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1. Account Team: Driving Collaborative Selling

The **Account Team** feature enables multiple users to collaborate on a single account. Instead of one account owner handling everything, team members can be assigned specific roles like:

- Sales Manager
- Account Executive
- Support Representative

Each team member can have defined access levels (Read Only or Read/Write) for the account and related opportunities or cases.

Why It Matters:

- Improves transparency
- Encourages teamwork
- Streamlines communication
- Enhances customer experience

It's particularly useful in enterprise sales environments where multiple stakeholders are involved.

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2. Create a Custom Object: Extending Salesforce Beyond Standard CRM

Standard objects like Accounts, Contacts, and Opportunities cover many use cases — but not all.

That's where **Custom Objects** come in.

Custom objects allow you to store data unique to your business. For example:

- Projects
- Assets
- Invoices
- Training Programs

Key Steps to Create a Custom Object:

1. Go to **Setup**
2. Navigate to **Object Manager**
3. Click **Create → Custom Object**
4. Define fields and relationships

Custom objects allow Salesforce to adapt to *your* processes — not the other way around.

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3. App Manager: Organizing the Salesforce Experience

The **App Manager** in Salesforce helps you create and manage apps that group related objects, tabs, and tools.

An app can include:

- Standard objects (Accounts, Leads)
- Custom objects
- Lightning pages
- Utility bar items

Why Use App Manager?

- Creates role-based experiences
- Reduces clutter
- Improves productivity
- Simplifies navigation

For example, a Sales App may differ from a Service App — each tailored to specific users.

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4. Lightning App Builder: Designing Pages Without Code

The **Lightning App Builder** is a drag-and-drop tool that allows admins to design custom pages for:

- Record Pages
- Home Pages

- App Pages

You can add:

- Related lists
- Dashboards
- Reports
- Custom components

Benefits:

- No coding required
- Personalized layouts per profile
- Dynamic visibility rules
- Improved user experience

This tool empowers admins to build intuitive interfaces that match business workflows.

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5. Compact Layout: Highlight What Matters Most

A **Compact Layout** controls which fields appear in the highlights panel of a record page — especially in Lightning Experience and mobile view.

Think of it as the “at-a-glance” summary.

For example, on an Account record, you may want to display:

- Account Name
- Phone
- Industry
- Account Owner

Why It’s Important:

- Enhances quick decision-making
- Improves mobile usability
- Prioritizes key information

Compact layouts help users focus on what truly matters.

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6. Object-Specific Actions: Contextual Productivity

Object-Specific Actions allow users to quickly perform actions related to a specific object.

Examples:

- Create a new Contact from an Account
- Log a Call on an Opportunity
- Create a Case from an Account

These actions automatically associate records with their parent object.

Use Cases:

- Faster data entry
- Fewer clicks
- Better data relationships

They're perfect for improving workflow efficiency.

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7. Global Actions: Create Records from Anywhere

Unlike object-specific actions, **Global Actions** can be accessed from anywhere in Salesforce using the global action menu (the "+" icon).

Examples:

- Create a new Lead
- Log a Call
- Send an Email
- Create a Task

When to Use Global Actions:

- When the action doesn't need to be tied to a specific record
- For quick, universal tasks

Global actions enhance flexibility and speed across the platform.

- Specific Actions streamline workflow