookups of users, the dialog shows a list of recently accessed user records from across your organization.

Lookup Auto-Completion

If enabled by your administrator, lookups support auto-complete.

Both standard lookups and enhanced lookups can display a dynamic list of matching recently used records when a lookup field is edited. This list is restricted to objects of the appropriate type and,

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with the exception of lookups of users, is populated from recently used items. For example, while editing an Account lookup, you can see recently used accounts with names that match the prefix you have entered. Recently used contacts don't appear in this list.

Lookup auto-completion is subject to the following restrictions:

- You must have recently visited records of the appropriate type for the lookup's auto-completion list to be populated.
- You must be editing the lookup field on a record's edit page.

Hover details are displayed only for lookup fields on object types that are included in lists of recently used records. For example, products aren't included in lists of recently used records, so hover details aren't displayed for a lookup field on products.

Tips for Using Standard and Enhanced Lookups

Consider these tips when using standard and enhanced lookups.

- In standard lookup searches, a wildcard is automatically appended to each of your search terms. For example, a search for *bob jo* is really a search for *bob* jo** and returns items with *bob jones*, *bobby jones*, or *bob johnson*. You can also explicitly use an asterisk (*) wildcard in your search string.
- For enhanced lookups in particular, the wildcard can't be the first character in the search term or phrase, and search results may include more records than you expect if your search terms contain a combination of letters, numbers, and special characters.
- If you enter a value in the lookup text box and save the record without clicking the lookup icon (🔍), Salesforce automatically performs a standard lookup search. If it finds an exact match, it saves that value to the lookup field, even if it finds other partial matches. If it doesn't find an exact match and finds one or more partial matches, Salesforce requires you to select a value from a drop-down list of matches. If no results match the text you entered, an error displays instead.
- To search for contacts, leads, users, or other individuals that include spaces in the **First Name** or **Last Name** fields, enter quotes around the terms.
For example, to search for someone with the last name *von hausen*, enter *"von hausen"*.
- In organizations where the Salesforce Customer Portal or partner portal is enabled, you can filter the results that appear on the user lookup dialog by selecting either a queue or group of users from the **Owner** or **Assigned To** drop-down list.
- If your organization uses divisions and you have the "Affected by Divisions" permission, your lookup dialog search results include records in the division you select in the lookup dialog window.

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Refine Search Results

Refining Search Using Operators

Sidebar and standard lookup search don't support the use of operators.

Operators

Operator support is case-insensitive.

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Operators not available in:
Connect Offline

Operator	Description
AND	Finds items that match all of the search terms. For example, <i>acme AND california</i> finds items with the word <i>acme</i> and the word <i>california</i> , but not items with only the word <i>acme</i> . Using AND is optional in most cases, because searching for <i>acme california</i> is the same as searching for <i>acme AND california</i> . However, when searching articles, documents, and solutions on their respective tabs, AND must be used because OR is the default operator for these objects on their tabs.
OR	Finds items with at least one of the search terms. For example, <i>acme OR california</i> finds items with either <i>acme</i> or <i>california</i> or both.
AND NOT	Finds items that don't contain the search term. For example, <i>acme AND NOT california</i> finds items that have the word <i>acme</i> but not the word <i>california</i> .
() (parentheses)	Group search terms together. Grouped search terms are evaluated before other search terms in your string. See Search Order .
" " (quotation marks)	Find an exact phrase. Sidebar search automatically places the quotation mark operators around any search string that you enter. This is the same as selecting Exact phrase in advanced search or global search. For example, a search for <i>"monday meeting"</i> finds items that contain <i>monday meeting</i> , but not items that contain <i>monday afternoon meeting</i> or <i>monday's meeting</i> . The asterisk (*) and question mark (?) function as wildcards when included in a search phrase that is enclosed in quotation marks or when Exact phrase is selected in the search scope.

Search Order

When you combine multiple operators in a search string, they are evaluated in this order:

1. () (parentheses)
2. AND and AND NOT (evaluated from right to left)
3. OR

These examples show how search strings are evaluated:

Searching for...	Is the same as...	Finds items with the words...
<i>acme AND california AND NOT meeting</i>	<i>acme AND (california AND NOT meeting)</i>	<i>acme</i> and <i>california</i> but not <i>meeting</i>
<i>acme AND NOT california AND meeting</i>	<i>acme AND NOT (california AND meeting)</i>	<i>acme</i> but not with both <i>california</i> and <i>meeting</i>
<i>acme AND california OR meeting</i>	<i>(acme AND california) OR meeting</i>	<i>acme</i> and <i>california</i> and items with the word <i>meeting</i>
<i>acme AND (california OR meeting)</i>	<i>acme AND (california OR meeting)</i>	<i>acme</i> and <i>california</i> and items with the words <i>acme</i> and <i>meeting</i>

Refining Search Using Wildcards

Wildcards

Wildcard	Description
* (asterisk)	Asterisks match zero or more characters at the middle or end (not the beginning) of your search term. For example, a search for <i>john*</i> finds items that start with <i>john</i> , such as, <i>john</i> , <i>johnson</i> , or <i>johnny</i> . A search for <i>mi* meyers</i> finds items with <i>mike meyers</i> or <i>michael meyers</i> . If you're using sidebar search, an <i>*</i> is automatically appended to the end of the search string. You can use an <i>*</i> at the beginning of a search term in a standard lookup search .
? (question mark)	Question marks match only one character in the middle or end (not the beginning) of your search term. For example, a search for <i>jo?n</i> finds items with the term <i>john</i> or <i>joan</i> but not <i>jon</i> or <i>johan</i> . If you're using global search, the <i>?</i> is removed from the end of your search term and isn't treated as a wildcard. You can't use a <i>?</i> in a lookup search .

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Wildcard Behavior and Limitations

- Wildcards take on the type of the preceding character. For example, *aa*a* matches *aaaa* and *aabca*, but not *aa2a* or *aa.//a*, and *p?n* matches *pin* and *pan*, but not *p1n* or *p!n*. Likewise, *1?3* matches *123* and *143*, but not *1a3* or *1b3*.
- You can't search for a *?* or *** in a search phrase that is enclosed in quotation marks or when **Exact phrase** is selected in the search scope because they function as wildcards. For example, *"my wo?d"* matches *my wood* and *my word*.
- A wildcard (***) is appended at the end of single characters in Chinese, Japanese, Korean, and Thai (CJKT) searches, except in exact phrase searches.
- If you're entering search terms in global search, the search box drop-down list gives you the option to search for your term with an *** added to the end. For example, type *jo* in the search box, then select **Search for jo* (starts with)** to find *joan*, *john*, *johnson*, and other matches that start with *jo*.

Refining Search

Improve your search results by:

- Changing search options
 - [Sidebar search](#)
 - [Advanced search](#)
 - [Global search](#)
- Using [feed search](#), if you're trying to find information in a specific feed
- Using [wildcards](#)
- Using [operators](#), if you're using advanced search, global search, or feed search

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Customizing Search Results Columns

For most objects, you can specify the enhanced lookup and search results columns and column order.

1. In the object's search results related list, click **My Columns** (Administrators click **Customize...** > **My Columns**).

2. To choose columns, use **Add** and **Remove**.

Your administrator determines the available columns in a search layout. If search layouts aren't available for the object, such as articles, dashboards, reports, and tags, you can't customize the columns.

3. To reorder columns, use **Up** and **Down**.

4. Click **Save**.

5. Click column headings to sort the results in ascending or descending order.

Sorting applies across all search results for a particular object, including those on subsequent pages. You can't click on column headings for multi-select picklist fields because you can't sort the multi-select picklist field type.

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Filtering Search Results

To restrict search or enhanced lookups results for objects, you can use filters. Your administrator determines the available filter fields in a search layout. If your administrator didn't create a search layout for the object or if search layouts aren't available for the object, such as articles, dashboards, reports, and tags, you can't filter your results.

Filters aren't available in Customer Portals or partner portals.

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Filtering Search Results for Most Objects

1. Click **Show Filters** in a search results related list.

2. Enter filter criteria using the following tips and click **Apply Filters**.


- When filtering search results, the operator is selected automatically based on the field type. The = (equals) operator is used for fields with the following types of fields:
 - Dates
 - Numbers, except auto number or phone fields
 - Record IDs

All other fields use the contains operator. Auto number and phone fields use the contains operator because they can contain non-numeric characters.

- Except for number fields, commas are used as OR operators in search results filters. For example, if you enter *acme, california* in the **Account Name** filter field, your results include account names with either *acme* or *california*. For number fields (where a comma can be part of a number) commas aren't treated as OR operators and users must explicitly enter the OR operator.

 **Note:** Explicitly using the OR operator is only supported in number fields.

- The criteria you specify are AND based. That is, if you specify more than one criterion, the result includes only records that match all of the criteria. For example, if you enter *acme california* in the **Account Name** filter field, your results include account names with both *acme* and *california*.
- Any field of type URL is filtered based on the exact value that is entered by the user for that field.

 **Tip:** We recommend that you don't include `http://` or `https://` in URL filter criteria because you may not get the results that you expect.

When you enter values in URL fields and save records, Salesforce adds `http://` to any URL that doesn't start with `http://` or `https://`. The added `http://` isn't stored in the database. For example, if you enter `salesforce.com` in the `Website` field and save the record, the `Website` field displays `http://Salesforce`, but the value stored is `Salesforce`. Therefore, if you enter `http://salesforce.com` in the `Website` filter field, your results don't include your record.

- You can enter literal date values such as `YESTERDAY` or `NEXT MONTH`.
- If you perform a *blank lookup*—that is, you click the lookup icon without entering a search term—filters only apply to items in the most recently used list. Otherwise, filters apply to both this list and the resulting records of the lookup.

Clearing and Hiding Filters

Click **Clear Filters** to remove all filters and see unfiltered search results. Click **Hide Filters** to apply the filters but not display them on the page.

Filtering Search Results for Articles, Files, Products, and Solutions

To filter the results for articles, files, and products, and to further filter the results for solutions, click the link in the appropriate results related list. Your search and results automatically appear on the new page. If you filter the solutions results on the Search Results page and then use the link in the appropriate results related list to further filter your results, your filter options aren't applied on the new page.

Using Divisions in Search and List Views

If your organization uses divisions to segment data, you can search and create list views by division.

Searches

- To search within a division in a lookup dialog, select a division from the drop-down list in the lookup dialog window. Search results will contain records in the selected division.
- To search all records within the current user-selected division, use global search.
- To search within multiple divisions at the same time, use advanced search.

List Views

- To change results displayed in a custom list view, set the Division Name when creating or editing a list view. The current user-level selectable division will not change which results are displayed in your custom list view.
- To find records in a specific division in a list view that does not have the Division Name set, change your user-level selectable division.
- To view records across all divisions, change your user-level selectable division to “—All—” or when creating a custom list view, set Division Name to “—All—”.

SEE ALSO:

[Changing Your Working Division](#)

EDITIONS

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To search within divisions:

- “Affected by Divisions”

Topics

Topics on Records Overview

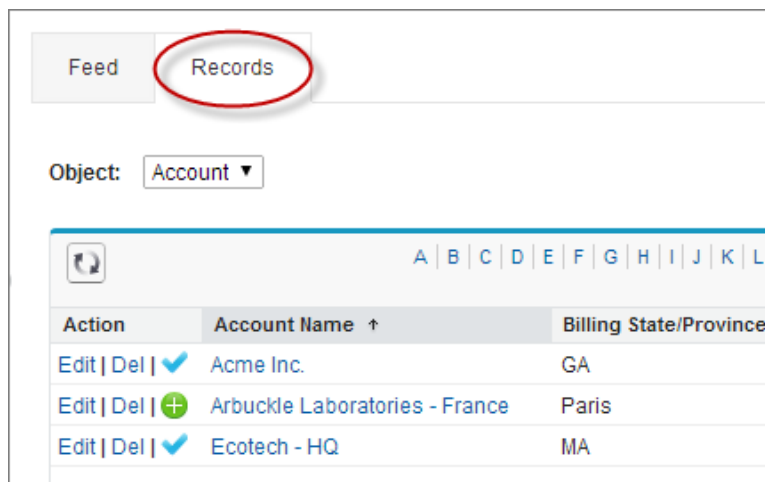
Topics are words or phrases that you can associate with Salesforce records to organize them around common themes.

Use topics to group records by a common theme, and then use those topics to filter list views. If Chatter is enabled, you can also see records on a topic in one central place—the Records tab of the topic detail page. For example, if a number of accounts are participating in a conference, you might add the topic *User Conference 2014* to their records. You could then use that topic to filter an accounts list view, or (with Chatter) view the accounts together on the Records tab of the *User Conference 2014* topic page.

Here's an example topic detail page, with the Records tab showing accounts on the topic. (If you don't see a Records tab like this for a particular topic, the topic hasn't been added to any records.)

EDITIONS

Available in all editions



Administrators can enable topics for accounts, assets, campaigns, cases, contacts, contracts, leads, opportunities, and custom objects. (Though topics can also be enabled for tasks and events, they aren't accessible via list views or the Records tab.)


SEE ALSO:

[Add Topics to Records](#)

Add Topics to Records

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.

1. 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 all editions

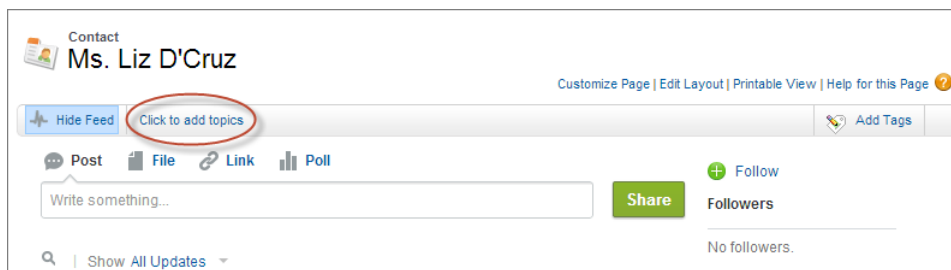
USER PERMISSIONS

To add existing topics to a record:

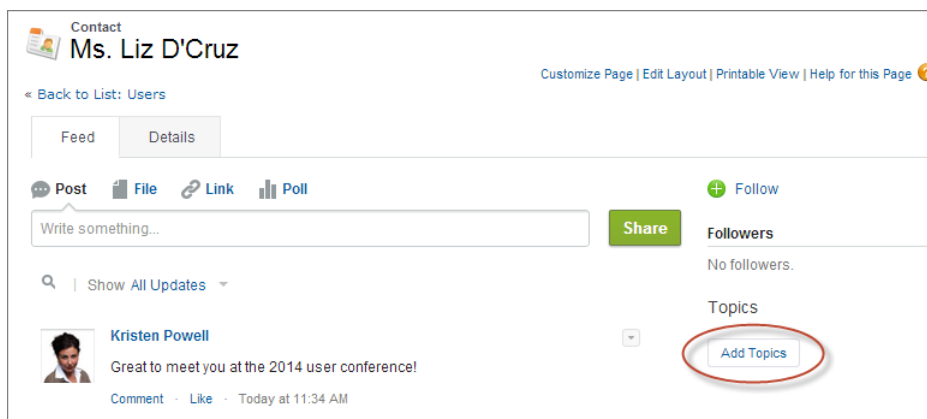
- "Read" on the record AND "Assign Topics"

To add new topics to a record:

- "Read" on the record AND "Create Topics"



If your administrator enabled feed-based layouts, click **Add Topics** in the sidebar of the feed view.



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. And if your administrator enabled Chatter, topics added to records become links to topic detail pages, where associated records appear on the Records tab for easy access. (Note that Chatter posts on a record aren't automatically added to a record's topics; you must add the topics to the posts.)

SEE ALSO:


[Creating Custom List Views](#)

[Remove Topics from Records](#)

Remove Topics from Records

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 all editions

USER PERMISSIONS

To remove topics from a record:

- "Read" on the record AND "Assign Topics"

Tags

Tags Overview

Tags are words or short phrases that you can associate with most Salesforce records to describe and organize their data in a personalized way. Use tags to group records from various objects by a common theme or use, and then use those tags in search to make finding information fast and intuitive.

For example, if you met a number of contacts and leads at a conference, you might tag them all with the phrase *User Conference 2011*. You could then search for the *User Conference 2011* tag and click that tag in search results to retrieve those records.

Salesforce supports two types of tags.

- *Personal tags* are private. Only you can view any personal tags that you add to a record.
- *Public tags* are shared among all users in an organization. Any user with access to the record can view the public tags that you add.

Administrators can enable personal and public tags for accounts, activities, assets, campaigns, cases, contacts, contracts, dashboards, documents, events, leads, notes, opportunities, reports, solutions, tasks, and any custom objects (except relationship group members), allowing you to:

- [Tag records](#)
- [Remove tags from a record](#)
- [Browse, search, and manage tags](#)



Note: If your administrator enables [topics](#) for an object, public tags are disabled for that object. Personal tags aren't affected.

EDITIONS

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

Tagging Records

1. On the top right corner of the record detail page, click **Add Tags**. If the record already has associated tags, click **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. As you type, the list of suggestions changes to show only those tags that match the prefix you have entered. To choose a suggestion, click it or use your keyboard arrow keys to select it and press the TAB or ENTER key.

3. Click **Save**.



Tip: When you create or edit tags, you can press the ENTER key to save your changes or the ESC key to discard them.



Note: There are limits on the number of personal and public tags you can create and apply to records. For all editions, if you attempt to tag a record with a new tag that exceeds one or more of these limits, the tag isn't saved. If you reach a limit, you can go to the Tags page and delete infrequently used tags.

SEE ALSO:

[Tags Overview](#)

[Removing Tags from Records](#)

Removing 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. Click **Save**.



Tip: When you create or edit tags, you can press the ENTER key to save your changes or the ESC key to discard them.

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

USER PERMISSIONS

To edit tags on a record:

- "Read" on the record

Browsing, Searching, and Managing Tags

To access the [Tags](#) page, click the name of any tag on a detail page, or if your administrator added tags to the sidebar, click **Tags** in the sidebar.

From this page, you can:

- [View and browse tags](#)
- [Find records with tags](#)
- [Search tags](#)
- [Rename and delete tags](#)
- [Review personal tag statistics](#)

EDITIONS

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

USER PERMISSIONS

To rename or delete public tags:

- “Tag Manager”

Viewing and Browsing Tags

Use the **Personal Tags** and **Public Tags** checkboxes to limit or expand your view. Because personal tags are private, you can only see the personal tags that you have defined. You can see all public tags that are defined in your organization.

Click a letter at the top of the tag browsing area to view only tags that begin with that letter or click **Next Page** or **Previous Page**.

By default, tags are listed in alphabetical order. From the **Sort** picklist, choose **By Number of Uses** to sort tags by the number of records that are tagged by them, or choose **By Most Recently Used** to sort tags by how recently they were added to a record.

Finding Records with Tags

Click a tag to see the list of records organized by object. The number of records associated with the tag is displayed next to the tag. You can narrow your results further by clicking additional tags. When more than one tag is selected, only records that match all selected tags are displayed in the list of results. Click **[X]** next to a tag to deselect it and remove it from the filter. Click **Clear Selected Tag(s)** to deselect all tags and start over.

Note:

- The number of records associated with a tag can sometimes be greater than the number of records displayed when you click that tag in the Tags page. This situation occurs if you tagged a record and then lost permission to view it because of a change in sharing, or if a record that you don't have access to has one or more public tags.
- Search results and the Tags page don't display custom objects that don't have an associated tab, even if tags are enabled for the custom object.

You can customize columns and filter the search results. See [Search Results](#).

Searching Tags

Enter terms in the Search Tags text box and click **Search**. Only tags that meet your search criteria are listed in the tag browsing area. You can then click any tag to view records associated with that tag.

Search strings must include at least two characters and can include [wildcards](#) and [operators](#).

The most recent search result is saved in the tag browsing area next to the alphabet at the top of the page. Click the search string to return to your results.

Renaming and Deleting Tags

- To rename a tag, hover over the tag and select **Rename** from the drop-down list that appears around the tag. Enter a new name for the tag in the text box that appears and click **Save**.

- To delete a tag, hover over the tag and select **Delete** from the drop-down list that appears around the tag. The tag is removed from every record in your organization and is placed in the Recycle Bin.

If you restore a tag from the Recycle Bin, it is automatically reassociated with the records from which it was removed. For more information, see [Using the Recycle Bin](#) on page 126.

You can rename or delete any personal tag, but you must have the “Tag Manager” permission to rename or delete a public tag.

Reviewing Personal Tag Statistics

Click **Personal Tag Usage** on the right side. This page displays your current number of unique personal tags and personal tag applications. You can have a maximum of:

- 500 unique personal tags
- 5,000 instances of personal tags applied to records

If you are approaching your personal tag limits, consider merging similar tags into a single tag by renaming. For example, if you have tags for Bicycling, Cycling, and Biking, you can rename Cycling and Biking to Bicycling to reduce your number of unique personal tags.

To reduce the number of instances of tags applied to records, delete personal tags that you no longer use.

Viewing Recently Used Tags

The **Tags** link and Recent Tags drop-down list, available in the sidebar, allow you to browse tags and access your most recently used tags, respectively.

- Click **Tags** to browse, search, and manage your entire tag collection.
- Select a tag in the Recent Tags drop-down list to view all records that have been marked with that tag. The tags that appear in this list are those you have most recently used to tag records.


Search FAQ

Why does the same search by different users return different results?

The reason two users may not have the same results for the same [search](#) is because each search is configured for the specific user. For example, if a user has recently viewed a record, that past viewing increases the relevancy of that record and moves it higher in the list of search results. Records also become more relevant if they are owned by the user performing the search, or if they are used frequently by other members of the organization.

Collaborate Within Salesforce

Editing Chatter Contact Information

Your contact information is visible to all users in your Chatter organization. You can change this information at any time by viewing your profile on the Profile tab or by clicking *Your Name* > **My Profile** at the top of any page. Click  in the Contact or About Me sections to edit your contact information.

If your organization has enabled Communities, you can control the visibility of your contact information within communities on a field-by-field basis. In the global header, click *Your Name* > **Edit Contact Info** to edit your contact information and visibility settings.

You can change the following fields (in alphabetical order):

Field	Description
City	City portion of user's address. Up to 40 characters are allowed in this field.
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.
Email	Email address of user. Must be a valid email address in the form: jsmith@acme.com. Up to 80 characters are allowed in this field.
Fax	Fax number for user.
First Name	First name of user, as displayed on the user edit page. Up to 40 characters are allowed in this field.
Last Name	Last name of user, as displayed on the user edit page. Up to 80 characters are allowed in this field.
Manager	Indicates the user's manager. This field can only be set by an administrator.
Mobile Phone	Cellular or mobile phone number. Up to 40 characters are allowed in this field.
Nickname	The user's nickname. All users have nicknames assigned by default, but they can update it.
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.
Street Address	Street address for user. Up to 255 characters are allowed in this field.
Title	Job title of user. Up to 80 characters are allowed in this field.
Work Phone	The user's work phone number. Up to 80 characters are allowed in this field.

EDITIONS

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Contact Manager
- Developer

Field	Description
Zip/Postal Code	Zip code or postal code portion of user's address. Up to 20 characters are allowed in this field.

SEE ALSO:

[Uploading Chatter Group and Profile Photos](#)

Uploading Chatter Group and Profile Photos

Upload a photo to your profile so people can see who you are, or upload a photo for Chatter groups that you own or manage.

1. View your profile or a group:
 - View your profile by clicking *Your Name* > **My Profile** at the top of any page or by clicking the Profile tab.
 - View a group by clicking a group name in a feed, on the Groups tab, or in the Groups list on someone's profile.
2. Hover over the stock photo and click **Add Photo**, or if you previously added a photo, click **Update**.
3. Click **Browse....**
4. Select a file to upload and click **Open**.



Note: Photos can be .jpg, .gif, or .png format up to 8 MB.

5. Drag the dotted lines in the photo to create a thumbnail image that displays next to your name or the group's name around the application.
6. If the photo is for your profile and you're a member of any communities, you can select *Show in communities with publicly accessible pages*. This makes the photo visible to guest users viewing publicly accessible sites or pages that don't require login.
7. Click **Save**.

To delete a photo, hover over the photo and click **Delete**, then click **OK**.

EDITIONS

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Contact Manager
- Developer

Following People

Follow people to see updates in your Chatter feed, including posts, comments, and likes.



Note: When your administrator turns on Chatter, you automatically follow some users and records in your organization.

Click **+ Follow** to follow a person wherever you see the person's name in Chatter, for example on the:

- Person's profile page
- People list view
- Person's hover
- Recommendations list


EDITIONS

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Contact Manager
- Developer

- Followers and Following lists

Once you follow people, you see their posts, comments, and likes in your Chatter feed. You can follow a maximum combined total of 500 people, topics, and records.

To stop following a person, hover over the person's name and click  next to Following. When you stop following a person, you don't see future updates from that person in your Chatter feed.

SEE ALSO:

[Following Records](#)

Following Records

Follow records so you can see updates in your Chatter feed, including field changes, posts, tasks, and comments on records.

The field changes you see in your feed are determined by the fields your administrator configured for feed tracking. Updates to encrypted custom fields don't display in feeds.




Note: When your administrator turns on Chatter, you automatically follow some users and records in your organization.

Click  **Follow** on a

- Record detail page, in the record feed above the Followers list
- Salesforce Knowledge article, next to the record
- Person's Following list, next to the record

When you follow a record, you see updates to the record in your Chatter feed.

To stop following a record, click  on the record detail page or on the record's hover. After you stop following a record, you don't see future updates to the record in your Chatter feed.

Consider these tips when following records in Chatter:

- You don't automatically follow records you create. To automatically follow records you create, from your Chatter settings, click **My Feeds** and select **Automatically follow records I create**. However, you don't auto-follow events, tasks, or dashboards in Chatter after you create them.
- When you create person accounts, you can only auto-follow the account fields, not the contact fields.
- You can follow a maximum combined total of 500 people, topics, and records.

SEE ALSO:

[Following People](#)

EDITIONS

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Contact Manager
- Developer

USER PERMISSIONS

To view a record:

- "Read" on the record

Join or Leave Chatter Groups

To join a Chatter group:

- For public groups, click **Join** on a group detail page, in the **Groups** list on the Chatter tab, or on a group hover.
- For private groups, click **Ask to Join** on a group detail page, in the **Groups** list on the Chatter tab, or on a group hover. An email is sent to the group's owner and managers, who can accept or decline your request. Users with the "Modify All Data" permission can directly join private groups, and therefore see **Join** for private groups.
- For unlisted groups, membership is by invitation only.

You can join up to 100 groups. All Chatter groups count toward this limit, including unlisted and archived groups. For example, if you're a member of 90 groups, of which 10 are archived, you can only request to join 10 more groups.

To leave a public or private Chatter group, go to the **Groups** list on the Chatter tab or a group detail page and click . Clicking  also withdraws a request to join a private group.

EDITIONS

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Contact Manager
- Developer

Searching in Chatter


Watch a Demo:  [Using Smart Search](#)

To find feeds, people, groups, topics, and files across Chatter:

1. Enter your search terms in the header search box.
2. Click **Search**.
3. From the search results, click an item to open it or click **Edit**, if available.

Click **Search Feeds** at the top of the page to view Chatter feed search results that include your search terms. Click **Records** to return to Chatter people, groups, topics, and files search results.

You can also fine tune your feed searches in the following ways:

- Search the posts and comments in a specific group, profile, record, or other Chatter feeds by using the feed search () in that context.
- Search for hashtag topics by entering # followed by the topic (such as *#SalesReport*) in the header search box. Search results return feed items that contain your search terms. To search for hashtag topics with multiple words, use brackets after the hashtag and around the words. For example, to find all instances of *#Universal Paper*, type *#[universal paper]* in the search box.
- Search for mentions by entering @ followed by a person's name (such as *@Madison Rigsby*) in the header search box. In the search results, click **Search Feeds** to see where Madison Rigsby is mentioned in Chatter posts and comments.

EDITIONS

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Contact Manager
- Developer

Use Salesforce on Mobile Devices

Get Started With Salesforce1


Salesforce1 Mobile App Overview

The Salesforce1 mobile app is Salesforce on the go! This enterprise-class mobile app gives you real-time access to the same information that you see in the office, but organized for getting work done faster when you're between customer meetings, waiting for a flight...even when you're in line for coffee.

The intuitive interface is optimized for easy navigation and data interaction on a touchscreen, so you can review details, update data, and create new records with just a few taps. And Salesforce1 includes many of your organization's Salesforce customizations, which means your mobile experience is as tailored to your specific business needs as you need it to be.

You can get Salesforce1 in different ways:

- As a downloadable app from the App Store and Google Play™. Users can install it directly on Apple® and Android™ mobile devices.
- As a mobile browser app that runs in supported mobile browsers on Android, Apple, BlackBerry, and Windows 8.1 mobile devices. This option doesn't require anything to be installed.

 **Note:** This release of Salesforce1 doesn't have all of the functionality of the full Salesforce site. To see data or do actions that aren't supported in Salesforce1, use the full site instead.

SEE ALSO:

- [Salesforce1 Mobile App Help Docs](#)
- [Salesforce1 App Feature Summary: What's Available in Each Version](#)
- [Requirements for Using the Salesforce1 App](#)
- [Data That's Available in the Salesforce1 App](#)

Salesforce1 Mobile App Help Docs

These resources provide information about using the Salesforce1 app, setting up your organization to use the app, and developing for the app.

Getting Started with Salesforce1

Guides

Using the Salesforce1 App	PDF
---------------------------	---------------------

Help Topics

Salesforce1 Mobile App Overview	HTML
Salesforce1 App Feature Summary: What's Available in Each Version	HTML
Requirements for Using the Salesforce1 App	HTML

EDITIONS


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

EDITIONS

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

Data That's Available in the Salesforce1 App	HTML
Options for Accessing the Salesforce1 App	HTML
Salesforce1 Limits and Differences from the Full Salesforce Site	HTML

Help in the App

(This help is also available in the app—tap , scroll to the end of the navigation menu, and tap **Help**.)




For the Salesforce1 Downloadable App on Android Phones	HTML
For the Salesforce1 Downloadable App on iPhone	HTML
For the Salesforce1 Downloadable App on iPad	HTML
For the Salesforce1 Mobile Browser App on Mobile Phones	HTML
For the Salesforce1 Mobile Browser App on Tablets	HTML

Salesforce1 Videos

Take Your Tasks from Desktop to Mobile	Video
Accounts and Contacts on the Go	Video
Using Salesforce1: Accessing Chatter	Video
Using Salesforce1: Creating New Records	Video
Using Salesforce1: Modifying Records	Video

Setting Up and Customizing Salesforce1

Salesforce1 Walkthroughs

Customize Mobile Navigation	 Walk Through It
Create Global Publisher Actions	 Walk Through It
Customize Global Publisher Layout	 Walk Through It

Guides and Cheat Sheets

Salesforce1 Section in the Salesforce Winter '15 Release Notes	PDF	HTML
Salesforce1 App Getting Started Guide	PDF	
Salesforce1 App Admin Rollout Guide		HTML
Salesforce1 Admin Cheat Sheet	PDF	
Salesforce1 Mobile App Admin Guide	PDF	HTML

Help Topics

Set Up the Salesforce1 App with the Salesforce1 Wizard	HTML
The Definitive List: Options for Setting Up the Salesforce1 App	HTML

Custom Salesforce1 App Branding	HTML
Enable Visualforce Pages for Use in the Salesforce1 App	HTML
Configure Offline Access to Salesforce1	HTML

Developing for Salesforce1

Guides and Cheat Sheets

Salesforce1 Developer Cheat Sheet	PDF	
Salesforce1 App Developer Guide	PDF	HTML
Salesforce1 Platform API Services Guide	PDF	HTML
Salesforce1 for iOS Mobile URL Schemes	PDF	

Salesforce1 App Feature Summary: What's Available in Each Version

In most cases, the Salesforce1 downloadable and mobile browser apps include the same features. But there are some differences between the apps.

Feature	Downloadable Apps for Android and iOS	Mobile Browser App
Receive in-app notifications	✓	✓
Receive push notifications	✓	
Configure the push notifications that are sent	✓	
Search for Salesforce records, including Salesforce Files	✓	✓
See up to 200 list views per object	✓	✓
Sort list views	✓	✓
Filter list views		✓
Do actions like make phone calls, log calls, send emails, map locations, and view news or Websites <i>(Phone calls supported on Android phone and iPhone devices only)</i>	✓	✓
Use publisher actions created for your organization	✓	✓
Add new records and update existing records	✓	✓

Feature	Downloadable Apps for Android and iOS	Mobile Browser App
Prevent the creation of duplicate records	✓	✓
Work with data stored outside of Salesforce	✓ (iOS only)	✓
Locate, associate, and view Twitter profiles for Salesforce accounts, contacts, and leads	✓	✓
Submit records for approval	✓	✓
Use Today to prepare for and manage the day's events	✓	
Add meeting invitees as Salesforce contacts	✓	
Track, close, or reopen tasks	✓	✓
Create and view Salesforce events	✓	✓
View dashboards and dashboard component details	✓	✓
Drill down to reports and records	✓	✓
Sort data in reports	✓	✓
Apply field and scope filters to reports	✓	✓
Share dashboards in feeds		✓
Use Chatter feeds, people, and groups	✓	✓
Search in the main Chatter feed	✓	✓
View and follow feed entries organized by topic		✓
Attach photos or files to posts or comments, or use publisher actions to post photos or files	✓	✓
Share Chatter posts	✓	
See previews of files posted to posts and comments	✓	✓
Double-tap to add or remove bookmarks for Chatter posts	✓	
Ask questions and get answers in the feed		✓
Edit user profile details	✓ (Android only)	✓

Feature	Downloadable Apps for Android and iOS	Mobile Browser App
Change the user profile picture	✓	✓
Collaborate with more privacy in unlisted Chatter groups		✓
Use Salesforce Files (<i>Requires Chatter</i>)	✓	✓
Use the app when Chatter is turned off	✓	✓
Access publisher actions when Chatter is turned off	✓ (iOS only)	✓
Launch Salesforce1 from Salesforce email notifications and digest links	✓	✓
Keep working when offline by viewing cached records	✓	
Access communities	✓	✓
Switch between multiple Salesforce accounts without leaving the app	✓	
Configure connections to multiple instances from the login page	✓	
Control app access with a security PIN	✓	
View Visualforce pages	✓	✓
Access custom and third-party apps from the navigation menu or the action bar	✓	✓
Use app settings	✓	

SEE ALSO:

[Salesforce1 Mobile App Help Docs](#)

Requirements for Using the Salesforce1 App

Supported Devices for the Downloadable Apps

You can run the Salesforce1 downloadable apps on these mobile devices.

- Apple mobile devices with iOS 7 or later:
 - iPhone® 4 and later models
 - iPad® 2 and later models (including the iPad mini)
- Android phones with Android 4.2 or later

Supported Browsers and Devices for the Mobile Browser App

EDITIONS

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

You can access the Salesforce1 mobile browser app in these environments.

- Apple Safari® browser on iPad® 2 and later models (including the iPad mini) and iPhone® 4 and later models, with iOS 7 or later
- BlackBerry® Browser on BlackBerry Z10 devices with BlackBerry OS 10.2 or later and BlackBerry Z30 devices with BlackBerry OS 10.2.1.3175 or later. (Salesforce1 isn't supported on BlackBerry Q10 devices.)
- Good Access™ secure mobile browser on Android™ mobile devices with Android 4.2 or later and on Apple® mobile devices with iOS 7 or later.



Note: Good Access™ secure mobile browser doesn't support uploading files.

- Google Chrome browser on Android phones, and Google® Nexus 7™ and Nexus 10™ tablets, with Android 4.2 or later.
- Microsoft® Internet Explorer® 11 browser on Nokia™ Lumia™ 1020 and HTC™ 8X phones with Windows® 8.1. (Salesforce1 isn't supported on mobile phones with Windows 8.0 or on Windows tablets.)

For best results, Incognito Mode in Chrome, InPrivate Browsing in Internet Explorer, or Private Browsing in Safari or BlackBerry Browser should be turned off.

Salesforce Editions and Licenses

These Salesforce editions allow the use of Salesforce1. A special Salesforce1 or mobile license isn't required.

- Contact Manager Edition
- Developer Edition
- Enterprise Edition
- Group Edition
- Performance Edition
- Personal Edition
- Professional Edition
- Unlimited Edition

Database.com Edition isn't supported.

These user license types can access Salesforce1.

- Salesforce users
- Salesforce Platform and Force.com users
- Chatter Plus users, Chatter Free users, and Chatter customers
- Customer Community 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 Work.com users.



Note: You can access the same data and functionality that's available to you in the full site, as determined by your organization's Salesforce edition, your user license type, and your assigned user profile and permission sets.

Wireless Connection

A Wi-Fi® or cellular network connection is required to communicate with Salesforce. For the best performance, we recommend using Wi-Fi.

If you're using one of the Salesforce1 downloadable apps, you can view your most recently accessed records when your device is offline.

Accessibility

Salesforce1 is designed with accessibility in mind and delivers a fully-accessible mobile experience for all individuals, including users working with screen readers. Unlike the full Salesforce site, Salesforce1 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.

SEE ALSO:

[Data That's Available in the Salesforce1 App](#)

[Locale and Language Support for the Salesforce1 App](#)

Locale and Language Support for the Salesforce1 App

Salesforce1 works with almost all Salesforce-supported locales and the fully-supported and end user languages. (The Salesforce Help includes a complete list of supported locales and languages.) Languages that are read right to left, including Arabic and Hebrew, aren't supported in this release.



Note: The Salesforce1 downloadable apps use the language and locale settings from both your Salesforce user profile and the locale settings on your mobile device. If your device uses different locale settings than are specified for your user profile, you may see different languages displayed throughout the app. For example, the navigation menu might display in English while records display in French.

Salesforce1 includes multi-currency support, but advanced currency management isn't available.

SEE ALSO:

[Requirements for Using the Salesforce1 App](#)

Data That's Available in the Salesforce1 App

Salesforce1 uses your organization's Salesforce edition, your user license type, and your assigned user profile and permission sets to determine the data that's available to you. In most cases, you can see the same objects, record types, fields, and page layouts that you do when working in the full Salesforce site. Not all Salesforce data is supported in this release, however.

If Chatter is enabled, you can access feeds, people, groups, and Salesforce Files Sync.

If you're using the Salesforce1 downloadable app, you can use Today to prepare for meetings, stay in touch with customers, quickly join conference calls, and generally manage your day.

These standard objects are supported in Salesforce1. Unless noted otherwise, you can view, edit, or create records for these objects.

- Accounts and Person Accounts
- Articles (*view only; mobile browser app only*)
- Campaigns
- Cases
- Contacts
- Contracts
- D&B Company (*view only, for Data.com Premium Prospector and Data.com Premium Clean customers*)
- Dashboards (*view only*)
- Events (*view only*)

EDITIONS

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

EDITIONS

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

- Leads
- Live Chat Transcripts (*view only*)
- Opportunities
- Orders (*view or edit only*)
- Tasks
- Users
- Work.com Coaching, Goals, Rewards, and Skills (*Skills not available in the iOS downloadable app*)
- Custom objects that have a tab you can access
- External objects via Lightning Connect (*view only; not available in the Android downloadable app*)

With some exceptions, all of the standard and custom fields are available on these records. And you can work with most of the related lists for supported objects.

If you're new to Salesforce and don't yet have a history of recent items, you initially see these objects in the Recent section of the Salesforce1 navigation menu:

- Accounts
- Cases
- Contacts
- Files
- Groups (unless added directly to the navigation menu)
- Leads
- Opportunities
- People (unless added directly to the navigation menu)

As you work in the full Salesforce site, the Salesforce1-supported objects that you use the most will start to replace the default objects in the Recent section.



Tip: It can take up to 15 days for the objects that you work with regularly in the full site to appear in the Recent section. To make objects appear under Recent sooner, pin them from your search results in the full site.

If a **More** option is available at the bottom of the Recent section, tap it to see the full list of all objects available to you in Salesforce1.

When doing a global search in Salesforce1, you can find records for the objects that appear in the Recent section only. To search the other objects that are in the full object list when the Recent section is expanded, tap the object in the navigation menu, then use the search box on the object's record search page.

SEE ALSO:

[Requirements for Using the Salesforce1 App](#)

Options for Accessing the Salesforce1 App

The way you access Salesforce1 depends on the version that you want to use: one of the downloadable apps or the mobile browser app. Ask your Salesforce administrator which versions of Salesforce1 are available for your organization.

Accessing a Downloadable App

Salesforce1 downloadable apps are available for Android phones and iPad and iPhone devices. You can download and install the app from Google Play or the App Store.

EDITIONS

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

Once the app is installed, launch it from your home screen and log in to your Salesforce account. You may be prompted to create a security PIN. By default, you're connected to your production environment.

 **Note:** If you're not able to log in, ask your administrator if you can get access to the downloadable app.

Accessing the Mobile Browser App

The Salesforce1 mobile browser app runs in a mobile browser, and is available on Android phones and tablets, Apple iPad and iPhone devices, and BlackBerry Z10 and Z30 phones. Beta support is available for some Windows 8.1 phones. The mobile browser app is a great option if your organization prevents installing apps on your corporate-issued device.

If the mobile browser version of Salesforce1 is enabled for your organization, you're automatically redirected to it when you log in to Salesforce from one of the supported mobile browsers.

If Salesforce1 doesn't automatically start for you, make sure you didn't turn off the redirection to the mobile browser app and that you're using a supported browser.

SEE ALSO:

[Requirements for Using the Salesforce1 App](#)

[Turn the Salesforce1 Mobile Browser App Off or On](#)

Get Help in the Salesforce1 App

The Salesforce1 app includes a **Help** link that you can use to learn about using the mobile app.

The **Help** link is located at the bottom of the Salesforce1 navigation menu. Tap  to open the navigation menu.


And there are a lot of other resources that can help you get started with Salesforce1. Check out [Salesforce1 Mobile App Help Docs](#) on page 148.

EDITIONS

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


Turn the Salesforce1 Mobile Browser App Off or On

When the Salesforce1 mobile browser app is enabled for your organization, you automatically redirect to this experience when you log in to Salesforce from a supported mobile browser. If you prefer to use the full Salesforce site instead, you can turn off the mobile browser for yourself—either from your mobile device or from the full site. If you change your mind, you can quickly re-enable redirection to the mobile browser app anytime from the full site.

 **Note:** If you disable automatic redirection to the Salesforce1 mobile browser app, you can't access it from any supported browser, on any of your mobile devices. For example, if you turn off the mobile browser app from your tablet, you won't be able to use the mobile browser app on your mobile phone either.

These steps don't affect the Salesforce1 downloadable apps, which always display the Salesforce1 interface.

To turn off the mobile browser app from within the app:

1. Tap .
2. Tap **Full Site**.

You switch immediately to the full site. The full Salesforce site is now your default environment whenever you log in from a mobile browser. You can switch back to the Salesforce1 app using the **Go to Salesforce1** link in the full site footer, after which the mobile browser app becomes your new default environment.

EDITIONS

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

To turn off the mobile browser app from the full site:

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **My Settings** or **Setup**—whichever one appears.
2. From the left pane, select one of the following:
 - If you clicked **My Settings**, select **Personal > Advanced User Details**.
 - If you clicked **Setup**, select **My Personal Information > Personal Information**.
3. Deselect **Salesforce1 User**.
4. Click **Save**.

If you change your mind later, you can turn the Salesforce1 mobile browser app back on. From the full site, repeat the previous steps and select the **Salesforce1 User** checkbox.

SEE ALSO:

[Options for Accessing the Salesforce1 App](#)
[Requirements for Using the Salesforce1 App](#)

Get Started With Chatter Mobile for BlackBerry

Chatter Mobile for BlackBerry Overview

The Chatter Mobile for BlackBerry app lets you collaborate in Chatter from your mobile device as follows:

- Receive updates about the people and records you follow and your groups.
- View and create posts and comments.
- Post photos from your device.
- Find and follow people in your organization.
- Find and join groups in your organization.
- View your coworkers' profiles to see their contact information, bio, who they're following, and who's following them.
- Email, call, or text people directly from their Chatter profiles.

Chatter Mobile for BlackBerry is free and available for BlackBerry devices with OS 5 or later. Download the app from BlackBerry World. Customers that manage BlackBerry devices with a BlackBerry Enterprise Server can use Application Push to remotely deliver the Chatter Mobile for BlackBerry app to users. Navigate to downloads.salesforce.com and click **BESpush** under Chatter Files and Tools to download the Application Push package.

Chatter Mobile for BlackBerry is enabled for use in most organizations by default. If it is not enabled in your organization or you want to change the default settings, contact your administrator.

EDITIONS

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Contact Manager
- Developer
- Database.com

What are push notifications? How do I enable or disable them for Chatter Mobile for BlackBerry?

Push notifications are alerts that apps send to your mobile device's home screen when you're not using the app. These alerts can consist of text, icons, and sounds, depending on your device type. The Chatter Mobile for BlackBerry mobile app uses push notifications to keep

you aware of important Chatter activity without requiring you to return to the app. A setting controls whether or not you receive Chatter push notifications; however, you can't enable push notifications if they were disabled by your administrator.

To learn about enabling or disabling push notifications, visit the Chatter mobile app help site from your device.

Can Chatter customers from Customer Groups use Chatter Mobile for BlackBerry?

Chatter customers can download the Chatter Mobile for BlackBerry mobile app to use Chatter from their BlackBerry device. Chatter Mobile for BlackBerry applies the same restrictions to customer users as Chatter on the Web.

Chatter Customers are users outside of your company's email domains, who have access to private groups with customers. In Chatter Mobile for BlackBerry, the names and profiles of customer users can be viewed by people inside your company's domain.

Get Started With Salesforce Touch

Salesforce Touch Overview

In the Spring '14 release, Salesforce Touch has been upgraded to the Salesforce1 app. As a result, the Salesforce Touch mobile browser app and downloadable app are no longer available.

Requirements for Using Salesforce Touch

In the Spring '14 release, Salesforce Touch has been upgraded to the Salesforce1 app. As a result, the Salesforce Touch mobile browser app and downloadable app are no longer available.

Available Data in Salesforce Touch

In the Spring '14 release, Salesforce Touch has been upgraded to the Salesforce1 app. As a result, the Salesforce Touch mobile browser app and downloadable app are no longer available.

Accessing Salesforce Touch

In the Spring '14 release, Salesforce Touch has been upgraded to the Salesforce1 app. As a result, the Salesforce Touch mobile browser app and downloadable app are no longer available.

Using Salesforce Touch

In the Spring '14 release, Salesforce Touch has been upgraded to the Salesforce1 app. As a result, the Salesforce Touch mobile browser app and downloadable app are no longer available.


Turning the Salesforce Touch Mobile Browser App Off or On

In the Spring '14 release, Salesforce Touch has been upgraded to the Salesforce1 app. As a result, the Salesforce Touch mobile browser app and downloadable app are no longer available.

Get Started With Salesforce Classic

Salesforce Classic Overview

The Salesforce Classic app provides mobile access to your Salesforce data from Android™, BlackBerry® and iPhone® devices. If you have a license to use the full version of Salesforce Classic, you can view, create, edit, and delete records, keep track of your activities, view your dashboards, run simple reports, and log calls and emails. Any Salesforce user who doesn't have a mobile license can download a free, restricted version of Salesforce Classic. With the free version, you can view, create, edit, and delete only accounts, assets, contacts, leads, opportunities, events, tasks, cases, and solutions. You can also access your dashboards.

 **Note:** Supported features may vary depending on your mobile operating system and device model.

Salesforce Classic stores your Salesforce records in a local database on your mobile device, which means you can use the Salesforce Classic app even when a data connection is unavailable. Salesforce Classic periodically polls Salesforce for new and updated records, saving you from the hassle of manually synchronizing your data.

In the free version of Salesforce Classic, only records you recently accessed in Salesforce automatically synchronize to your device. However, you can search for and download records that are not automatically delivered to your device. Items you download from Salesforce become a permanent part of your mobile data set. In addition to recently accessed records, the default configuration synchronizes activities closed in the past five days and open activities due in the next 30 days.

Check the [list of supported mobile devices](#) to see if you can use the Salesforce Classic app on your smartphone.

SEE ALSO:

- [Salesforce Classic Implementation Guide](#)
- [Salesforce Classic User Guide for BlackBerry](#)
- [Salesforce Classic User Guide for iPhone](#)

Requirements for Using Salesforce Classic

The Salesforce Classic app can run on Android, BlackBerry, and iOS operating systems, and it's supported by virtually all wireless carriers—if the device can establish a data connection to the Internet, it can typically run the mobile app. [Verify that your device is supported](#) before installing the mobile app. Recently-released mobile devices may not be immediately supported because every device goes through the official certification and quality assurance process.

Notes About BlackBerry Smartphones

- Even if your device meets the minimum operating system requirement, you can improve its performance by upgrading to the latest supported version of the operating system offered by your mobile carrier.
- Mobile users running versions 4.0 - 4.3 of the BlackBerry operating system can still download and install the Salesforce Classic app; however, the mobile server will detect the older operating system and send version 11.6 of Salesforce Classic, which was the last release that supported BlackBerry operating system versions 4.0 - 4.3. Users on version 11.6 of Salesforce Classic can't use any of the new features included in the current release or future releases.

EDITIONS

Free version available in: **All** editions except **Database.com**

Full version available in: **Performance, Unlimited, and Developer** Editions, and for an additional cost in: **Professional and Enterprise** Editions

EDITIONS

Free version available in: **All** editions except **Database.com**

Full version available in: **Performance, Unlimited, and Developer** Editions, and for an additional cost in: **Professional and Enterprise** Editions

- Starting in Winter '09, Salesforce Classic no longer officially supports the BlackBerry 8700 series, although the mobile app may continue to run on those device models.
- BlackBerry touchscreen devices use the same Salesforce Classic app as other BlackBerry devices, so some aspects of Salesforce Classic aren't optimized for the touchscreen interface.

Notes About iOS Devices

Use of the Salesforce Classic app for Apple products is subject to certain limitations:

- Third parties (including, but not limited to, Apple Inc. and your network connectivity provider) may at any time restrict, interrupt or prevent use of Salesforce Classic for the iPhone and iPod touch devices, or delete the Salesforce Classic app from iPhone or iPod touch devices, or require Salesforce to do any of the foregoing, without entitling the customer to any refund, credit or other compensation from such third party or Salesforce.
- Service level agreements don't apply to the Salesforce Classic for iPhone product. Additional limitations are described in the Order Form Supplement for Salesforce Classic for iPhone, which users are required to accept upon download or installation of the Salesforce Classic for iPhone product.

SEE ALSO:

[Salesforce Mobile Products Overview](#)

[Salesforce Classic Overview](#)

Installing the Salesforce Classic App

You can install the Salesforce Classic app on any [supported](#) Android, BlackBerry, or iPhone device.

The easiest way to install Salesforce Classic is to visit <http://mobile.salesforce.com> from your mobile device and follow the on-screen instructions.

Or, you can use the installation steps for your type of device:

Android Installation

Salesforce Classic is available for download from Google Play. To access Google Play, your Android device must be connected to the network. You also need a Google account to download applications. If you don't already have a Google account, go to <https://accounts.google.com> and select **Sign up** to set one up.

To install Salesforce Classic from Google Play:

1. From the Apps screen of your Android device, select the Google Play Store.
2. Select the **Search** field, and type *salesforce*.
3. Select Salesforce Classic from the search results.
4. Select **Download**.
5. Tap **Accept and Download** if you agree to the terms.
6. Select **Open** to launch the application.
7. The first time you launch the Salesforce Classic app on your device, you must activate the app for your device by logging in and downloading data. Verify that your phone is connected to a network.
 - a. Select **I Accept**.

EDITIONS

Free version available in: **All** editions except **Database.com**

Full version available in: **Performance, Unlimited, and Developer** Editions, and for an additional cost in: **Professional and Enterprise** Editions

- b. On the activation screen, enter your Salesforce username and password.
- c. Select **Activate**.

Depending on your organization's setup, you might need to set up a passcode before accessing the app.

BlackBerry Installation

Salesforce Classic is available for download from BlackBerry World. You need a BlackBerry World account to download apps on your BlackBerry, but you can create an account from your device if you don't already have one. To install Salesforce Classic from BlackBerry World:

1. Select the BlackBerry World icon.

If you can't find the icon on your device, you might need to [download BlackBerry World](#). BlackBerry World can't run on all BlackBerry smartphones, so be sure to review Research In Motion's system requirements before trying to install BlackBerry World on your device.

2. Select the **Search** icon.
3. Enter *salesforce* in the *Search* field.
4. In the search results, select Salesforce Classic.
5. Click **Download**.
6. After the installation completes, select **OK**.
7. When prompted whether to permit the app to access the phone, select **Allow**.
8. When prompted whether to permit the app to access *tp.mobile.salesforce.com*, select **Yes**.
9. Close BlackBerry World.
10. Select the app icon, which resides on the home page of your device or in the Applications folder. On newer phones, the icon may be in the Downloads folder.
11. The first time you launch the Salesforce Classic app on your device, you must activate the app for your device by logging in and downloading data. Verify that your device is connected to a network.
 - a. Read the license agreement and select **I Accept**.
 - b. Enter your Salesforce username and password.

Because many passwords contain special characters that are difficult to enter on the device, the *Show Password* checkbox is selected by default. To protect your password, you can deselect the option.
 - c. Select **Activate**.

After your username and password are confirmed by Salesforce, the data downloads. The initial data download may last a few minutes. Future updates to the data occur automatically.

Depending on your organization's setup, you might need to set up a passcode before accessing the app.



Note: If you're unable to download the Salesforce Classic app from BlackBerry World, you can [install the app over-the-air directly from Salesforce](#) instead.

iPhone Installation

Salesforce Classic is available for download from Apple's App Store. To use the App Store, your iPhone or iPod touch must be connected to the network. You also need an iTunes™ Store account to download applications. If you don't already have an iTunes Store account, open iTunes on your computer and select **Store > Account** to set one up.

To install Salesforce Classic from [the App Store](#):

1. From the Home screen of your iPhone or iPod touch, select the App Store icon.
2. Tap **Search**.
3. Tap within the `Search` field to open the keyboard. Type `salesforce`.
4. Select Salesforce Classic in the list of search results to view information about the application.
5. Tap **Free**, and then tap **Install**.



Note: There's no charge to download the app from the App Store. Enterprise, Professional, Unlimited, Performance, and Developer Edition users with mobile licenses run the full version of Salesforce Classic. Any Salesforce user who doesn't have a mobile license can download a free, restricted version of Salesforce Classic.

6. Enter your iTunes Store account and password and tap **OK**.
7. The first time you launch Salesforce Classic, you must activate the app for your device by logging in and downloading data. Verify that your device is connected to a network.
 - a. Tap the Salesforce icon on the Home screen.
 - b. Tap **I Accept**.
 - c. On the activation screen, enter your Salesforce username and password.
 - d. Tap **Activate**.



Warning: If the application closes or the device locks during the activation process, the iPhone operating system pauses the download process but it will resume the next time you open the app.

Depending on your organization's setup, you might need to set up a passcode before accessing the app.

SEE ALSO:

[Salesforce Classic Implementation Guide](#)
[Salesforce Classic User Guide for BlackBerry](#)
[Salesforce Classic User Guide for iPhone](#)
[Salesforce Mobile Products Overview](#)
[Salesforce Classic Overview](#)

Downloading Salesforce Classic Over-the-Air from Salesforce

The BlackBerry World is the preferred place for downloading the Salesforce Classic app because users are automatically notified as upgrades become available. However, some BlackBerry administrators restrict users from downloading and using the BlackBerry World on their devices. BlackBerry users can install Salesforce Classic over-the-air directly from Salesforce if they are unable to access BlackBerry World.

To download Salesforce Classic over-the-air:

1. Point your mobile browser to `mobile.salesforce.com/bb`.
2. Highlight the **Download the application** link and select **Get Link** from the menu.
3. Select **Download**. If prompted to replace an older version of the client application, select **Yes**.

EDITIONS

Free version available in: **All** editions except **Database.com**

Full version available in: **Performance, Unlimited, and Developer** Editions, and for an additional cost in: **Professional and Enterprise** Editions



Note: The minimum BlackBerry operating system requirement for the mobile application is 4.3. If you're running versions 4.0–4.3 of the operating system, you can still download and install the mobile application; however, the mobile server will detect the older operating system and send version 11.6 of the mobile application, which was the last release that supported operating system versions 4.0–4.3. You can't use any of the new features included in the current release or future releases until you upgrade to the most recent BlackBerry operating system for your phone.

4. Select **Reboot** to restart your device.
5. When prompted to allow an HTTP connection, select the `tp.mobile.salesforce.com` checkbox. Scroll down and select **Allow this connection**.
6. Select the Salesforce Classic icon, which resides on the home page of your device or in the Applications folder. On newer phones, the icon may be in the Downloads folder.
7. Read the license agreement and select **I Accept**.
8. Enter your Salesforce username and password.

Because many passwords contain special characters that are difficult to enter on the device, the `Show Password` checkbox is selected by default. To protect your password, you can deselect the option.

9. Select **Activate**.

After your username and password are confirmed by Salesforce, the data downloads. The initial data download may last a few minutes. Future updates to the data automatically occur behind the scenes.

SEE ALSO:

[Salesforce Mobile Products Overview](#)

[Salesforce Classic Overview](#)

Mobile FAQ

Using Salesforce Classic FAQ

- [Do I need a license to use Salesforce Classic?](#)
- [Is my phone compatible with the Salesforce Classic app?](#)
- [What Salesforce data is stored on my device when I use the Salesforce Classic app?](#)
- [How do I use the Salesforce Classic app to access records that aren't on my mobile device?](#)
- [How frequently does the Salesforce Classic app update my data?](#)
- [Can I see records in the Salesforce Classic app that I can't access in Salesforce?](#)
- [When I receive a call on my mobile device, will the Salesforce Classic app open the associated contact record?](#)

Do I need a license to use Salesforce Classic?

You need a mobile license to use the full version of Salesforce Classic. Any Salesforce user who doesn't have a mobile license can download a free, restricted version of Salesforce Classic.

With the free version, you can view, create, edit, and delete only accounts, assets, contacts, leads, opportunities, events, tasks, cases, and solutions. You can also access your dashboards. The free version synchronizes records you recently accessed on the Salesforce website, and you can search for records that were not automatically downloaded to your device. Starting with Summer '13, the free version of

Salesforce Classic is disabled by default in all new organizations. You can enable it to give users access to Salesforce on their mobile devices.

If you've been assigned a mobile license but your administrator hasn't set up your mobile configuration yet, you can activate Salesforce Classic with the default mobile configuration. The default configuration automatically synchronizes the records you most recently accessed in Salesforce to your mobile device. You can also search for and download any records from Salesforce that aren't available locally on your device.

To find out if your user account has been assigned a mobile license to access the full version of Salesforce Classic, review your personal setup.

- If the **Mobile User** checkbox is selected, you can install and run Salesforce Classic. If the **Mobile User** checkbox is selected but the **Mobile Configuration** field is blank, you can activate Salesforce Classic using the default mobile configuration.
- If the **Mobile User** checkbox isn't selected and you're an Enterprise, Professional, Unlimited, Performance, or Developer Edition customer, you may have access to the free version of Salesforce Classic. Ask your administrator whether you have access to the free version of Salesforce Classic.



Note: The **Mobile User** checkbox is disabled by default for new Unlimited and Performance Edition users.

Is my phone compatible with the Salesforce Classic app?

The Salesforce Classic app can run on iPhones, iPod touch devices, and most BlackBerry and Android devices. To find out if your phone can run the app, see the [list of supported mobile devices](#).



Note: Supported features may vary depending on your mobile operating system and device model.


What Salesforce data is stored on my device when I use the Salesforce Classic app?

Using the Salesforce Classic app to access Salesforce on a mobile device is much different from using the full Salesforce application on your computer. Mobile devices have a minimal amount of memory and a small screen, and don't always maintain a constant network connection. To work with these limitations, a subset of your Salesforce data is stored in a local database on your phone.

The following types of tabs are available in the Salesforce Classic app:

- All custom object tabs and these standard object tabs:
 - Accounts
 - Assets
 - Attachments
 - Cases
 - Contacts
 - Content
 - Events
 - Groups
 - Group Members
 - Leads
 - Notes
 - Opportunities
 - Price Books
 - Products

- Solutions
 - Tasks
 - Users
 - Dashboards
 - Reports
- Web and Visualforce tabs

 **Note:** The tabs and objects that you see in the app are determined by your mobile configuration and might not include all the tabs and objects listed here. Additionally, the iPhone and Android apps don't support reports.

When you open the tab for an object, you probably won't see all of your Salesforce records. For each mobilized object, your administrator can create filter criteria to limit the number of records on your device. For example, in a large organization, sending all open and closed opportunities to your mobile device could consume too much memory or potentially crash it. Instead of sending all opportunities, your administrator might send a subset of them, such as open opportunities that you own that are scheduled to close this month.

Can I see records in the Salesforce Classic app that I can't access in Salesforce?

No. User permissions, sharing rules, and field-level security are inherited from Salesforce—the mobile application enforces all the restrictions set up in Salesforce.

How frequently does the Salesforce Classic app update my data?

The Salesforce Classic app checks for data changes every 20 minutes. During this incremental update, the server retrieves any newly created Salesforce records that you own, and then sends that data to your device. It also sends modifications to any records already stored on the device.

 **Note:** Note the following about data synchronization:

- The Android and BlackBerry client apps adjust their data polling time based on app usage. If the app isn't in use, the polling time interval increases in an exponential fashion, until it reaches eight hours. From that point forward, the device polls for data every eight hours. This prevents the Salesforce Classic app from draining the device battery when the app is rarely used.
- Because only one app can run on the iPhone at a time, the Salesforce Classic app can't request a data update unless the app is open. When you launch the app on the iPhone, it performs an incremental update unless a data synchronization has occurred in the past 20 minutes.

How do I use the Salesforce Classic app to access records that aren't on my mobile device?

The Salesforce data available on your device is defined by your mobile configuration. You can easily search for records that aren't automatically downloaded to your device. A search box is available on each object tab in the Salesforce Classic app, as well as on the app's home page.

When I receive a call on my mobile device, will the Salesforce Classic app open the associated contact record?

The Salesforce Classic app can't open a Salesforce contact when you receive incoming calls. However, if you place a call from Salesforce Classic, you're automatically prompted to log the call.

Get Additional Help

Tip Sheets and Implementation Guides

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

- [For All Users](#)
- [For Sales Professionals](#)
- [For Support Professionals](#)
- [For Marketing Professionals](#)
- [For Administrators](#)

SEE ALSO:

[Video Demos](#)

For All Users

These documents are for all Salesforce users.

- [How to be Successful with Salesforce](#)
- [Find the Information You Need](#)
- [Tips & Hints for Custom Views](#)
- [Browser Support and Configuration](#)
- [Salesforce System Requirements](#)
- [Tips for Using Content Deliveries](#)
- [Using Salesforce Group Edition](#)
- [Chatter Plus Frequently Asked Questions](#)

Reports and Dashboards

- [Getting Started with Salesforce1 Reporting](#)
- [Analytics Workbook](#)
- [Using the Reports Tab](#)
- [Using the Drag-and-Drop Report Builder](#)
- [Do your big reports take a long time to return data?](#)
- [Report Formula Summary Functions](#)
- [FAQ: Scheduling Reports](#)
- [Tips for Creating Dashboards](#)
- [One Dashboard For Many Viewers](#)
- [Taking Advantage of Dynamic Dashboards](#)

- [Sample CRM Dashboards](#)
- [What are Joined Reports?](#)
- [Using Cross Filters in Reports](#)
- [Using Bucket Fields](#)

For Sales Professionals

The following documents apply to sales professionals:

Territory Management 2.0

- [Implementing Territory Management 2.0](#)

Account Management

- [Getting Microsoft® Outlook® and Salesforce in Sync](#)
- [Tips & Hints for Sales Reps](#)
- [Importing Your Personal Accounts and Contacts](#)
- [Implementing Data.com Clean](#)
- [Tips for Using Content Deliveries](#)
- [Tips for Using HTML Email Templates](#)
- [Working with Connect for Outlook](#)
- [Using Force.com Connect for Office](#)
- [Salesforce Bulk Mail Merge Process](#)
- [Guidelines for Uploading Mail Merge Templates](#)
- [Sample Mail Merge Templates](#) (Zip file)
- [Getting Started with Force.com Connect Offline](#)
- [Tips & Hints for Working with Territories](#)
- [Tips & Hints for Person Accounts](#)

Pipeline Management

- [Forecasts Administrator's Workbook](#)—For administrators of Collaborative Forecasts.
- [Using Customizable Forecasts](#)—For users of Customizable Forecasting. For more information, search for “Customizable Forecasting Overview” in the Salesforce online help.
- [Forecasts: Assessing Your Position](#)—For users of Forecasts (Classic). For more information, search for “Do I have Customizable Forecasting?” in the Salesforce online help.
- [Tips & Hints for Products & Schedules](#)

Pardot and Salesforce Integration

- [Syncing Between Pardot and Salesforce](#)

Mobile

- [Using the Salesforce1 App](#)
- [Salesforce Classic Implementation Guide](#)
- [Salesforce Classic User Guide for iPhone](#)
- [Tips for Salesforce Classic for BlackBerry](#)
- [Salesforce Classic User Guide for BlackBerry](#)
- [Getting Started with Chatter Mobile](#)

For Support Professionals

These documents are for support professionals.

- [Tips & Hints for Support Reps](#)
- [Getting Started with your SoftPhone](#)
- [Using the Console Tab](#)
- [Tips & Hints for Solutions](#)
- [Getting to Know Case Feed](#)
- [Live Agent for Support Agents](#)
- [Live Agent for Support Supervisors](#)

For Marketing Professionals

The following documents apply to marketing professionals:

- [Getting the Most from Your Leads](#)
- [Five Steps for Managing Campaigns](#)
- [Tips for Using Content Deliveries](#)
- [Using Data.com Clean in Salesforce](#)

For Administrators

The following documents apply to administrators:

Mobile Administration

- [Salesforce1 Mobile App Admin Guide](#)

Sales Administration

- [Sales Cloud Implementation Guide for Growing Businesses](#)
- [Setting Up Shared Calendaring](#)
- [Deploying Territory Management](#)
- [Implementing Person Accounts](#)
- [Forecasts Administrator's Workbook—For Collaborative Forecasts](#)
- [Setting Up Customizable Forecasting](#)

- [Customizable Forecasting FAQ](#)
- [Salesforce Classic Implementation Guide](#)
- [Salesforce CRM Content Implementation Guide](#)
- [Administering Salesforce Desktop Clients](#)
- [Administering Connect for Outlook](#)
- [Getting Started with Relationship Groups](#)
- [Getting Started with Assets](#)
- [Getting Started with Contracts](#)
- [Work.com Implementation Guide](#)

Support Administration

- [Service Communities Guide](#)
- [Setting Up Customer Support](#)
- [Case Management Implementation Guide](#)
- [Solutions Implementation Guide](#)
- [Getting Started with Setting Up Call Centers](#)
- [Getting the Most from Your Self-Service and Customer Portals](#)
- [Salesforce Customer Portal Implementation Guide](#)
- [Chatter Answers Implementation Guide](#)
- [Self-Service Portal Implementation Guide](#)
- [Salesforce CRM Content Implementation Guide](#)
- [Salesforce Knowledge Implementation Guide](#)
- [Setting up Salesforce Knowledge](#)
- [Importing Articles into Salesforce Knowledge](#)
- [Answers Implementation Guide](#)
- [Entitlement Management Implementation Guide](#)
- [Live Agent for Administrators](#)
- [Setting Up Case Feed](#)
- [Getting Started with the Ideas Base Theme](#)
- [Getting Started with Social Customer Service](#)

Marketing Administration

- [Tips for Lead Administrators](#)
- [Salesforce Lead Management Implementation Guide](#)
- [Campaign Management Implementation Guide](#)
- [Salesforce Ideas Implementation Guide](#)

Collaboration Administration

- [Getting Started With Salesforce Communities](#)

- [Communities Managers Guide](#)
- [Migrating From Portals to Communities](#)
- [Publisher Actions Implementation Guide](#)
- [Customizing Chatter Profile Pages](#)
- [Salesforce Files Sync Implementation Guide](#)

Salesforce Implementations

- [Salesforce Enterprise Edition Upgrade Guide](#)
- [Setting Up SalesforceGroup Edition](#)
- [Salesforce Limits Quick Reference Guide](#)

Customization

- [Tips & Hints for Record Types](#)
- [Building Salesforce Custom Links](#)
- [Tips & Hints for Page Layouts and Field-Level Security](#)
- [Building Custom Objects, Tabs, and Related Lists](#)
- [Implementing State and Country Picklists \(Beta\)](#)
- [Formulas Quick Reference Guide](#)
- [Useful Formula Fields](#)
- [Tips for Reducing Formula Size](#)
- [Using Date and Date/Time in Formulas](#)
- [Useful Validation Rules](#)
- [Using Multiple Business Processes](#)
- [Workflow: Automating The Process](#)
- [Useful Workflow Rules](#)
- [Getting Started with Approval Processes](#)
- [Useful Approval Processes](#)
- [Email Approval Response](#)
- [Visual Workflow Implementation Guide](#)
- [Creating Lookup Filters on Relationship Fields \(Beta\)](#)

Security and Data Management

- [Security Implementation Guide](#)
- [Single Sign-On Implementation Guide](#)
- [Understanding User Sharing](#)
- [Understanding Defer Sharing Calculations](#)
- [Managing Data Quality](#)
- [Implementing Data.com Clean for Accounts, Contacts, and Leads](#)
- [Importing Your Organization's Accounts and Contacts](#)

- [Using Mass Delete to Undo Imports](#)
- [Getting Started with Divisions](#)
- [Data Loader Guide](#)
- [Salesforce Field Reference Guide](#)
- [Resolving Data Conflicts and Errors in Force.com Flex Apps](#)
- [Salesforce Identity Implementation Guide](#)
- [Identity Connect Implementation Guide](#)

Extending Salesforce

- [Developing Packages for Distribution](#)
- [Force.com Sites Implementation Guide](#)
- [OEM User License Comparison](#)

Globalization


- [Setting Up the Translation Workbench](#)
- [International Organizations: Using Multiple Currencies](#)







Video Demos

Salesforce creates video demos to help you be successful with Salesforce.

- [Chatter](#)
- [Sales](#)
- [Service](#)
- [Analytics](#)
- [Data.com](#)
- [Force.com](#)
- [Site.com](#)
- [Security](#)
- [Data Import](#)











Chatter







Video Title	For End Users	For Administrators
 Tips for Rolling Out Chatter Not sure how to rollout Chatter in your organization or drive adoption among users? Watch this short video to see your options and come up with a plan unique to your business needs.		✓

Video Title	For End Users	For Administrators
 Collaborate in Chatter Groups Chatter groups offer collaboration spaces with different degrees of privacy that allow group members to work as a team, share resources, and even invite customers. Watch this video to plan your organization's group strategy and make the most of out of the group feed, group search, files, announcements, and other powerful features.	✓	✓
 Discover and Organize with Chatter Topics Use Chatter topics to see what people are talking about, organize the conversations you want to be a part of, and discover people and groups that are interested and knowledgeable in the same areas.	✓	
 Using Smart Search Watch this short video to see how you can find what you need quickly and easily, in Salesforce Chatter, using smart search.	✓	
 Getting the Most Out of Chatter Feeds Use Salesforce Chatter to create posts, polls, and bookmarks to collaborate effectively with your coworkers in Chatter. You learn how to post to your followers or a group, bookmark a post so you can find it later, and how to create a poll on the fly so you can gather results fast!	✓	
 Enhancing Your Chatter Posts Learn how to use @mentions and hashtag topics to enhance your Chatter posts. Mentions alert others to your posts, and topics help you organize and search Chatter so you can find relevant content and conversations.	✓	
 Using Chatter in Apex to Display Two Chatter Feeds in a Visualforce Page Learn how easy it is to use Chatter in Apex to get Chatter feeds for your Salesforce Communities and display them side by side in Salesforce. Use the Developer Console to create an Apex custom controller, a Visualforce custom component, and a Visualforce page.		


Sales





Video Title	For End Users	For Administrators
 Take Your Tasks from Desktop to Mobile	✓	

Video Title	For End Users	For Administrators
Keep on top of your tasks with the Salesforce1 app for phones and tablets.		
 Accounts and Contacts on the Go Combine desktop and mobile data with the Salesforce1 app for phones and tablets.	✓	
 Splitting Credit across Your Sales Team Learn how to add revenue and overlay splits to opportunities.	✓	
 Connecting Social Networks to Accounts, Contacts, and Leads Gain insights to your current and prospective customers by adding social data to your Salesforce accounts, contacts, and leads.	✓	
 Creating a Criteria-Based Sharing Rule Learn how to create a sharing rule based on a field value in a record.		✓
 Editing Role-Based Category Group Visibility Allows certain roles to view information, such as questions in an answers community or articles in a knowledge base, according to specific data categories.		✓
 Forecast Accurately With Collaborative Forecasts See how to maneuver around Collaborative Forecasts so that you can reach your sales goals.	✓	
 How to Manage Leads and Opportunities Learn how Salesforce can help you track your leads and opportunities through the sales funnel, and automatically incorporates updates into management forecasts.	✓	
 Sending Mass Email This demo shows you how to leverage the mass email tool in Salesforce, so you can quickly contact your customers and keep track of these emails within the Salesforce app.	✓	
 Setting Up Data Categories Data categories let you classify your data based on your business needs.		✓
 Using Quote Templates (1:42 minutes)	✓	





Video Title	For End Users	For Administrators
Quote templates let you design, preview, and activate templates for the quote PDFs you send to your customers.		
 Entitlements Management Setup Learn how to set up the Entitlement Management feature. Entitlement Management helps your support reps determine which customers are eligible for certain kinds of support. This video covers Entitlement Management Milestones, Entitlement Processes, Entitlements, and Service Contracts.		✓
 How to Merge Contacts in Salesforce Learn how you can merge duplicate contact records in Salesforce.	✓	
Salesforce for Outlook Videos		
 Getting Ready to Integrate Microsoft® Outlook® and Salesforce If you want to sync contacts, events, and tasks between Microsoft® Outlook® and Salesforce, as well as add emails and events to Salesforce records, you'll use Salesforce for Outlook. Learn how to download and install it.	✓	
 Learning about Sync Directions Learn how to view your sync direction settings in Salesforce for Outlook, and find out whether you have permissions to change them.	✓	
 Using Salesforce for Outlook Learn how to easily sync contacts, events, and tasks with Salesforce and add emails to related Salesforce records.	✓	
 Using the Salesforce Side Panel to Work with Records in Microsoft® Outlook® Learn how you can work with Salesforce records directly in Outlook. In addition, learn about adding Outlook emails and events to the Salesforce records of your choice.	✓	





Service

Video Title	For End Users	For Administrators
 Encourage Collaboration with Idea Themes	✓	





Video Title	For End Users	For Administrators
Idea Themes lets you invite community members to post ideas about specific topics so that members can solve problems or propose innovations for your company.		
 Introducing the Salesforce Console The Salesforce console uses tabs to help you find and update records quickly.	✓	
 Salesforce Console How to set up a Service Cloud console for support agents.		✓
 Supporting Multiple Languages with Salesforce Knowledge Learn how to translate knowledge base articles with Salesforce Knowledge.		✓
 Updating Entitlement Processes with Entitlement Versioning Learn how to create a new version of an entitlement process, change the milestone in the new version of the entitlement process, and apply the new version of the entitlement process to an entitlement and its associated cases.		✓



Analytics

Video Title	For End Users	For Administrators
 Building Matrix Reports This video shows you how easy it is to create matrix reports using report builder.	✓	
 Using Cross Filters in Reports Use a cross filter to find just the records you need in a report. Cross filters let you fine-tune your results by including or excluding records from related objects, without having to write formulas or code.	✓	
 Getting Started with Buckets Learn how to group your data without having to create custom fields! Buckets help you sort, organize, and understand large amounts of data in Salesforce quickly and easily. Create your own categories on the fly, without formulas or custom fields.	✓	
 Getting Started with Report Builder	✓	






Video Title	For End Users	For Administrators
<p>This video introduces you to the report builder, a powerful drag-and-drop interface for building reports.</p>		
<p> Introducing Joined Reports in Salesforce</p> <p>With joined reports, you create different types of information in a single report. Our example creates open and closed opportunities and active support cases.</p>	✓	
<p> An Overview of Dashboards</p> <p>This demo covers some key dashboard features, such as changing the visual display, changing drill down options, and creating dynamic dashboards, so sales managers and team members can use one dashboard to track their team's or individual performance.</p>	✓	
<p> Tips for Scheduling Reports</p> <p>Learn how to schedule reports with an active running user, send them during off-peak hours without impacting performance, and email them to the right users.</p>		✓
<p> Making Your Reports Run Faster</p> <p>Get tips to make your reports run faster. Learn how to remove unnecessary columns, set the scope for relevant data, and use efficient filters with operators.</p>	✓	










Data.com

Video Title	For End Users	For Administrators
<p> Finding Data.com Accounts and Contacts and Adding Them to Salesforce</p> <p>Learn how to find Data.com accounts and contacts and add them to Salesforce. Check out the Account Card.</p>	✓	
<p> How Do I Set Up Data.com Clean?</p> <p>This video shows Salesforce administrators how to set up and maintain Data.com Clean. It covers the clean features available with the Data.com Corporate and Premium products, plus the additional features available with the Data.com Clean product.</p>		✓
<p> Select a Data.com Match for your Salesforce Account Record</p>		
<p> Using the Data.com Industry Selector</p>	✓	

Video Title	For End Users	For Administrators
Learn how to use the Data.com Industry Selector to navigate easily through extensive industry lists and add industry criteria to your search for accounts or contacts.		
 Managing Duplicate Records in Salesforce with Duplicate Rules Learn how to create a duplicate rule so you can control whether and when users are allowed to save records that are identified as duplicates.		
 Identifying Duplicate Records with Matching Rules Learn how to create a matching rule so you can control how duplicate records are identified.		


Force.com

Video Title	For End Users	For Administrators
 How to Change the Look and Feel of Salesforce for Your Company Quick demo of how to customize the way Salesforce looks for your organization.		✓
 Creating a Workflow Rule Quick demo of how to create a workflow rule in Salesforce.		✓
 Visual Workflow Cloud Flow Designer Overview This demo gives you an overview of Visual Workflow's Cloud Flow Designer, the tool for creating flows. With the Salesforce Cloud Flow Designer, you can configure screens and define branching logic for your flows, completely within Salesforce, without writing any code.		✓
 Building a Simple Flow Follow along as we create a simple two-screen pledge flow using user input fields and choices. We'll collect users' information, ask them to choose a pledge level, then thank them for their donation.		✓
 Troubleshooting Workflow Learn how to investigate and troubleshoot the most common issues that occasionally arise with Workflow.		✓







Video Title	For End Users	For Administrators
 Importing Accounts Using the Data Loader Command Line Interface Learn how to use the Data Loader CLI to import data into Salesforce.		✓
 How to Create a Custom Field in Salesforce Want to customize Salesforce so it captures all your business data? This short video walks you through how to create a custom picklist field, from choosing the correct field type to applying field level security.		✓
 Accessing the Email Field from a Lookup Object Have you ever wanted to use a field from a lookup object on its child object? For example, accessing the email field on a lookup object in a workflow that is based on the child object? This video walks you through just such a scenario.		✓
 Getting Started With Formulas This video gives a brief introduction to Salesforce formulas, accessing the formulas editor in the app, and how to use the editor tools to create formulas.		✓
 How to Calculate the Number of Days a Case is Open This video walks you through constructing a formula that will calculate the number of days it took to close a case, or if the case is still open, how many days have passed since it was first opened.		✓
 How to Build an Image Formula This video explains how to create a quick and easy formula that adds graphics to the ratings field on a lead—five stars for hot, three stars for warm, and one star for cold—so that salespeople can see at a glance which leads are the most important.		✓
 Release Management: Overview Learn how to use Force.com point-and-click tools, a developer sandbox, and change sets to manage releases for your organization.		✓
 Release Management: Developing and Testing on Sandbox Learn about the four types of sandboxes that Salesforce provides, and discover how to create sandboxes to develop and test your applications.		✓
 Release Management: Deploying Changes Using Change Sets		✓








Video Title	For End Users	For Administrators
Learn how to use change sets to move configuration changes, such as applications, objects, and permission sets, between your organizations.		

Site.com


Video Title	For End Users	For Administrators
 Building a Website with Site.com Learn how to import assets to use in your site, create page templates, apply CSS styles, and add and duplicate site pages in Site.com Studio.	✓	






Security

Video Title	For End Users	For Administrators
 Who Sees What: Overview Learn how you can control who sees what data in your organization.		✓
 Who Sees What: Organization Access Learn how to restrict login through IP ranges and login hours.		✓
 Who Sees What: Object Access Learn how you can grant users access to objects by using profiles.		✓
 Who Sees What: Organization-Wide Defaults Learn how you can restrict access to records owned by other users.		✓
 Who Sees What: Record Access via the Role Hierarchy Learn how you can open up access to records using the role hierarchy.		✓
 Who Sees What: Record Access via Sharing Rules Learn how you can grant access to records using sharing rules.		✓

Video Title	For End Users	For Administrators
 Who Sees What: Field-level Security Learn how you can restrict access to specific fields on a profile by profile basis.		✓
 Who Sees Whom: User Sharing Learn how you can control visibility among users in your organization.		✓
 Who Sees What: Permission Sets Learn how to give users additional permissions and access settings without changing profiles.		✓
 Letting Your Salesforce Administrator Access Your Account Learn how you can grant your administrator access to your Salesforce account without distributing your password.	✓	
 Removing Users' Access to Salesforce Deactivating users in Salesforce removes access to their account data while preserving their historical activity and records. Once you understand why you deactivate users rather than deleting them, learn how to deactivate someone and see what happens to their data.		✓
 Activating Your Computer Learn how to activate your computer so you can log in to Salesforce outside the office.	✓	
 Enhancing Security with Two-Factor Authentication (6:56 minutes) See a demonstration of Two-Factor Authentication for Salesforce, and when to use it.		✓

Data Import

Video Title	For End Users	For Administrators
 Data Import Overview If you're importing data into Salesforce, the Data Import video series is a must-see. This overview video gives a quick glimpse of what each video covers, and lets you use the clickable list of titles to access the videos you're interested in.		✓

Video Title	For End Users	For Administrators
 Preparing Your Data for Import Learn how to clean up your import files and get Salesforce ready, as well as best practices for keeping data clean once it's been imported.		✓
 Cleaning and Preparing Your Data Using Excel Excel offers many features and functions to make quick work of getting your data files ready for import. We'll show you some practical ways to use these features with your import data.		✓
 Should I Use Data Loader Learn Data Loader in depth, so you can decide whether it's right for your needs. We compare it to the Import Wizards and also list some other tools you might consider.		✓
 Importing Your Data in the Right Order Learn, step by step, which objects should be imported, and when.		✓
 Best Practices for Importing Data Learn the top pain points experienced by our customers, so you can avoid them entirely! This video could save you hours of frustration. We detail how to delete a bad import, how to back up data before import, and more.		✓

SEE ALSO:

[Tip Sheets and Implementation Guides](#)

Troubleshooting

Troubleshooting Login Issues

Salesforce makes it easy to log on to the service and to change your password, but you may experience issues if you forget your username or password, or if you're locked out for too many attempts to log on with the wrong credentials. The password policies set up by your administrator determine how many failed logins are allowed, how long lockout periods last, and password requirements such as minimum length.

We recommend changing your password periodically to protect the privacy of your data. If your administrator specifies that user passwords expire on a periodic basis, you'll be prompted to change your password at the end of each period.


- Forgot your password? [Retrieve it.](#)

EDITIONS

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

- Locked out? Wait until the lockout period expires and try again, or contact your administrator.
- Password expired? We'll prompt you to change your password. You may also need to [reactivate your computer](#).
- What does **Log in to a custom domain** on the login page mean? If your Salesforce administrator created a custom domain for your organization, click **Log in to a custom domain** to provide the existing domain name and log in.

A custom domain is in the form `https://universalcontainers.my.salesforce.com`, where `universalcontainers` is a name selected by your administrator. Your administrator should provide the correct domain name to you.

 **Tip:** You might want to bookmark the Salesforce login page using the login link you received in your welcome email. If you do create a bookmark, be sure not to accidentally bookmark the Password Reset page instead.

SEE ALSO:

[Resetting Your Security Token](#)

[Retrieving Forgotten Passwords](#)

Resetting Your Security Token


A security token is an automatically generated key that you must add to the end of your password in order to log into Salesforce from an untrusted network. For example, if your password is `mypassword`, and your security token is `XXXXXXXXXX`, then you must enter `mypasswordXXXXXXXXXX` to log in. Security tokens are required whether you log in via the API or a desktop client such as Connect for Outlook, Connect Offline, Connect for Office, Connect for Lotus Notes, or the Data Loader.

You are offered a security token if you try to access Salesforce from an untrusted network. Once you have been issued a security token, you have the option to reset this security token at any time.

To reset your security token:

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
 - If you clicked **Setup**, select **My Personal Information > Reset My Security Token**.
 - If you clicked **My Settings**, select **Personal > Reset My Security Token**.
3. Click the **Reset Security Token** button. The new security token is sent via email to the email address on your Salesforce user record.

If you have never been offered a security token, for example, because your organization restricts the IP addresses from which you can log in, the **Reset My Security Token** node does not appear in your personal settings.

 **Tip:** We recommend that you obtain your security token using the Salesforce user interface from a trusted network prior to attempting to access Salesforce from a new IP address.

If you have the “Two-Factor Authentication for API Logins” permission and you add a time-based token, you must enter the changing token from your mobile authenticator app to access the service instead of the standard security token.

EDITIONS

Available in: **All Editions**

Connect for Outlook,
Connect Offline, Connect for
Office, Connect for Lotus
Notes are not available in
Database.com

Granting Login Access


Watch a Demo:  [Letting Your Salesforce Administrator Access Your Account](#)

To assist you, your administrator or a customer support representative may need to log in to the application using your login. You can grant access to them for a specified duration. For security reasons, the maximum period for granting access is limited to one year. During the time you have granted access, they can use your login and access your data to help you resolve any problems.

To grant login access:

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
 - If you clicked **Setup**, select **My Personal Information** > **Grant Login Access**.
 - If you clicked **My Settings**, select **Personal** > **Grant Account Login Access**.
3. Set the access expiration date by choosing a value from the picklist.
4. Click **Save**.

If an administrator, support representative, or publisher makes setup changes using your login, the setup audit trail lists those changes, including the username of the delegate user who made the changes.

 **Note:** You may be unable to grant access to certain support organizations due to restrictions set up by your administrator or based on the type of licensing used by a packaged application.

SEE ALSO:

[Understanding Your Administrator's Role](#)

Retrieving Forgotten Passwords

1. Go to <https://login.salesforce.com>.
2. Click **Forgot your password?**.
3. Enter your username and click **Continue**. You'll receive an email at the email address specified on your Salesforce Personal Information page.
4. Click the link provided in the email, answer your password question, and click **Continue**. A temporary password is automatically sent to your email address.
5. Click the link to log in using the temporary password.
6. When prompted, enter a new password.

You might be prompted to enter a token (also called a verification code) when you log into Salesforce to activate your computer. Computer activation allows Salesforce to verify your identity and prevent unauthorized access to the service whenever your password is changed or reset, or when you log in from a computer you have not previously used to access Salesforce.

SEE ALSO:

[Activating Your Computer](#)

[Troubleshooting Login Issues](#)

EDITIONS

Available in: **All** Editions

Granting administrator access available in: **Enterprise, Performance, Unlimited, Developer, and Database.com** Editions

EDITIONS

Available in all editions

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