For the best experience and security, follow these guidelines

Additional Resources

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

Concepts, Products, and Services

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

EDITIONS

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

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 or supporting your customers. Two common examples are *Service Cloud* and *Sales Cloud*.
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	A Salesforce term for its company-wide commitment to building and delivering the most secure, fast, and reliable cloud-based service available. `trust.salesforce.com` is a systems status website that provides Salesforce customers and the community access to real-time and historical system performance information and updates. It also lists incident reports and maintenance schedules across all its key system components. `trust.salesforce.com` is free to all members of the Salesforce community.

Products and Services

Salesforce includes these products and services.

Product or Service	Description
Salesforce Applications	Salesforce includes prebuilt applications (or "apps") for customer relationship management (CRM) ranging from sales force automation to partner relationship management, marketing, and customer service.
Lightning Platform	The Lightning platform is the first platform as a service (PaaS). Developers can create and deliver any kind of business application entirely on demand and without software. The platform also includes easy to use point-and-click customization tools to help you create solutions for your unique business requirements, without any programming experience.
AppExchange	AppExchange is a marketplace featuring hundreds of cloud applications created by Salesforce customers, developers, and partners. Many of the applications are free and all of them are pre-integrated with Salesforce, enabling you to easily and efficiently add functionality.
Salesforce.com Community	Salesforce provides training, support, consulting, events, best practices, and discussion boards to help you be successful. Visit Salesforce.com Community.

Terms

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

	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.

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

The Salesforce Admin

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

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

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

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

- Find or use an object, field, or feature you heard about during training.
- Create a custom workflow that lets you find out when a case is closed.
- Create a custom approval process that allows you to sign off on employee expenses.
- Create a custom report for your sales region.

- Give you a user permission that's not granted as part of your user profile.
- Answer questions about your own or others' access to records.
- Address those cursed error messages that ask you to contact your administrator for help or more information.

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

What Happens When You Purchase Salesforce

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

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

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

Org-Level Licenses

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

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Org-Level Licenses

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

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

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

User-Level Licenses

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

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

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

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

Permission Set Licenses

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

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

Add-On Licenses

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

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

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Permissions

User permissions specify:

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

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

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

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

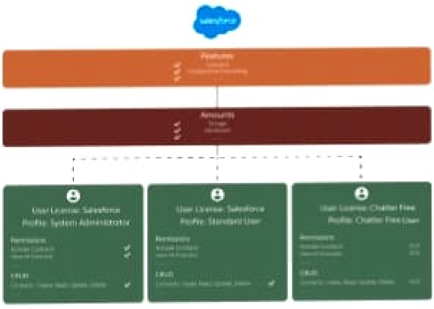
Profiles

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

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

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

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



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

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

SEE ALSO:

- Salesforce Editions
- Data and File Storage Allocations
- Licenses Overview

Push Updated Licenses to Sandbox Orgs

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

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

- CRUD (Create, Read, Update, and Delete) access allowed on objects, such as who can create a contract or delete an account

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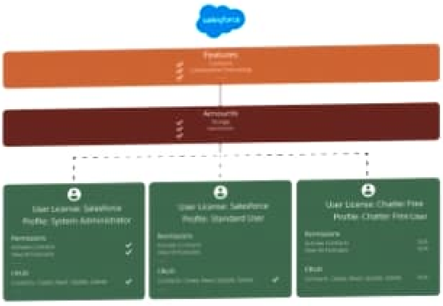

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When you use the Match Production Licenses to Sandbox tool, all provisioned changes are matched in the production org.

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

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

License Updates and Your Org

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

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

- Upgraded from Professional Edition to Enterprise Edition

Data and File Storage Allocations
Licenses Overview

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

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

After you upgrade:

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

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

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SEE ALSO:

Salesforce Editions
What Happens When You Purchase Salesforce
Licenses Overview

Salesforce Editions

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

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

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

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

Edition	What's Great About It
Essentials	Designed for small businesses getting started with CRM to boost sales or service productivity. It includes a setup assistant and administration tools to customize your deployment as you grow.
Starter	Want to get started with sales, service, and marketing functionality all in one? With out-of-the-box tools and built-in guidance, Salesforce Starter is the fastest way to get started with the Salesforce CRM suite. It's perfect if you're a first-time user who wants to find, win, and keep customers and build stronger relationships from day one.

Edition	What's Great About It
Professional	Designed for businesses requiring full-featured CRM functionality. It includes straightforward and easy-to-use customization, integration, and administration tools to facilitate any small to midsize deployment.
Enterprise	Meets the needs of large and complex businesses. It gives you advanced customization and administration tools, in addition to all the functionality available in Professional Edition, that can support large-scale deployments. Enterprise Edition also includes access to Salesforce APIs, so you can easily integrate with back-office systems.

Edition	What's Great About It
Essentials	Designed for small businesses getting started with CRM to boost sales or service productivity. It includes a setup assistant and administration tools to customize your deployment as you grow.
Starter	Want to get started with sales, service, and marketing functionality all in one? With out-of-the-box tools and built-in guidance, Salesforce Starter is the fastest way to get started with the Salesforce CRM suite. It's perfect if you're a first-time user who wants to find, win, and keep customers and build stronger relationships from day one.

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Unlimited	Maximizes your success and extends it across the entire enterprise through the Lightning Platform. It gives you new levels of platform flexibility for managing and sharing all your information on demand. Includes all Enterprise Edition functionality, Premier Support, full mobile access, unlimited custom apps, increased storage limits, and other features.
Developer	Provides access to the Lightning Platform and APIs. It lets developers extend Salesforce, integrate with other applications, and develop new tools and applications. Developer Edition also provides access to many of the features available in Enterprise Edition. Salesforce doesn't provide technical support for Developer Edition. But you can ask for help from developer community message boards after you register for the Lightning Platform developer website: developer.salesforce.com.

For many trial and purchased subscription editions for new orgs, Lightning Experience is the exclusive user interface for end users. See Lightning Experience Only Editions.

Compare editions and their features in Salesforce Pricing and Editions.

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

Lightning Experience–Only Editions
Customers using Lightning Experience are more productive than customers working in Salesforce Classic. To ensure that our customers benefit from these productivity gains, selected trials and purchased subscriptions for several editions offer Lightning Experience as the exclusive user interface for end users without admin permissions.

Salesforce Editions That Are No Longer Sold
Some Salesforce editions are no longer sold. You can continue to use your Contact Manager, Group, Personal, Performance, or Database.com Edition org or purchase one of the editions that are currently sold: Professional, Enterprise, and Unlimited. Developer Editions are also still available for free.

Controlled Setting Edition: What's Different or Unavailable in Controlled Setting Edition
Controlled Setting Edition and Controlled Setting products are versions of Salesforce applications that give customers enhanced control of data flows within Salesforce. The Controlled Setting Edition restricts the use of features that require connections outside of Salesforce. Because of this isolation restriction, some features are unavailable. Controlled Setting Products also restrict the use of features that require external connections or that are turned off by default.

Find Your Edition

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

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

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

Lightning Experience–Only Editions

Customers using Lightning Experience are more productive than customers working in Salesforce Classic. To ensure that our customers benefit from these productivity gains, selected trials and purchased subscriptions for several editions offer Lightning Experience as the exclusive user interface for end users without admin permissions.

Admins in these orgs can access Salesforce Classic, but they can't disable Lightning Experience or grant users access to Salesforce Classic on the Lightning Experience Migration Assistant setup page.

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Lightning Experience–Only Editions

Customers using Lightning Experience are more productive than customers working in Salesforce Classic. To ensure that our customers benefit from these productivity gains, selected trials and purchased subscriptions for several editions offer Lightning Experience as the exclusive user interface for end users without admin permissions.

Admins in these orgs can access Salesforce Classic, but they can't disable Lightning Experience or grant users access to Salesforce Classic on the Lightning Experience Migration Assistant setup page.

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

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

1. Go to Salesforce Help Finder and log in with your Salesforce credentials.
2. Click the **Feature Activation** topic, and then the **Other** category.
3. Click **Log a New Case**.
4. For the **Subject** field, enter `Enable Classic`.
5. For the **Description** field, enter details on why you are requesting end-user access to Salesforce Classic.
6. Check that the OrgId is accurate, and then submit the case.

Salesforce Editions That Are No Longer Sold

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

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

EDITIONS

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

Contact Manager Edition

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

Group Edition

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

Customers already using Group Edition can buy additional subscriptions, up to 10 Group Edition subscriptions total.

Personal Edition

This edition is a CRM solution designed for an individual sales representative or other single user. Personal Edition provides access to

COSMETIC STORE MANAGEMENT

SALESFORCE NAAN MUDHALVAN

PROJECT REPORT

Submitted By

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VANITHA R (611420104089)

VIDHYA S (611420104093)

VARSHA S (611420104090)

In partial fulfilment for the award of the

degree of

BACHELOR OF ENGINEERING

COMPUTER SCIENCE AND ENGINEERING

MAHENDRA ENGINEERING
COLLEGE FOR WOMEN

TIRUCHENGODE,NAMAKKAL-

637205

Concepts

Concept	Definition
Cloud	A Salesforce name for a loose federation of features that help you accomplish certain types activities, such as selling products or supporting your customers. Two common examples are *Service Cloud* and *Sales Cloud*.
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	A Salesforce term for its company-wide commitment to building and delivering the most secure, fast, and reliable cloud-based service available. `trust.salesforce.com` is a systems status website that provides Salesforce customers and the community access to real-time and historical system performance information and updates. It also lists incident reports and maintenance schedules across all its key system components. `trust.salesforce.com` is free to all members of the Salesforce community.

Products and Services

Salesforce includes these products and services.

Product or Service	Description
Salesforce Applications	Salesforce includes prebuilt applications (or "apps") for customer relationship management (CRM) ranging from sales force automation to partner relationship management, marketing, and customer service.
Lightning Platform	The Lightning platform is the first platform as a service (PaaS). Developers can create and deliver any kind of business application entirely on demand and without software. The platform also includes easy to use point-and-click customization tools to help you create solutions for your unique business requirements, without any programming experience.
AppExchange	AppExchange is a marketplace featuring hundreds of cloud applications created by Salesforce customers, developers, and partners. Many of the applications are free and all of them are pre-integrated with Salesforce, enabling you to easily and efficiently add functionality.
Salesforce.com Community	Salesforce provides training, support, consulting, events, best practices, and discussion boards to help you be successful. Visit Salesforce.com Community.

Terms

Term	Definition
App	Short for *application*. A collection of components such as tabs, reports, dashboards, and Visualforce pages that address specific business needs. Salesforce provides standard apps, which you can customize, such as Sales and Service. You can customize the standard apps to match the way you work.
Edition	One of several bundles of Salesforce products and services, each geared toward a different set of business needs. All Salesforce editions share the look and feel, but they vary by feature, functionality, and pricing.
Object	A definition of a specific type of information you can store in Salesforce. For example, the Case object lets you store information about customer inquiries. For each object, your organization has multiple, specific records. 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 your data and applications.
Record	A collection of fields that store information about a specific item of a specific type. A record is an object, such as a contact, an account, or an opportunity. For example, you can have a contact record to store information about Joe Smith, and a case record store information about his training inquiry.
Release	Salesforce releases new products and features three times per year, and we identify releases by season—Winter, Spring, and Summer—along with the calendar year. *Example:* Winter '15. For every Salesforce release, the Salesforce release notes include new features and products that are generally available or in beta release. They also describe all changes to existing features and products. You can find the release notes when you search for "Release Notes" in the Salesforce Help.
Salesforce	The name of the Salesforce cloud computing CRM service and the company name.

The Salesforce Admin

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

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

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

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

- Find or use an object, field, or feature you heard about during training
- Create a custom workflow that lets you find out when a case is closed
- Create a custom approval process that allows you to sign off on employee expenses
- Create a custom report for your sales region.

- Give you a user permission that's not granted as part of your user profile
- Answer questions about your own or others' access to records.
- Address those cursed error messages that ask you to contact your administrator for help or more information.

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

What Happens When You Purchase Salesforce

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

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

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

Org-Level Licenses

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

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

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

User-Level Licenses

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

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

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

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

Permission Set Licenses

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

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

Add-On Licenses

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

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

When you create users, you assign each one to a user license. A user license defines the permissions or the maximum capabilities that a user can have. To see which user licenses your org has, from Setup, in the Quick Find box, enter `Company Information`, and then select **User Licenses**.

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

Permissions

User permissions specify:

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

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

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

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

Profiles

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

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

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

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

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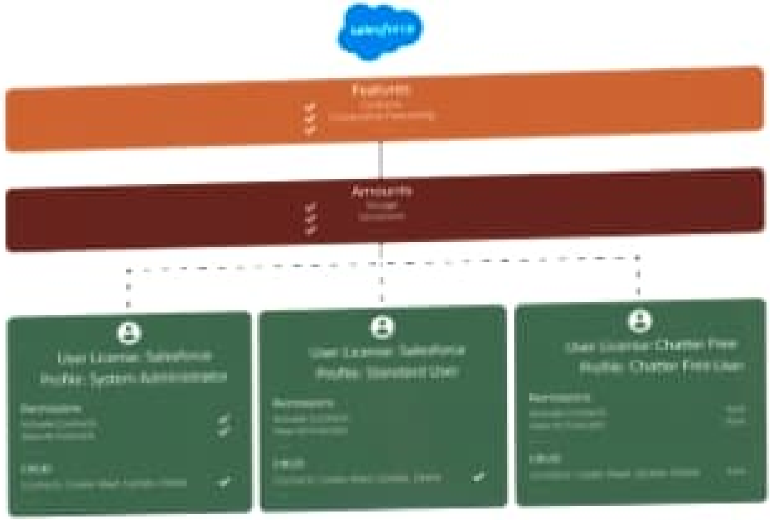


You can create custom profiles to offer different permissions or functionality to users with the same user license. However, using a permission set is typically a more efficient way to achieve the same goal. (Make sure that the permissions defined in the profile or permission set don't exceed the permissions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

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

SEE ALSO

- Salesforce Editions
- Data and File Storage Allocations
- Licenses Overview

Push Updated Licenses to Sandbox Orgs

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

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

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

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

License Updates and Your Org

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

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

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

After you upgrade:

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

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

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

SEE ALSO:

Salesforce Editions

What Happens When You Purchase Salesforce

Licenses Overview

Salesforce Editions

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

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

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

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

Edition	What's Great About It
Essentials	Designed for small businesses getting started with CRM to boost sales or service productivity. It includes a setup assistant and administration tools to customize your deployment as you grow.
Starter	Want to get started with sales, service, and marketing functionality all in one? With out-of-the-box tools and built-in guidance, Salesforce Starter is the fastest way to get started with the Salesforce CRM suite. It's perfect if you're a first-time user who wants to find, win, and keep customers and build stronger relationships from day one.

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

For many trial and purchased subscription editions for new orgs, Lightning Experience is the exclusive user interface for end users. See Lightning Experience Only Editions.

Compare editions and their features in Salesforce Pricing and Editions.

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

Lightning Experience–Only Editions
Customers using Lightning Experience are more productive than customers working in Salesforce Classic. To ensure that our customers benefit from these productivity gains, selected trials and purchased subscriptions for several editions offer Lightning Experience as the exclusive user interface for end users without admin permissions.

Salesforce Editions That Are No Longer Sold
Some Salesforce editions are no longer sold. You can continue to use your Contact Manager, Group, Personal, Performance, or Database.com Edition org or purchase one of the editions that are currently sold: Professional, Enterprise, and Unlimited. Developer Editions are also still available for free.

Controlled Setting Edition: What's Different or Unavailable in Controlled Setting Edition
Controlled Setting Edition and Controlled Setting products are versions of Salesforce applications that give customers enhanced control of data flows within Salesforce. The Controlled Setting Edition restricts the use of features that require connections outside of Salesforce. Because of this isolation restriction, some features are unavailable. Controlled Setting Products also restrict the use of features that require external connections or that are turned off by default.

Find Your Edition

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

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

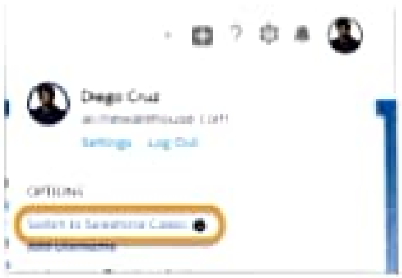
1. From Setup, enter `Company Information` in the `Quick Find` box, then select **Company Information**.
2. **Organization Edition** appears in the lower right.

Lightning Experience–Only Editions

Customers using Lightning Experience are more productive than customers working in Salesforce Classic. To ensure that our customers benefit from these productivity gains, selected trials and purchased subscriptions for several editions offer Lightning Experience as the exclusive user interface for end users without admin permissions.

Admins in these orgs can access Salesforce Classic, but they can't disable Lightning Experience or grant users access to Salesforce Classic on the Lightning Experience Migration Assistant setup page.

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



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

1. Go to Salesforce Help Finder and log in with your Salesforce credentials.
2. Click the **Feature Activation** topic, and then the **Other** category.
3. Click **Log a New Case**.
4. For the **Subject** field, enter `Enable Classic`.
5. For the **Description** field, enter details on why you are requesting end-user access to Salesforce Classic.
6. Check that the OrgId is accurate, and then submit the case.

Salesforce Editions That Are No Longer Sold

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

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

EDITIONS

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

Contact Manager Edition

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