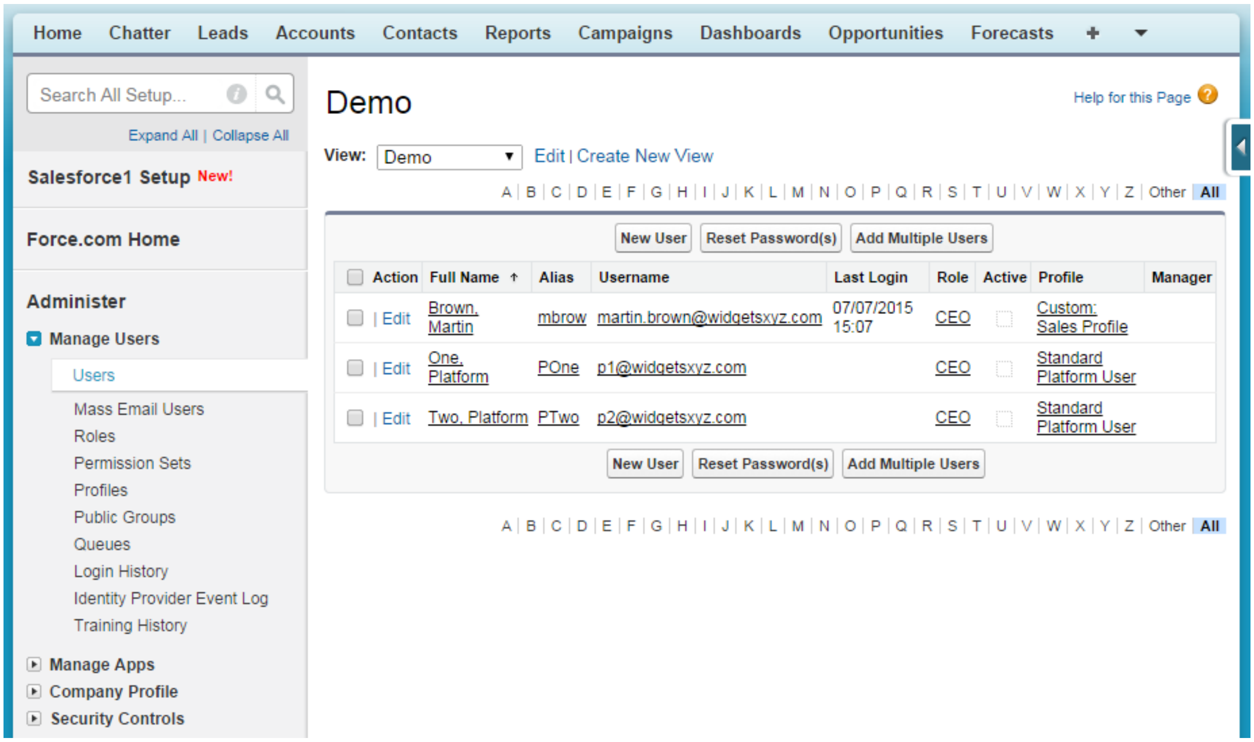
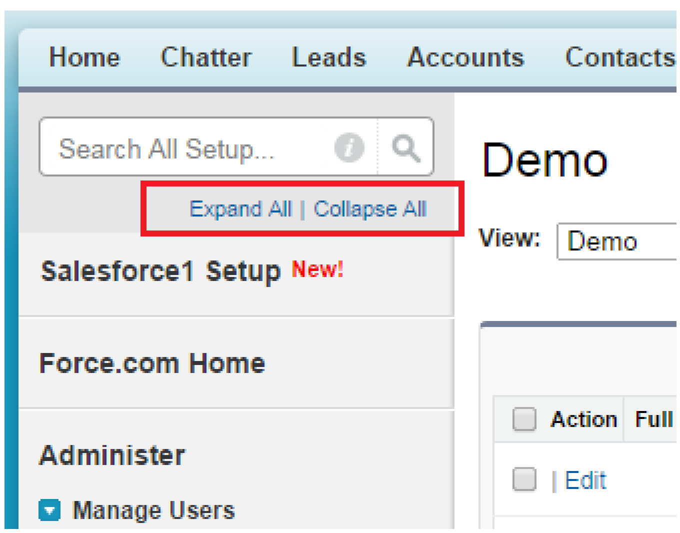
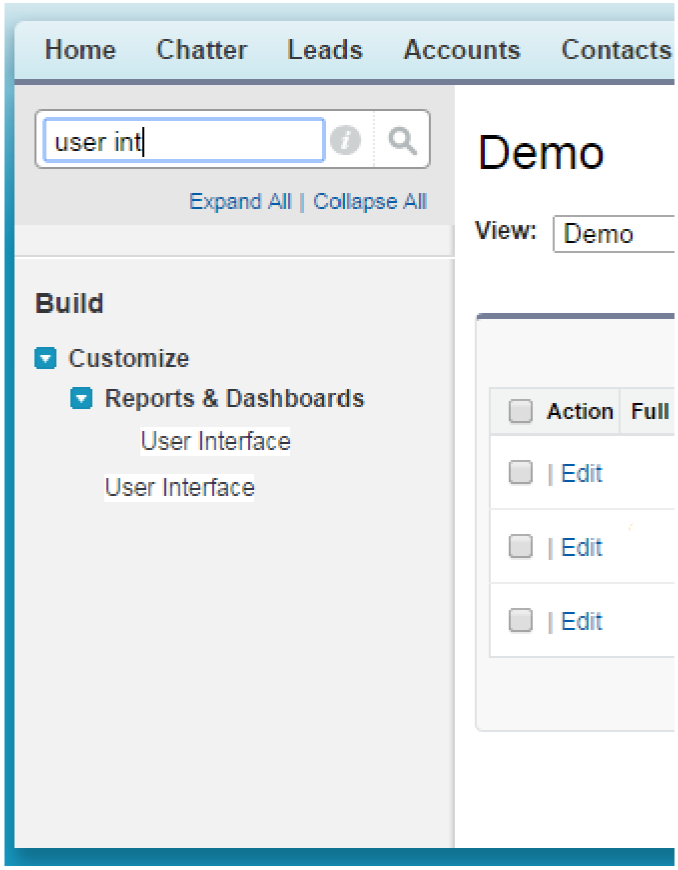
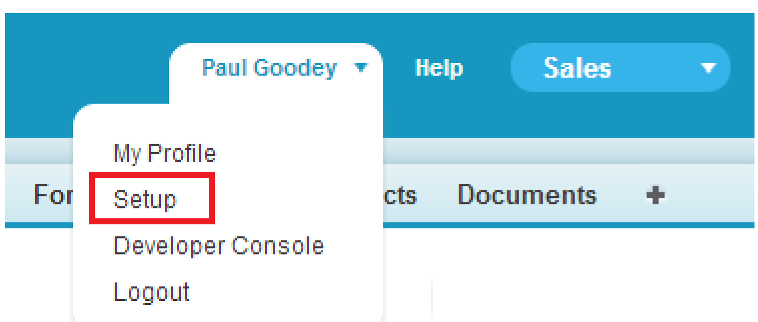
Chapter 1

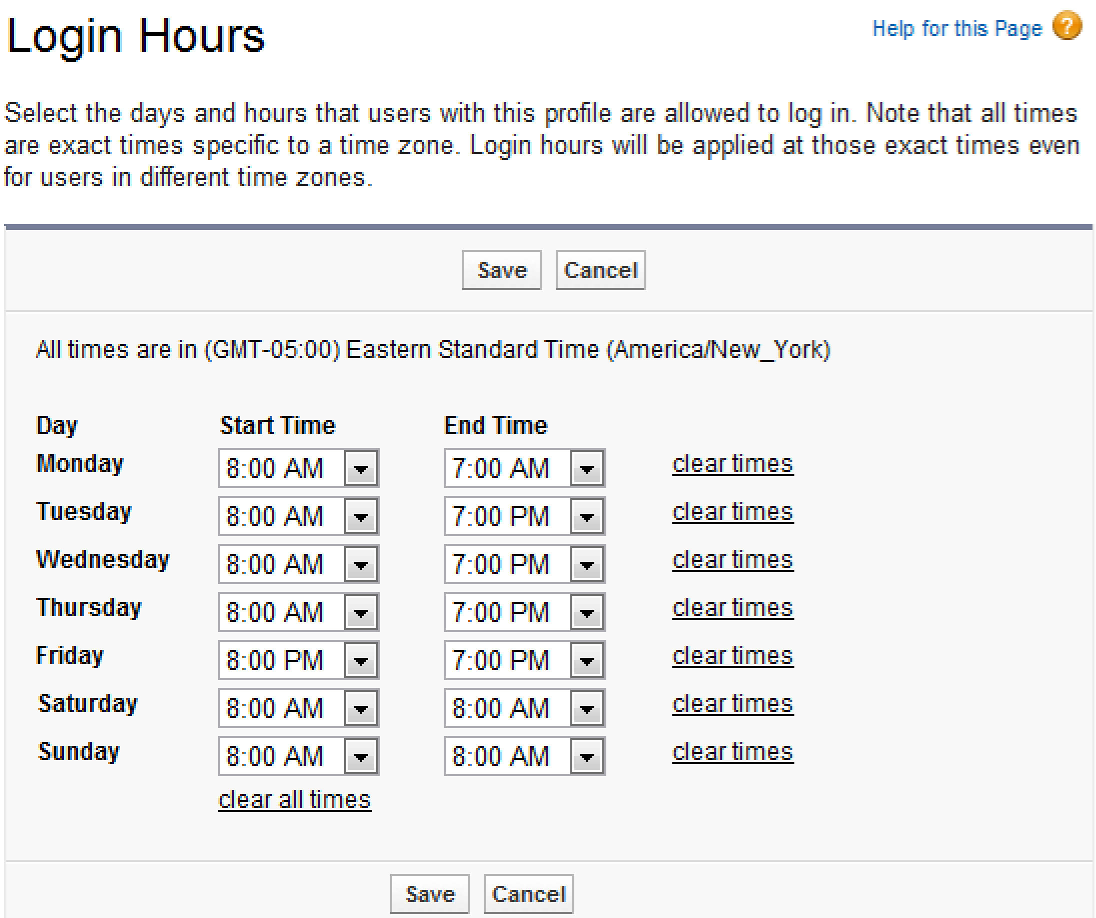

Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Dashboards
Opportunities
Forecasts
Search All Setup...
Expand All | Collapse All
Salesforce1 Setup New!
Force.com Home
Administer
Manage Users
Users
Mass Email Users
Roles
Permission Sets
Profiles
Public Groups
Queues
Login History
Identity Provider Event Log
Training History
Manage Apps
Company Profile
Security Controls
Demo
Help for this Page
View: Demo
Edit | Create New 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
New User
Reset Password(s)
Add Multiple Users
Action
Full Name
Alias
Username
Last Login
Role
Active
Profile
Manager
Edit
Brown, Martin
mbrow
martin.brown@widgetsxyz.com
07/07/2015 15:07
CEO
Custom: Sales Profile
Edit
One, Platform
POne
p1@widgetsxyz.com
CEO
Standard Platform User
Edit
Two, Platform
PTwo
p2@widgetsxyz.com
CEO
Standard Platform User


Home
Chatter
Leads
Accounts
Contacts
Search All Setup...
Expand All | Collapse All
Salesforce1 Setup New!
Force.com Home
Administer
Manage Users
Demo
View: Demo
Action
Full
Edit

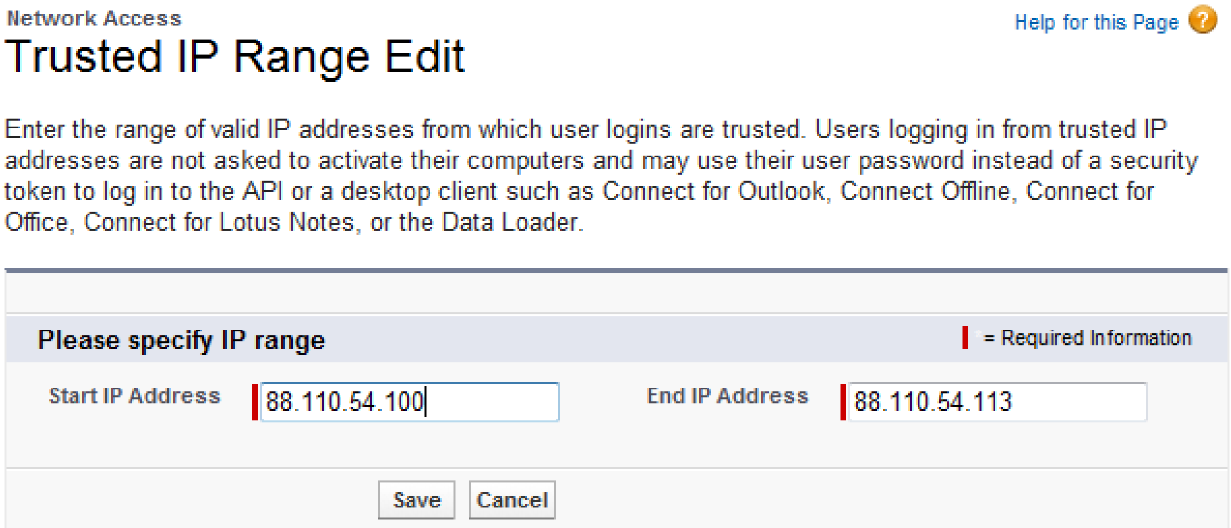

Home
Chatter
Leads
Accounts
Contacts
user int
Expand All | Collapse All
Demo
View: Demo
Build
Customize
Reports & Dashboards
User Interface
User Interface
Action
Full
| Edit
| Edit
| Edit


Paul Goodey
Setup
Help
Sales


Paul Goodey
Help
Sales
My Profile
Setup
Developer Console
Logout
Documents


Login Hours
Help for this Page
Select the days and hours that users with this profile are allowed to log in. Note that all times are exact times specific to a time zone. Login hours will be applied at those exact times even for users in different time zones.
Save
Cancel
All times are in (GMT-05:00) Eastern Standard Time (America/New_York)
Day
Start Time
End Time
Monday
8:00 AM
7:00 AM
clear times
Tuesday
8:00 AM
7:00 PM
clear times
Wednesday
8:00 AM
7:00 PM
clear times
Thursday
8:00 AM
7:00 PM
clear times
Friday
8:00 PM
7:00 PM
clear times
Saturday
8:00 AM
8:00 AM
clear times
Sunday
8:00 AM
8:00 AM
clear times
clear all times
Save
Cancel


Login IP Ranges
Enter the range of valid IP addresses from which users with this profile can log in.
IP Start Address
88.110.54.113
IP End Address
88.110.54.113
Save
Save & New
Cancel


Network Access
Trusted IP Range Edit
Help for this Page
Enter the range of valid IP addresses from which user logins are trusted. Users logging in from trusted IP addresses are not asked to activate their computers and may use their user password instead of a security token to log in to the API or a desktop client such as Connect for Outlook, Connect Offline, Connect for Office, Connect for Lotus Notes, or the Data Loader.
Please specify IP range
= Required Information
Start IP Address
88.110.54.100
End IP Address
88.110.54.113
Save
Cancel

Activated Login IP

Help for this Page

The list below shows login IP addresses representing the device IP addresses that have been activated by a user.

View: All ▼ Create New View

<Previous Page | Next Page>

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

Remove

	Username ↑	Login IP	Created Date	Is Authenticated	Challenge Sent
☐	sales@widgetsxyz.com	81.178.189.173	28.01.2014 17:37	✓	28.01.2014 17:37
☐	sales@widgetsxyz.com	82.12.148.221	28.05.2014 22:21	✓	
☐	sales@widgetsxyz.com	31.100.158.80	11.06.2014 08:18	✓	11.06.2014 08:18
☐	trevor.howard@widgetsxyz.com	80.47.223.92	01.01.2010 11:14	✓	
☐	trevor.howard@widgetsxyz.com	80.47.236.99	18.02.2010 05:44	✓	18.02.2010 05:44
☐	trevor.howard@widgetsxyz.com	88.110.54.113	01.01.2011 12:04	✓	01.01.2011 12:04
☐	trevor.howard@widgetsxyz.com	81.178.188.171	31.01.2011 02:44	✓	31.01.2011 02:44
☐	trevor.howard@widgetsxyz.com	81.178.177.167	23.07.2011 14:15	✓	23.07.2011 14:17
☐	trevor.howard@widgetsxyz.com	81.178.189.7	21.04.2013 21:59	✓	21.04.2013 22:00
☐	trevor.howard@widgetsxyz.com	82.12.148.221	02.07.2014 20:38	✓	02.07.2014 20:38

Activated Client Browsers

Help for this Page

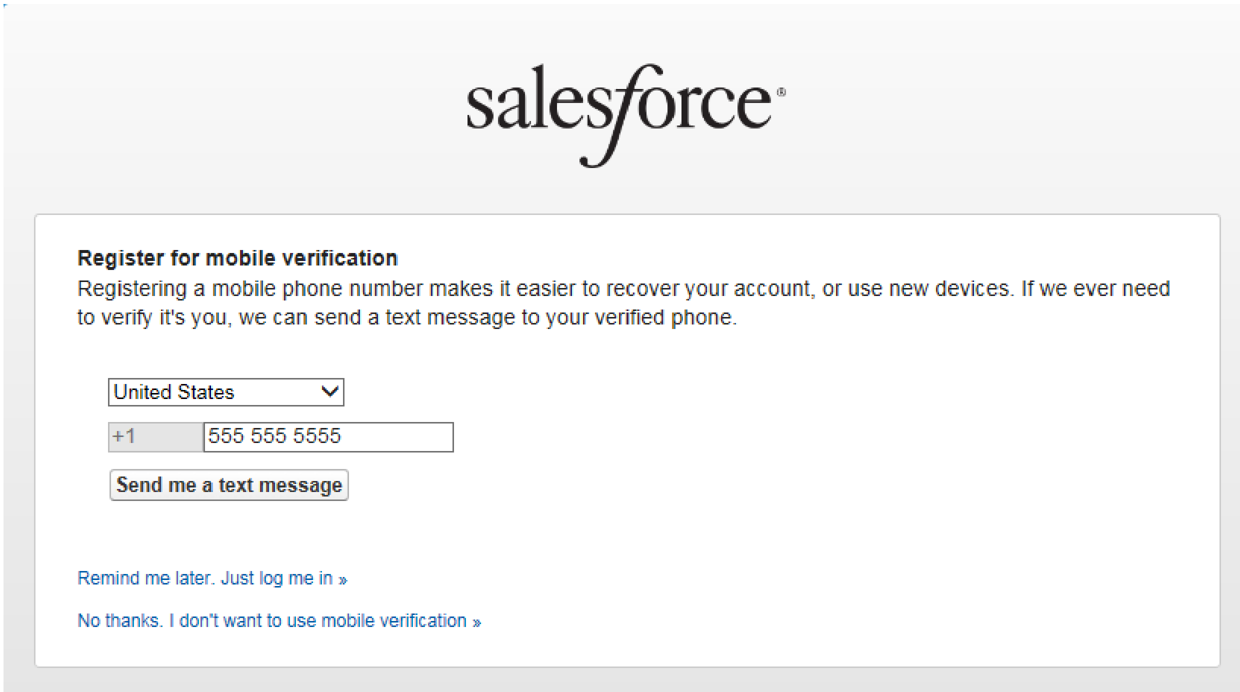
The list below shows Activated Client Browser information, with the browser agent information stored when a user accesses an organization from an activated device IP address.

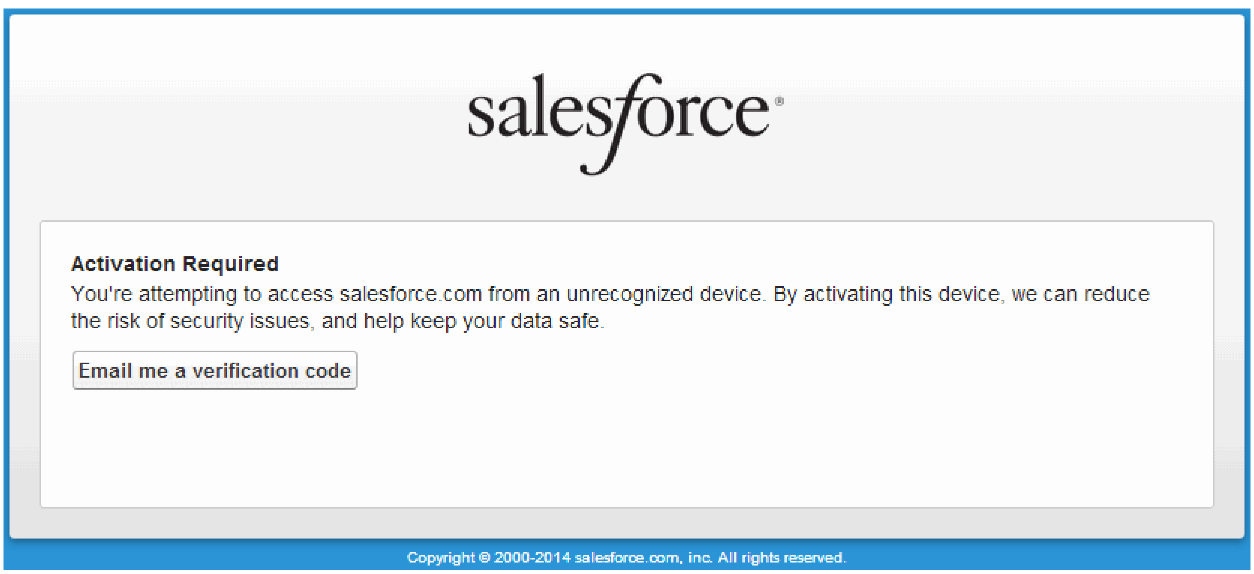
View: All ▼ Create New View

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

Remove

	Username ↑	User Agent String	Proxy Info	Created Date	Last Update
☐	sales@widgetsxyz.com	Mozilla/5.0 (Windows NT 6.1; WOW64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/35.0.1916.153 Safari/537.36		28.01.2014 17:38	02.07.2014 20:43
☐	sales@widgetsxyz.com	Mozilla/5.0 (Macintosh; Intel Mac OS X 10_8_5) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/35.0.1916.114 Safari/537.36		11.06.2014 08:21	11.06.2014 08:21
☐	trevor.howard@widgetsxyz.com	Mozilla/5.0 (Windows NT 6.1; WOW64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/35.0.1916.153 Safari/537.36		02.07.2014 20:43	02.07.2014 20:43


salesforce
Register for mobile verification
Registering a mobile phone number makes it easier to recover your account, or use new devices. If we ever need to verify it's you, we can send a text message to your verified phone.
United States
+1
555 555 5555
Send me a text message
Remind me later. Just log me in »
No thanks. I don't want to use mobile verification »


salesforce
Activation Required
You're attempting to access salesforce.com from an unrecognized device. By activating this device, we can reduce the risk of security issues, and help keep your data safe.
Email me a verification code
Copyright © 2000-2014 salesforce.com, inc. All rights reserved.

salesforce

Enter your verification code

A verification code was sent via email to trevor.howard@widgetsxyz.com. When you receive the code, enter it below.

Verify my code and log me in

Didn't receive the email?

Sometimes automated messages get categorized as spam. Check your spam folder.

If you're still having trouble, click here to try again.

New | Reply Reply all Forward | Delete Junk Sweep ▾ Mark as ▾ Move to ▾ |

Your salesforce.com Activation Email

Back to messages

support@salesforce.com Add to contacts

To

07:45

Reply

Dear

You have requested access to salesforce.com from an unknown device. Use the verification code below within 24 hours to activate this device.

Verification Code: 83295

IMPORTANT: If you have not requested to activate a device, or believe you have received this message in error, please contact salesforce.com support (support@salesforce.com) immediately.

What does "activation" mean? Should I activate this computer?

Activation helps reduce the risk of security issues related to login. Activating this computer helps salesforce.com recognize this computer when you use it to access salesforce.com. You should activate this computer if it is owned by you or your employer and you are confident it is free of malware.

Company Information

WidgetsXYZ

Help for this Page

The organization's profile is below.

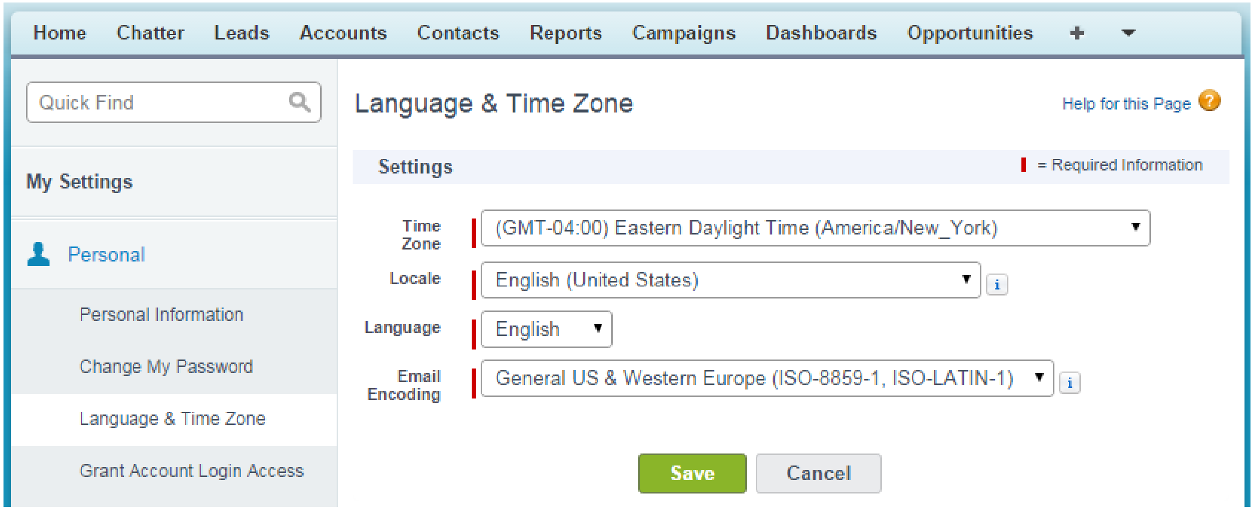
User Licenses [13] | Permission Set Licenses [1] | Feature Licenses [10]

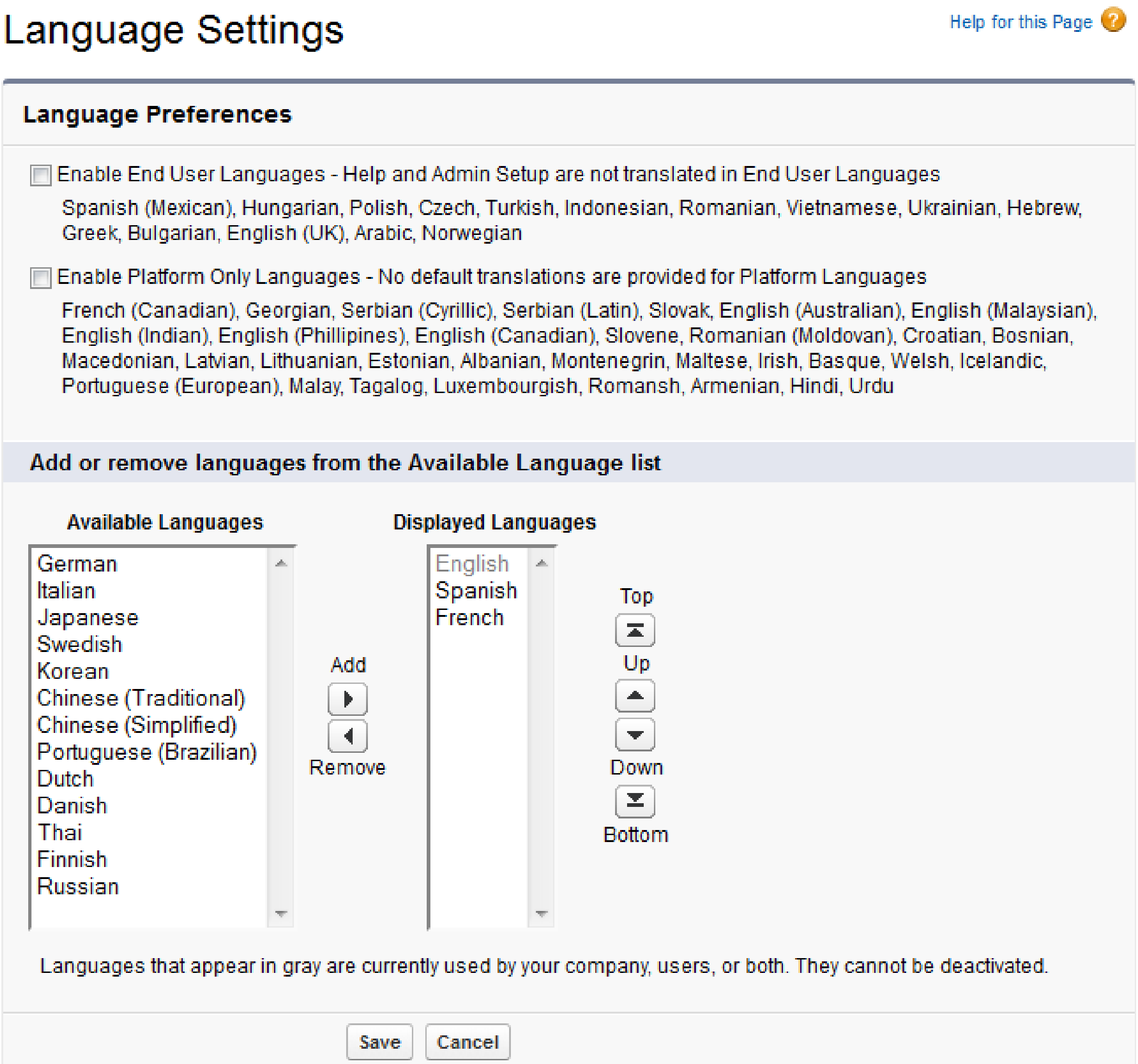
Organization Detail

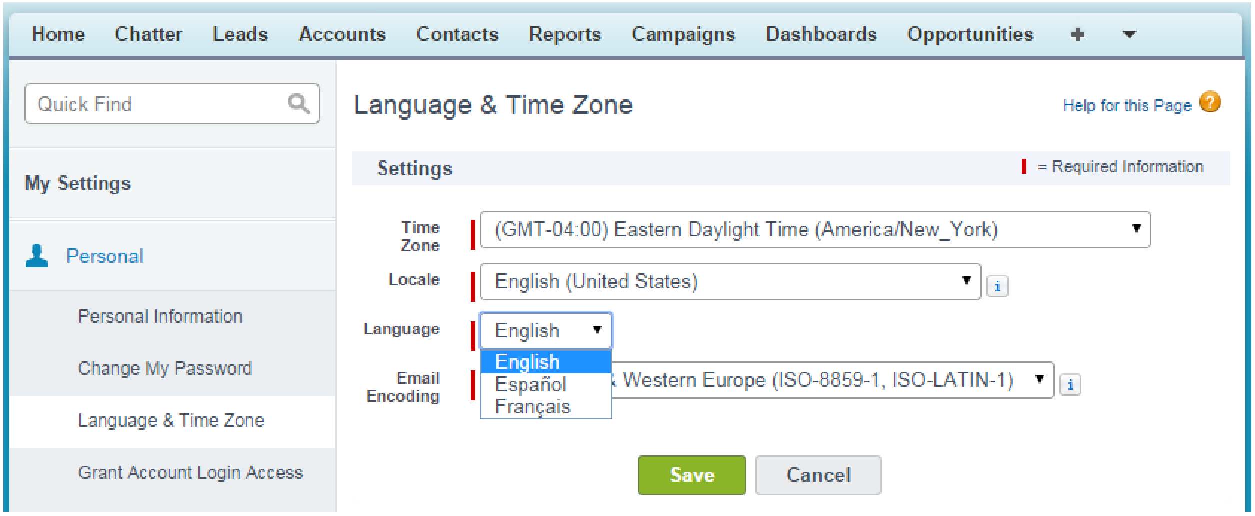
Edit | Currency Setup

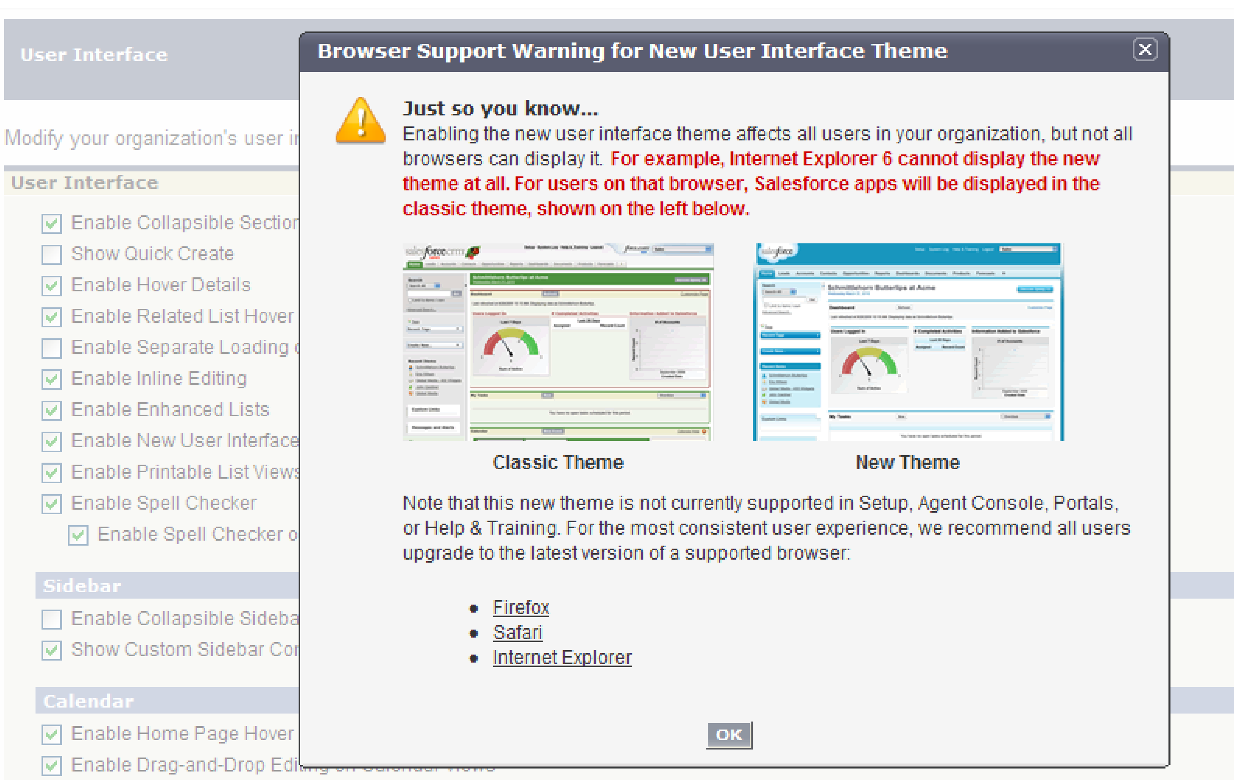
Organization Name	WidgetsXYZ	**Phone**	555-123-5678
Primary Contact	Martin Brown	**Fax**	555-123-5679
Division	ICT	**Default Locale**	English (United States)
Address	5 East 345th Street New York, NY 55511 US	**Default Language**	English
Fiscal Year Starts In	January	**Default Time Zone**	(GMT-04:00) Eastern Daylight Time (America/New_York)
Newsletter	☐	**Currency Locale**	English (United States)
Admin Newsletter	☐	**Used Data Space**	842 KB (4%) [View]
Hide Notices About System Maintenance	☐	**Used File Space**	302 KB (1%) [View]
Hide Notices About System Downtime	☐	**API Requests, Last 24 Hours**	0 (5,000 max)
		Streaming API Events, Last 24 Hours	0 (10,000 max)
		Restricted Logins, Current Month	0 (0 max)
		Salesforce.com Organization ID	00DA0000000Ils1
Created By	Paul Goodey, 19/12/2009 13:01	**Modified By**	Paul Goodey, 14/08/2011 11:43

Edit


Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Dashboards
Opportunities
Quick Find
My Settings
Personal
Personal Information
Change My Password
Language & Time Zone
Grant Account Login Access
Language & Time Zone
Help for this Page
Settings
= Required Information
Time Zone
(GMT-04:00) Eastern Daylight Time (America/New_York)
Locale
English (United States)
Language
English
Email Encoding
General US & Western Europe (ISO-8859-1, ISO-LATIN-1)
Save
Cancel


Language Settings
Help for this Page
Language Preferences
Enable End User Languages - Help and Admin Setup are not translated in End User Languages
Spanish (Mexican), Hungarian, Polish, Czech, Turkish, Indonesian, Romanian, Vietnamese, Ukrainian, Hebrew, Greek, Bulgarian, English (UK), Arabic, Norwegian
Enable Platform Only Languages - No default translations are provided for Platform Languages
French (Canadian), Georgian, Serbian (Cyrillic), Serbian (Latin), Slovak, English (Australian), English (Malaysian), English (Indian), English (Phillipines), English (Canadian), Slovene, Romanian (Moldovan), Croatian, Bosnian, Macedonian, Latvian, Lithuanian, Estonian, Albanian, Montenegrin, Maltese, Irish, Basque, Welsh, Icelandic, Portuguese (European), Malay, Tagalog, Luxembourgish, Romansh, Armenian, Hindi, Urdu
Add or remove languages from the Available Language list
Available Languages
German
Italian
Japanese
Swedish
Korean
Chinese (Traditional)
Chinese (Simplified)
Portuguese (Brazilian)
Dutch
Danish
Thai
Finnish
Russian
Add
Remove
Displayed Languages
English
Spanish
French
Top
Up
Down
Bottom
Languages that appear in gray are currently used by your company, users, or both. They cannot be deactivated.
Save
Cancel


Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Dashboards
Opportunities
Quick Find
My Settings
Personal
Personal Information
Change My Password
Language & Time Zone
Grant Account Login Access
Language & Time Zone
Help for this Page
Settings
= Required Information
Time Zone
(GMT-04:00) Eastern Daylight Time (America/New_York)
Locale
English (United States)
Language
English
English
Español
Français
Email Encoding
Western Europe (ISO-8859-1, ISO-LATIN-1)
Save
Cancel


User Interface
Modify your organization's user i
User Interface
Enable Collapsible Sectio
Show Quick Create
Enable Hover Details
Enable Related List Hover
Enable Separate Loading
Enable Inline Editing
Enable Enhanced Lists
Enable New User Interface
Enable Printable List Views
Enable Spell Checker
Enable Spell Checker o
Sidebar
Enable Collapsible Sideba
Show Custom Sidebar Co
Calendar
Enable Home Page Hover
Enable Drag-and-Drop Edi
Browser Support Warning for New User Interface Theme
Just so you know...
Enabling the new user interface theme affects all users in your organization, but not all browsers can display it. For example, Internet Explorer 6 cannot display the new theme at all. For users on that browser, Salesforce apps will be displayed in the classic theme, shown on the left below.
Classic Theme
New Theme
Note that this new theme is not currently supported in Setup, Agent Console, Portals, or Help & Training. For the most consistent user experience, we recommend all users upgrade to the latest version of a supported browser:
Firefox
Safari
Internet Explorer
OK

User Interface

Help for this Page

Modify your organization's user interface with the following settings:

User Interface

- [x] Enable Collapsible Sections
- [ ] Show Quick Create
- [x] Enable Hover Details
- [x] Enable Related List Hover Links
- [x] Enable Separate Loading of Related Lists
- [x] Enable Inline Editing
- [x] Enable Enhanced Lists
- [x] Enable New User Interface Theme

⚠ Some Salesforce features like Chatter need the new user interface theme. Disabling the theme disables Chatter.

- [x] Enable Tab Bar Organizer
- [x] Enable Printable List Views
- [x] Enable Spell Checker
  - [x] Enable Spell Checker on Tasks and Events
- [x] Enable Customization of Chatter User Profile Pages i
- [x] Enable Salesforce Notification Banner

Sidebar

- [x] Enable Collapsible Sidebar
- [x] Show Custom Sidebar Components on All Pages

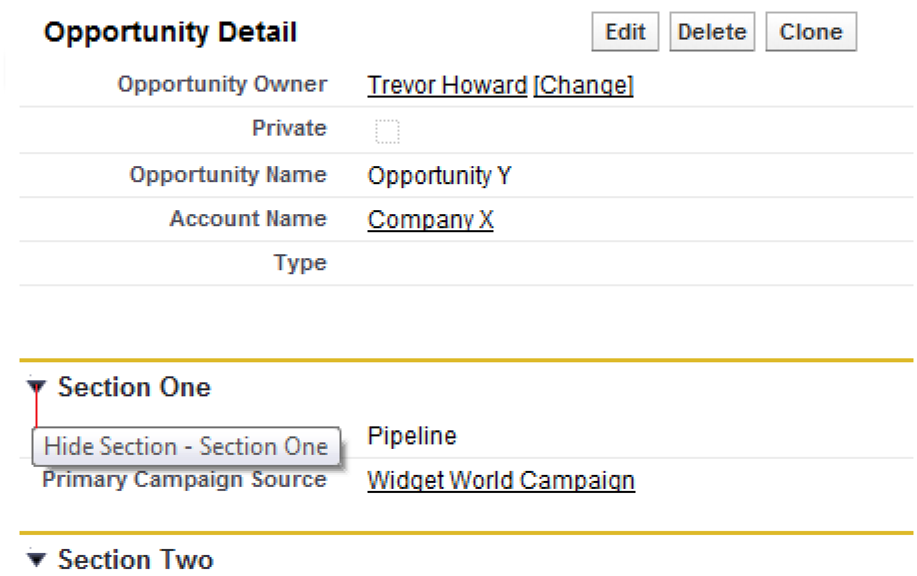
Calendar

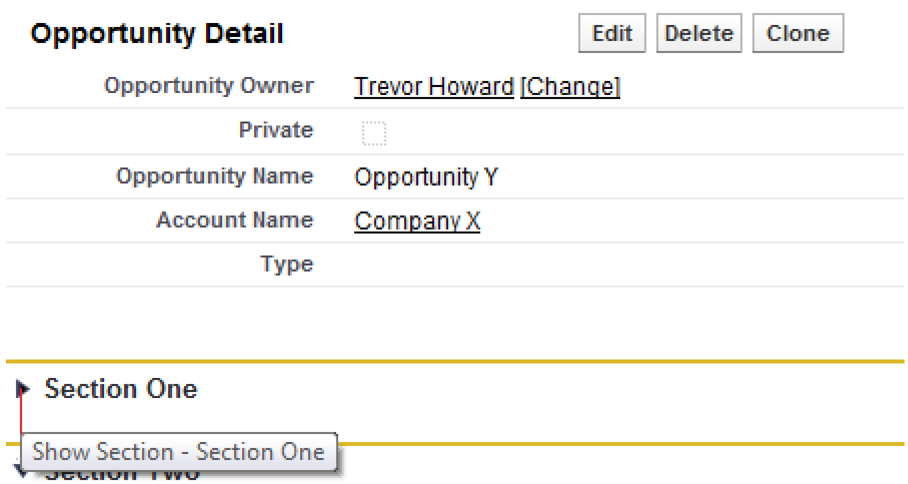
- [x] Enable Home Page Hover Links for Events
- [x] Enable Drag-and-Drop Editing on Calendar Views
  - [x] Enable Click-and-Create Events on Calendar Views
    - [x] Enable Drag-and-Drop Scheduling on List Views
- [x] Enable Hover Links for My Tasks list

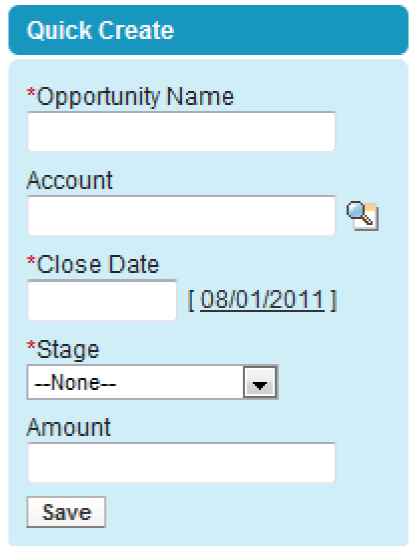
Setup

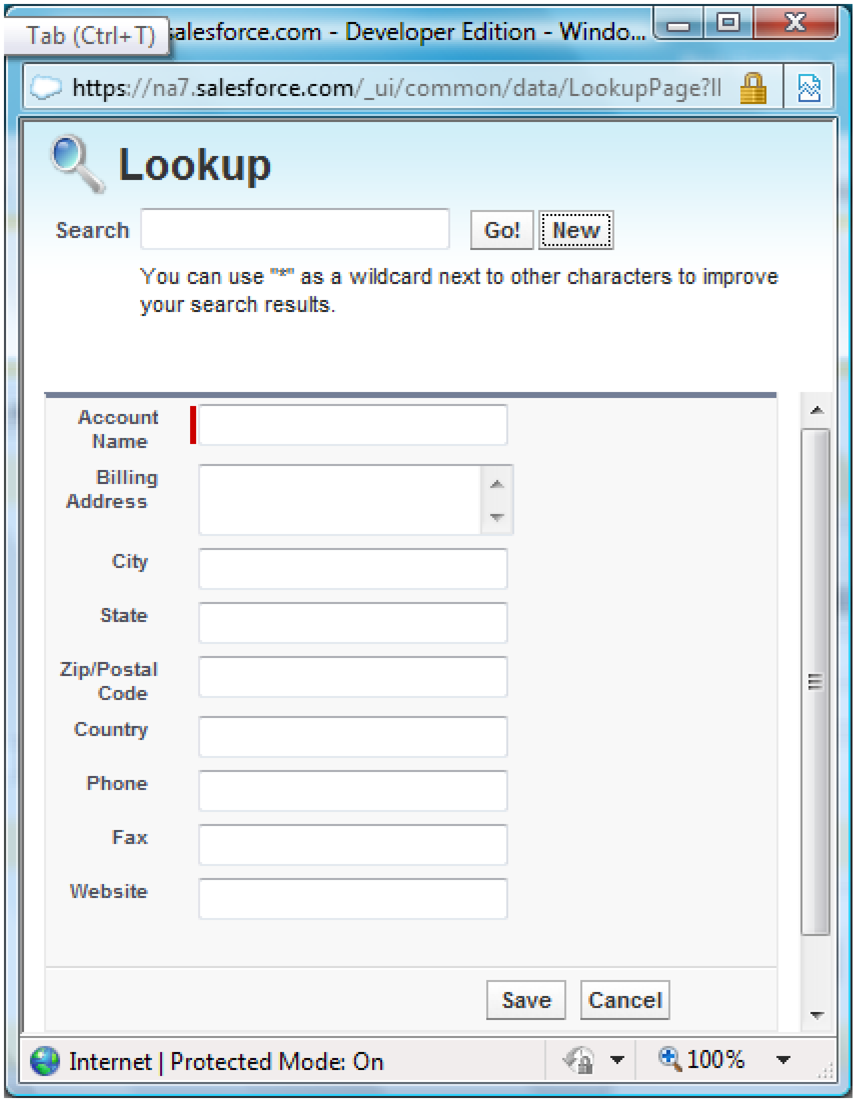
- [x] Enable Enhanced Page Layout Editor
- [x] Enable Enhanced Profile List Views
- [ ] Enable Enhanced Profile User Interface
- [x] Enable Streaming API
- [ ] Enable Custom Object Truncate
- [x] Enable Improved Setup User Interface i
- [x] Enable Advanced Setup Search (Beta) i

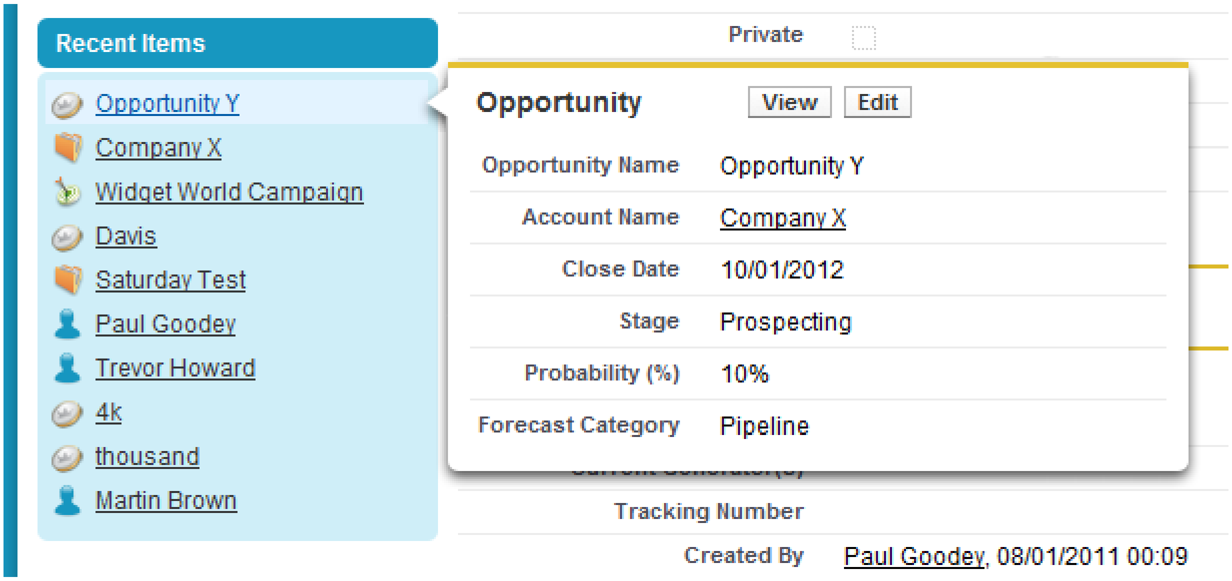
Save | Cancel


Opportunity Detail
Edit
Delete
Clone
Opportunity Owner
Trevor Howard [Change]
Private
Opportunity Name
Opportunity Y
Account Name
Company X
Type
Section One
Hide Section - Section One
Pipeline
Primary Campaign Source
Widget World Campaign
Section Two

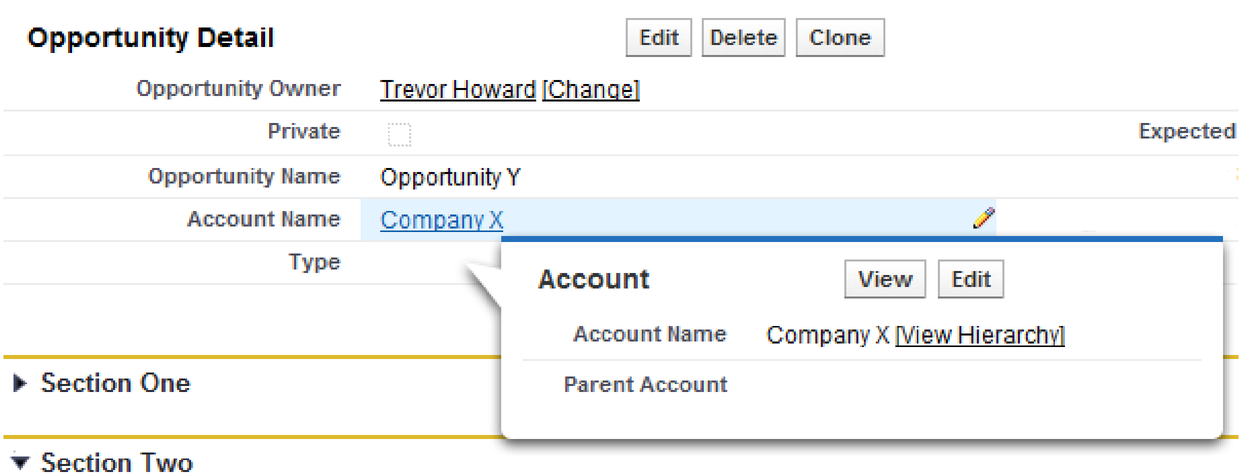

Opportunity Detail
Edit
Delete
Clone
Opportunity Owner
Trevor Howard [Change]
Private
Opportunity Name
Opportunity Y
Account Name
Company X
Type
Section One
Show Section - Section One


Quick Create
*Opportunity Name
Account
*Close Date
[08/01/2011]
*Stage
--None--
Amount
Save


Tab (Ctrl+T)
alesforce.com - Developer Edition - Windo...
https://na7.salesforce.com/_ui/common/data/LookupPage?ll
Lookup
Search
Go!
New
You can use "*" as a wildcard next to other characters to improve your search results.
Account Name
Billing Address
City
State
Zip/Postal Code
Country
Phone
Fax
Website
Save
Cancel
Internet | Protected Mode: On
100%

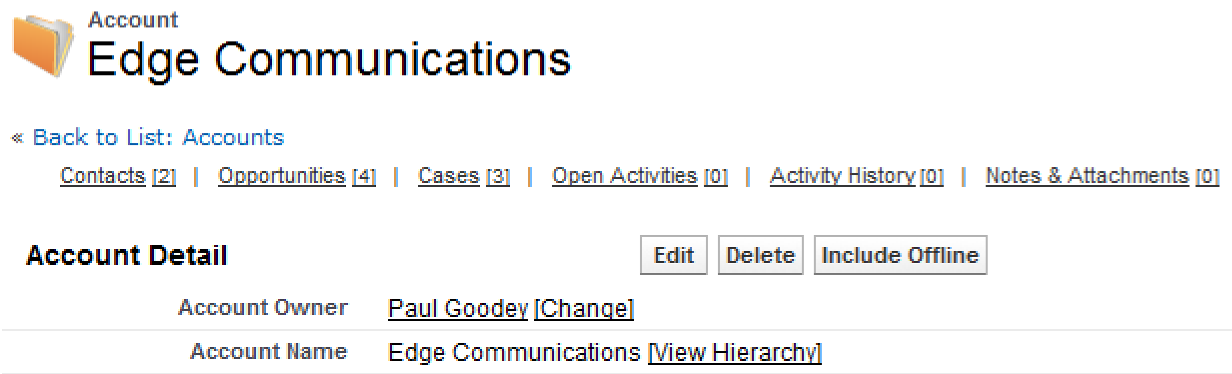


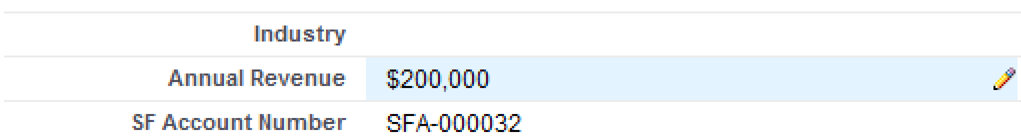
Recent Items
Opportunity Y
Company X
Widget World Campaign
Davis
Saturday Test
Paul Goodey
Trevor Howard
4k
thousand
Martin Brown
Private
Opportunity
View
Edit
Opportunity Name
Opportunity Y
Account Name
Company X
Close Date
10/01/2012
Stage
Prospecting
Probability (%)
10%
Forecast Category
Pipeline
Tracking Number
Created By
Paul Goodey, 08/01/2011 00:09

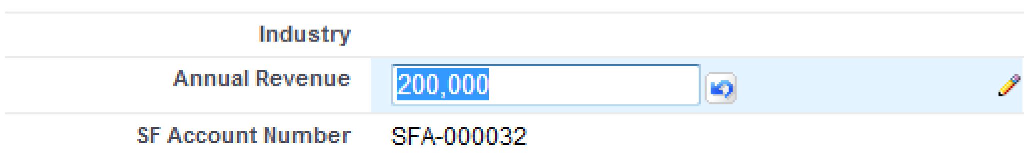


Opportunity Detail
Edit
Delete
Clone
Opportunity Owner
Trevor Howard [Change]
Private
Expected
Opportunity Name
Opportunity Y
Account Name
Company X
Type
Section One
Section Two
Account
View
Edit
Account Name
Company X [View Hierarchy]
Parent Account

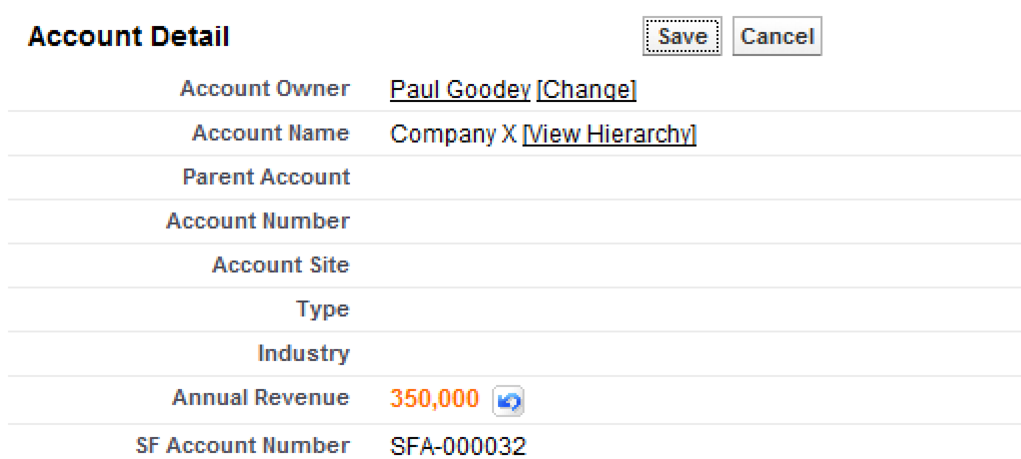
Account
Edge Communications
« Back to List: Accounts
Contacts [...] | Opportunities [...] | Cases [...] | Open Activities [...] | Activity History [...] | Notes & Attachments [...] |
Account Detail
Edit
Delete
Include Offline
Account Owner
Paul Goodey [Change]
Account Name
Edge Communications [View Hierarchy]

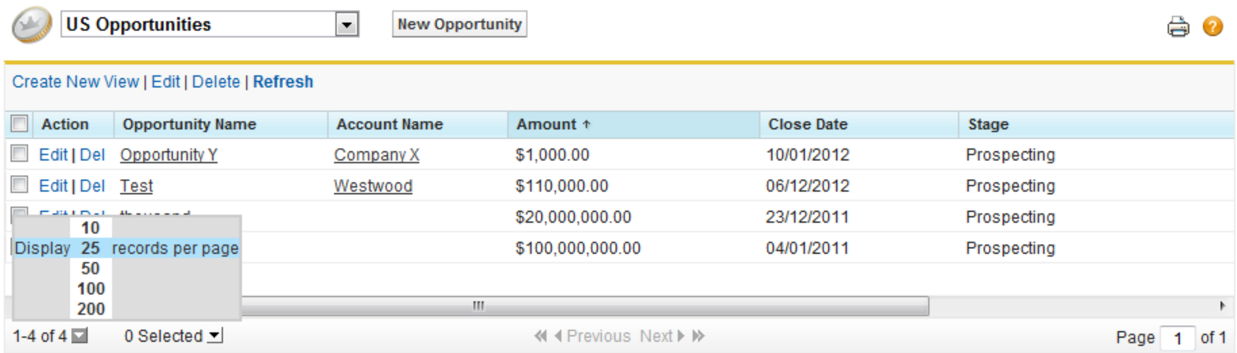

Account
Edge Communications
« Back to List: Accounts
Contacts [2] | Opportunities [4] | Cases [3] | Open Activities [0] | Activity History [0] | Notes & Attachments [0] |
Account Detail
Edit
Delete
Include Offline
Account Owner
Paul Goodey [Change]
Account Name
Edge Communications [View Hierarchy]

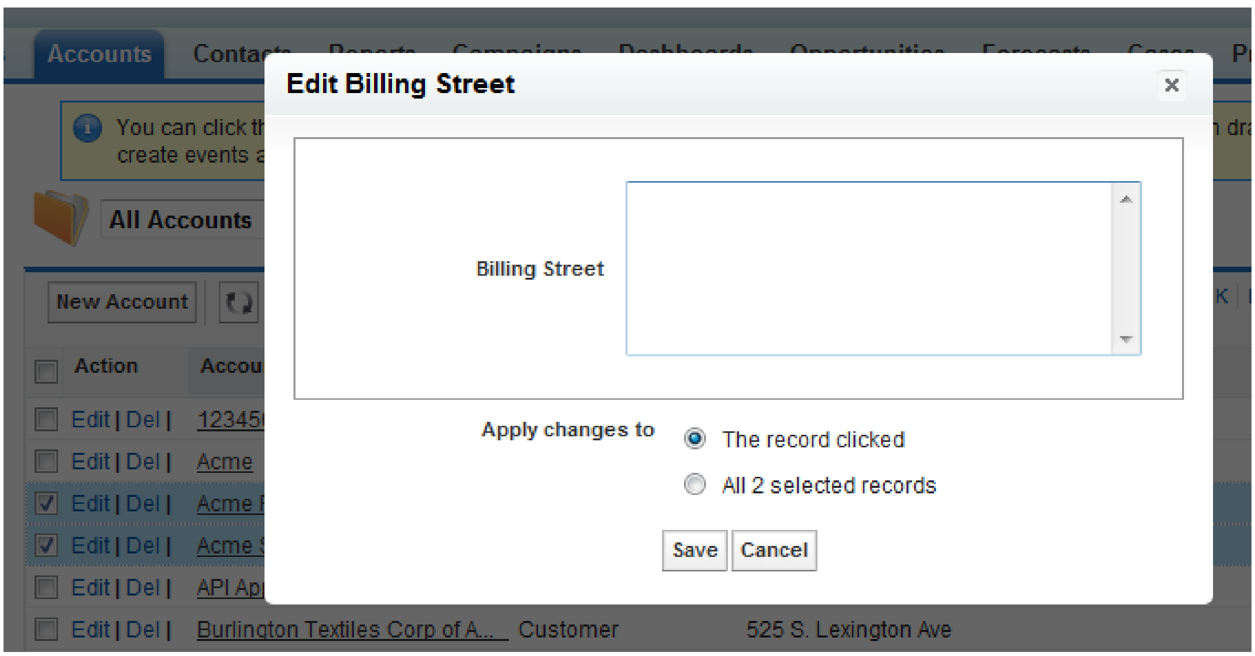

Industry
Annual Revenue
$200,000
SF Account Number
SFA-000032

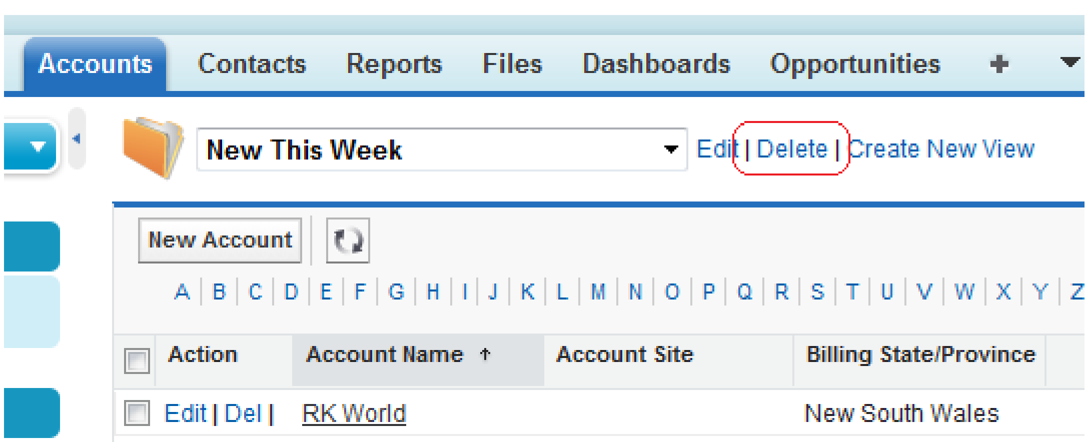

Industry
Annual Revenue
200,000
SF Account Number
SFA-000032

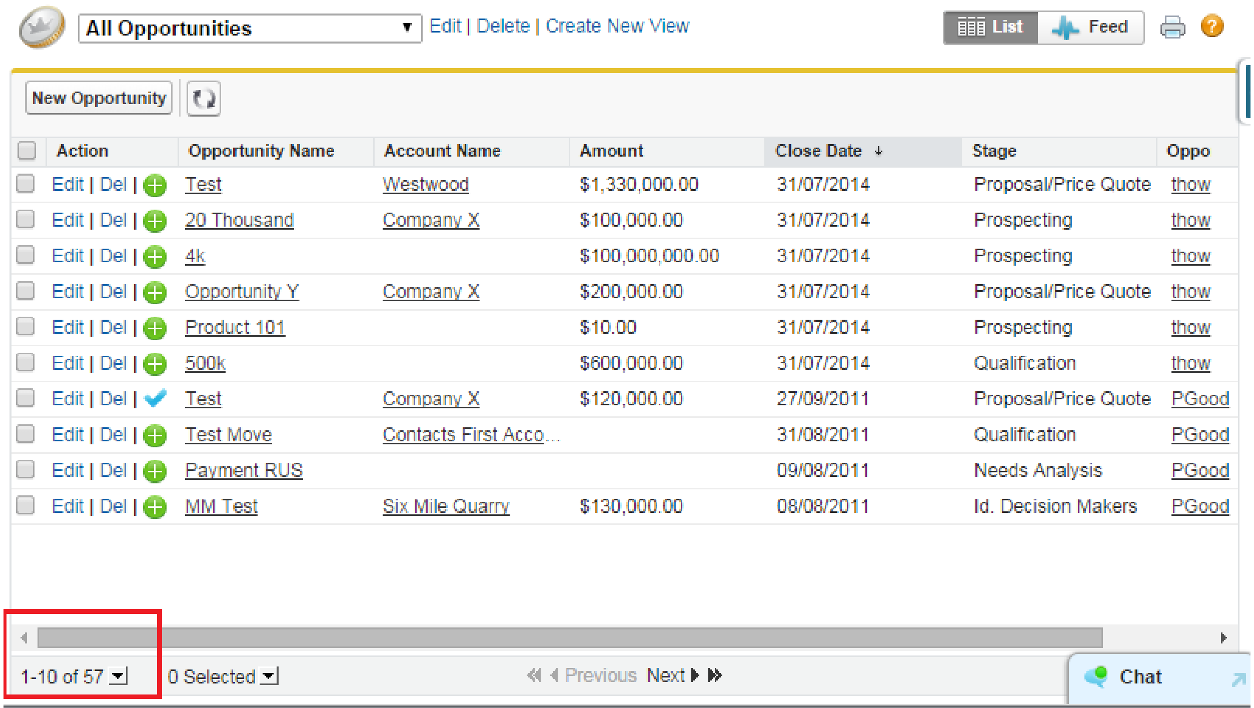

Industry
Annual Revenue
350,000
SF Account Number
SFA-000032

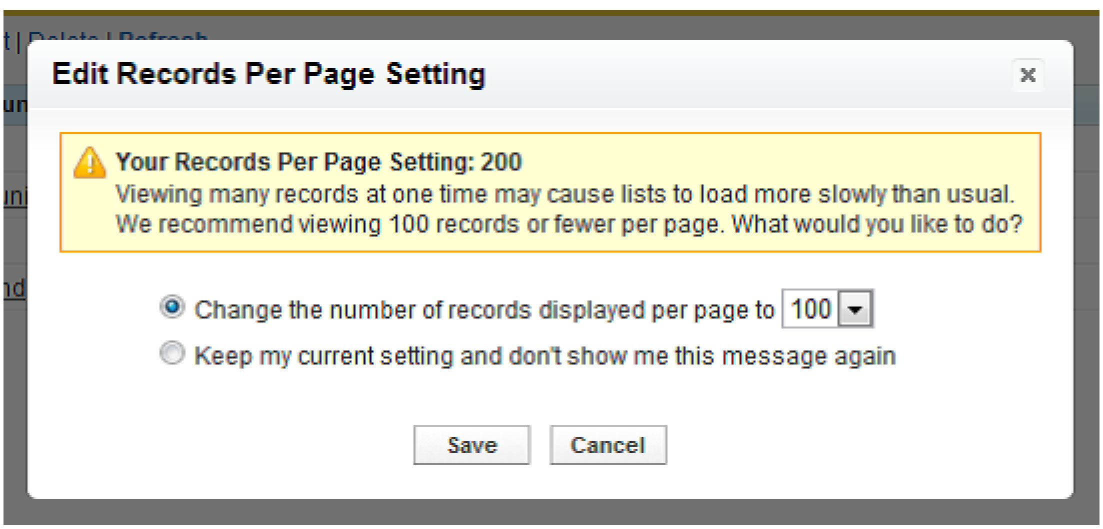

Account Detail
Save
Cancel
Account Owner
Paul Goodey [Change]
Account Name
Company X [View Hierarchy]
Parent Account
Account Number
Account Site
Type
Industry
Annual Revenue
350,000
SF Account Number
SFA-000032

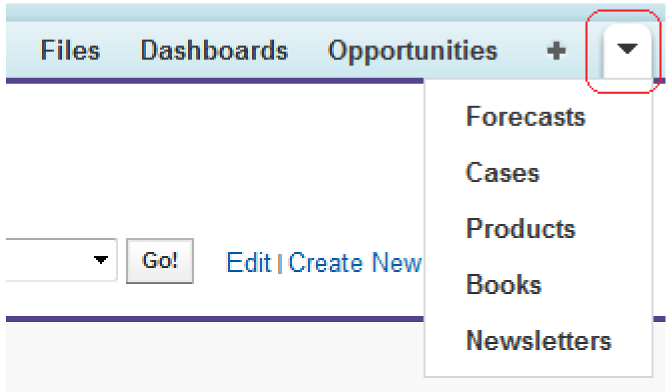

US Opportunities
New Opportunity
Create New View | Edit | Delete | Refresh
Action
Opportunity Name
Account Name
Amount
Close Date
Stage
Edit | Del
Opportunity Y
Company X
$1,000.00
10/01/2012
Prospecting
Edit | Del
Test
Westwood
$110,000.00
06/12/2012
Prospecting
$20,000,000.00
23/12/2011
Prospecting
$100,000,000.00
04/01/2011
Prospecting
Display 10 25 50 100 200 records per page
1-4 of 4
0 Selected
Previous Next
Page 1 of 1

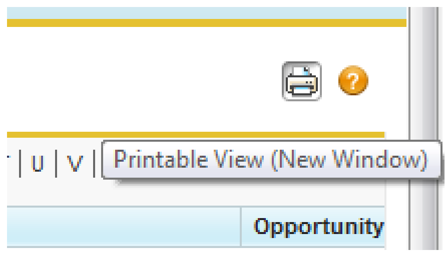

Accounts
Edit Billing Street
All Accounts
New Account
Action
Billing Street
Apply changes to
The record clicked
All 2 selected records
Save
Cancel
Edit | Del |
Acme
Burlington Textiles Corp of A...
Customer
525 S. Lexington Ave


Accounts
Contacts
Reports
Files
Dashboards
Opportunities
New This Week
Edit | Delete | Create New View
New Account
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
Action
Account Name
Account Site
Billing State/Province
Edit | Del |
RK World
New South Wales

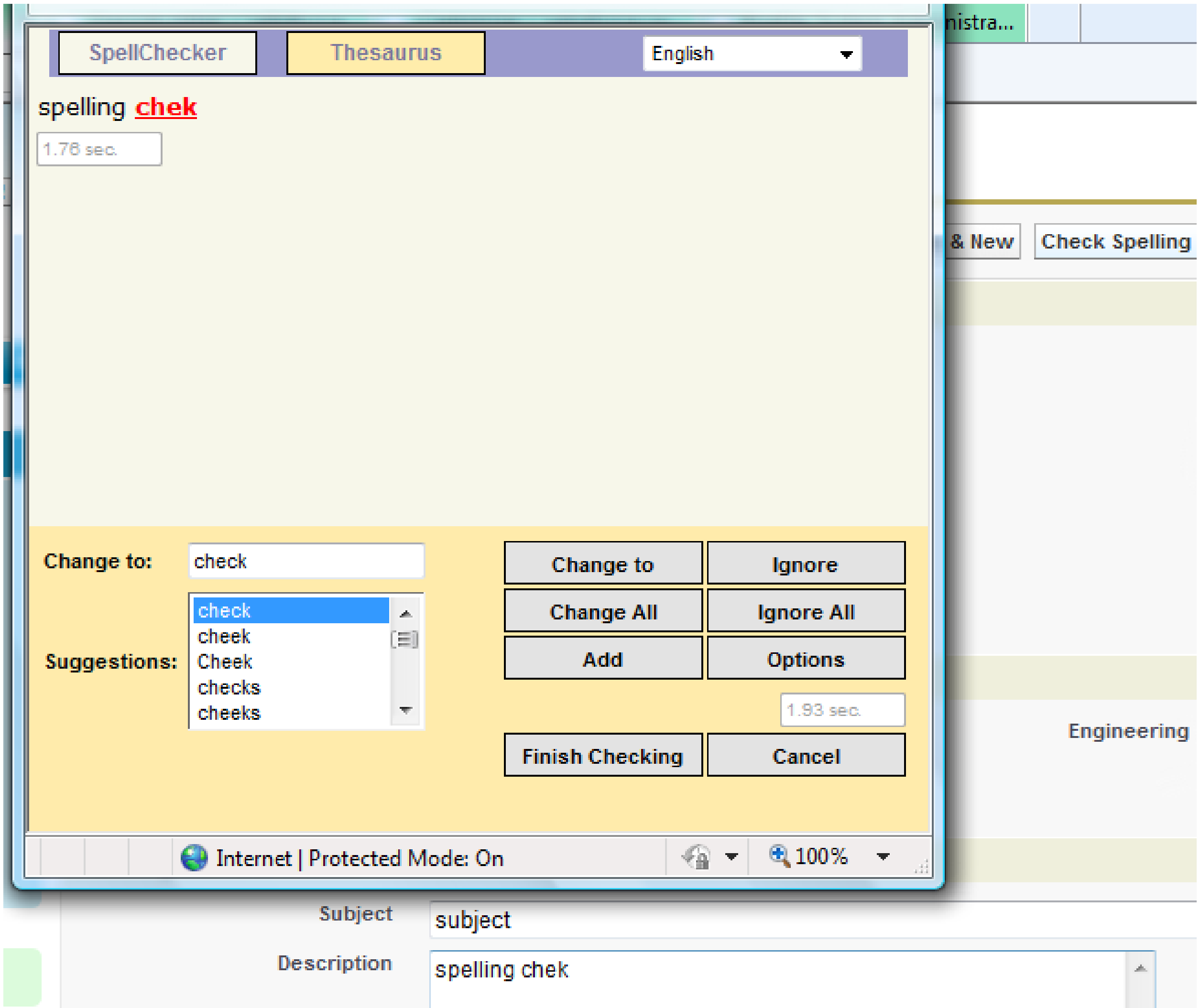

All Opportunities
Edit | Delete | Create New View
List
Feed
New Opportunity
Action
Opportunity Name
Account Name
Amount
Close Date
Stage
Oppo
Edit | Del | Test Westwood $1,330,000.00 31/07/2014 Proposal/Price Quote thow
Edit | Del | 20 Thousand Company X $100,000.00 31/07/2014 Prospecting thow
Edit | Del | 4k $100,000,000.00 31/07/2014 Prospecting thow
Edit | Del | Opportunity Y Company X $200,000.00 31/07/2014 Proposal/Price Quote thow
Edit | Del | Product 101 $10.00 31/07/2014 Prospecting thow
Edit | Del | 500k $600,000.00 31/07/2014 Qualification thow
Edit | Del | Test Company X $120,000.00 27/09/2011 Proposal/Price Quote PGood
Edit | Del | Test Move Contacts First Acco... 31/08/2011 Qualification PGood
Edit | Del | Payment RUS 09/08/2011 Needs Analysis PGood
Edit | Del | MM Test Six Mile Quarry $130,000.00 08/08/2011 Id. Decision Makers PGood
1-10 of 57
0 Selected
Previous
Next
Chat

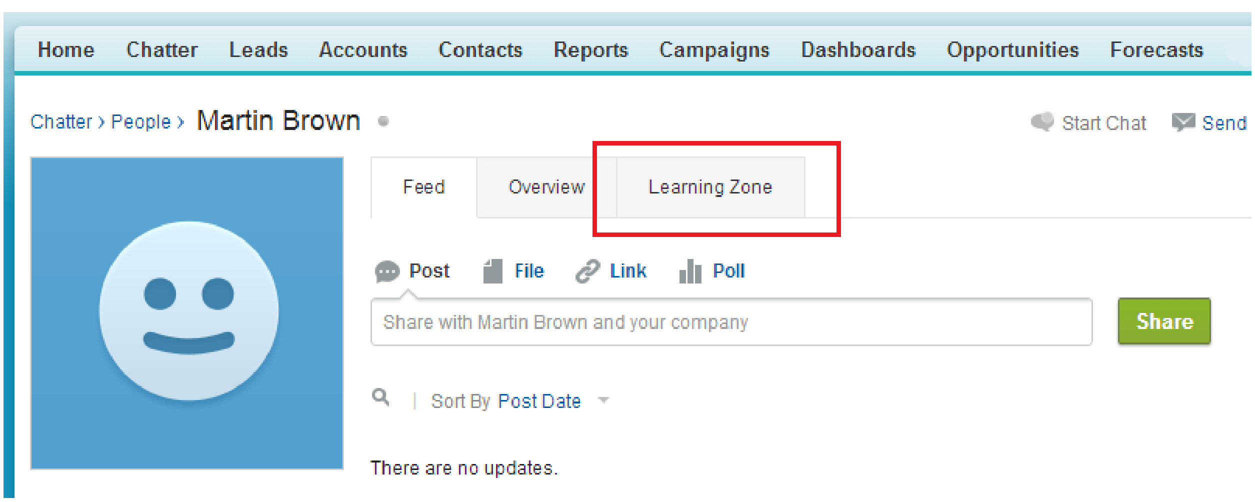

Edit Records Per Page Setting
Your Records Per Page Setting: 200
Viewing many records at one time may cause lists to load more slowly than usual.
We recommend viewing 100 records or fewer per page. What would you like to do?
Change the number of records displayed per page to 100
Keep my current setting and don't show me this message again
Save
Cancel

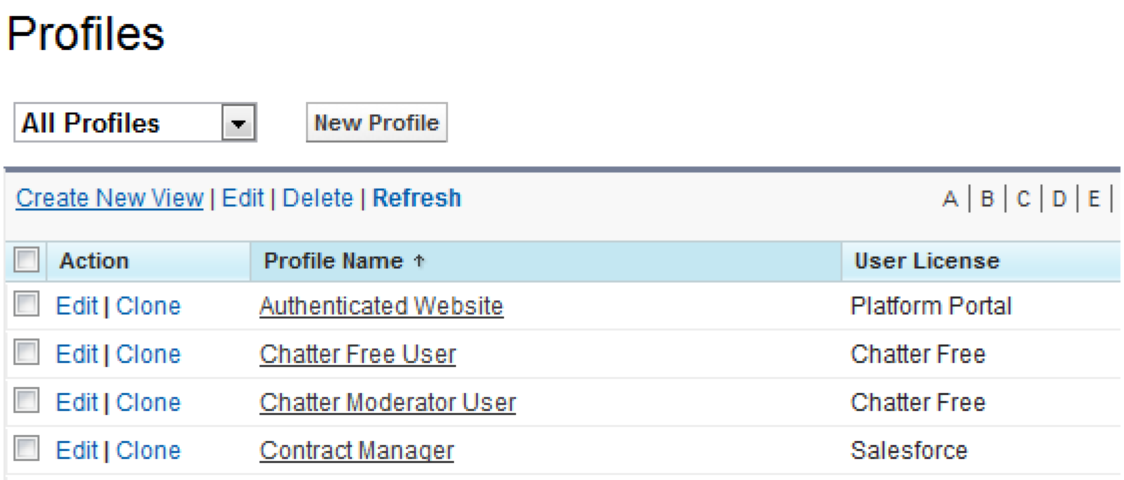

Files
Dashboards
Opportunities
Forecasts
Cases
Products
Books
Newsletters
Go!
Edit | Create New

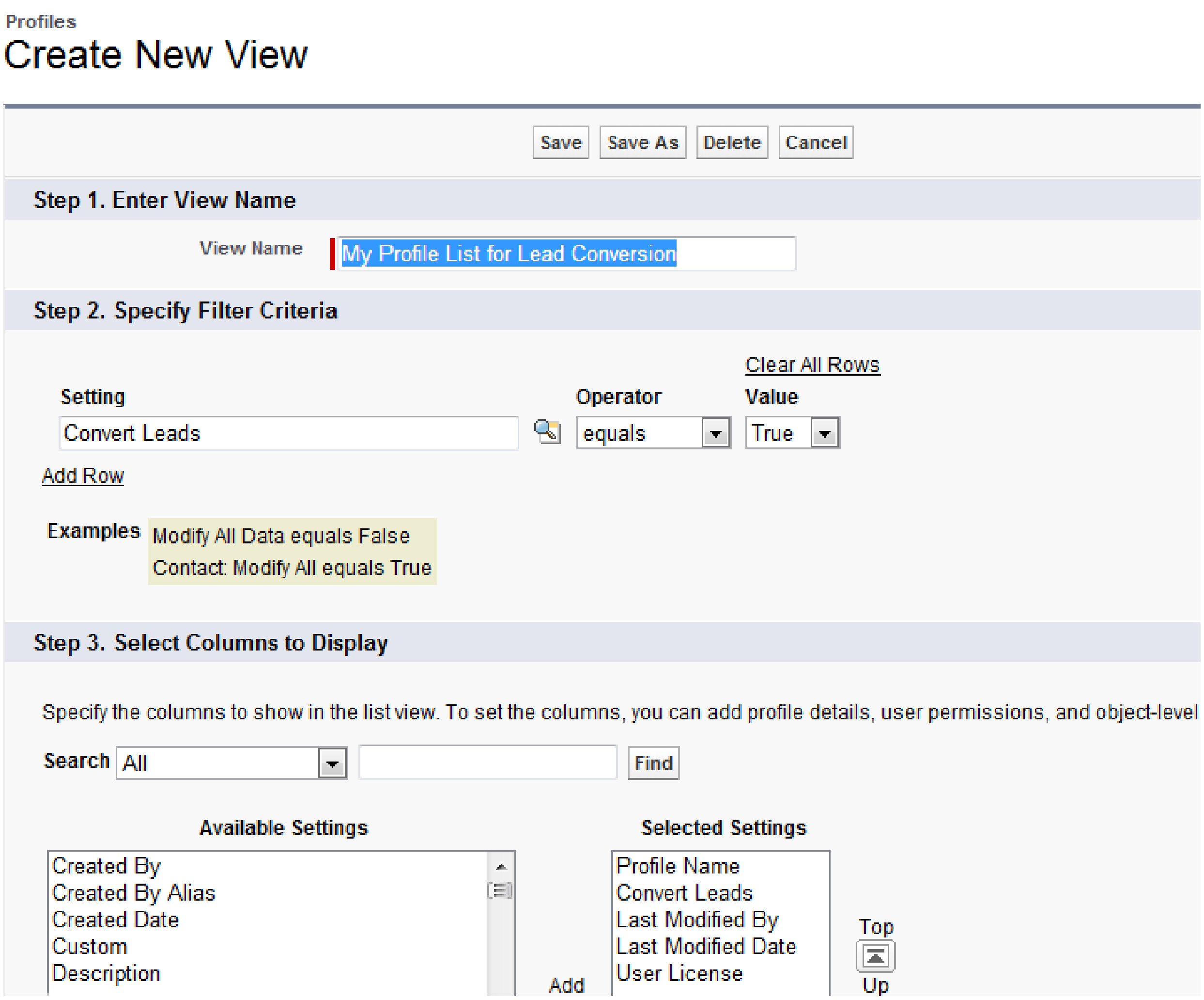

| U | V |
Printable View (New Window)
Opportunity


salesforce.com
Success On Demand.
Close Window
Print This Page
US Opportunities
Displaying records 1 - 4
Number of records
4
Opportunity Name ↑
Account Name
Amount
Close Date
Stage
Opportunity Owner Alias
4k
$100,000,000.00
04/01/2011
Prospecting
jsmit
Opportunity Y
Company X
$1,000.00
10/01/2012
Prospecting
jsmit
Test
Westwood
$110,000.00
06/12/2012
Prospecting
jsmit
thousand
$20,000,000.00
23/12/2011
Prospecting
jsmit
Copyright © 2000-2011 salesforce.com, inc. All rights reserved.


SpellChecker
Thesaurus
English
spelling chek
1.76 sec.
Change to:
check
Suggestions:
check
cheek
Cheek
checks
cheeks
Change to
Ignore
Change All
Ignore All
Add
Options
1.93 sec.
Finish Checking
Cancel
Internet | Protected Mode: On
100%
& New
Check Spelling
Engineering
Subject
subject
Description
spelling chek


Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Dashboards
Opportunities
Forecasts
Chatter › People › Martin Brown
Start Chat
Send
Feed
Overview
Learning Zone
Post
File
Link
Poll
Share with Martin Brown and your company
Share
Sort By Post Date
There are no updates.


Profiles
All Profiles
New Profile
Create New View | Edit | Delete | Refresh
A | B | C | D | E |
Action
Profile Name ↑
User License
Edit | Clone
Authenticated Website
Platform Portal
Edit | Clone
Chatter Free User
Chatter Free
Edit | Clone
Chatter Moderator User
Chatter Free
Edit | Clone
Contract Manager
Salesforce


Profiles
Create New View
Save
Save As
Delete
Cancel
Step 1. Enter View Name
View Name
My Profile List for Lead Conversion
Step 2. Specify Filter Criteria
Clear All Rows
Setting
Operator
Value
Convert Leads
equals
True
Add Row
Examples
Modify All Data equals False
Contact: Modify All equals True
Step 3. Select Columns to Display
Specify the columns to show in the list view. To set the columns, you can add profile details, user permissions, and object-level
Search
All
Find
Available Settings
Selected Settings
Created By
Created By Alias
Created Date
Custom
Description
Add
Profile Name
Convert Leads
Last Modified By
Last Modified Date
User License
Top
Up

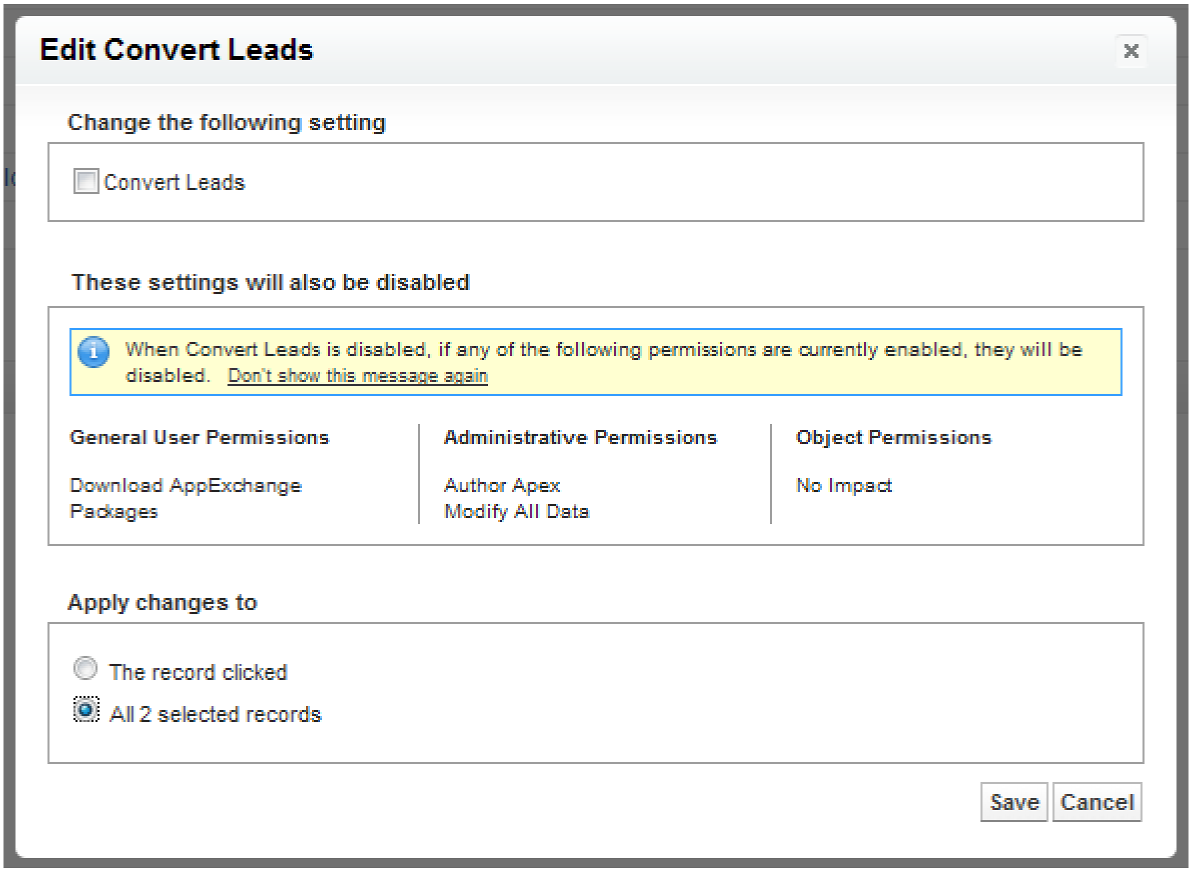
Profiles

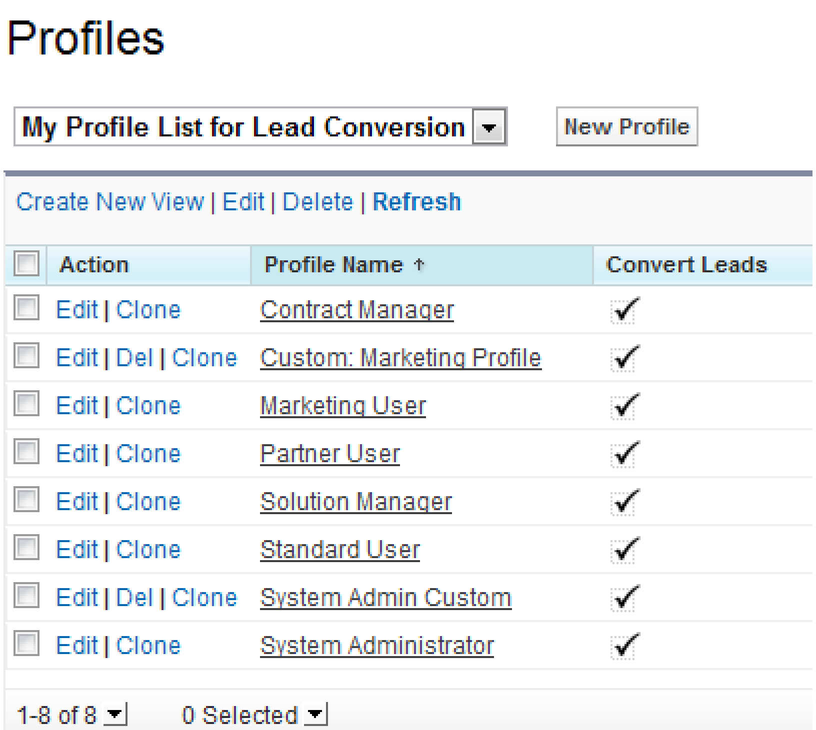
My Profile List for Lead Conversion | New Profile

Create New View | Edit | Delete | **Refresh**

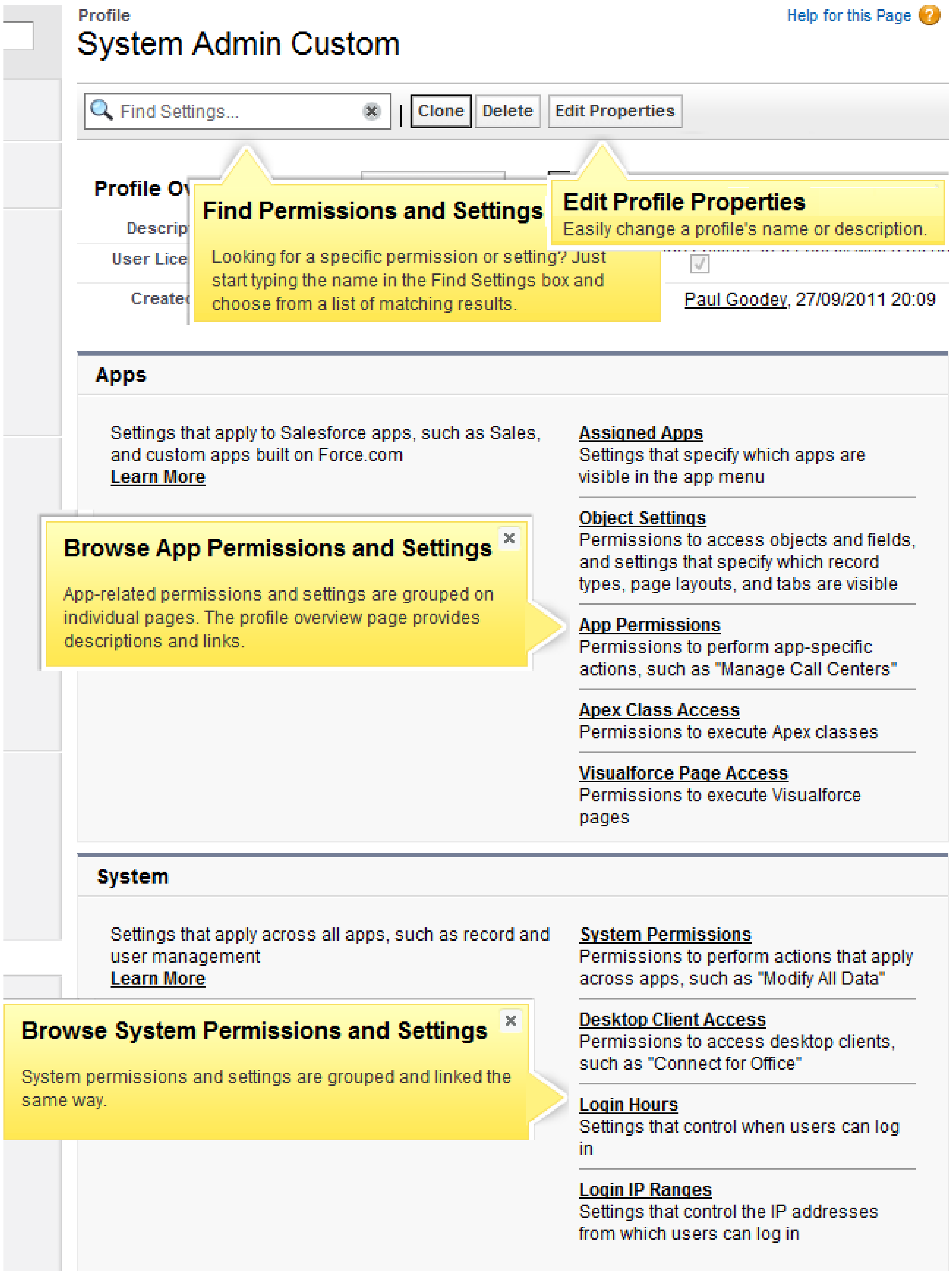
	Action	Profile Name ↑	Convert Leads
☐	Edit | Clone	Contract Manager	✓
☐	Edit | Del | Clone	Custom: Marketing Profile	✓
☑	Edit | Del | Clone	Custom: Sales Profile	✓
☑	Edit | Del | Clone	Custom: Support Profile	✓
☐	Edit | Clone	Marketing User	✓
☐	Edit | Clone	Partner User	✓
☐	Edit | Clone	Solution Manager	✓
☐	Edit | Clone	Standard User	✓
☐	Edit | Del | Clone	System Admin Custom	✓
☐	Edit | Clone	System Administrator	✓

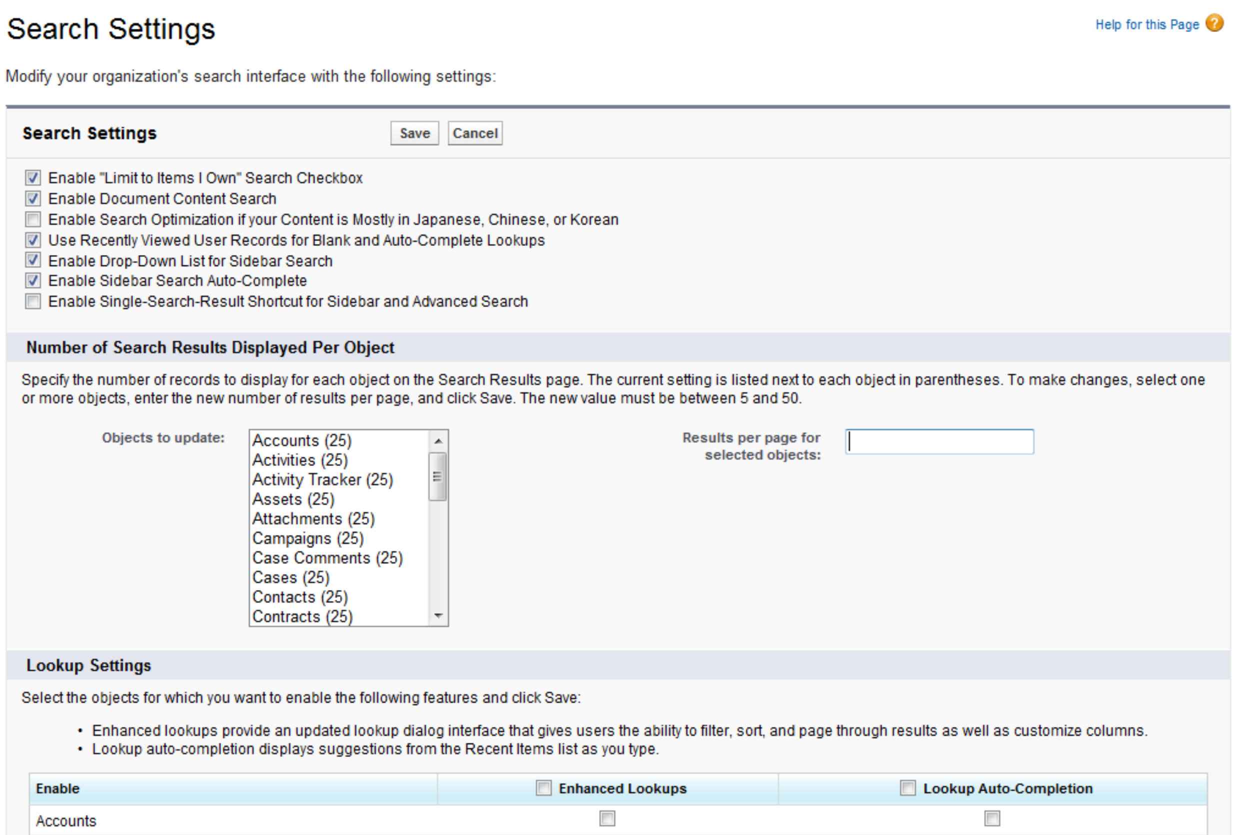
1-10 of 10 | 2 Selected

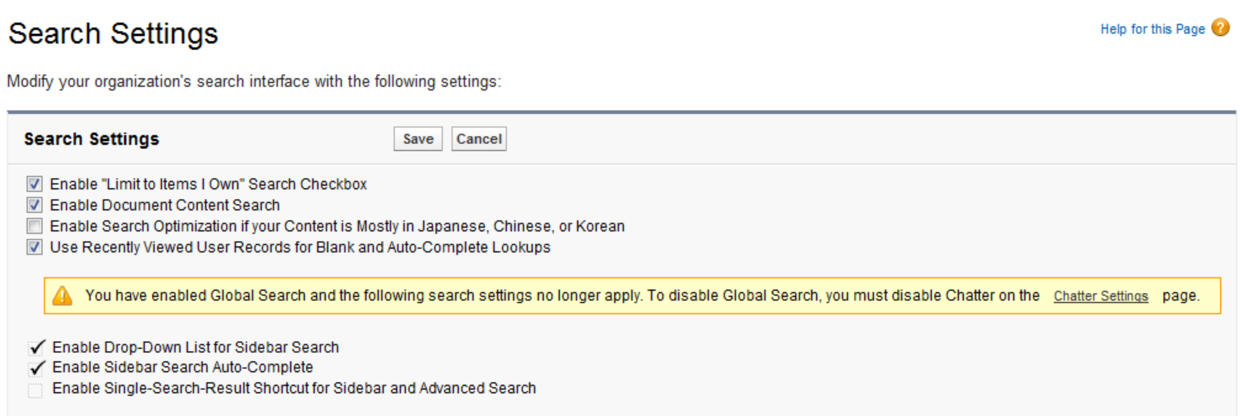


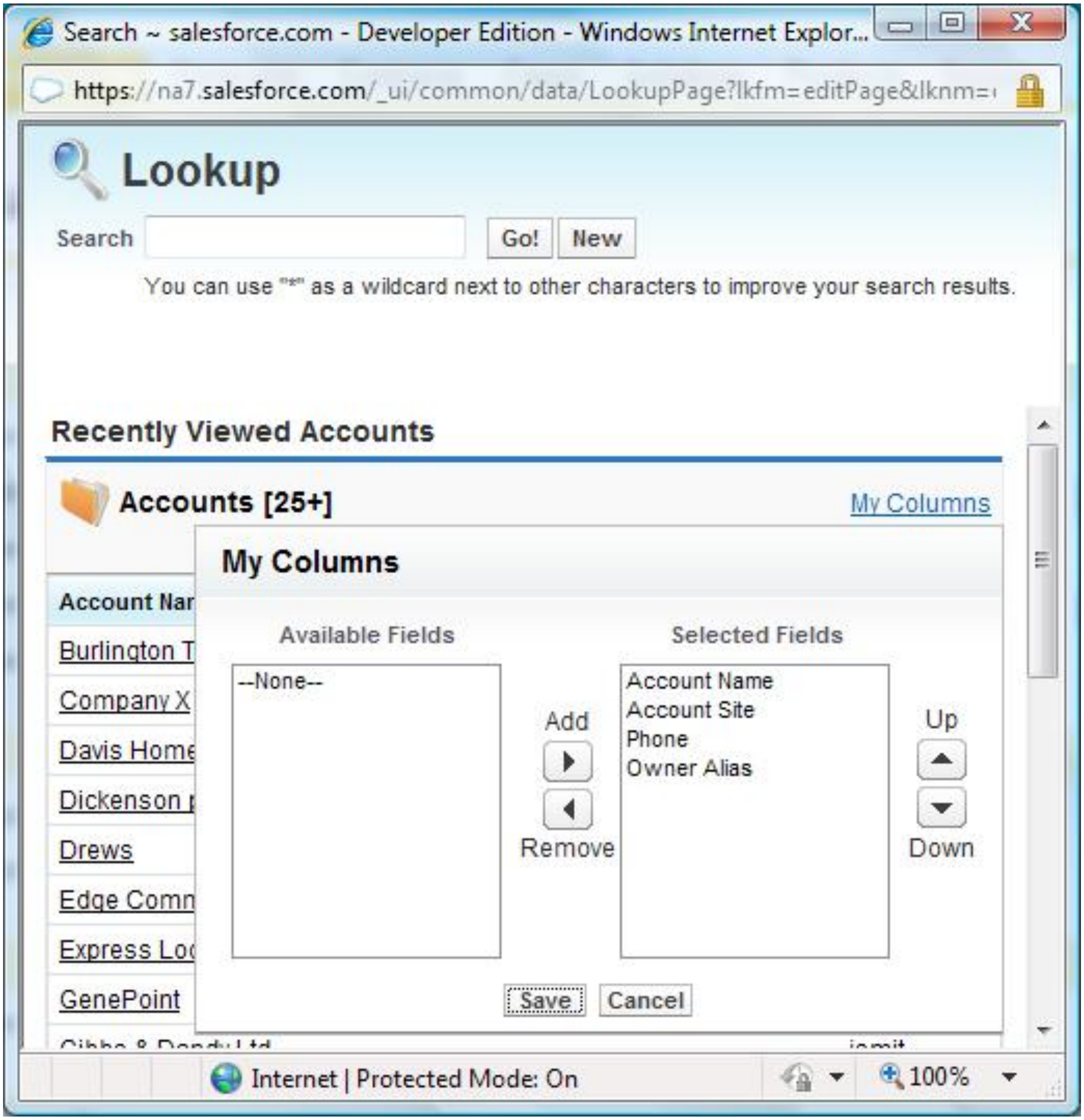


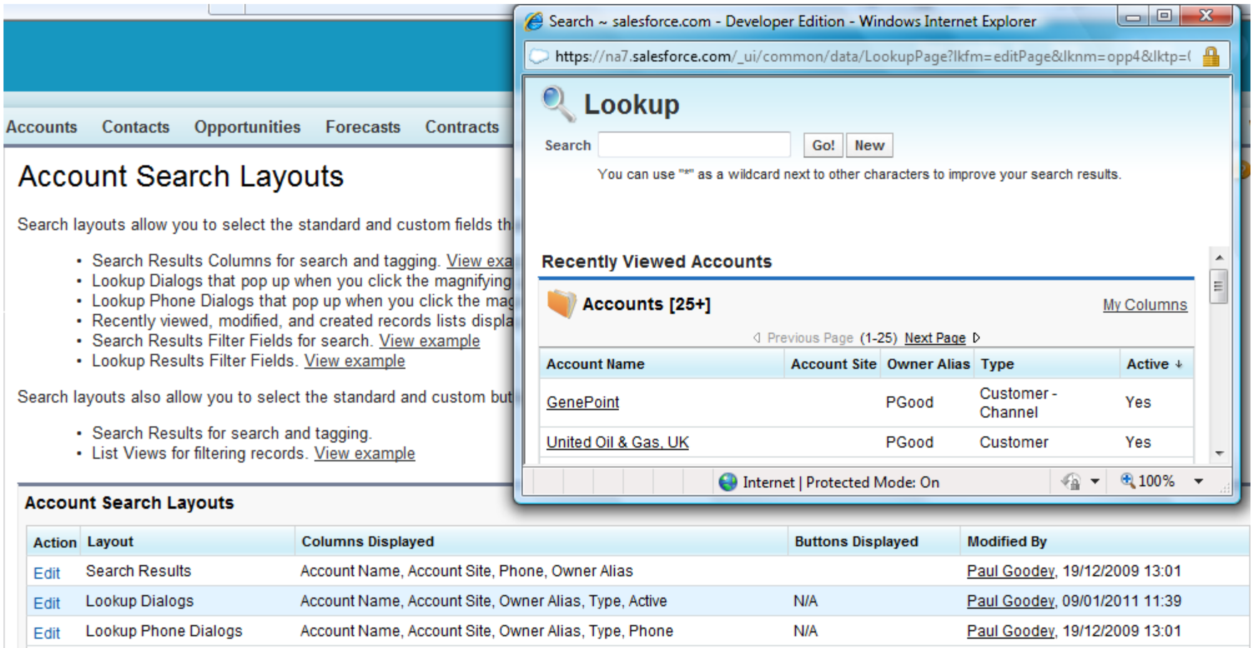
Action	Profile Name ↑	Convert Leads
Edit | Clone	Contract Manager	✓
Edit | Del | Clone	Custom: Marketing Profile	✓
Edit | Clone	Marketing User	✓
Edit | Clone	Partner User	✓
Edit | Clone	Solution Manager	✓
Edit | Clone	Standard User	✓
Edit | Del | Clone	System Admin Custom	✓
Edit | Clone	System Administrator	✓


Profile
System Admin Custom
Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Find Permissions and Settings
Looking for a specific permission or setting? Just start typing the name in the Find Settings box and choose from a list of matching results.
Edit Profile Properties
Easily change a profile's name or description.
Paul Goodey, 27/09/2011 20:09
Apps
Settings that apply to Salesforce apps, such as Sales, and custom apps built on Force.com
Learn More
Assigned Apps
Settings that specify which apps are visible in the app menu
Object Settings
Permissions to access objects and fields, and settings that specify which record types, page layouts, and tabs are visible
Browse App Permissions and Settings
App-related permissions and settings are grouped on individual pages. The profile overview page provides descriptions and links.
App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"
Apex Class Access
Permissions to execute Apex classes
Visualforce Page Access
Permissions to execute Visualforce pages
System
Settings that apply across all apps, such as record and user management
Learn More
System Permissions
Permissions to perform actions that apply across apps, such as "Modify All Data"
Browse System Permissions and Settings
System permissions and settings are grouped and linked the same way.
Desktop Client Access
Permissions to access desktop clients, such as "Connect for Office"
Login Hours
Settings that control when users can log in
Login IP Ranges
Settings that control the IP addresses from which users can log in

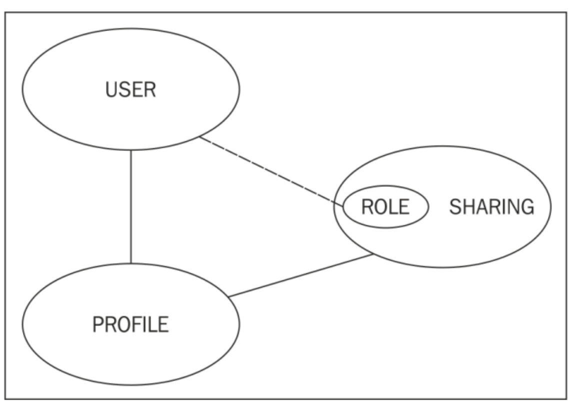

Search Settings
Help for this Page
Modify your organization's search interface with the following settings:
Search Settings
Save
Cancel
Enable "Limit to Items I Own" Search Checkbox
Enable Document Content Search
Enable Search Optimization if your Content is Mostly in Japanese, Chinese, or Korean
Use Recently Viewed User Records for Blank and Auto-Complete Lookups
Enable Drop-Down List for Sidebar Search
Enable Sidebar Search Auto-Complete
Enable Single-Search-Result Shortcut for Sidebar and Advanced Search
Number of Search Results Displayed Per Object
Specify the number of records to display for each object on the Search Results page. The current setting is listed next to each object in parentheses. To make changes, select one or more objects, enter the new number of results per page, and click Save. The new value must be between 5 and 50.
Objects to update:
Accounts (25)
Activities (25)
Activity Tracker (25)
Assets (25)
Attachments (25)
Campaigns (25)
Case Comments (25)
Cases (25)
Contacts (25)
Contracts (25)
Results per page for selected objects:
Lookup Settings
Select the objects for which you want to enable the following features and click Save:
• Enhanced lookups provide an updated lookup dialog interface that gives users the ability to filter, sort, and page through results as well as customize columns.
• Lookup auto-completion displays suggestions from the Recent Items list as you type.
Enable
Enhanced Lookups
Lookup Auto-Completion
Accounts

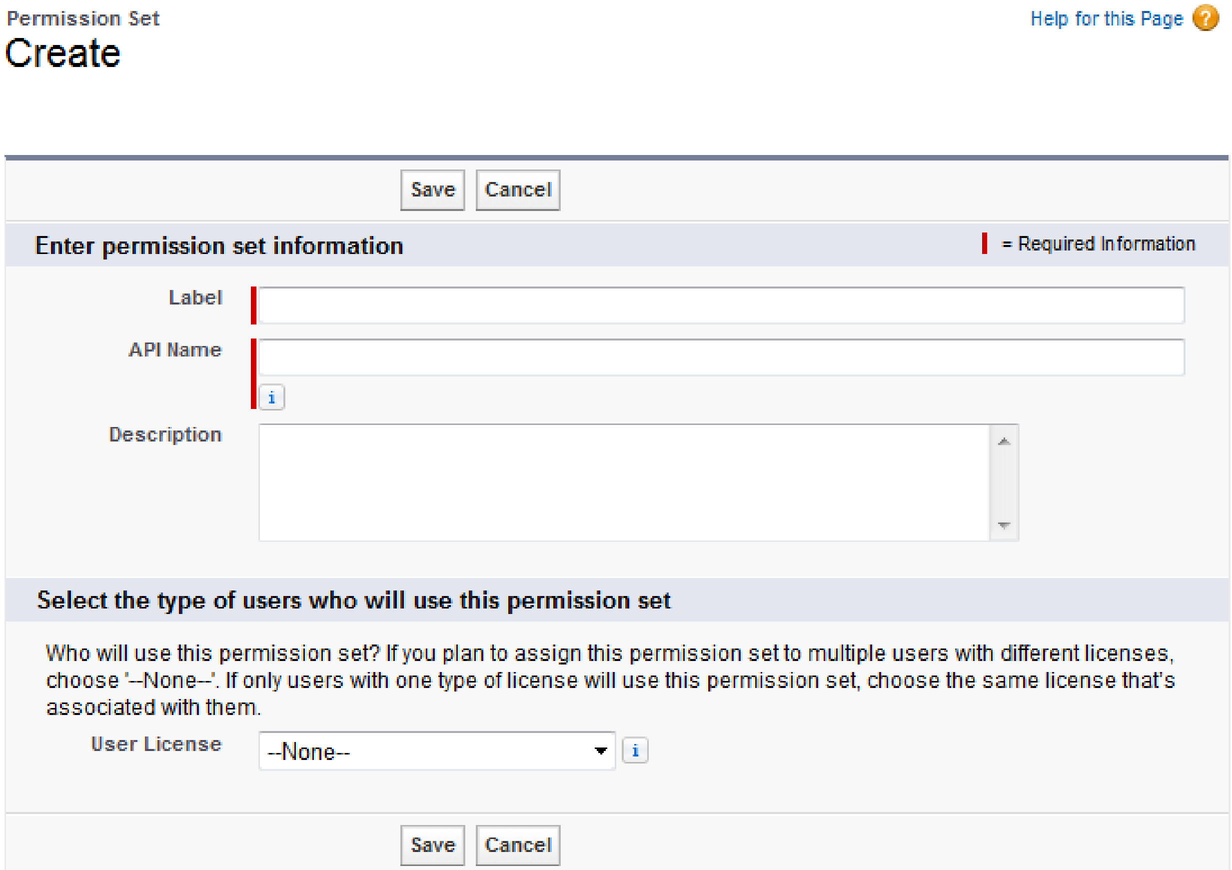

Search Settings
Help for this Page
Modify your organization's search interface with the following settings:
Search Settings
Save
Cancel
Enable "Limit to Items I Own" Search Checkbox
Enable Document Content Search
Enable Search Optimization if your Content is Mostly in Japanese, Chinese, or Korean
Use Recently Viewed User Records for Blank and Auto-Complete Lookups
You have enabled Global Search and the following search settings no longer apply. To disable Global Search, you must disable Chatter on the Chatter Settings page.
Enable Drop-Down List for Sidebar Search
Enable Sidebar Search Auto-Complete
Enable Single-Search-Result Shortcut for Sidebar and Advanced Search

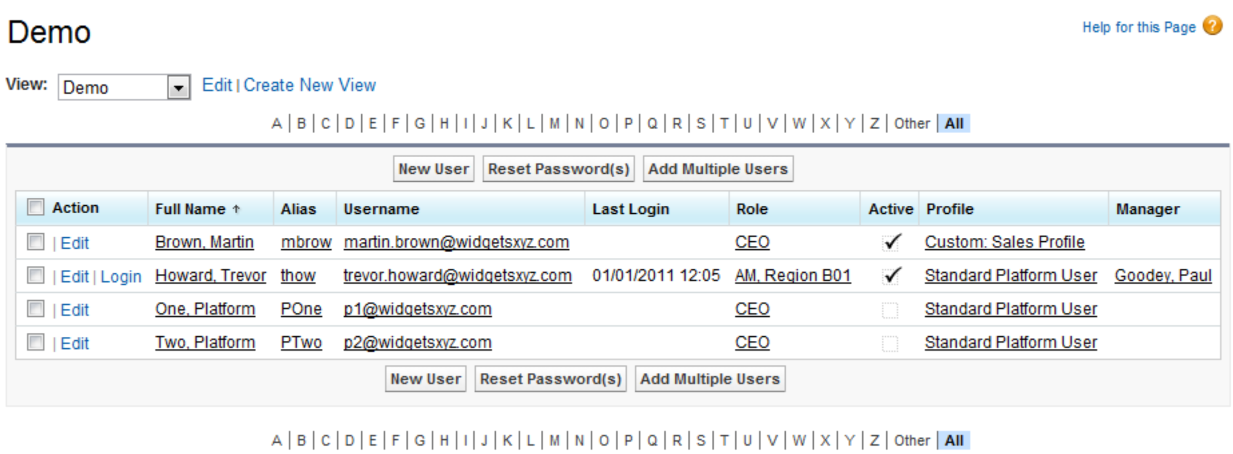

Search ~ salesforce.com - Developer Edition - Windows Internet Explor...
https://na7.salesforce.com/_ui/common/data/LookupPage?lkfm=editPage&lknm=
Lookup
Search
Go!
New
You can use "*" as a wildcard next to other characters to improve your search results.
Recently Viewed Accounts
Accounts [25+]
My Columns
My Columns
Account Nar
Burlington T
Company X
Davis Home
Dickenson
Drews
Edge Comn
Express Lo
GenePoint
Available Fields
Selected Fields
--None--
Account Name
Account Site
Phone
Owner Alias
Add
Remove
Up
Down
Save
Cancel
Internet | Protected Mode: On
100%

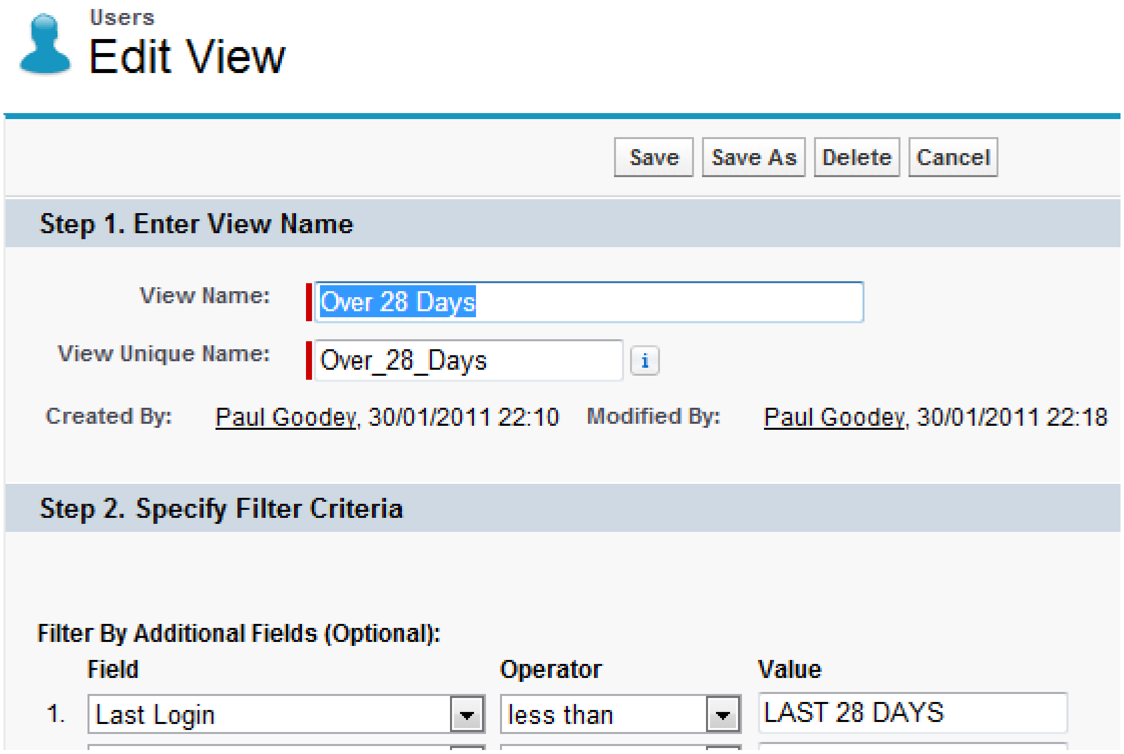

Search ~ salesforce.com - Developer Edition - Windows Internet Explorer
https://na7.salesforce.com/_ui/common/data/LookupPage?lkfm=editPage&lknm=opp4&lktp=(
Lookup
Search
Go!
New
You can use "*" as a wildcard next to other characters to improve your search results.
Recently Viewed Accounts
Accounts [25+]
My Columns
Previous Page (1-25) Next Page
Account Name
Account Site
Owner Alias
Type
Active
GenePoint
PGood
Customer - Channel
Yes
United Oil & Gas, UK
PGood
Customer
Yes
Internet | Protected Mode: On
100%
Accounts
Contacts
Opportunities
Forecasts
Contracts
Account Search Layouts
Search layouts allow you to select the standard and custom fields th
Search Results Columns for search and tagging. View exa
Lookup Dialogs that pop up when you click the magnifying
Lookup Phone Dialogs that pop up when you click the mag
Recently viewed, modified, and created records lists displa
Search Results Filter Fields for search. View example
Lookup Results Filter Fields. View example
Search layouts also allow you to select the standard and custom but
Search Results for search and tagging.
List Views for filtering records. View example
Account Search Layouts
Action
Layout
Columns Displayed
Buttons Displayed
Modified By
Edit
Search Results
Account Name, Account Site, Phone, Owner Alias
Paul Goodey, 19/12/2009 13:01
Edit
Lookup Dialogs
Account Name, Account Site, Owner Alias, Type, Active
N/A
Paul Goodey, 09/01/2011 11:39
Edit
Lookup Phone Dialogs
Account Name, Account Site, Owner Alias, Type, Phone
N/A
Paul Goodey, 19/12/2009 13:01

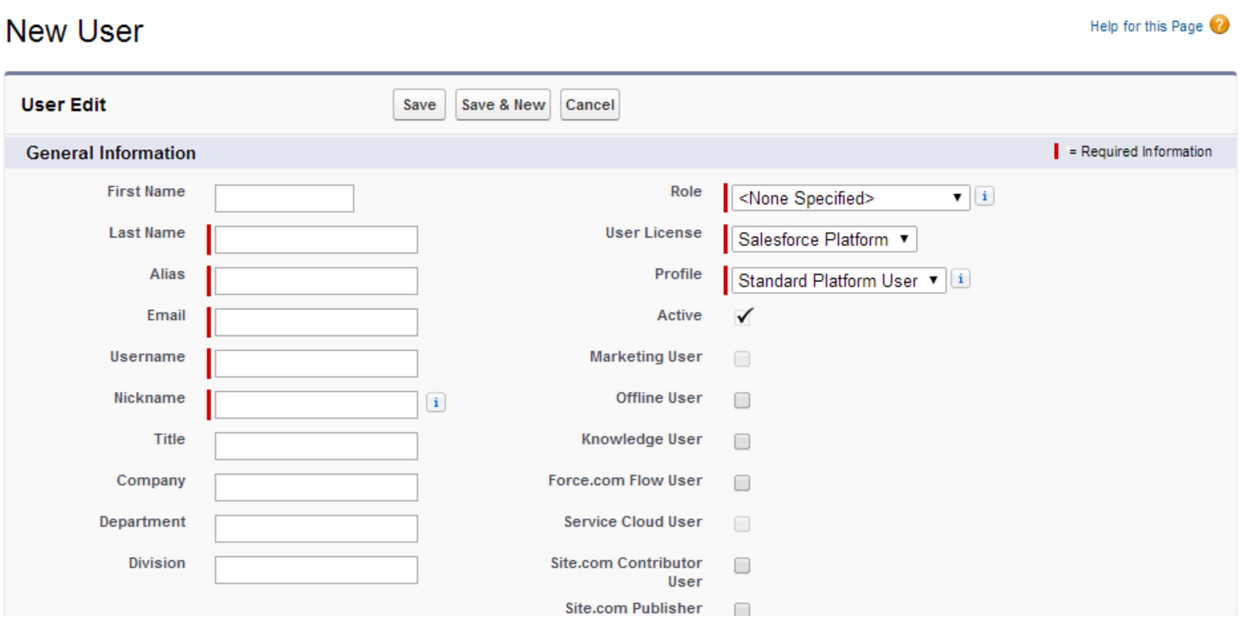
Chapter 2

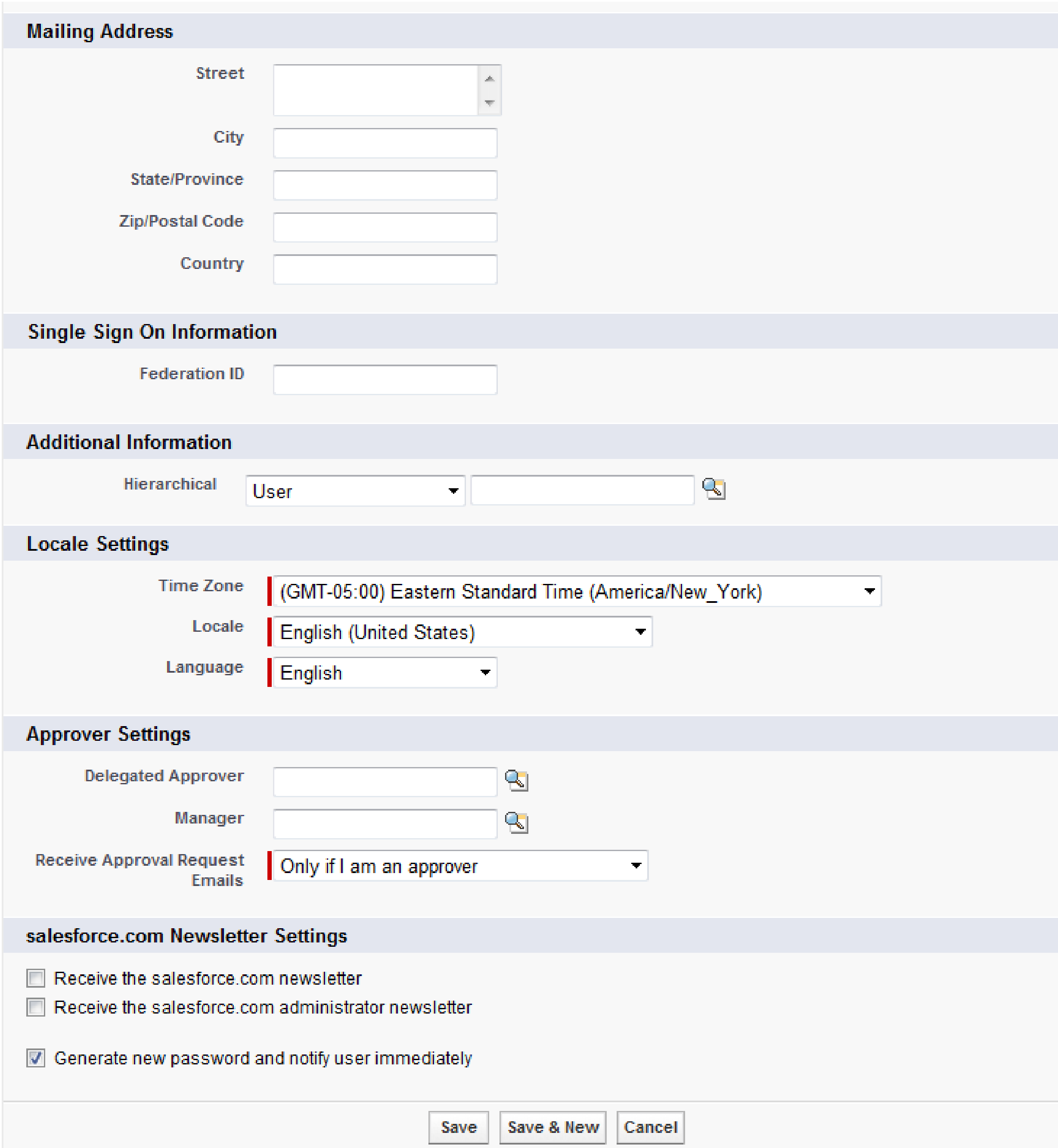

USER
ROLE
SHARING
PROFILE

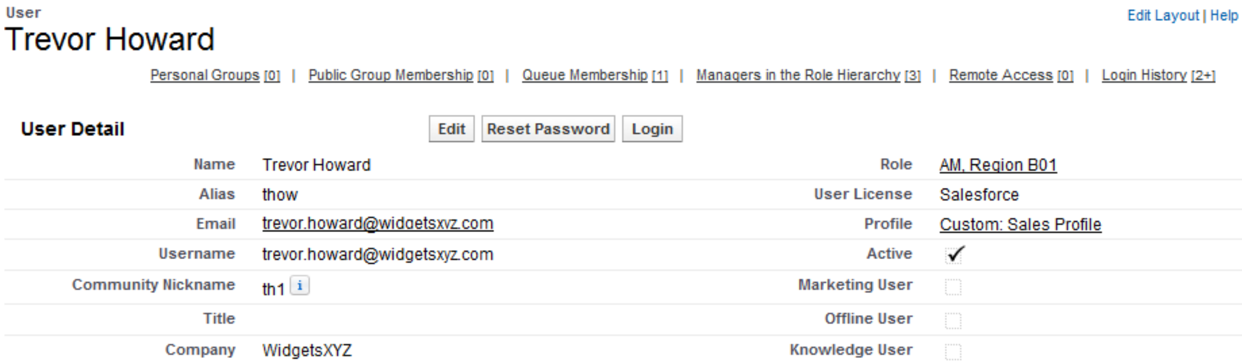

Permission Set
Create
Help for this Page
Save Cancel
Enter permission set information
= Required Information
Label
API Name
Description
Select the type of users who will use this permission set
Who will use this permission set? If you plan to assign this permission set to multiple users with different licenses, choose '--None--'. If only users with one type of license will use this permission set, choose the same license that's associated with them.
User License
--None--
Save Cancel

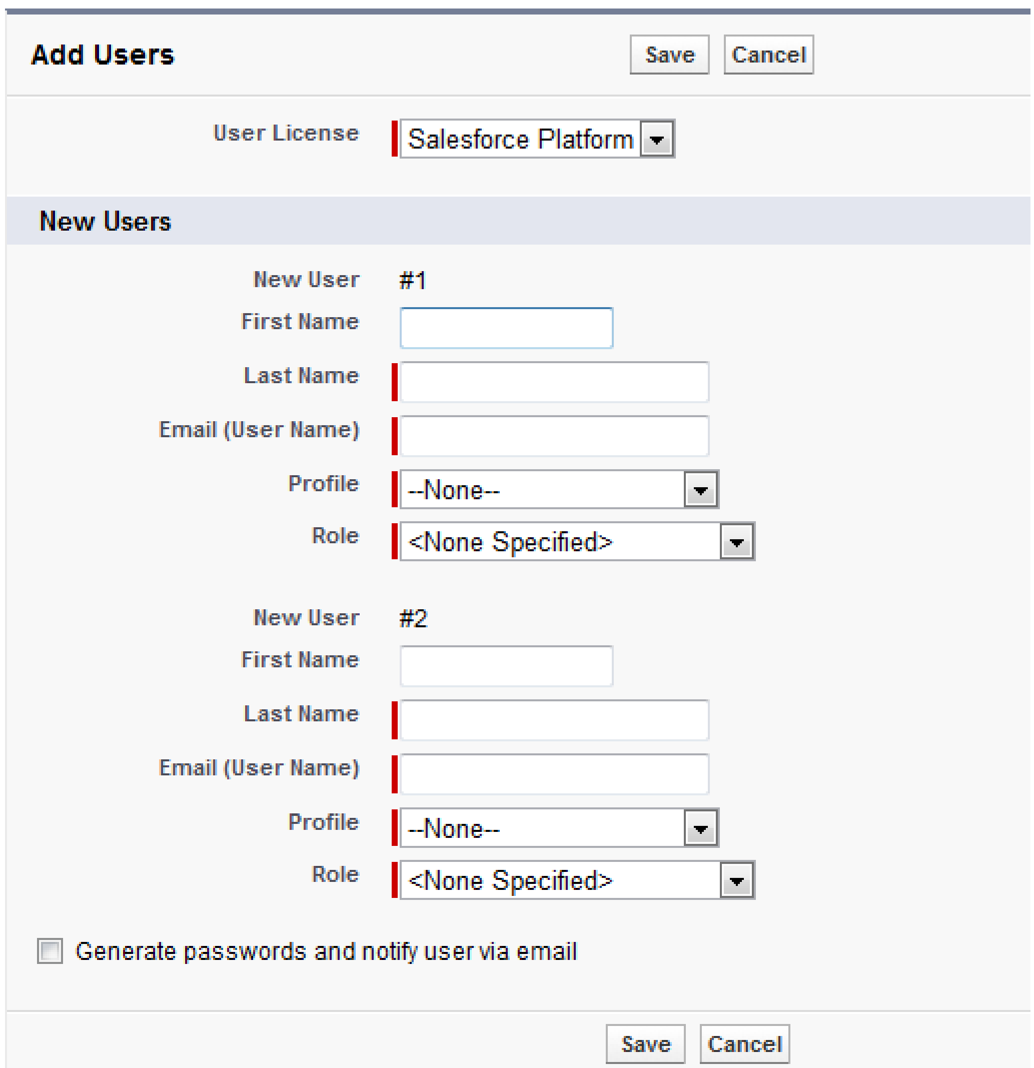

Demo
Help for this Page
View: Demo
Edit | Create New View
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
New User Reset Password(s) Add Multiple Users
Action Full Name Alias Username Last Login Role Active Profile Manager
Edit Brown, Martin mbrow martin.brown@widgetsxyz.com CEO Custom: Sales Profile
Edit | Login Howard, Trevor thow trevor.howard@widgetsxyz.com 01/01/2011 12:05 AM, Region B01 Standard Platform User Goodey, Paul
Edit One, Platform POne p1@widgetsxyz.com CEO Standard Platform User
Edit Two, Platform PTwo p2@widgetsxyz.com CEO Standard Platform User
New User Reset Password(s) Add Multiple Users
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


Users
Edit View
Save
Save As
Delete
Cancel
Step 1. Enter View Name
View Name: Over 28 Days
View Unique Name: Over_28_Days
Created By: Paul Goodey, 30/01/2011 22:10
Modified By: Paul Goodey, 30/01/2011 22:18
Step 2. Specify Filter Criteria
Filter By Additional Fields (Optional):
Field
Operator
Value
1. Last Login
less than
LAST 28 DAYS


New User
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
Last Name
Alias
Email
Username
Nickname
Title
Company
Department
Division
Role <None Specified>
User License Salesforce Platform
Profile Standard Platform User
Active
Marketing User
Offline User
Knowledge User
Force.com Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher


Mailing Address
Street
City
State/Province
Zip/Postal Code
Country
Single Sign On Information
Federation ID
Additional Information
Hierarchical
User
Locale Settings
Time Zone
(GMT-05:00) Eastern Standard Time (America/New_York)
Locale
English (United States)
Language
English
Approver Settings
Delegated Approver
Manager
Receive Approval Request Emails
Only if I am an approver
salesforce.com Newsletter Settings
Receive the salesforce.com newsletter
Receive the salesforce.com administrator newsletter
Generate new password and notify user immediately
Save
Save & New
Cancel


User
Trevor Howard
Edit Layout | Help
Personal Groups [0] | Public Group Membership [0] | Queue Membership [1] | Managers in the Role Hierarchy [3] | Remote Access [0] | Login History [2+]
User Detail
Edit
Reset Password
Login
Name Trevor Howard
Alias thow
Email trevor.howard@widgetsxyz.com
Username trevor.howard@widgetsxyz.com
Community Nickname th1
Title
Company WidgetsXYZ
Role AM, Region B01
User License Salesforce
Profile Custom: Sales Profile
Active
Marketing User
Offline User
Knowledge User


Add Users
Save
Cancel
User License
Salesforce Platform
New Users
New User #1
First Name
Last Name
Email (User Name)
Profile --None--
Role <None Specified>
New User #2
First Name
Last Name
Email (User Name)
Profile --None--
Role <None Specified>
Generate passwords and notify user via email
Save
Cancel

Manage Delegated Groups

Help for this Page

Below are delegated groups defined for your organization. You can choose to delegate user administration, custom object administration, or both to the delegated administrators of this group.

Delegated Groups New

Action	Delegated Group Name	Login Access	Created By	Modified By
Edit	User Management	✓	Paul Goodey, 30/01/2011 17:40	Paul Goodey, 31/01/2011 09:03

Delegated Group

User Management

Help for this Page

Delegated Group Detail Edit Delete

Delegated Group Name	User Management	Enable Group for Login Access	✓
Created By	Paul Goodey, 30/01/2011 17:40	Modified By	Paul Goodey, 31/01/2011 10:46

Delegated Administrators Add — Delegated Administrators Help

Action	Users	Modified By
Remove	Martin Brown	Paul Goodey, 30/01/2011 17:53

User Administration Add — User Administration Help

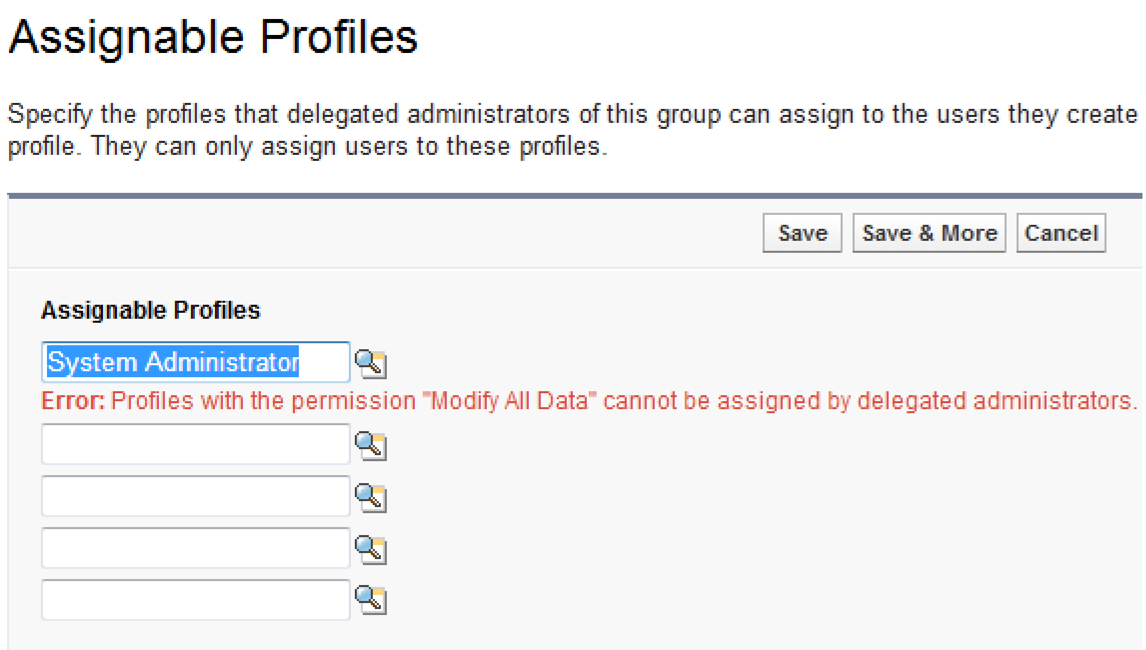
Action	Roles and Subordinates	Modified By
Remove	AM, Region B01	Paul Goodey, 30/01/2011 17:54

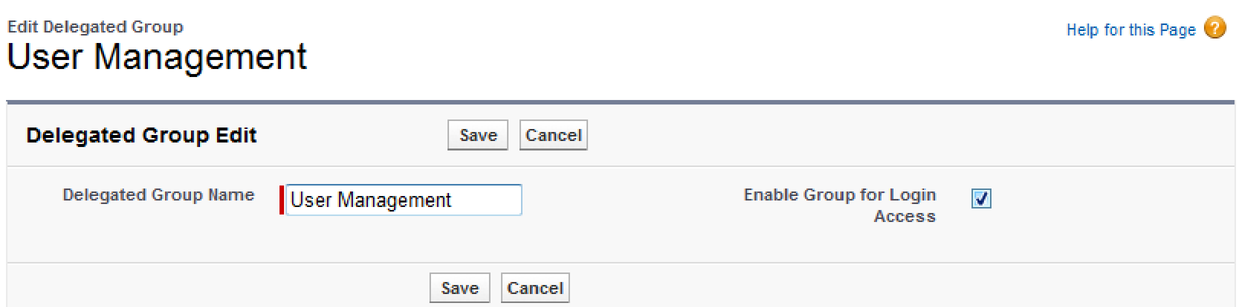
Assignable Profiles Add — Assignable Profiles Help

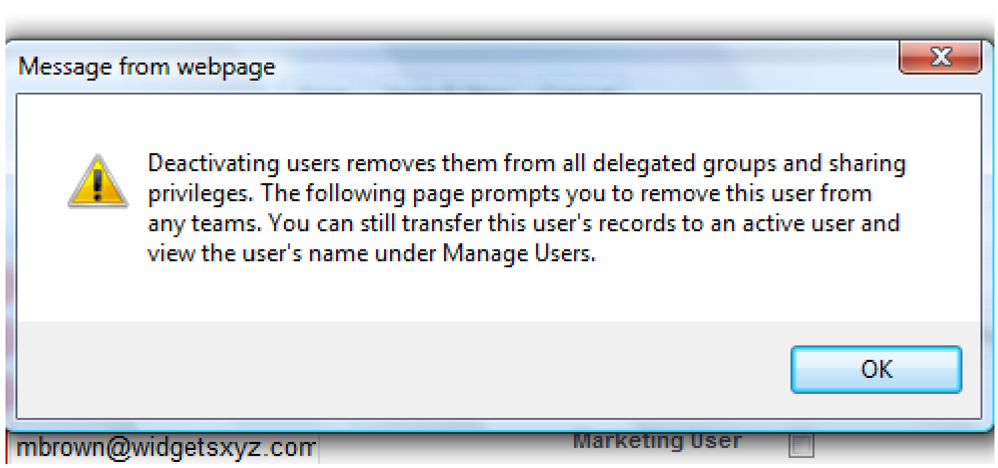
Action	Profiles	Modified By
Remove	Custom: Sales Profile	Paul Goodey, 30/01/2011 18:13

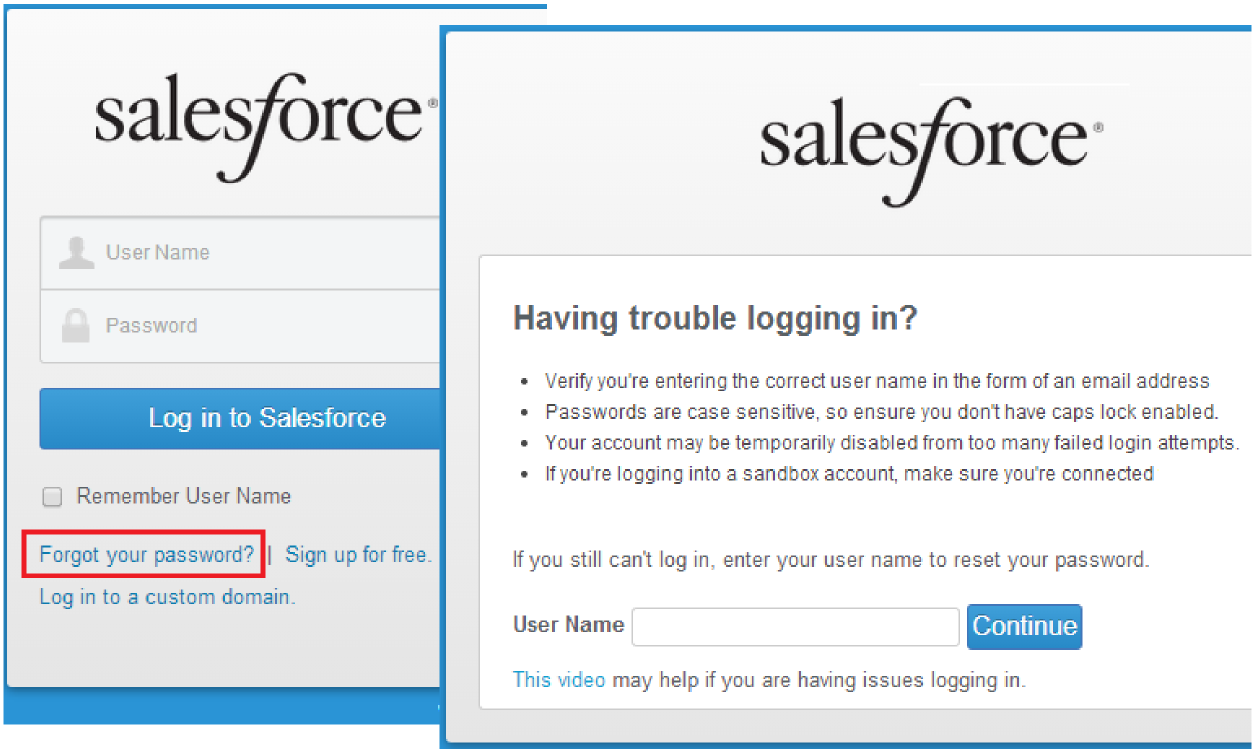
Custom Object Administration Add — Custom Object Administration Help

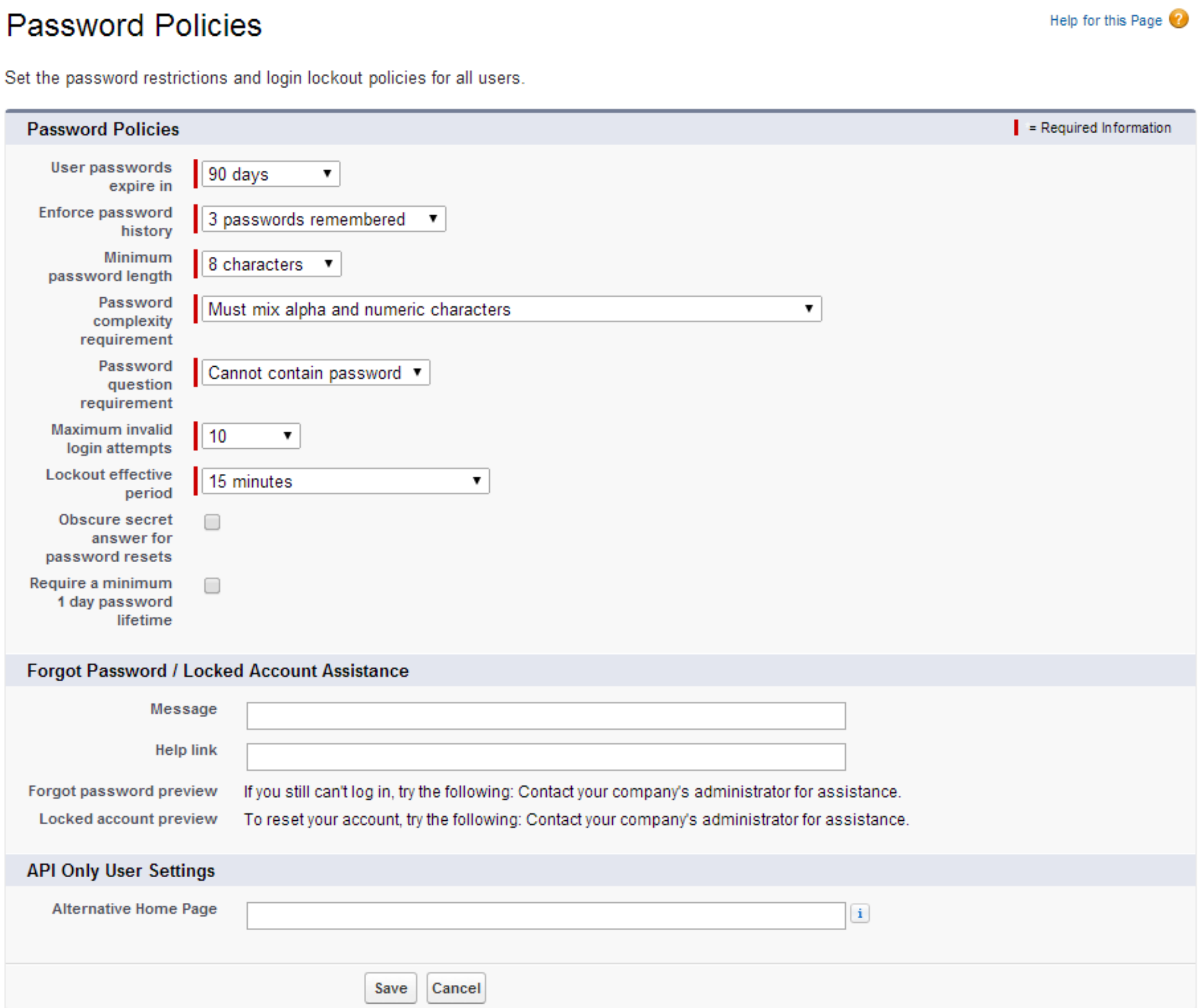
No custom objects specified.

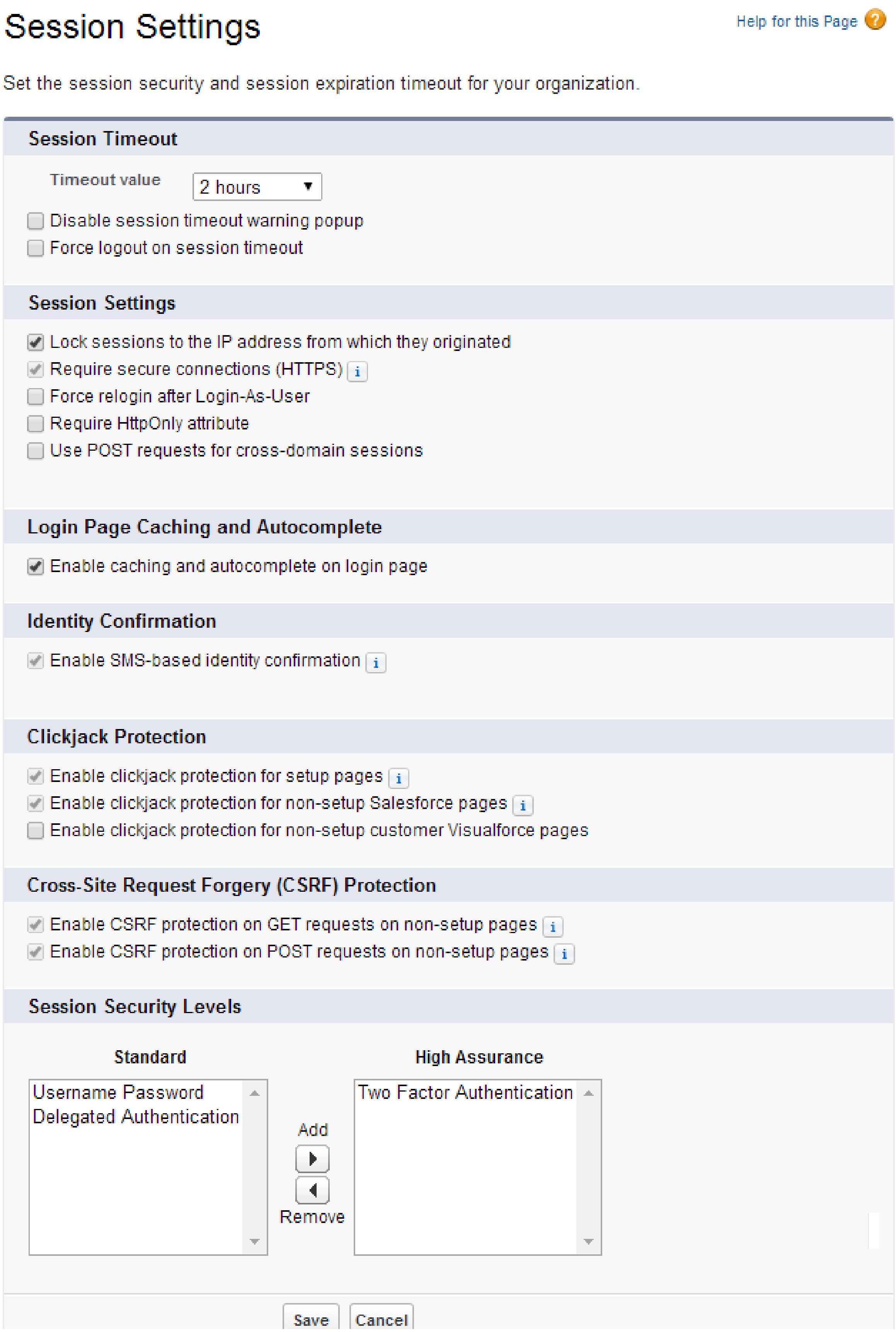

Assignable Profiles
Specify the profiles that delegated administrators of this group can assign to the users they create profile. They can only assign users to these profiles.
Save
Save & More
Cancel
Assignable Profiles
System Administrator
Error: Profiles with the permission "Modify All Data" cannot be assigned by delegated administrators.


Edit Delegated Group
User Management
Help for this Page
Delegated Group Edit
Save
Cancel
Delegated Group Name
User Management
Enable Group for Login Access
Save
Cancel

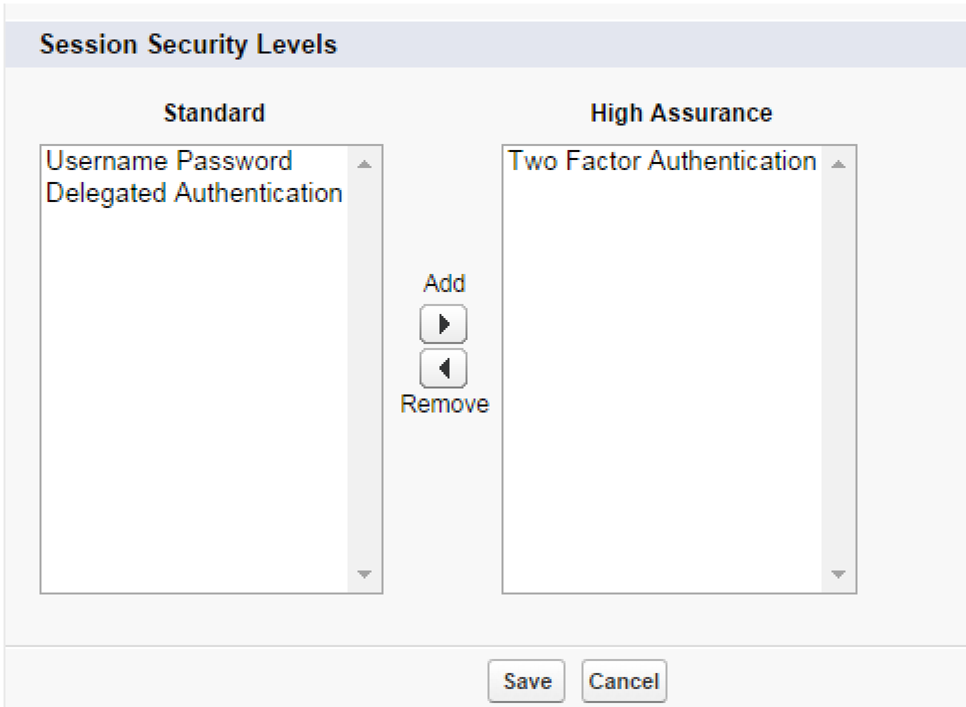

Message from webpage
Deactivating users removes them from all delegated groups and sharing privileges. The following page prompts you to remove this user from any teams. You can still transfer this user's records to an active user and view the user's name under Manage Users.
OK
mbrown@widgetsxyz.com
Marketing User

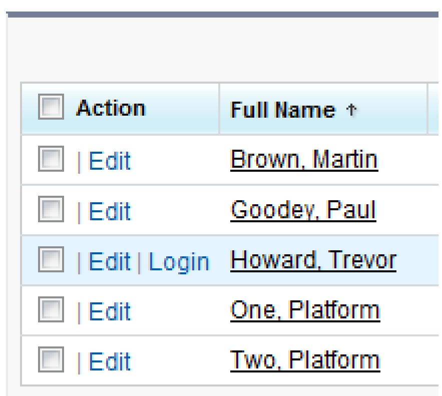

salesforce
User Name
Password
Log in to Salesforce
Remember User Name
Forgot your password? | Sign up for free.
Log in to a custom domain.
salesforce
Having trouble logging in?
Verify you're entering the correct user name in the form of an email address
Passwords are case sensitive, so ensure you don't have caps lock enabled.
Your account may be temporarily disabled from too many failed login attempts.
If you're logging into a sandbox account, make sure you're connected
If you still can't log in, enter your user name to reset your password.
User Name
Continue
This video may help if you are having issues logging in.

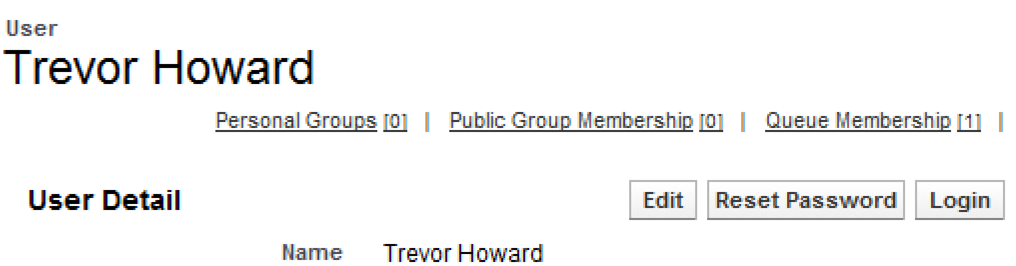

Password Policies
Help for this Page
Set the password restrictions and login lockout policies for all users.
Password Policies
= Required Information
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum password length
8 characters
Password complexity requirement
Must mix alpha and numeric characters
Password question requirement
Cannot contain password
Maximum invalid login attempts
10
Lockout effective period
15 minutes
Obscure secret answer for password resets
Require a minimum 1 day password lifetime
Forgot Password / Locked Account Assistance
Message
Help link
Forgot password preview
If you still can't log in, try the following: Contact your company's administrator for assistance.
Locked account preview
To reset your account, try the following: Contact your company's administrator for assistance.
API Only User Settings
Alternative Home Page
Save
Cancel

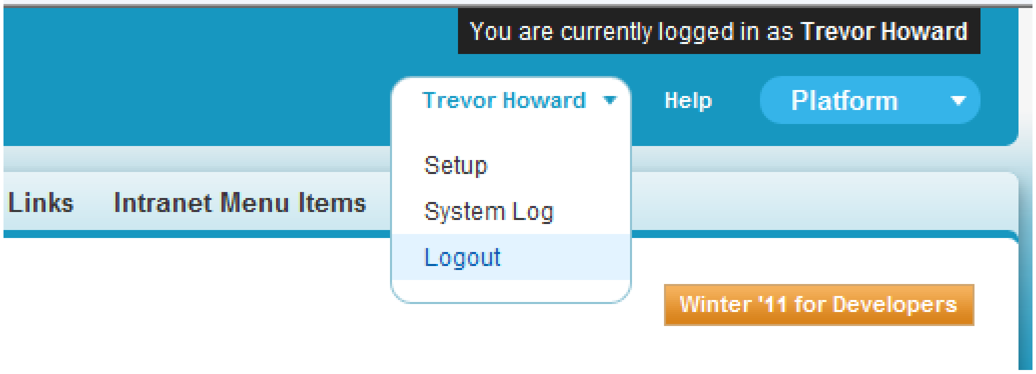


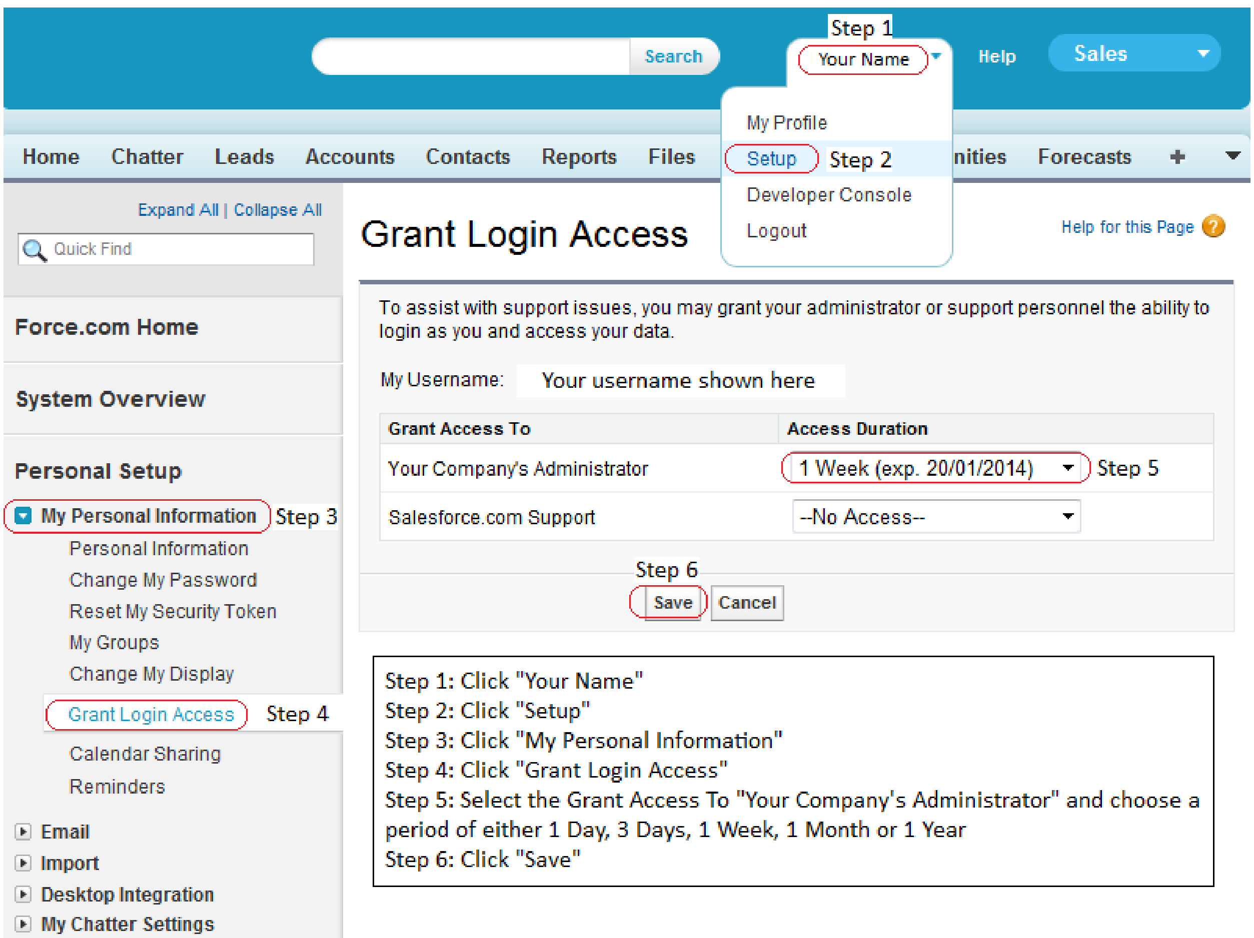
Session Settings
Help for this Page
Set the session security and session expiration timeout for your organization.
Session Timeout
Timeout value
2 hours
Disable session timeout warning popup
Force logout on session timeout
Session Settings
Lock sessions to the IP address from which they originated
Require secure connections (HTTPS)
Force relogin after Login-As-User
Require HttpOnly attribute
Use POST requests for cross-domain sessions
Login Page Caching and Autocomplete
Enable caching and autocomplete on login page
Identity Confirmation
Enable SMS-based identity confirmation
Clickjack Protection
Enable clickjack protection for setup pages
Enable clickjack protection for non-setup Salesforce pages
Enable clickjack protection for non-setup customer Visualforce pages
Cross-Site Request Forgery (CSRF) Protection
Enable CSRF protection on GET requests on non-setup pages
Enable CSRF protection on POST requests on non-setup pages
Session Security Levels
Standard
Username Password
Delegated Authentication
High Assurance
Two Factor Authentication
Add
Remove
Save
Cancel

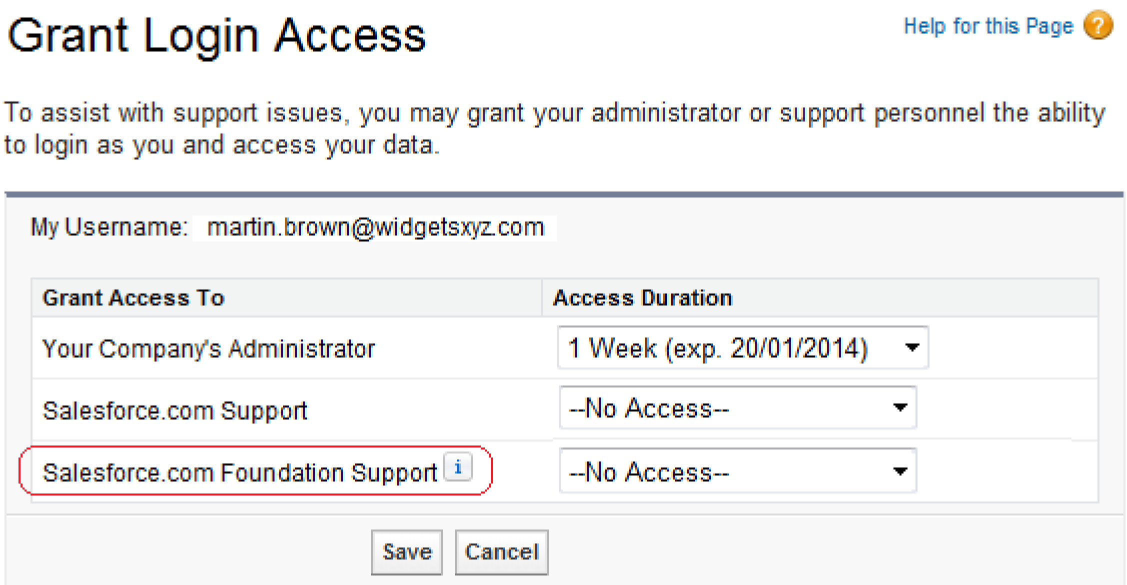

Session Security Levels
Standard
High Assurance
Username Password
Delegated Authentication
Two Factor Authentication
Add
Remove
Save
Cancel

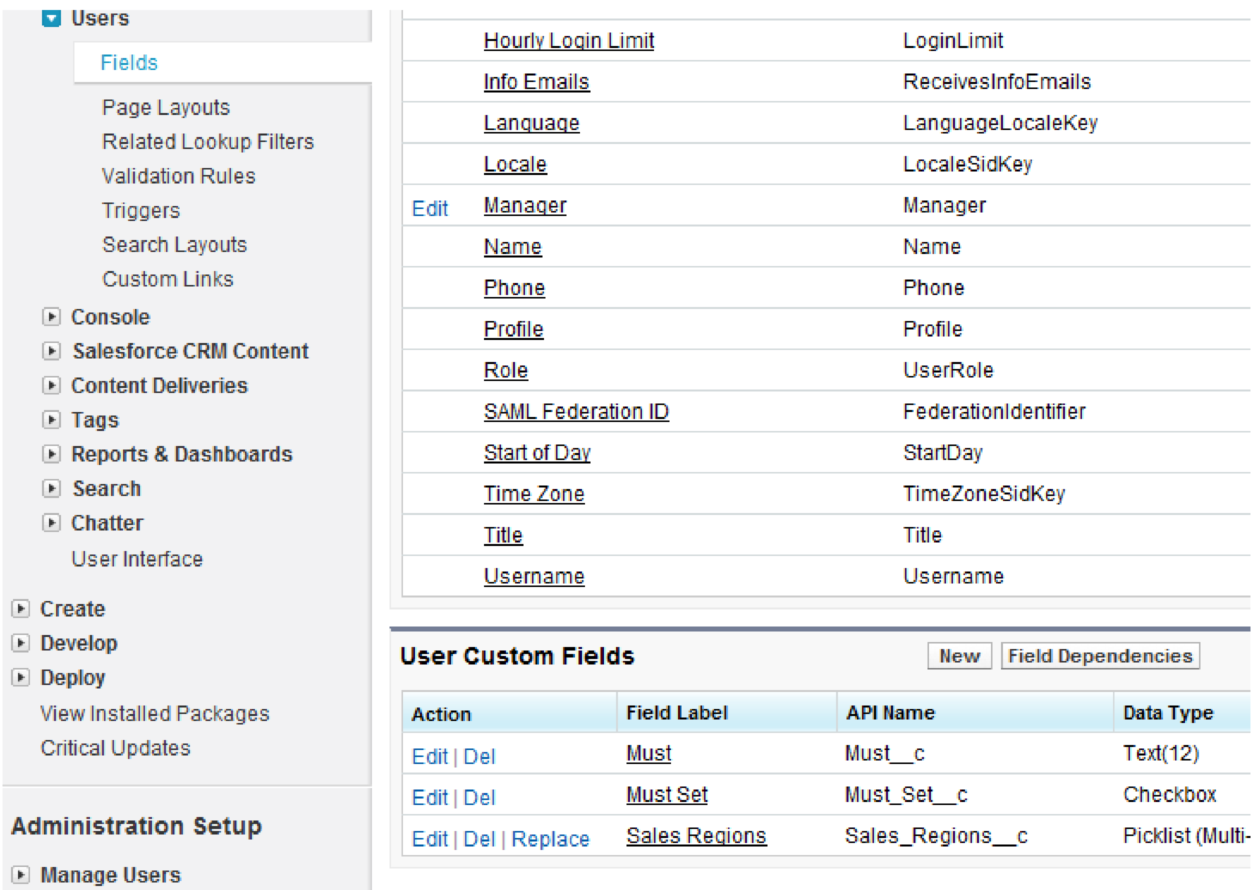

Action
Full Name ↑
| Edit
Brown, Martin
| Edit
Goodey, Paul
| Edit | Login
Howard, Trevor
| Edit
One, Platform
| Edit
Two, Platform


User
Trevor Howard
Personal Groups [0] | Public Group Membership [0] | Queue Membership [1] |
User Detail
Edit
Reset Password
Login
Name
Trevor Howard

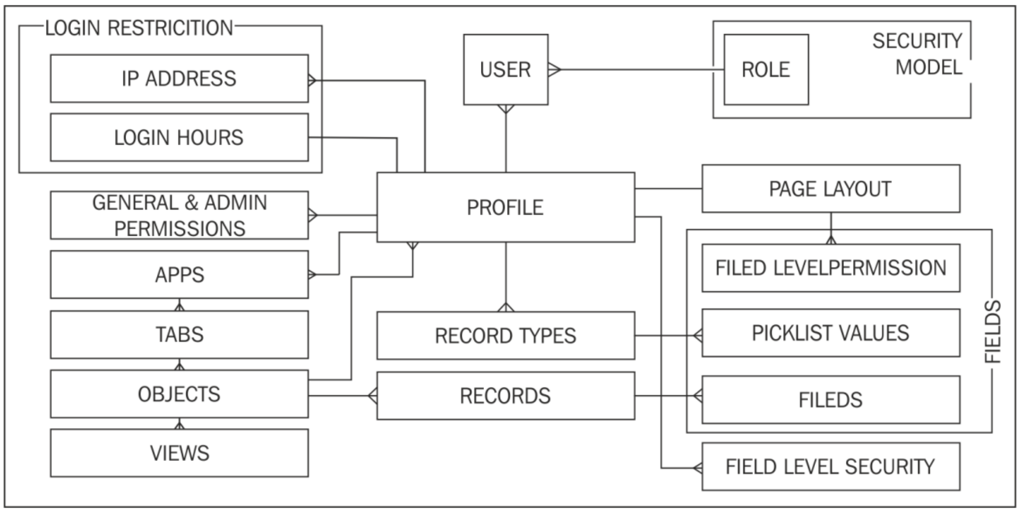

You are currently logged in as Trevor Howard
Trevor Howard
Help
Platform
Setup
System Log
Logout
Links
Intranet Menu Items
Winter '11 for Developers

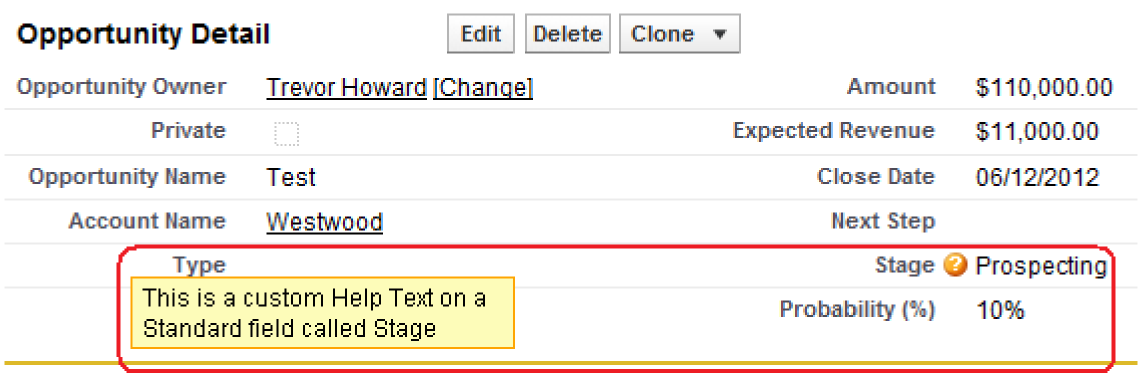

Search
Step 1
Your Name
Help
Sales
My Profile
Setup
Step 2
Developer Console
Logout
Home
Chatter
Leads
Accounts
Contacts
Reports
Files
nities
Forecasts
Expand All | Collapse All
Quick Find
Force.com Home
System Overview
Personal Setup
My Personal Information
Step 3
Personal Information
Change My Password
Reset My Security Token
My Groups
Change My Display
Grant Login Access
Step 4
Calendar Sharing
Reminders
Email
Import
Desktop Integration
My Chatter Settings
Grant Login Access
Help for this Page
To assist with support issues, you may grant your administrator or support personnel the ability to login as you and access your data.
My Username: Your username shown here
Grant Access To
Access Duration
Your Company's Administrator
1 Week (exp. 20/01/2014)
Step 5
Salesforce.com Support
--No Access--
Step 6
Save
Cancel
Step 1: Click "Your Name"
Step 2: Click "Setup"
Step 3: Click "My Personal Information"
Step 4: Click "Grant Login Access"
Step 5: Select the Grant Access To "Your Company's Administrator" and choose a period of either 1 Day, 3 Days, 1 Week, 1 Month or 1 Year
Step 6: Click "Save"

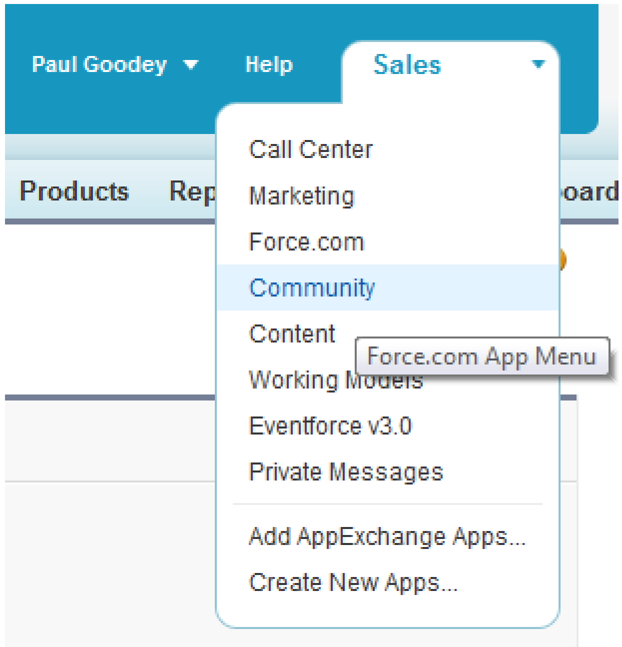

Grant Login Access
Help for this Page
To assist with support issues, you may grant your administrator or support personnel the ability to login as you and access your data.
My Username: martin.brown@widgetsxyz.com
Grant Access To
Access Duration
Your Company's Administrator
1 Week (exp. 20/01/2014)
Salesforce.com Support
--No Access--
Salesforce.com Foundation Support
--No Access--
Save
Cancel


Users
Fields
Page Layouts
Related Lookup Filters
Validation Rules
Triggers
Search Layouts
Custom Links
Console
Salesforce CRM Content
Content Deliveries
Tags
Reports & Dashboards
Search
Chatter
User Interface
Create
Develop
Deploy
View Installed Packages
Critical Updates
Administration Setup
Manage Users
Hourly Login Limit LoginLimit
Info Emails ReceivesInfoEmails
Language LanguageLocaleKey
Locale LocaleSidKey
Edit Manager Manager
Name Name
Phone Phone
Profile Profile
Role UserRole
SAML Federation ID FederationIdentifier
Start of Day StartDay
Time Zone TimeZoneSidKey
Title Title
Username Username
User Custom Fields
New
Field Dependencies
Action Field Label API Name Data Type
Edit | Del Must Must__c Text(12)
Edit | Del Must Set Must_Set__c Checkbox
Edit | Del | Replace Sales Regions Sales_Regions__c Picklist (Multi-

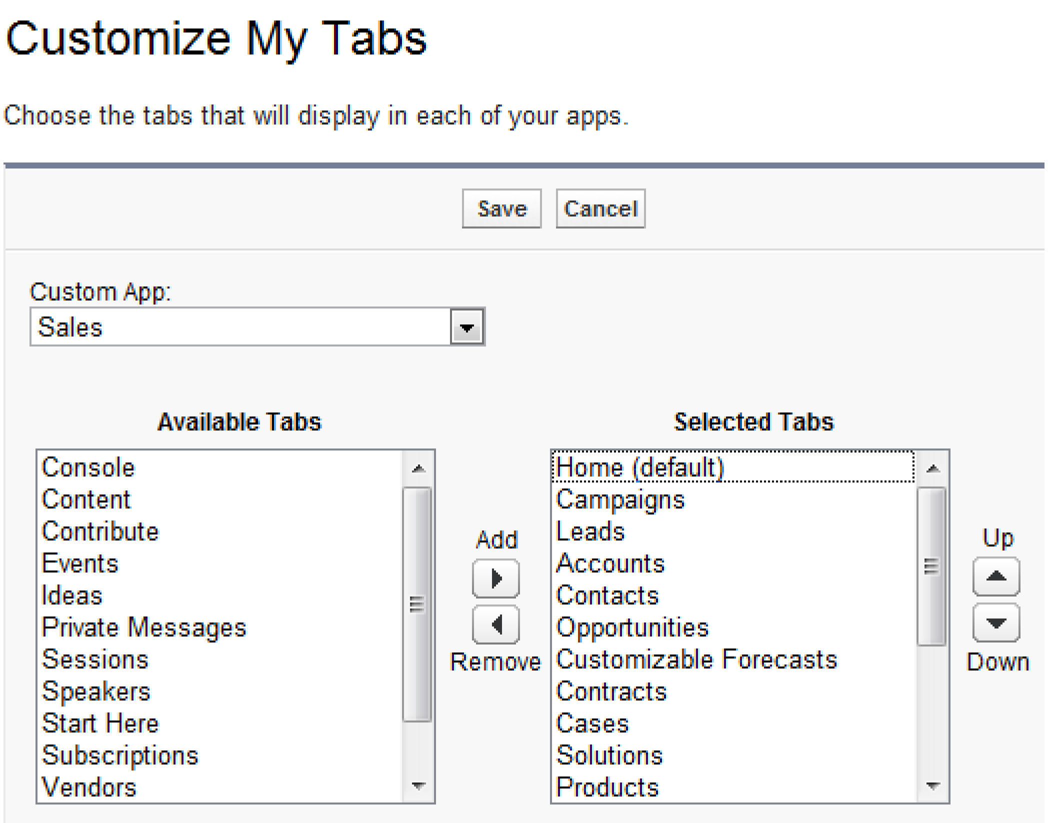
Chapter 3


LOGIN RESTRICITION
IP ADDRESS
LOGIN HOURS
USER
ROLE
SECURITY MODEL
GENERAL & ADMIN PERMISSIONS
PROFILE
PAGE LAYOUT
APPS
FILED LEVELPERMISSION
TABS
RECORD TYPES
PICKLIST VALUES
FIELDS
OBJECTS
RECORDS
FILEDS
VIEWS
FIELD LEVEL SECURITY

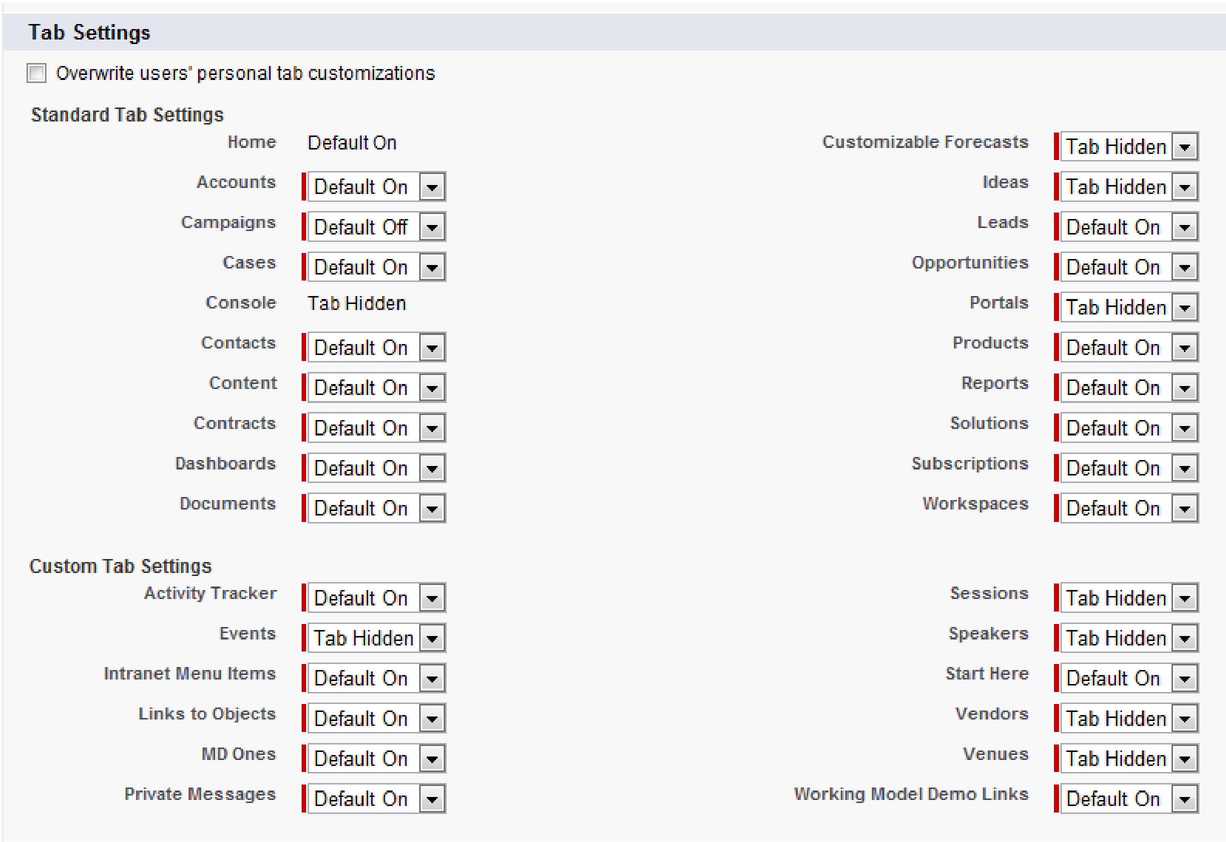

Opportunity Detail
Edit
Delete
Clone
Opportunity Owner
Trevor Howard [Change]
Amount
$110,000.00
Private
Expected Revenue
$11,000.00
Opportunity Name
Test
Close Date
06/12/2012
Account Name
Westwood
Next Step
Type
Stage
Prospecting
This is a custom Help Text on a Standard field called Stage
Probability (%)
10%

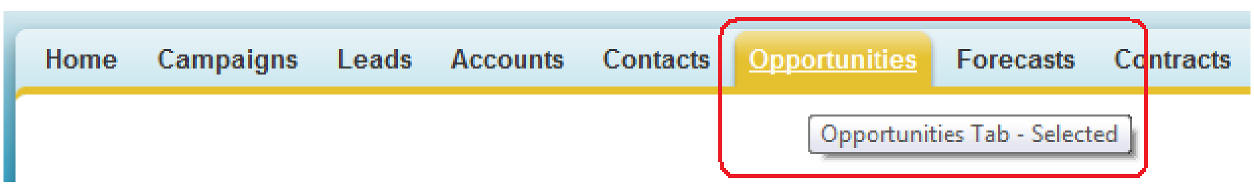


Paul Goodey
Help
Sales
Products
Rep
oard
Call Center
Marketing
Force.com
Community
Content
Force.com App Menu
Working Models
Eventforce v3.0
Private Messages
Add AppExchange Apps...
Create New Apps...



Customize My Tabs
Choose the tabs that will display in each of your apps.
Save
Cancel
Custom App:
Sales
Available Tabs
Selected Tabs
Console
Content
Contribute
Events
Ideas
Private Messages
Sessions
Speakers
Start Here
Subscriptions
Vendors
Add
Remove
Home (default)
Campaigns
Leads
Accounts
Contacts
Opportunities
Customizable Forecasts
Contracts
Cases
Solutions
Products
Up
Down


Tab Settings
Overwrite users' personal tab customizations
Standard Tab Settings
Home Default On
Accounts Default On
Campaigns Default Off
Cases Default On
Console Tab Hidden
Contacts Default On
Content Default On
Contracts Default On
Dashboards Default On
Documents Default On
Customizable Forecasts Tab Hidden
Ideas Tab Hidden
Leads Default On
Opportunities Default On
Portals Tab Hidden
Products Default On
Reports Default On
Solutions Default On
Subscriptions Default On
Workspaces Default On
Custom Tab Settings
Activity Tracker Default On
Events Tab Hidden
Intranet Menu Items Default On
Links to Objects Default On
MD Ones Default On
Private Messages Default On
Sessions Tab Hidden
Speakers Tab Hidden
Start Here Default On
Vendors Tab Hidden
Venues Tab Hidden
Working Model Demo Links Default On


Home
Campaigns
Leads
Accounts
Contacts
Opportunities
Forecasts
Contracts
Opportunities Tab - Selected

Custom Object Tabs New What Is This?

Action	Label	Tab Style	Description
Edit | Del	Activity Tracker	Hands	
Edit | Del	Events	Big top	
Edit | Del	Intranet Menu Items	Laptop	
Edit | Del	Links to Objects	Guitar	
Edit | Del	MD Ones	Alarm clock	
Edit | Del	Private Messages	Postage	
Edit | Del	Sessions	Presenter	
Edit | Del	Speakers	Microphone	
Edit | Del	Vendors	Desk	
Edit | Del	Venues	Building	

Web Tabs New What Is This?

No Web Tabs have been defined

Visualforce Tabs New What Is This?

Action	Label	Tab Style	Description
Edit | Del	Start Here	Wrench	
Edit | Del	Working Model Demo Links	People	

Rename Tabs and Labels

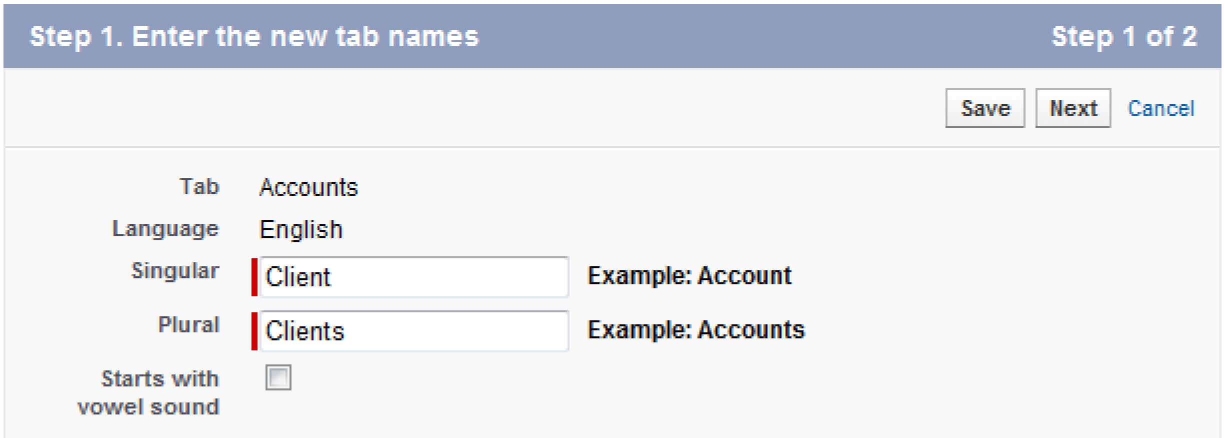
Help for this Page

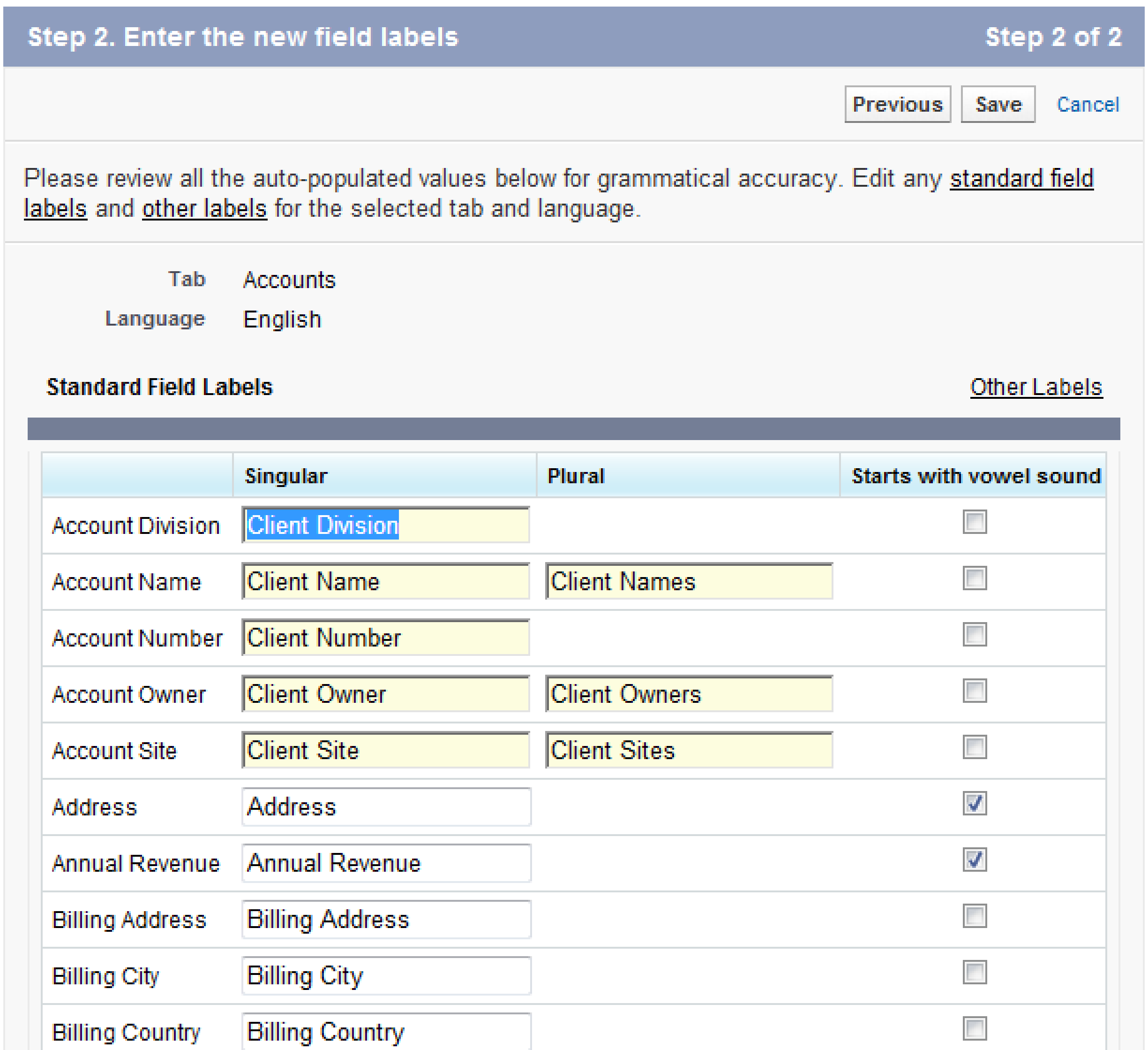
Make salesforce.com match your organization's terminology by renaming tab and field labels. Use the lists below to select the tab you want to rename in the language you choose. After renaming any tab or field label, remember to update all custom reports, views, templates and other items you have created containing the original name.

Select Language English

Standard Tabs Standard Tabs Help

Action	Tab Name	Display Label	Renamed	Last Modified
Edit	Accounts	Accounts	☐	
Edit	Activities	Activities	☐	
Edit	Articles	Articles	☐	
Edit	Assets	Assets	☐	
Edit	Campaigns	Campaigns	☐	
Edit	Cases	Cases	☐	


Step 1. Enter the new tab names
Step 1 of 2
Save
Next
Cancel
Tab
Accounts
Language
English
Singular
Client
Example: Account
Plural
Clients
Example: Accounts
Starts with vowel sound


Step 2. Enter the new field labels
Step 2 of 2
Previous
Save
Cancel
Please review all the auto-populated values below for grammatical accuracy. Edit any standard field labels and other labels for the selected tab and language.
Tab
Accounts
Language
English
Standard Field Labels
Other Labels
Singular
Plural
Starts with vowel sound
Account Division
Client Division
Account Name
Client Name
Client Names
Account Number
Client Number
Account Owner
Client Owner
Client Owners
Account Site
Client Site
Client Sites
Address
Address
Annual Revenue
Annual Revenue
Billing Address
Billing Address
Billing City
Billing City
Billing Country
Billing Country

Rename Tabs and Labels

Help for this Page

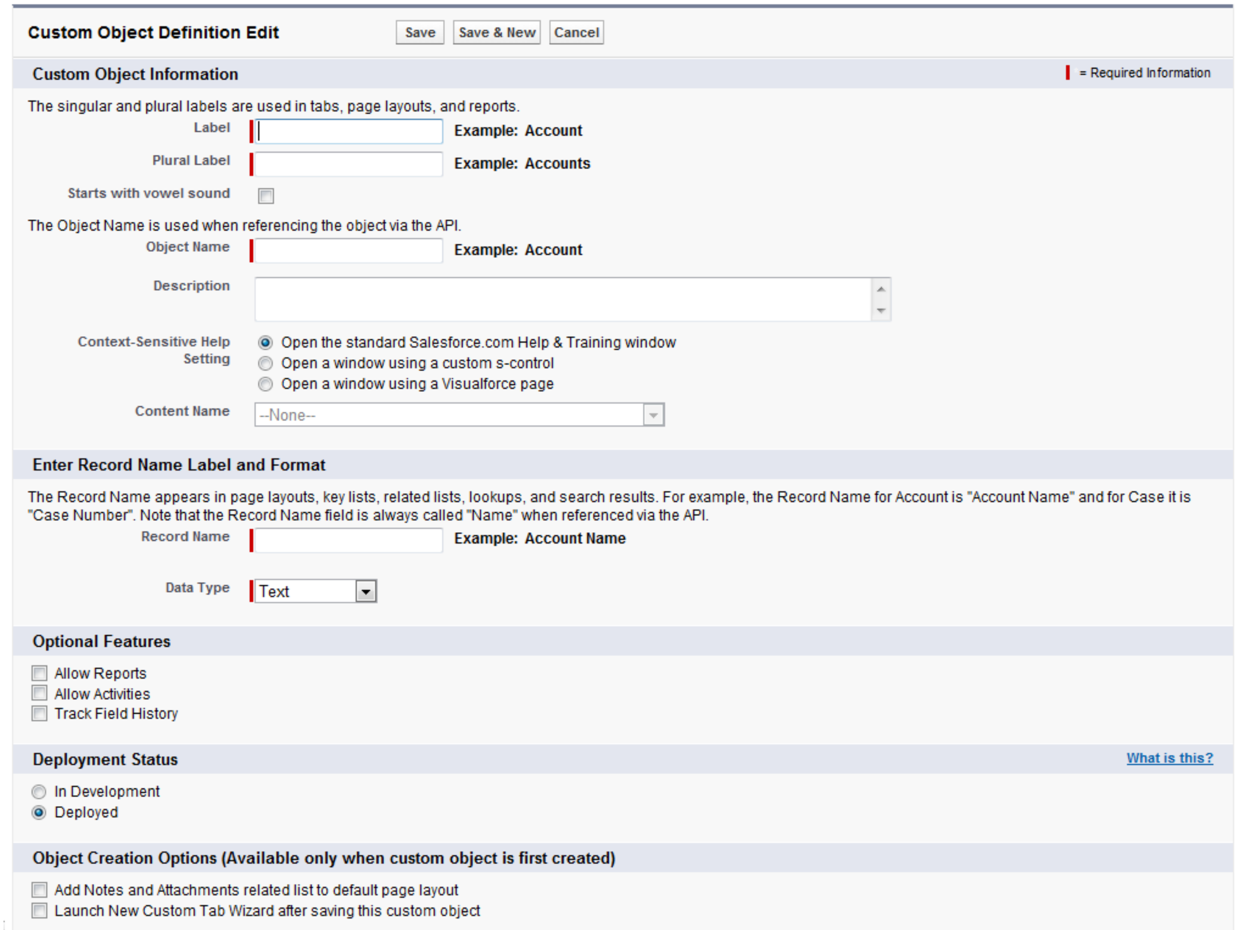
Make salesforce.com match your organization's terminology by renaming tab and field labels. Use the lists below to select the tab you want to rename in the language you choose. After renaming any tab or field label, remember to update all custom reports, views, templates and other items you have created containing the original name.

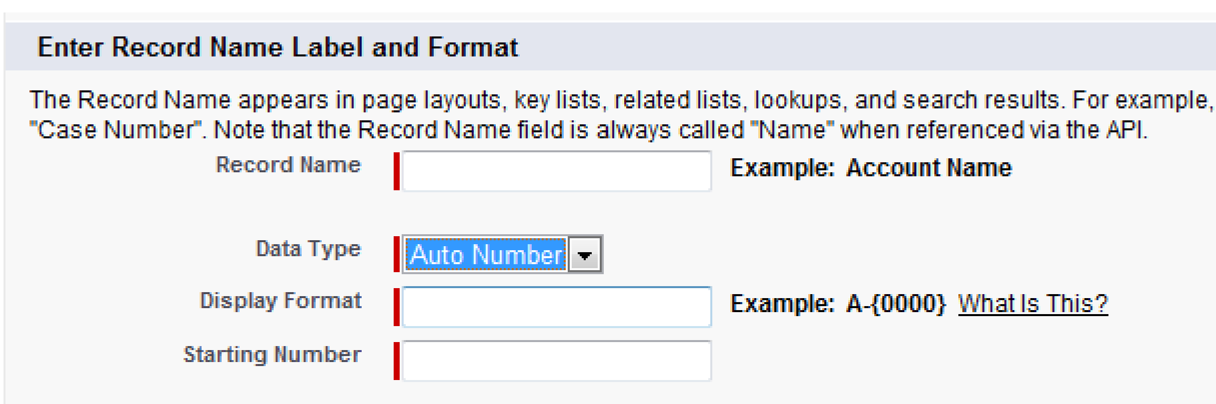
Select Language English

Standard Tabs

Standard Tabs Help

Action	Tab Name	Display Label	Renamed	Last Modified
Edit | Reset	Accounts	Clients	✓	Paul Goodey, 20/02/2011 04:04
Edit	Activities	Activities		
Edit	Articles	Articles		
Edit	Assets	Assets		
Edit	Campaigns	Campaigns		
Edit	Cases	Cases		


Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Example: Account
Plural Label
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a custom s-control
Open a window using a Visualforce page
Content Name
--None--
Enter Record Name Label and Format
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
Record Name
Example: Account Name
Data Type
Text
Optional Features
Allow Reports
Allow Activities
Track Field History
Deployment Status
What is this?
In Development
Deployed
Object Creation Options (Available only when custom object is first created)
Add Notes and Attachments related list to default page layout
Launch New Custom Tab Wizard after saving this custom object


Enter Record Name Label and Format
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example,
"Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
Record Name
Example: Account Name
Data Type
Auto Number
Display Format
Example: A-{0000} What Is This?
Starting Number

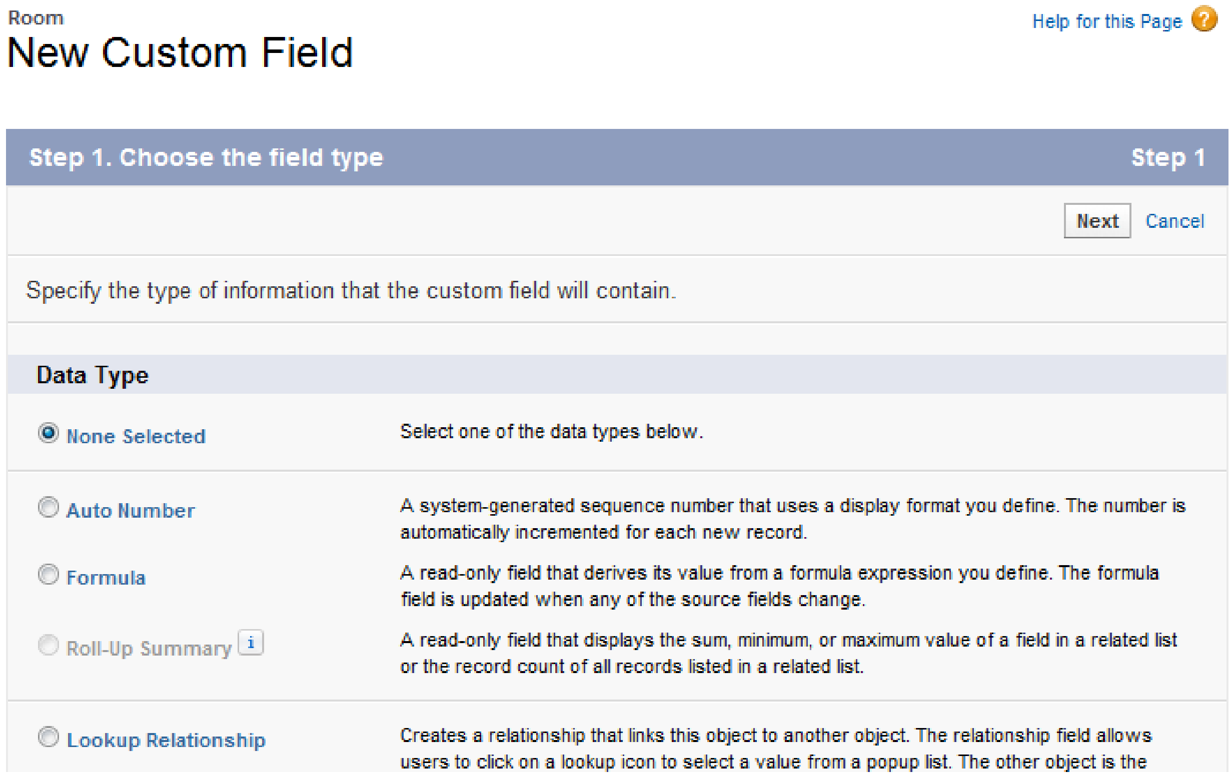
Account Limits

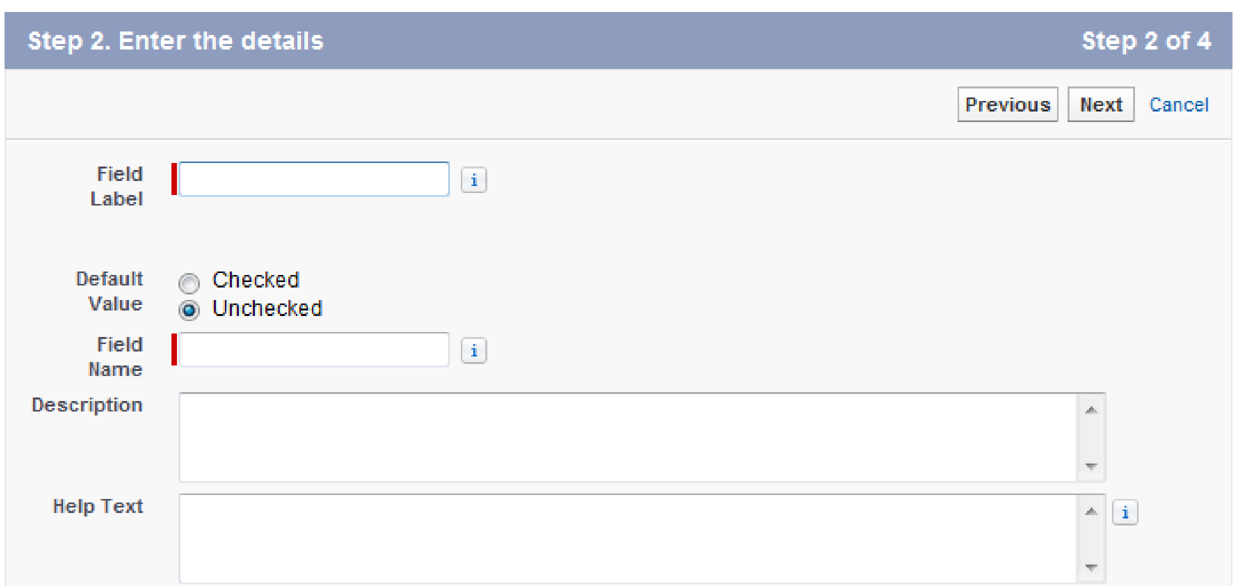
Help for this Page

These limits apply to the setup of this object in your organization. Some limits may vary by object. For a complete list of system limits, see Editions and Limits.

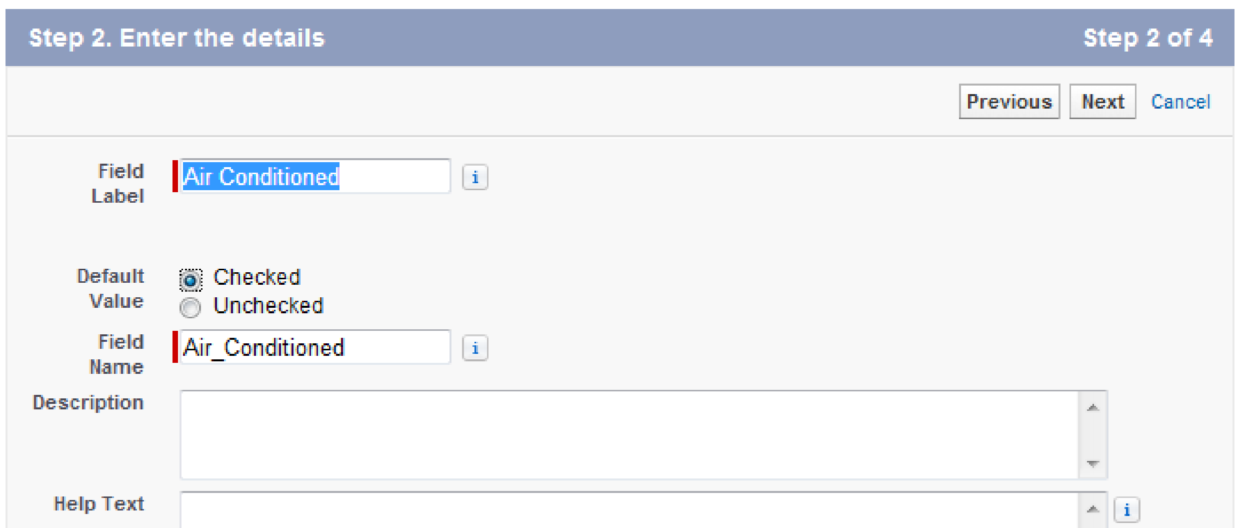
Object Limits

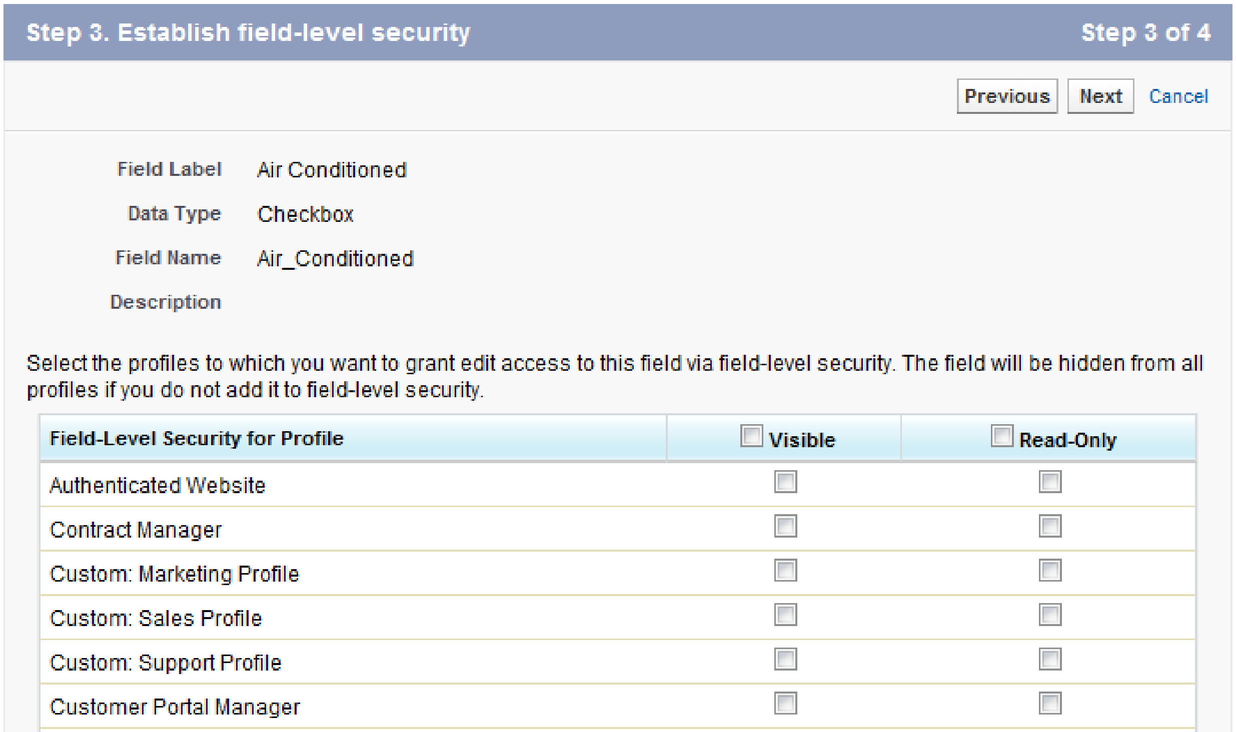
Item	Usage	Limit	% used	Message
Custom Fields	20	500	4%	
Rollup Summary Fields	2	10	20%	
Custom Relationship Fields	0	25	0%	
Active Workflow Rules	0	50	0%	
Total Workflow Rules	0	300	0%	
Approval Processes	0	500	0%	
Active Lookup Filters	0	5	0%	
Active Validation Rules	0	100	0%	
VLOOKUP Functions	0	10	0%	
Sharing Rules (Both Owner- and Criteria-based)	2	300	1%	
Sharing Rules (Criteria-based Only)	1	50	2%	

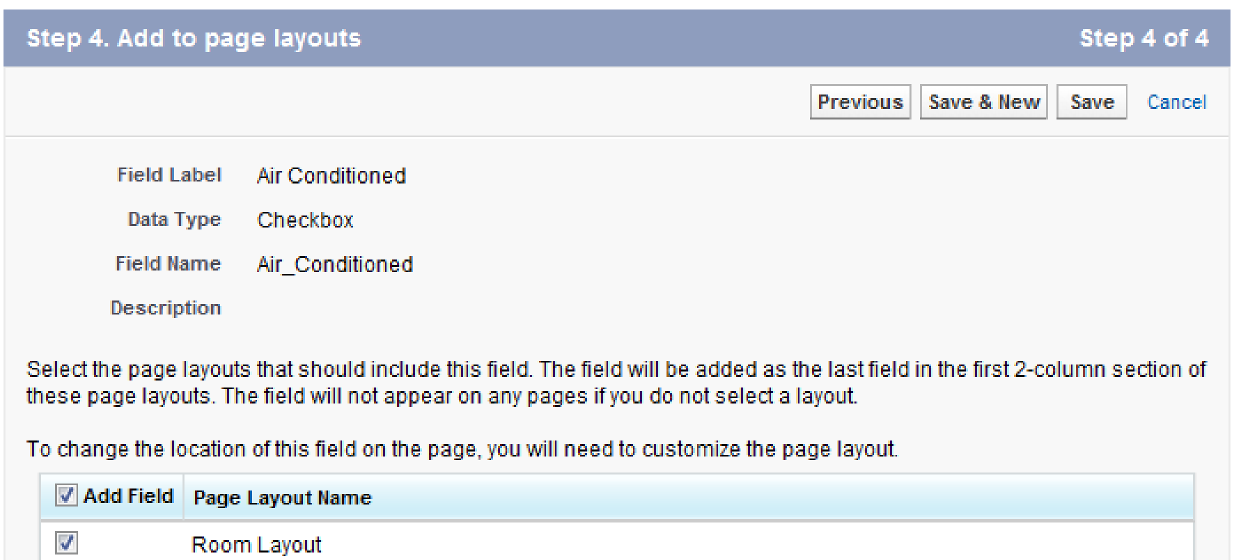

Room
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the

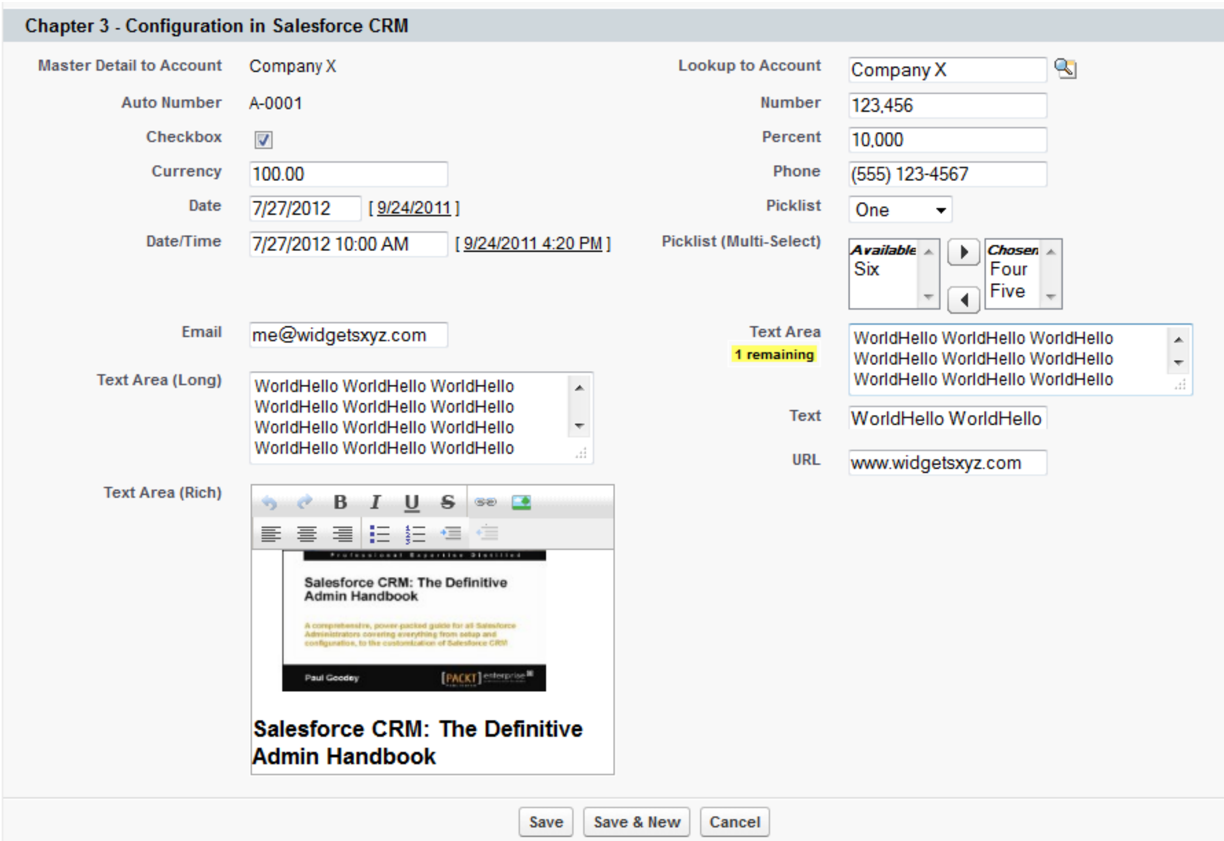

Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Default Value
Checked
Unchecked
Field Name
Description
Help Text

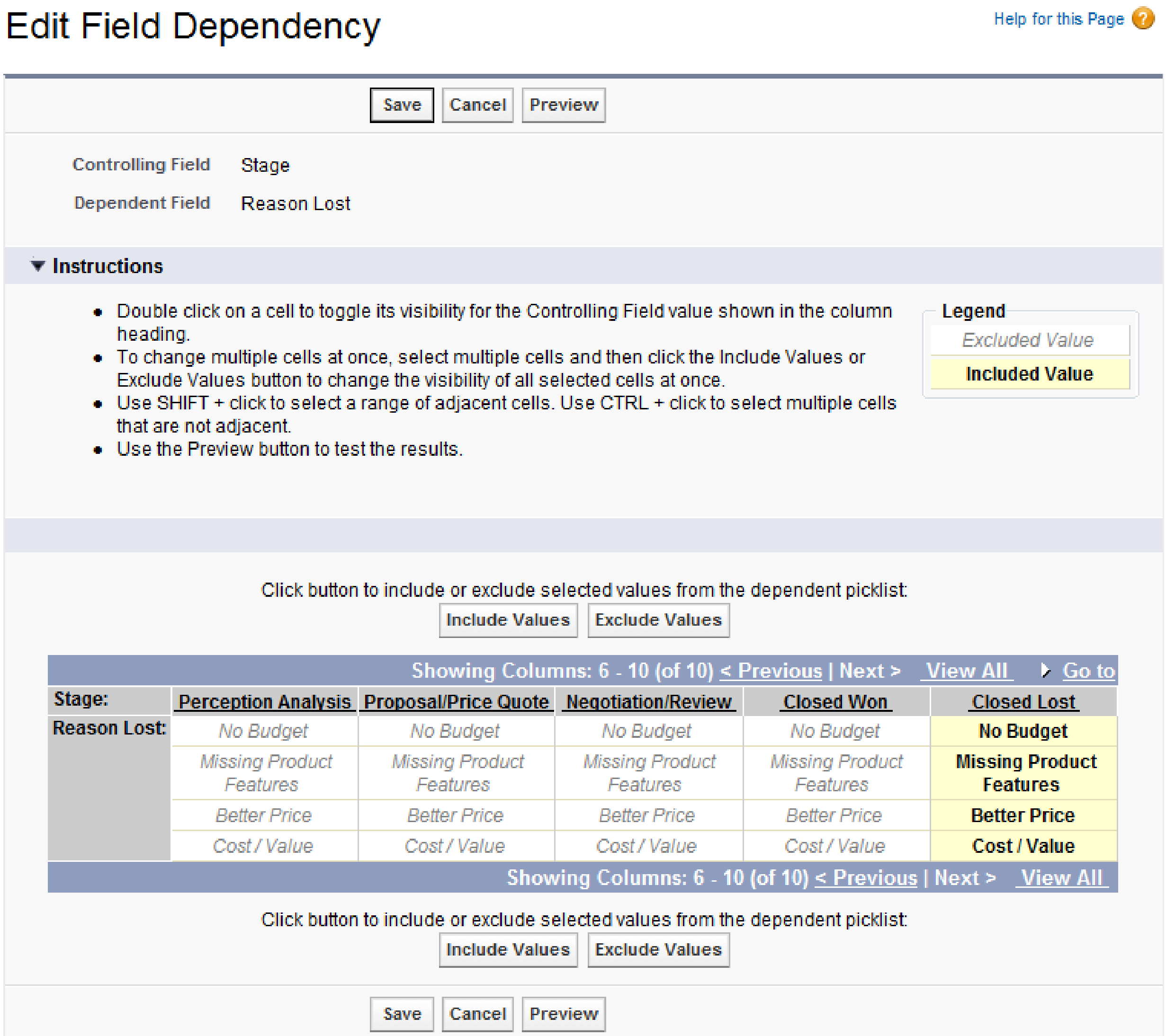

Room
New Relationship
Help for this Page
Step 2. Choose the related object
Step 2
Previous
Next
Cancel
Select the other object to which this object is related.
Related To
--None--

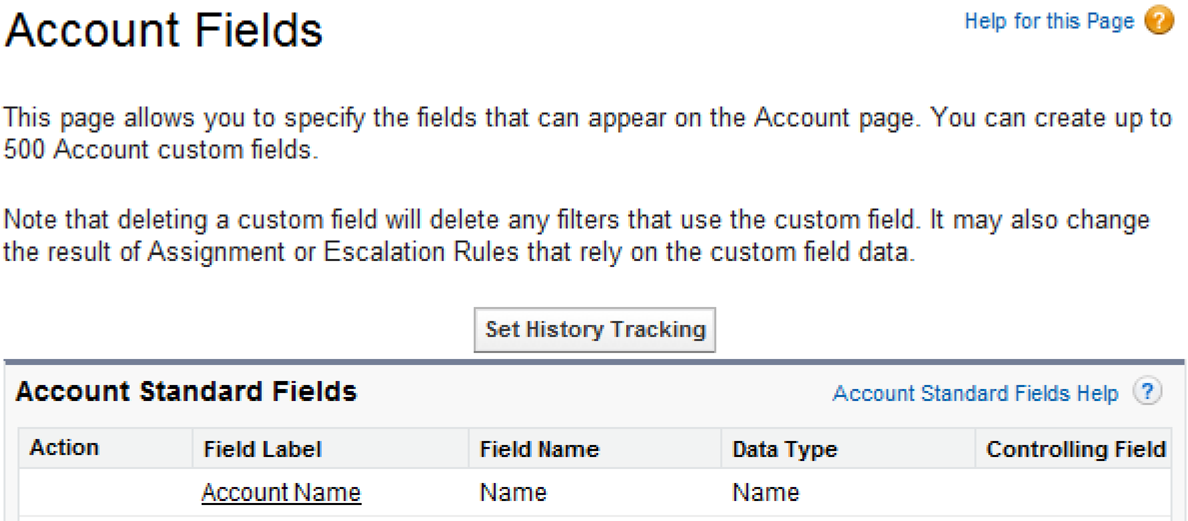

Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Air Conditioned
Default Value
Checked
Unchecked
Field Name
Air_Conditioned
Description
Help Text

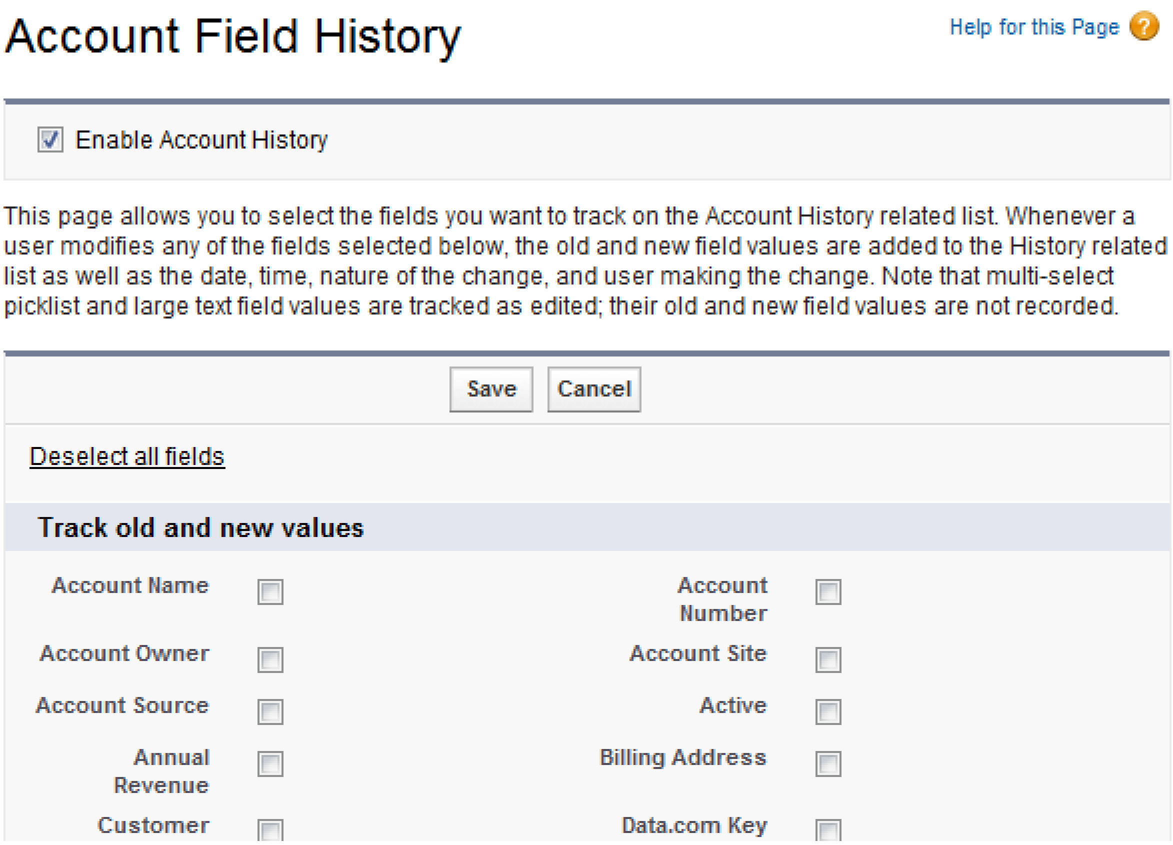

Step 3. Establish field-level security
Step 3 of 4
Previous
Next
Cancel
Field Label Air Conditioned
Data Type Checkbox
Field Name Air_Conditioned
Description
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.
Field-Level Security for Profile
Visible
Read-Only
Authenticated Website
Contract Manager
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Customer Portal Manager

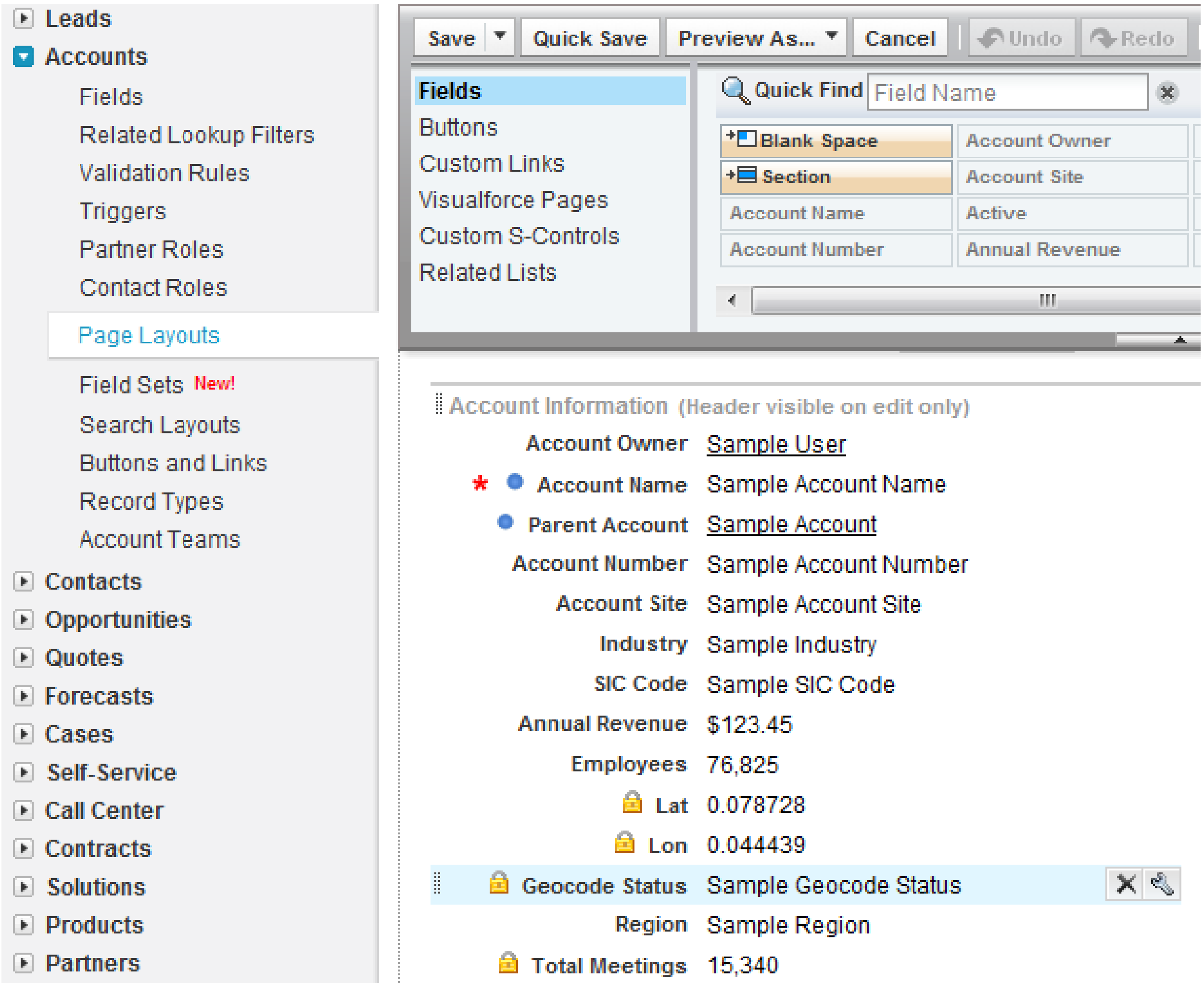

Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label Air Conditioned
Data Type Checkbox
Field Name Air_Conditioned
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Room Layout


Chapter 3 - Configuration in Salesforce CRM
Master Detail to Account
Company X
Lookup to Account
Company X
Auto Number
A-0001
Number
123,456
Checkbox
Percent
10,000
Currency
100.00
Phone
(555) 123-4567
Date
7/27/2012
[9/24/2011]
Picklist
One
Date/Time
7/27/2012 10:00 AM
[9/24/2011 4:20 PM]
Picklist (Multi-Select)
Available
Six
Chosen
Four
Five
Email
me@widgetsxyz.com
Text Area
1 remaining
WorldHello WorldHello WorldHello
WorldHello WorldHello WorldHello
WorldHello WorldHello WorldHello
Text Area (Long)
WorldHello WorldHello WorldHello
WorldHello WorldHello WorldHello
WorldHello WorldHello WorldHello
WorldHello WorldHello WorldHello
Text
WorldHello WorldHello
URL
www.widgetsxyz.com
Text Area (Rich)
Salesforce CRM: The Definitive Admin Handbook
Paul Goodey
Salesforce CRM: The Definitive Admin Handbook
Save
Save & New
Cancel

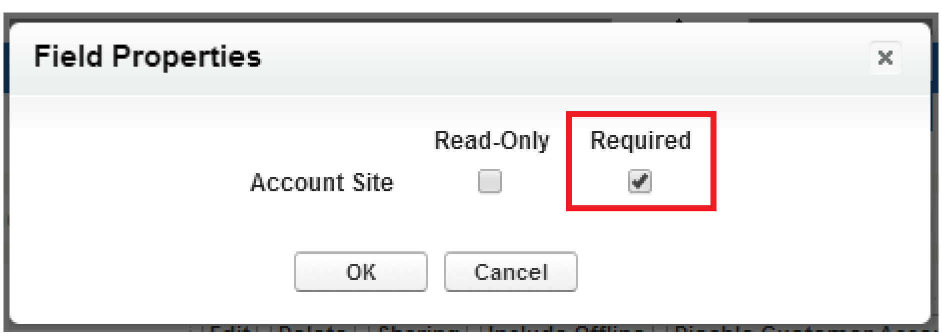

Edit Field Dependency
Help for this Page
Save
Cancel
Preview
Controlling Field
Stage
Dependent Field
Reason Lost
Instructions
Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
Use the Preview button to test the results.
Legend
Excluded Value
Included Value
Click button to include or exclude selected values from the dependent picklist:
Include Values
Exclude Values
Showing Columns: 6 - 10 (of 10) < Previous | Next > View All
Go to
Stage:
Perception Analysis
Proposal/Price Quote
Negotiation/Review
Closed Won
Closed Lost
Reason Lost:
No Budget
Missing Product Features
Better Price
Cost / Value
Showing Columns: 6 - 10 (of 10) < Previous | Next > View All
Click button to include or exclude selected values from the dependent picklist:
Include Values
Exclude Values
Save
Cancel
Preview


Account Fields
Help for this Page
This page allows you to specify the fields that can appear on the Account page. You can create up to 500 Account custom fields.
Note that deleting a custom field will delete any filters that use the custom field. It may also change the result of Assignment or Escalation Rules that rely on the custom field data.
Set History Tracking
Account Standard Fields
Account Standard Fields Help
Action
Field Label
Field Name
Data Type
Controlling Field
Account Name
Name
Name

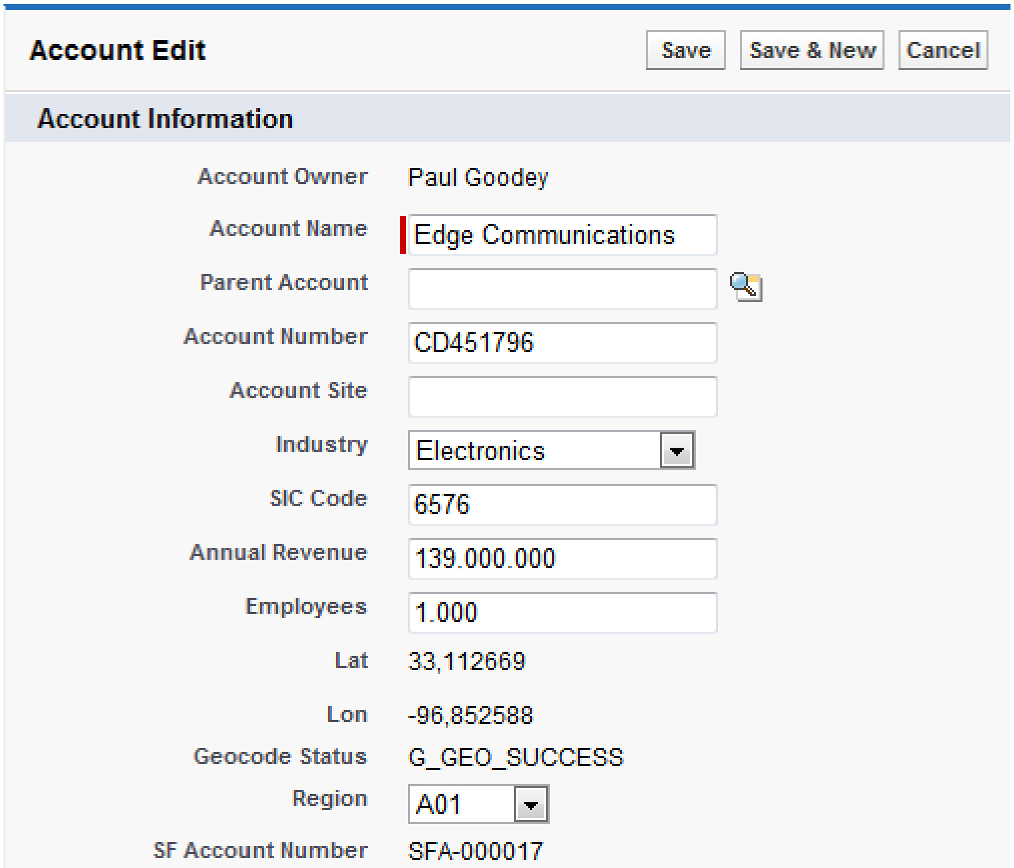

Account Field History
Help for this Page
Enable Account History
This page allows you to select the fields you want to track on the Account History related list. Whenever a user modifies any of the fields selected below, the old and new field values are added to the History related list as well as the date, time, nature of the change, and user making the change. Note that multi-select picklist and large text field values are tracked as edited; their old and new field values are not recorded.
Save
Cancel
Deselect all fields
Track old and new values
Account Name
Account Number
Account Owner
Account Site
Account Source
Active
Annual Revenue
Billing Address
Customer
Data.com Key



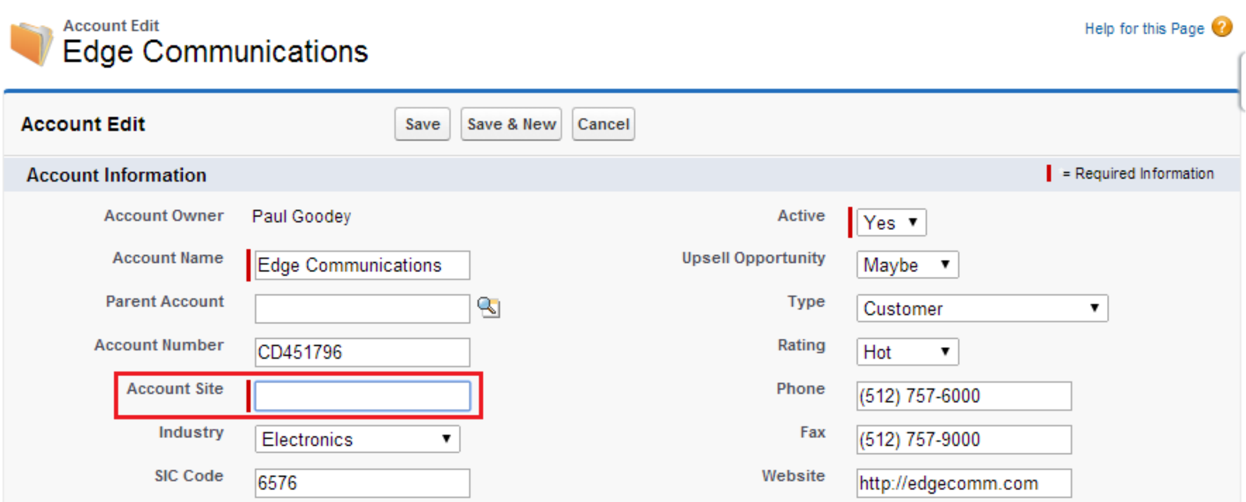
Leads
Accounts
Fields
Related Lookup Filters
Validation Rules
Triggers
Partner Roles
Contact Roles
Page Layouts
Field Sets New!
Search Layouts
Buttons and Links
Record Types
Account Teams
Contacts
Opportunities
Quotes
Forecasts
Cases
Self-Service
Call Center
Contracts
Solutions
Products
Partners
Save
Quick Save
Preview As...
Cancel
Undo
Redo
Fields
Buttons
Custom Links
Visualforce Pages
Custom S-Controls
Related Lists
Quick Find
Field Name
Blank Space
Account Owner
Section
Account Site
Account Name
Active
Account Number
Annual Revenue
Account Information (Header visible on edit only)
Account Owner Sample User
Account Name Sample Account Name
Parent Account Sample Account
Account Number Sample Account Number
Account Site Sample Account Site
Industry Sample Industry
SIC Code Sample SIC Code
Annual Revenue $123.45
Employees 76,825
Lat 0.078728
Lon 0.044439
Geocode Status Sample Geocode Status
Region Sample Region
Total Meetings 15,340



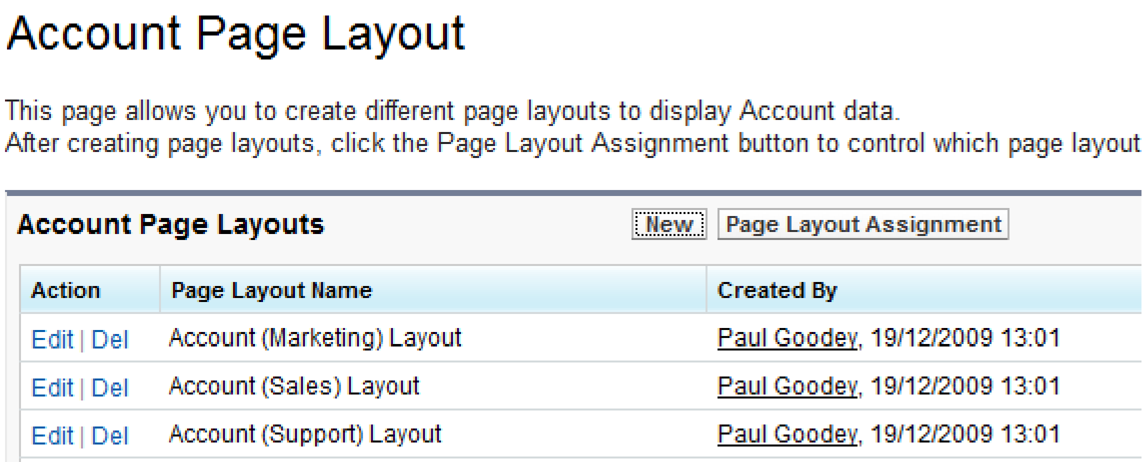
Field Properties
Read-Only
Required
Account Site
OK
Cancel



Account Edit
Save
Save & New
Cancel
Account Information
Account Owner
Paul Goodey
Account Name
Edge Communications
Parent Account
Account Number
CD451796
Account Site
Industry
Electronics
SIC Code
6576
Annual Revenue
139.000.000
Employees
1.000
Lat
33,112669
Lon
-96,852588
Geocode Status
G_GEO_SUCCESS
Region
A01
SF Account Number
SFA-000017



Account Edit
Edge Communications
Help for this Page
Account Edit
Save
Save & New
Cancel
Account Information
= Required Information
Account Owner
Paul Goodey
Account Name
Edge Communications
Parent Account
Account Number
CD451796
Account Site
Industry
Electronics
SIC Code
6576
Active
Yes
Upsell Opportunity
Maybe
Type
Customer
Rating
Hot
Phone
(512) 757-6000
Fax
(512) 757-9000
Website
http://edgecomm.com

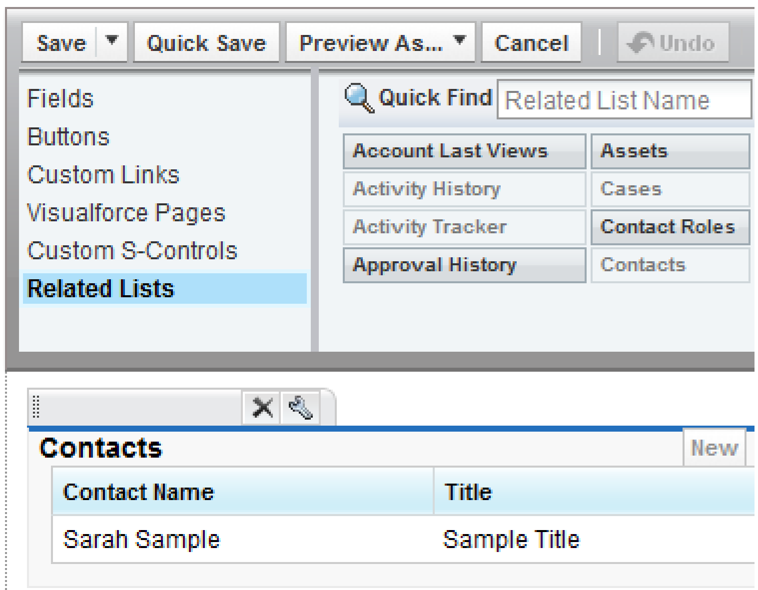


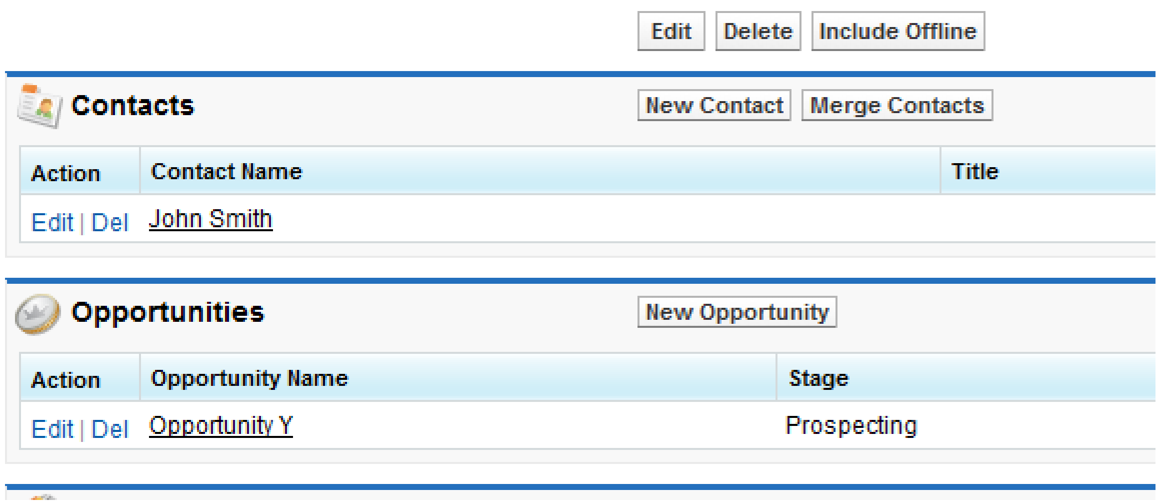
Account Page Layout

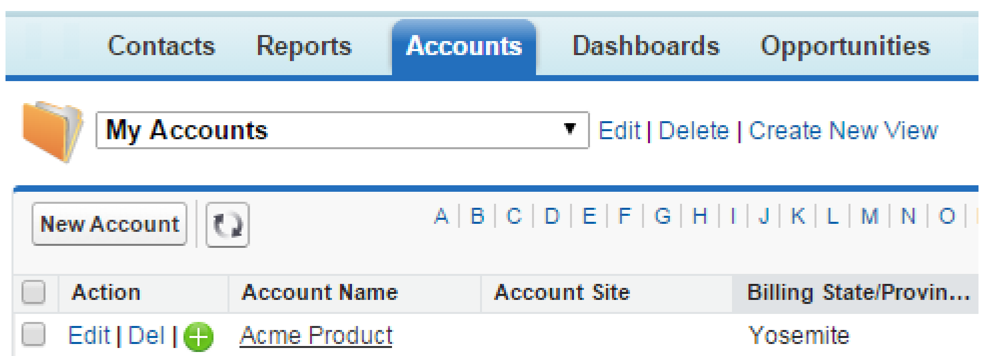
This page allows you to create different page layouts to display Account data.
After creating page layouts, click the Page Layout Assignment button to control which page layout

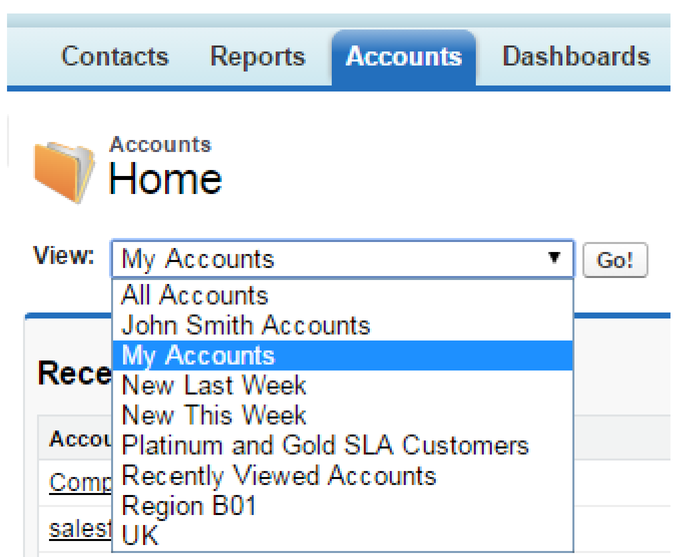
Account Page Layouts New | Page Layout Assignment

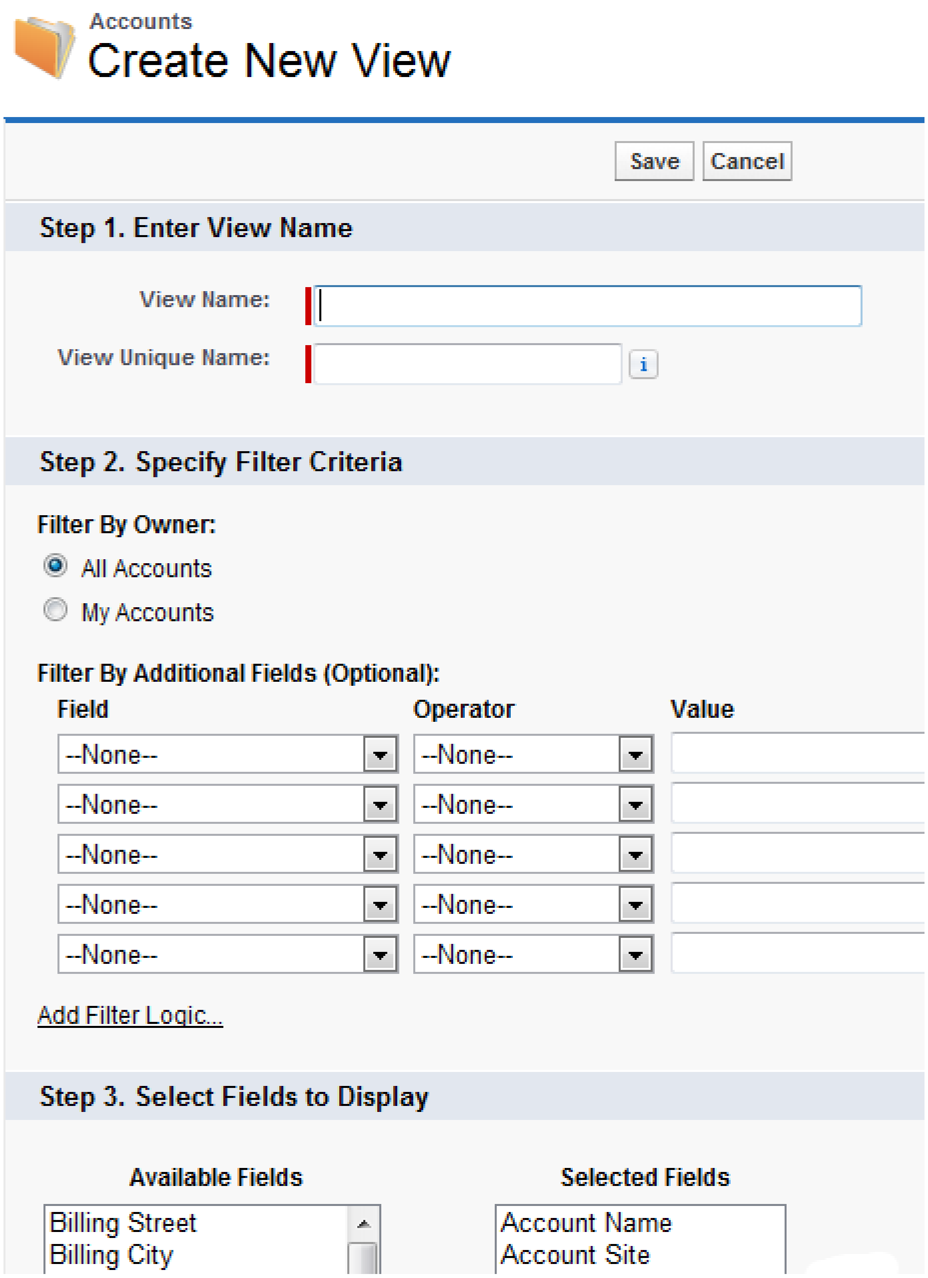
Action	Page Layout Name	Created By
Edit | Del	Account (Marketing) Layout	Paul Goodey, 19/12/2009 13:01
Edit | Del	Account (Sales) Layout	Paul Goodey, 19/12/2009 13:01
Edit | Del	Account (Support) Layout	Paul Goodey, 19/12/2009 13:01

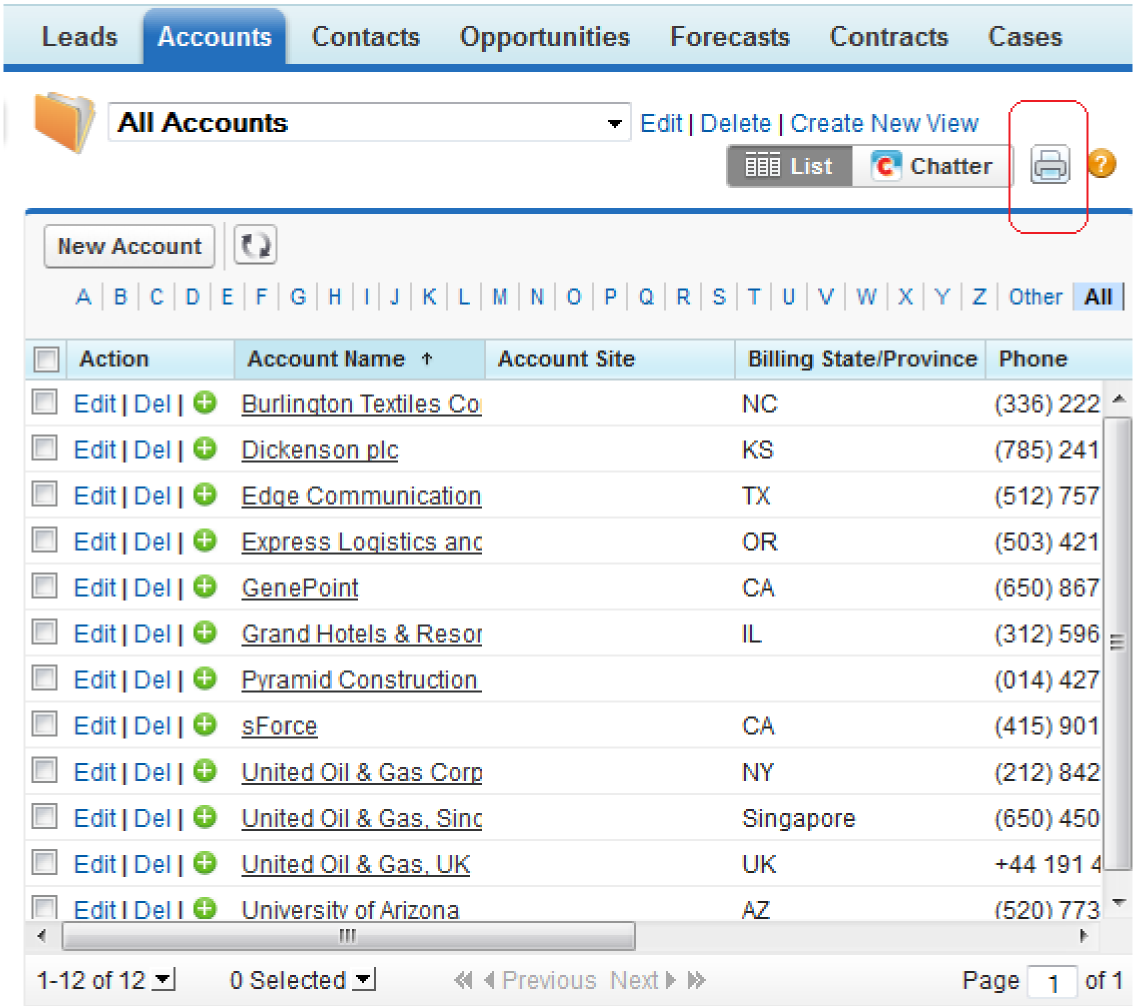


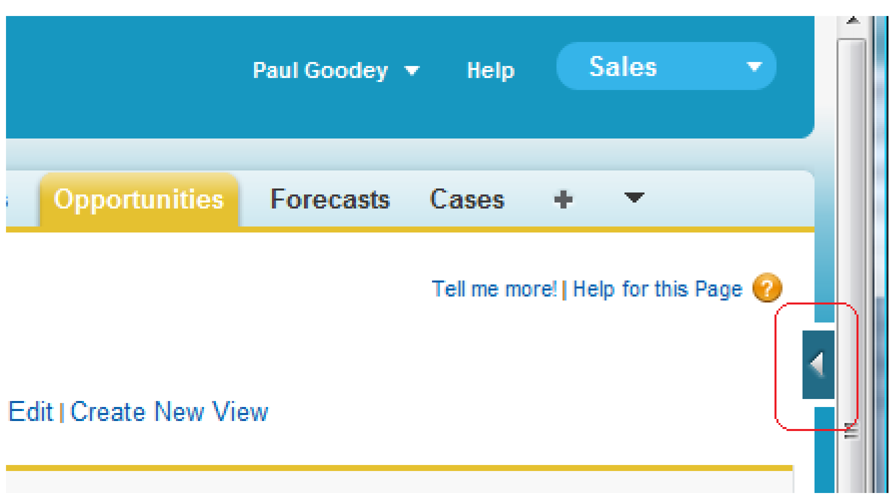

Edit
Delete
Include Offline
Contacts
New Contact
Merge Contacts
Action
Contact Name
Title
Edit | Del
John Smith
Opportunities
New Opportunity
Action
Opportunity Name
Stage
Edit | Del
Opportunity Y
Prospecting

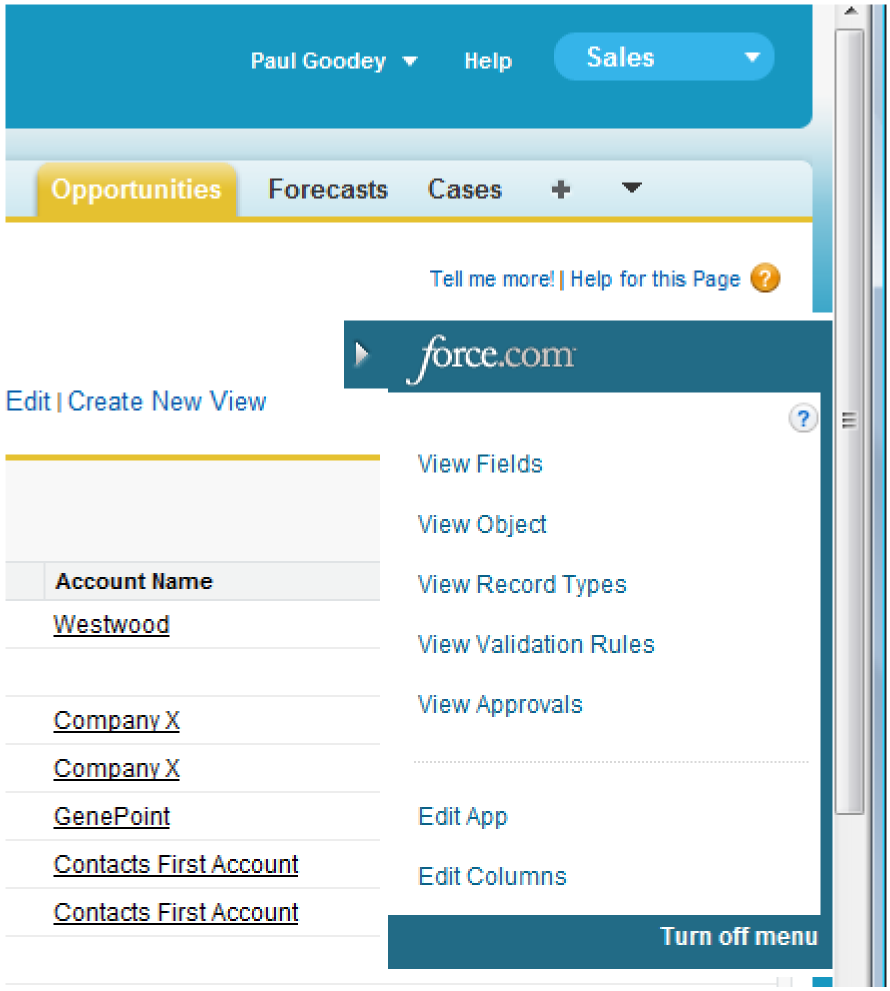

Contacts
Reports
Accounts
Dashboards
Opportunities
My Accounts
Edit | Delete | Create New View
New Account
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O
Action
Account Name
Account Site
Billing State/Provin...
Edit | Del |
Acme Product
Yosemite


Contacts
Reports
Accounts
Dashboards
Accounts
Home
View:
My Accounts
Go!
All Accounts
John Smith Accounts
My Accounts
New Last Week
New This Week
Platinum and Gold SLA Customers
Recently Viewed Accounts
Region B01
UK

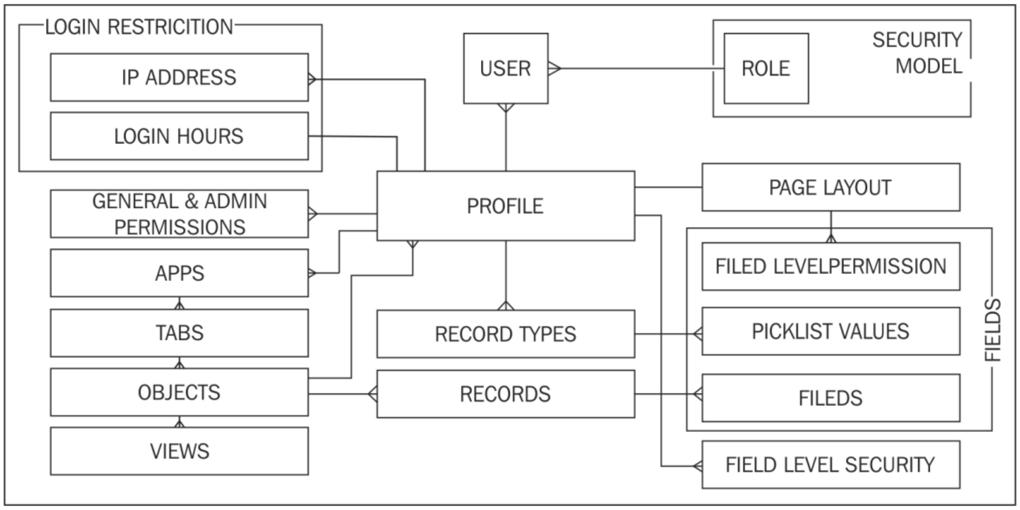

Accounts
Create New View
Save
Cancel
Step 1. Enter View Name
View Name:
View Unique Name:
Step 2. Specify Filter Criteria
Filter By Owner:
All Accounts
My Accounts
Filter By Additional Fields (Optional):
Field
Operator
Value
--None--
--None--
--None--
--None--
--None--
--None--
--None--
--None--
--None--
--None--
Add Filter Logic...
Step 3. Select Fields to Display
Available Fields
Selected Fields
Billing Street
Billing City
Account Name
Account Site

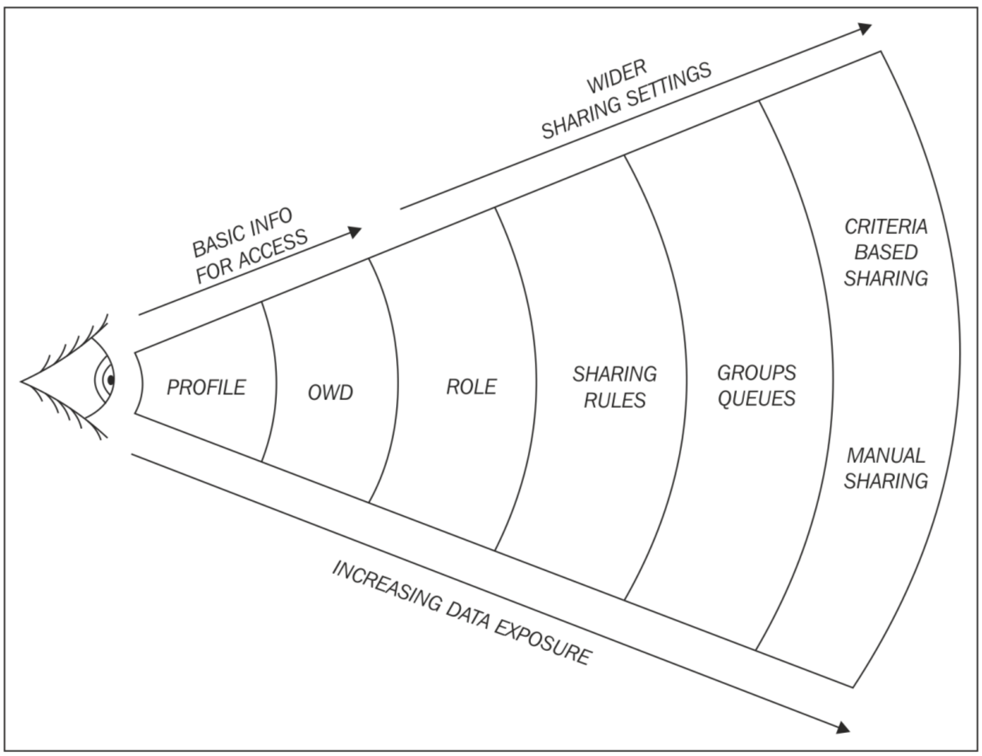

Leads
Accounts
Contacts
Opportunities
Forecasts
Contracts
Cases
All Accounts
Edit | Delete | Create New View
List
Chatter
New Account
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
Action
Account Name ↑
Account Site
Billing State/Province
Phone
Edit | Del | Burlington Textiles Co NC (336) 222
Edit | Del | Dickenson plc KS (785) 241
Edit | Del | Edge Communication TX (512) 757
Edit | Del | Express Logistics and OR (503) 421
Edit | Del | GenePoint CA (650) 867
Edit | Del | Grand Hotels & Resor IL (312) 596
Edit | Del | Pyramid Construction (014) 427
Edit | Del | sForce CA (415) 901
Edit | Del | United Oil & Gas Corp NY (212) 842
Edit | Del | United Oil & Gas, Sinc Singapore (650) 450
Edit | Del | United Oil & Gas, UK UK +44 191 4
Edit | Del | University of Arizona AZ (520) 773
1-12 of 12
0 Selected
Previous Next
Page 1 of 1


Paul Goodey
Help
Sales
Opportunities
Forecasts
Cases
Tell me more! | Help for this Page
Edit | Create New View


Paul Goodey
Help
Sales
Opportunities
Forecasts
Cases
Tell me more! | Help for this Page
force.com
Edit | Create New View
View Fields
View Object
View Record Types
View Validation Rules
View Approvals
Edit App
Edit Columns
Turn off menu
Account Name
Westwood
Company X
Company X
GenePoint
Contacts First Account
Contacts First Account

Chapter 4


LOGIN RESTRICITION
IP ADDRESS
LOGIN HOURS
USER
ROLE
SECURITY MODEL
GENERAL & ADMIN PERMISSIONS
PROFILE
PAGE LAYOUT
APPS
FILED LEVELPERMISSION
TABS
RECORD TYPES
PICKLIST VALUES
FIELDS
OBJECTS
RECORDS
FILEDS
VIEWS
FIELD LEVEL SECURITY


WIDER SHARING SETTINGS
BASIC INFO FOR ACCESS
PROFILE
OWD
ROLE
SHARING RULES
GROUPS QUEUES
CRITERIA BASED SHARING
MANUAL SHARING
INCREASING DATA EXPOSURE

Organization-Wide Sharing Defaults Edit

Help for this Page

Edit your organization-wide sharing defaults below. Changing these defaults will cause all sharing rules to be recalculated. This could require significant system resources and time depending on the amount of data in your organization. Setting an object to Private makes records visible to record owners and those above them in the role hierarchy, and access can be extended using sharing rules.

Save Cancel

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Private	Private	✓
Account, Contract, Order and Asset	Private	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Opportunity	Private	Private	✓
Case	Private	Private	✓
Campaign	Private	Private	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓

Object	Default Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	✓
Account, Contract and Asset	Public Read/Write	✓
Contact	Controlled by Parent	✓
Opportunity	Public Read/Write	✓
Case	Public Read/Write/Transfer	✓
Campaign	Public Full Access	✓
Activity	Private	✓
Calendar	Hide Details and Add Events	✓
Price Book	Use	✓
Activity Tracker Setup	Public Read/Write	✓
Country	Public Read Only	✓
Currency	Public Read Only	✓
Event	Public Read/Write	✓

Default Sharing Settings

Organization-Wide Defaults Edit Organization-Wide Defaults Help

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Private	Private	✓
Account, Contract, Order and Asset	Private	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Opportunity	Private	Private	✓
Quote	Controlled by Parent	Controlled by Parent	✓
Case	Private	Private	✓
Campaign	Private	Private	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Quick Text	Public Read Only	Public Read Only	✓
Service Contract	Private	Private	✓
abc	Public Read/Write	Public Read/Write	✓
Book	$\boxed{\text{Controlled by Parent}}$	Controlled by Parent	
File Attachment	Controlled by Parent	Controlled by Parent	

Sharing Settings

Criteria-Based Sharing Rules Video Tutorial | Help for this Page

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data.

Manage sharing settings for: All Objects

$\boxed{\text{Enable External Sharing Model}}$

Default Sharing Settings

Organization-Wide Defaults Edit Organization-Wide Defaults Help

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Private	Private	✓
Account, Contract, Order and Asset	Private	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Opportunity	Private	Private	✓
Quote	Controlled by Parent	Controlled by Parent	✓
Case	Private	Private	✓

Sharing Settings

Criteria-Based Sharing Rules Video Tutorial | Help for this Page

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data.

Paul Goodey initiated a organization-wide default update on 19/07/2019 12:19. You can't submit any changes until the operation finishes. Paul Goodey will receive an email when the organization-wide default update finishes.

Manage sharing settings for: All Objects

Enable External Sharing Model

Default Sharing Settings

Organization-Wide Defaults Edit

Organization-Wide Defaults Help

Object	Default Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	✓
Account, Contract and Asset	Public Read/Write	✓

Permission Set

Widget Access

Find Settings... | Clone | Edit Properties

Permission Set Overview > Object and Field Permissions ▾ **Widgets** ▾

Widgets

Save | Cancel

Object Permissions

Permission Name	Enabled
Read	☑
Create	☑
Edit	☑
Delete	☑
View All	☑
Modify All	☑

Field Permissions

Field Name	Read	Edit
Account	☐	☐
Name	☑	☑
Created By	☑	☐
Last Modified By	☑	☐
Owner	☑	☑

User

Sales Person

Edit Layout | Help for this Page

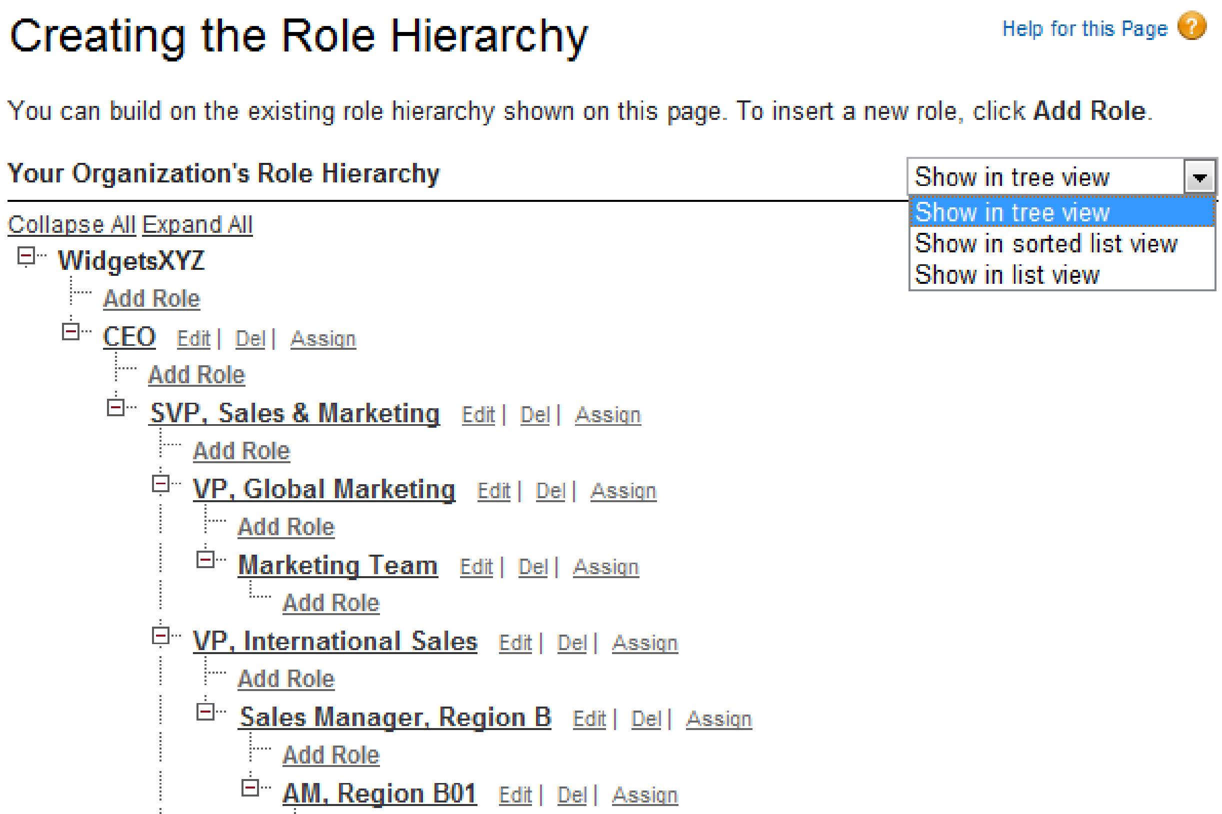
Permission Set Assignments [1] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] |

Permission Set Assignments

Edit Assignments

Permission Set Assignments Help

Action	Permission Set Label	Date Assigned
Del	Widget Access	25/09/2011



Creating the Role Hierarchy

Help for this Page

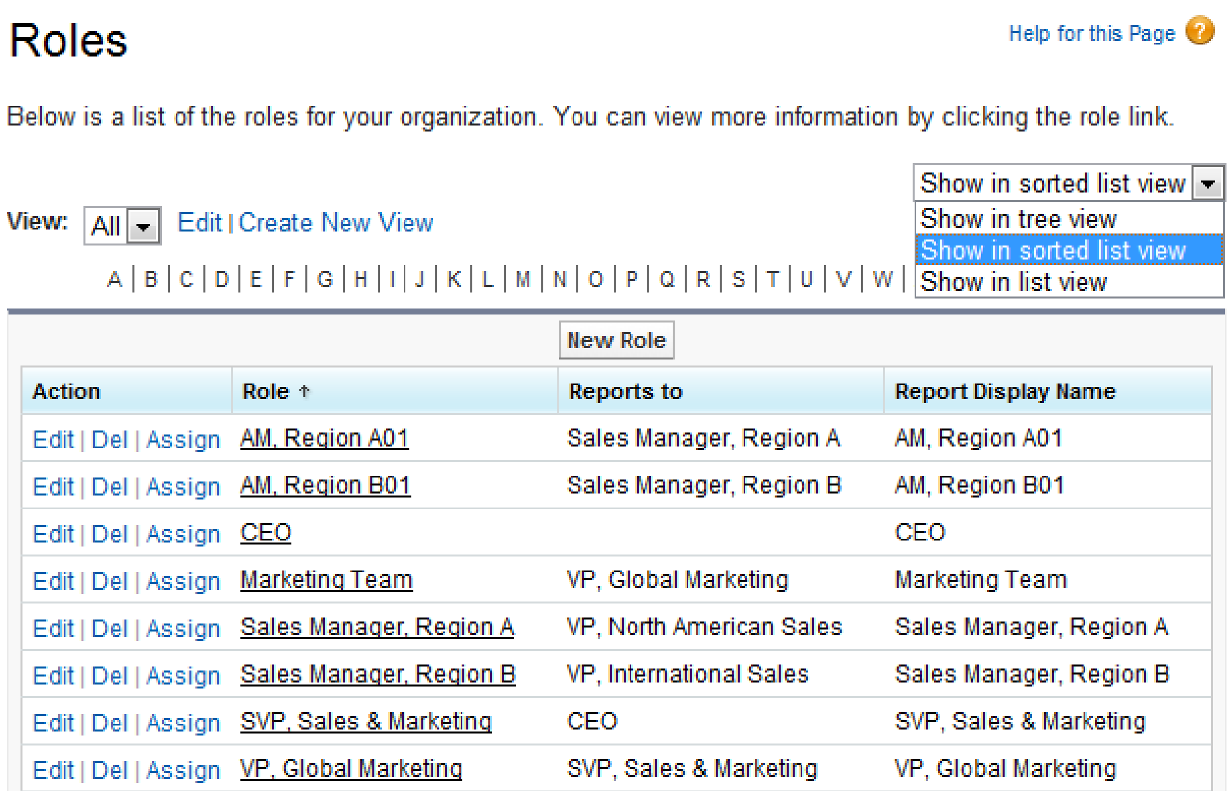
You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Show in tree view
Show in tree view
Show in sorted list view
Show in list view

Collapse All Expand All

- WidgetsXYZ
  - Add Role
  - CEO Edit | Del | Assign
    - Add Role
    - SVP, Sales & Marketing Edit | Del | Assign
      - Add Role
      - VP, Global Marketing Edit | Del | Assign
        - Add Role
        - Marketing Team Edit | Del | Assign
          - Add Role
      - VP, International Sales Edit | Del | Assign
        - Add Role
        - Sales Manager, Region B Edit | Del | Assign
          - Add Role
          - AM, Region B01 Edit | Del | Assign



Roles

Help for this Page

Below is a list of the roles for your organization. You can view more information by clicking the role link.

Show in sorted list view
Show in tree view
Show in sorted list view
Show in list view

View: All Edit | Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W |

New Role

Action	Role ↑	Reports to	Report Display Name
Edit | Del | Assign	AM, Region A01	Sales Manager, Region A	AM, Region A01
Edit | Del | Assign	AM, Region B01	Sales Manager, Region B	AM, Region B01
Edit | Del | Assign	CEO		CEO
Edit | Del | Assign	Marketing Team	VP, Global Marketing	Marketing Team
Edit | Del | Assign	Sales Manager, Region A	VP, North American Sales	Sales Manager, Region A
Edit | Del | Assign	Sales Manager, Region B	VP, International Sales	Sales Manager, Region B
Edit | Del | Assign	SVP, Sales & Marketing	CEO	SVP, Sales & Marketing
Edit | Del | Assign	VP, Global Marketing	SVP, Sales & Marketing	VP, Global Marketing

Roles

Help for this Page

Below is a list of the roles for your organization. You can view more information by clicking the role link.

New Role

Show in list view
- Show in tree view
- Show in sorted list view
- Show in list view

Action	Role	Reports To	
Edit | Del | Assign	CEO		
Edit | Del | Assign	SVP, Sales & Marketing	CEO	SVP, Sales & Marketing
Edit | Del | Assign	VP, Global Marketing	SVP, Sales & Marketing	VP, Global Marketing
Edit | Del | Assign	Marketing Team	VP, Global Marketing	Marketing Team
Edit | Del | Assign	VP, International Sales	SVP, Sales & Marketing	VP, International Sales
Edit | Del | Assign	Sales Manager, Region B	VP, International Sales	Sales Manager, Region B
Edit | Del | Assign	AM, Region B01	Sales Manager, Region B	AM, Region B01
Edit | Del | Assign	VP, North American Sales	SVP, Sales & Marketing	VP, North American Sales

Role

VP, International Sales

Help for this Page

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: WidgetsXYZ » CEO » SVP, Sales & Marketing » VP, International Sales
Siblings: VP, North American Sales, VP, Global Marketing

Users in VP, International Sales Role [1]

Role Detail

Edit | Delete

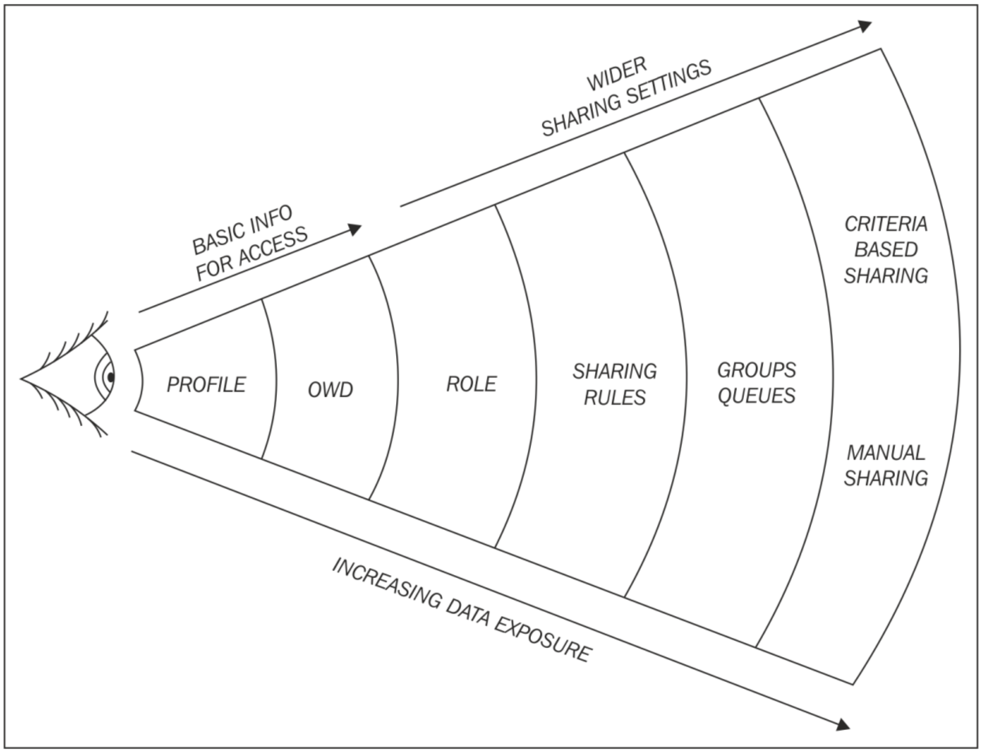
Role Name	VP, International Sales	Role Name as displayed on reports	VP, International Sales
This role reports to	SVP, Sales & Marketing	Sharing Groups	Role, Role and Subordinates
Modified By	Paul Goodey, 19/12/2009 13:01		
Customer Portal Role	☐		

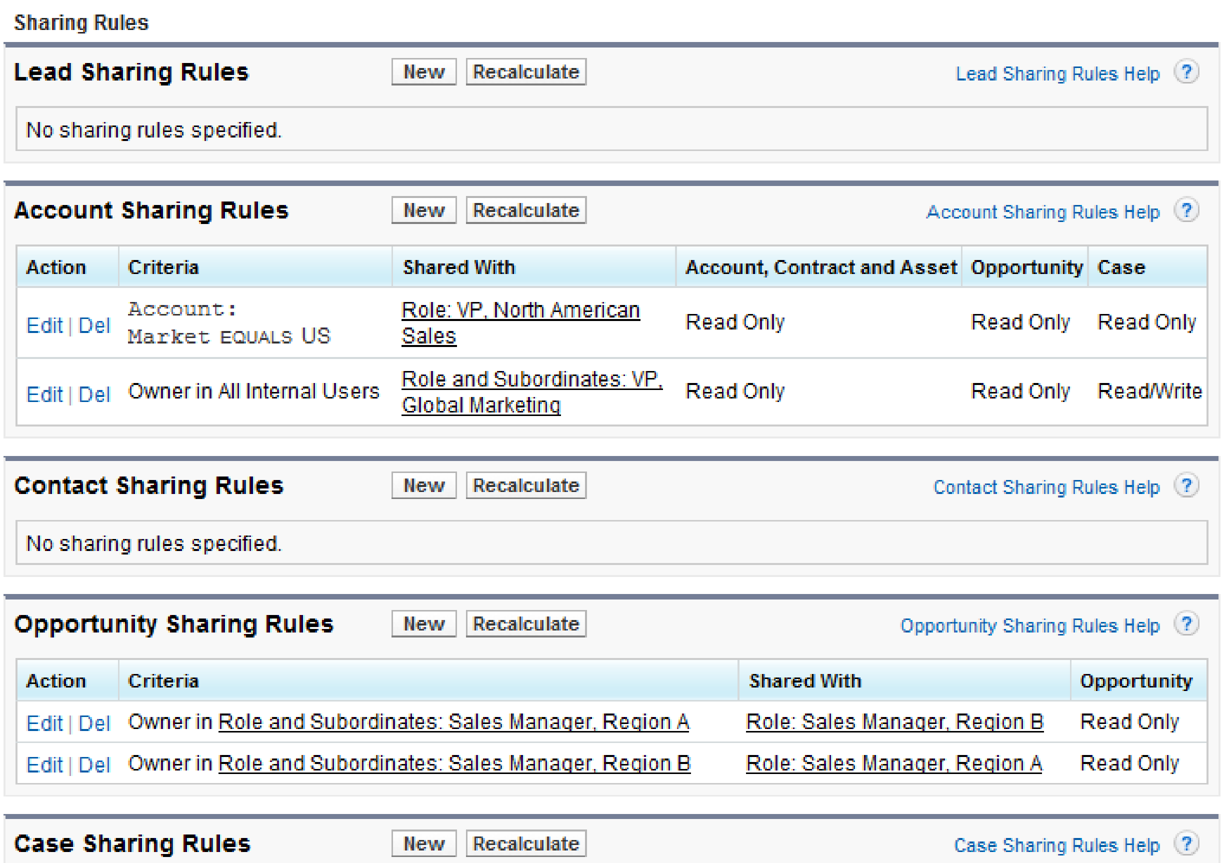
Users in VP, International Sales Role

Assign Users to Role | New User

Users in VP, International Sales Role Help

Action	Full Name	Alias	Username	Last Login	Active
Edit	Trevor Howard	thow	trevor.howard@widgetsxyz.com	31/01/2011 02:45	✓





Sharing Rules

Lead Sharing Rules New Recalculate Lead Sharing Rules Help ?

No sharing rules specified.

Account Sharing Rules New Recalculate Account Sharing Rules Help ?

Action	Criteria	Shared With	Account, Contract and Asset	Opportunity	Case
Edit | Del	Account: Market EQUALS US	Role: VP, North American Sales	Read Only	Read Only	Read Only
Edit | Del	Owner in All Internal Users	Role and Subordinates: VP, Global Marketing	Read Only	Read Only	Read/Write

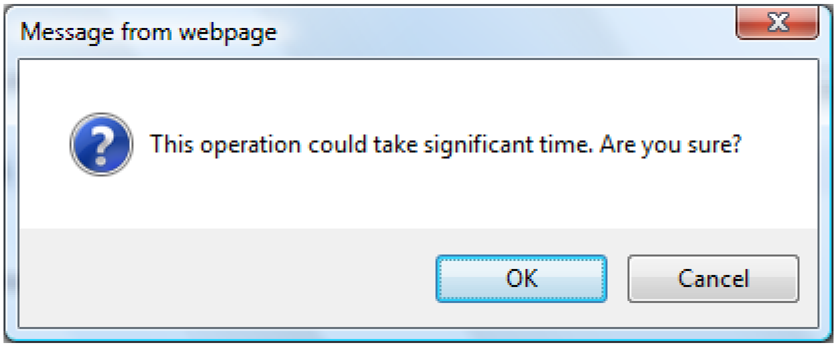
Contact Sharing Rules New Recalculate Contact Sharing Rules Help ?

No sharing rules specified.

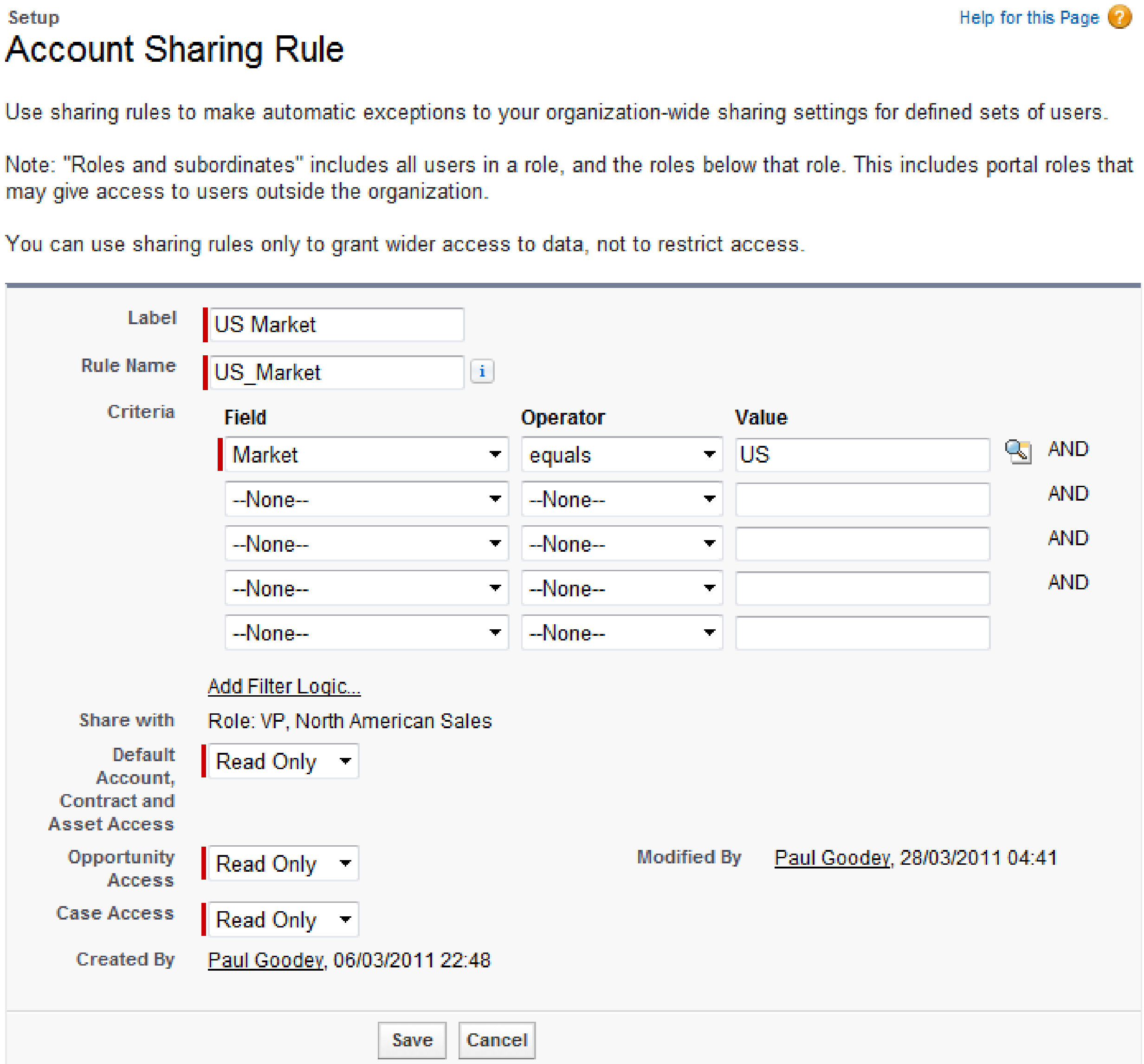
Opportunity Sharing Rules New Recalculate Opportunity Sharing Rules Help ?

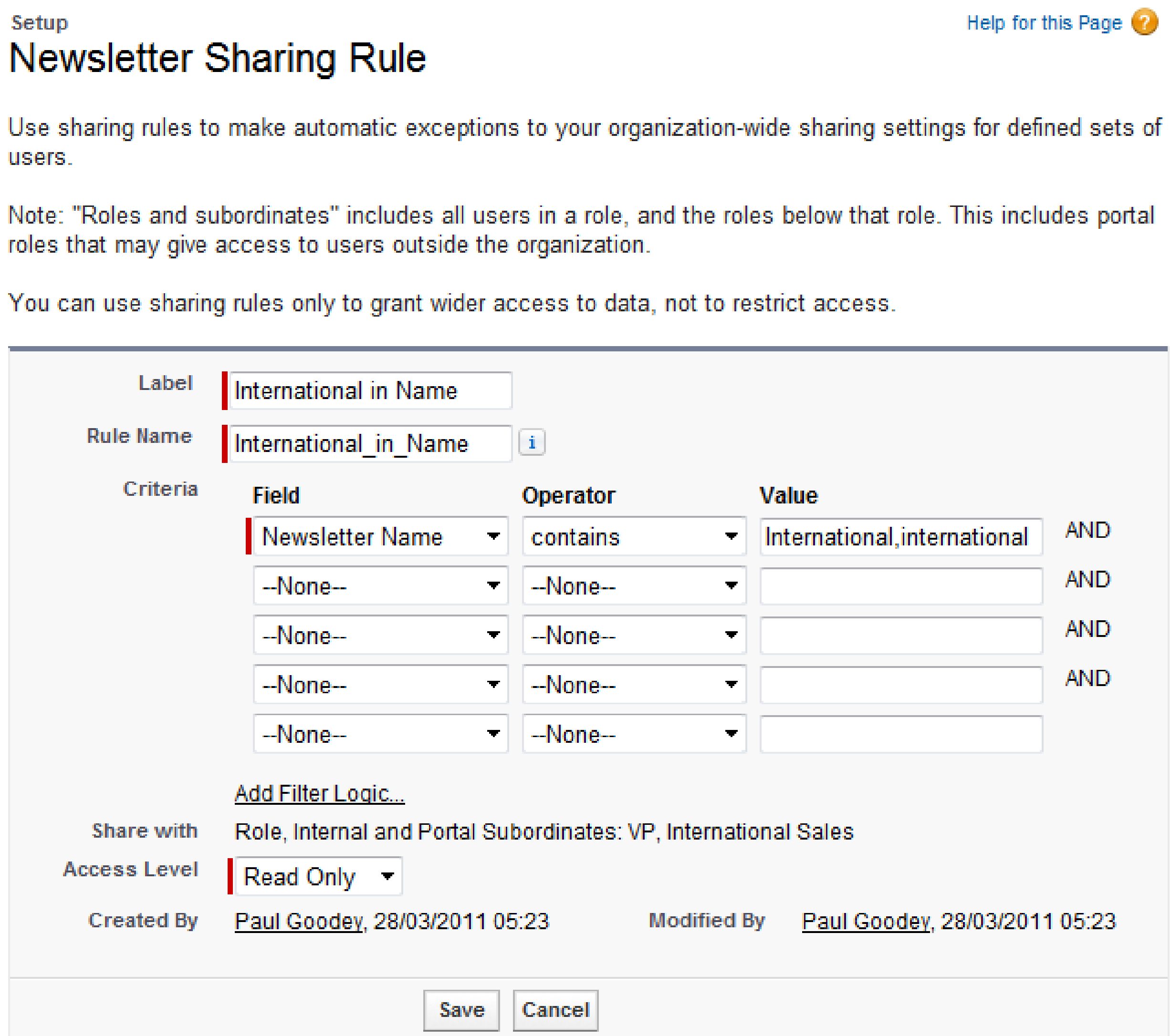
Action	Criteria	Shared With	Opportunity
Edit | Del	Owner in Role and Subordinates: Sales Manager, Region A	Role: Sales Manager, Region B	Read Only
Edit | Del	Owner in Role and Subordinates: Sales Manager, Region B	Role: Sales Manager, Region A	Read Only

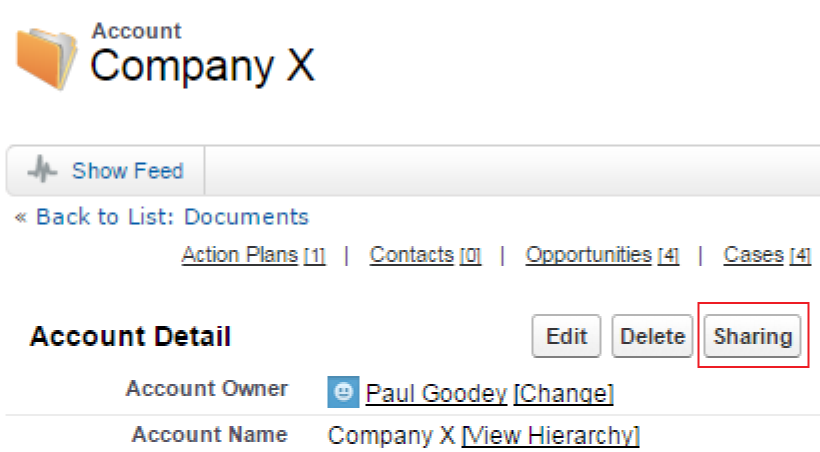
Case Sharing Rules New Recalculate Case Sharing Rules Help ?

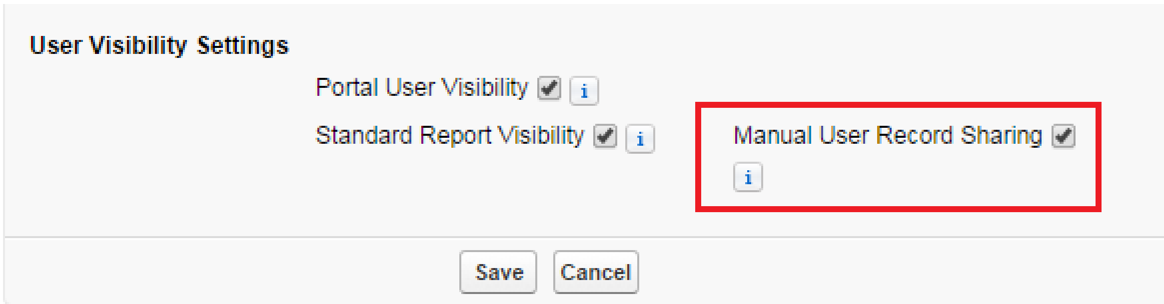

Message from webpage
This operation could take significant time. Are you sure?
OK
Cancel

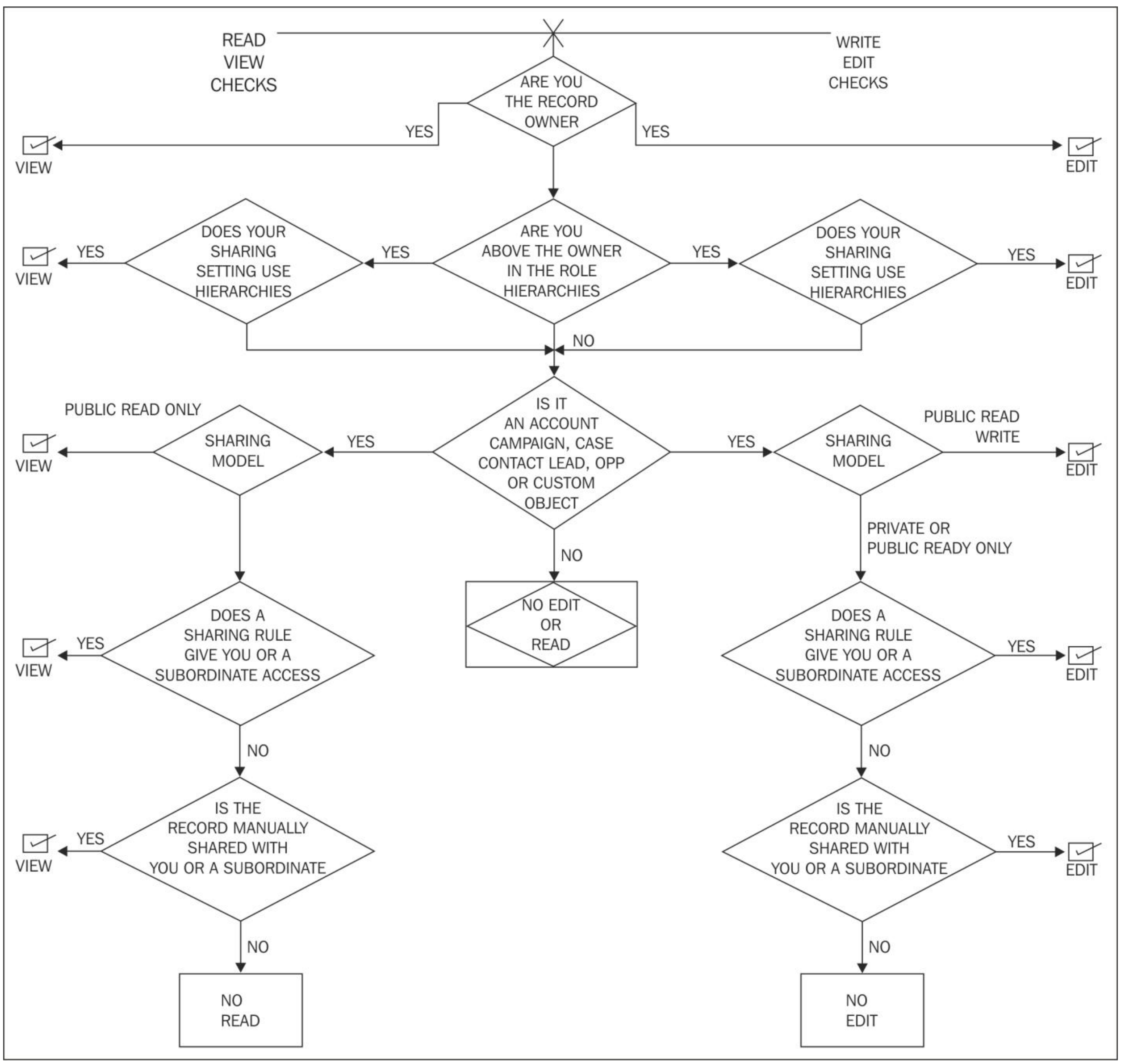

Sharing Rules
Lead Sharing Rules
New
Recalculate
Lead Sharing Rules Help
No sharing rules specified.
Account Sharing Rules
New
Recalculate
Account Sharing Rules Help
Action | Criteria | Shared With | Account, Contract and Asset | Opportunity | Case
Edit | Del | Account: Market EQUALS US | Role: VP, North American Sales | Read Only | Read Only | Read Only
Edit | Del | Owner in All Internal Users | Role and Subordinates: VP, Global Marketing | Read Only | Read Only | Read/Write
Contact Sharing Rules
New
Recalculate
Contact Sharing Rules Help
No sharing rules specified.
Opportunity Sharing Rules
New
Recalculate
Opportunity Sharing Rules Help
Action | Criteria | Shared With | Opportunity
Edit | Del | Owner in Role and Subordinates: Sales Manager, Region A | Role: Sales Manager, Region B | Read Only
Edit | Del | Owner in Role and Subordinates: Sales Manager, Region B | Role: Sales Manager, Region A | Read Only
Case Sharing Rules
New
Recalculate
Case Sharing Rules Help

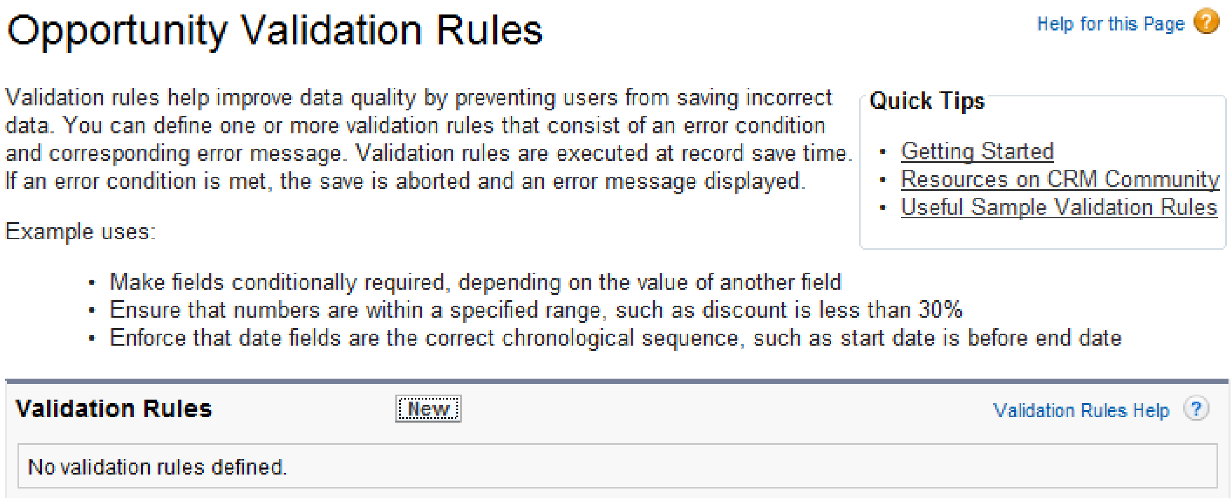

Setup
Account Sharing Rule
Help for this Page
Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.
Note: "Roles and subordinates" includes all users in a role, and the roles below that role. This includes portal roles that may give access to users outside the organization.
You can use sharing rules only to grant wider access to data, not to restrict access.
Label
US Market
Rule Name
US_Market
Criteria
Field
Operator
Value
Market
equals
US
AND
--None--
--None--
AND
--None--
--None--
AND
--None--
--None--
AND
--None--
--None--
Add Filter Logic...
Share with
Role: VP, North American Sales
Default Account, Contract and Asset Access
Read Only
Opportunity Access
Read Only
Modified By
Paul Goodey, 28/03/2011 04:41
Case Access
Read Only
Created By
Paul Goodey, 06/03/2011 22:48
Save
Cancel

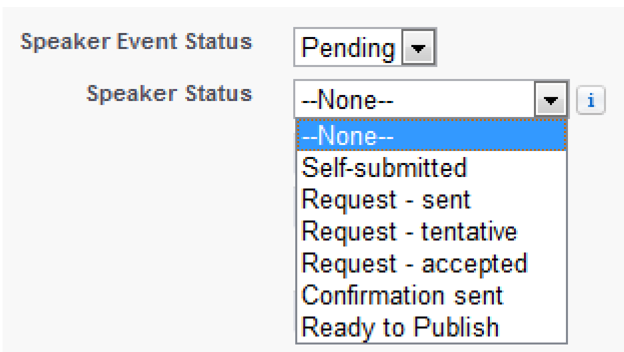

Setup
Newsletter Sharing Rule
Help for this Page
Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.
Note: "Roles and subordinates" includes all users in a role, and the roles below that role. This includes portal roles that may give access to users outside the organization.
You can use sharing rules only to grant wider access to data, not to restrict access.
Label
International in Name
Rule Name
International_in_Name
Criteria
Field
Operator
Value
Newsletter Name
contains
International,international
AND
--None--
--None--
AND
--None--
--None--
AND
--None--
--None--
AND
--None--
--None--
Add Filter Logic...
Share with
Role, Internal and Portal Subordinates: VP, International Sales
Access Level
Read Only
Created By
Paul Goodey, 28/03/2011 05:23
Modified By
Paul Goodey, 28/03/2011 05:23
Save
Cancel

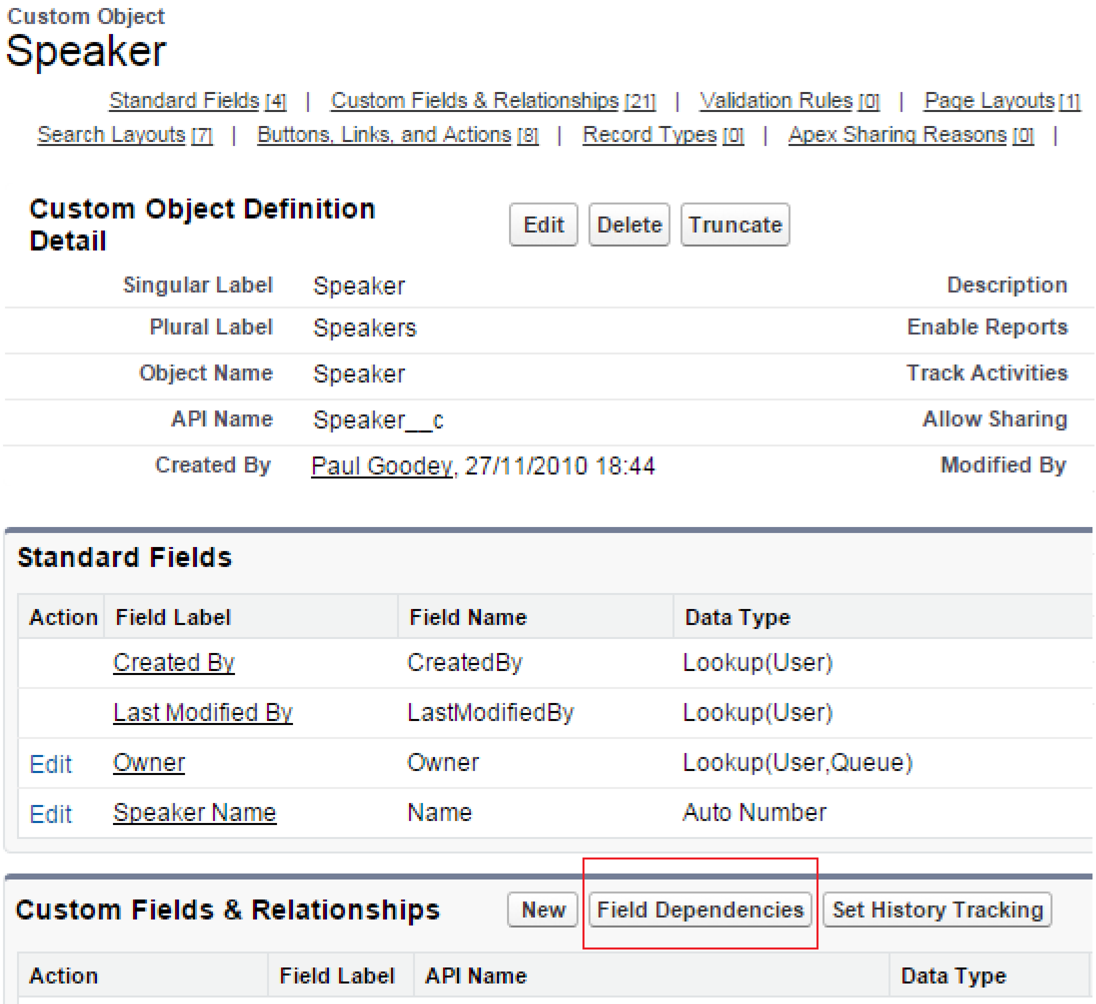

Account
Company X
Show Feed
« Back to List: Documents
Action Plans [1] | Contacts [0] | Opportunities [4] | Cases [4]
Account Detail
Edit
Delete
Sharing
Account Owner
Paul Goodey [Change]
Account Name
Company X [View Hierarchy]

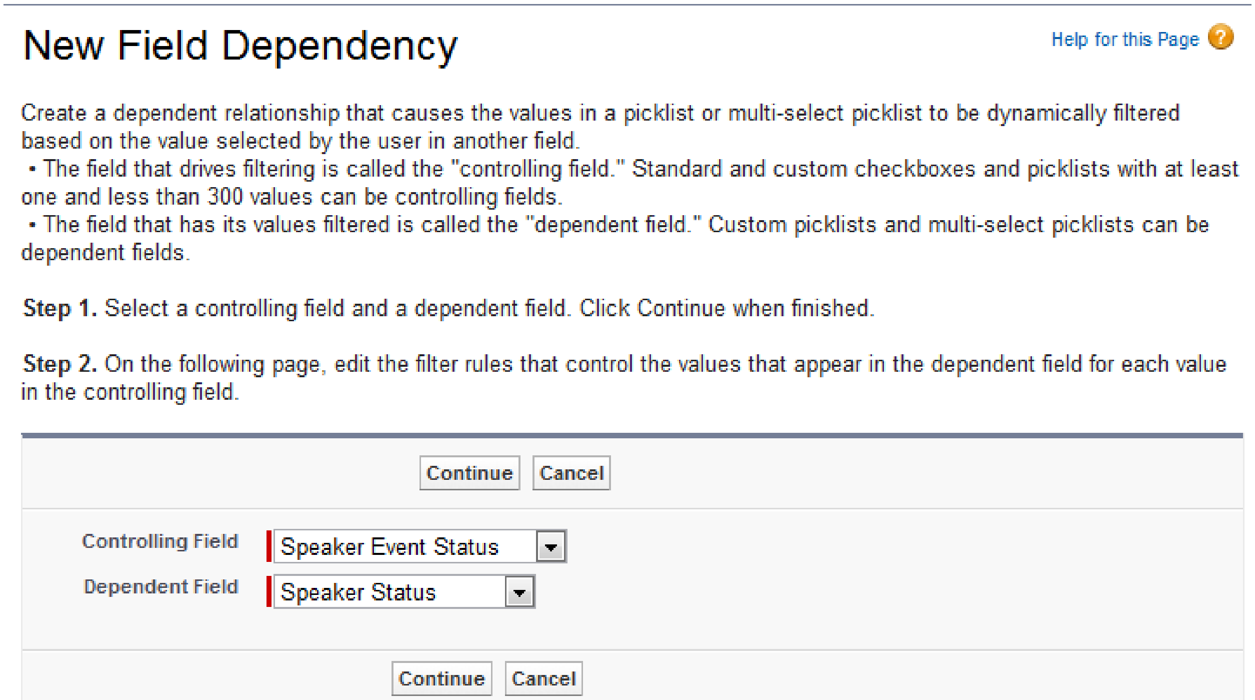

User Visibility Settings
Portal User Visibility
Standard Report Visibility
Manual User Record Sharing
Save
Cancel


READ VIEW CHECKS
WRITE EDIT CHECKS
ARE YOU THE RECORD OWNER
YES
YES
VIEW
EDIT
ARE YOU ABOVE THE OWNER IN THE ROLE HIERARCHIES
DOES YOUR SHARING SETTING USE HIERARCHIES
DOES YOUR SHARING SETTING USE HIERARCHIES
YES
YES
YES
YES
VIEW
EDIT
NO
IS IT AN ACCOUNT CAMPAIGN, CASE CONTACT LEAD, OPP OR CUSTOM OBJECT
PUBLIC READ ONLY
SHARING MODEL
YES
YES
SHARING MODEL
PUBLIC READ WRITE
VIEW
EDIT
NO
NO EDIT OR READ
PRIVATE OR PUBLIC READY ONLY
DOES A SHARING RULE GIVE YOU OR A SUBORDINATE ACCESS
DOES A SHARING RULE GIVE YOU OR A SUBORDINATE ACCESS
YES
YES
VIEW
EDIT
NO
NO
IS THE RECORD MANUALLY SHARED WITH YOU OR A SUBORDINATE
IS THE RECORD MANUALLY SHARED WITH YOU OR A SUBORDINATE
YES
YES
VIEW
EDIT
NO
NO
NO READ
NO EDIT


Opportunity Validation Rules
Help for this Page
Validation rules help improve data quality by preventing users from saving incorrect data. You can define one or more validation rules that consist of an error condition and corresponding error message. Validation rules are executed at record save time. If an error condition is met, the save is aborted and an error message displayed.
Example uses:
Make fields conditionally required, depending on the value of another field
Ensure that numbers are within a specified range, such as discount is less than 30%
Enforce that date fields are the correct chronological sequence, such as start date is before end date
Quick Tips
Getting Started
Resources on CRM Community
Useful Sample Validation Rules
Validation Rules
New
Validation Rules Help
No validation rules defined.


Speaker Event Status
Pending
Speaker Status
--None--
--None--
Self-submitted
Request - sent
Request - tentative
Request - accepted
Confirmation sent
Ready to Publish


Custom Object
Speaker
Standard Fields [4] | Custom Fields & Relationships [21] | Validation Rules [0] | Page Layouts [1]
Search Layouts [7] | Buttons, Links, and Actions [8] | Record Types [0] | Apex Sharing Reasons [0] |
Custom Object Definition Detail
Edit
Delete
Truncate
Singular Label
Speaker
Description
Plural Label
Speakers
Enable Reports
Object Name
Speaker
Track Activities
API Name
Speaker__c
Allow Sharing
Created By
Paul Goodey, 27/11/2010 18:44
Modified By
Standard Fields
Action
Field Label
Field Name
Data Type
Created By
CreatedBy
Lookup(User)
Last Modified By
LastModifiedBy
Lookup(User)
Edit
Owner
Owner
Lookup(User,Queue)
Edit
Speaker Name
Name
Auto Number
Custom Fields & Relationships
New
Field Dependencies
Set History Tracking
Action
Field Label
API Name
Data Type



New Field Dependency

Help for this Page

Create a dependent relationship that causes the values in a picklist or multi-select picklist to be dynamically filtered based on the value selected by the user in another field.

- The field that drives filtering is called the "controlling field." Standard and custom checkboxes and picklists with at least one and less than 300 values can be controlling fields.
- The field that has its values filtered is called the "dependent field." Custom picklists and multi-select picklists can be dependent fields.

Step 1. Select a controlling field and a dependent field. Click Continue when finished.

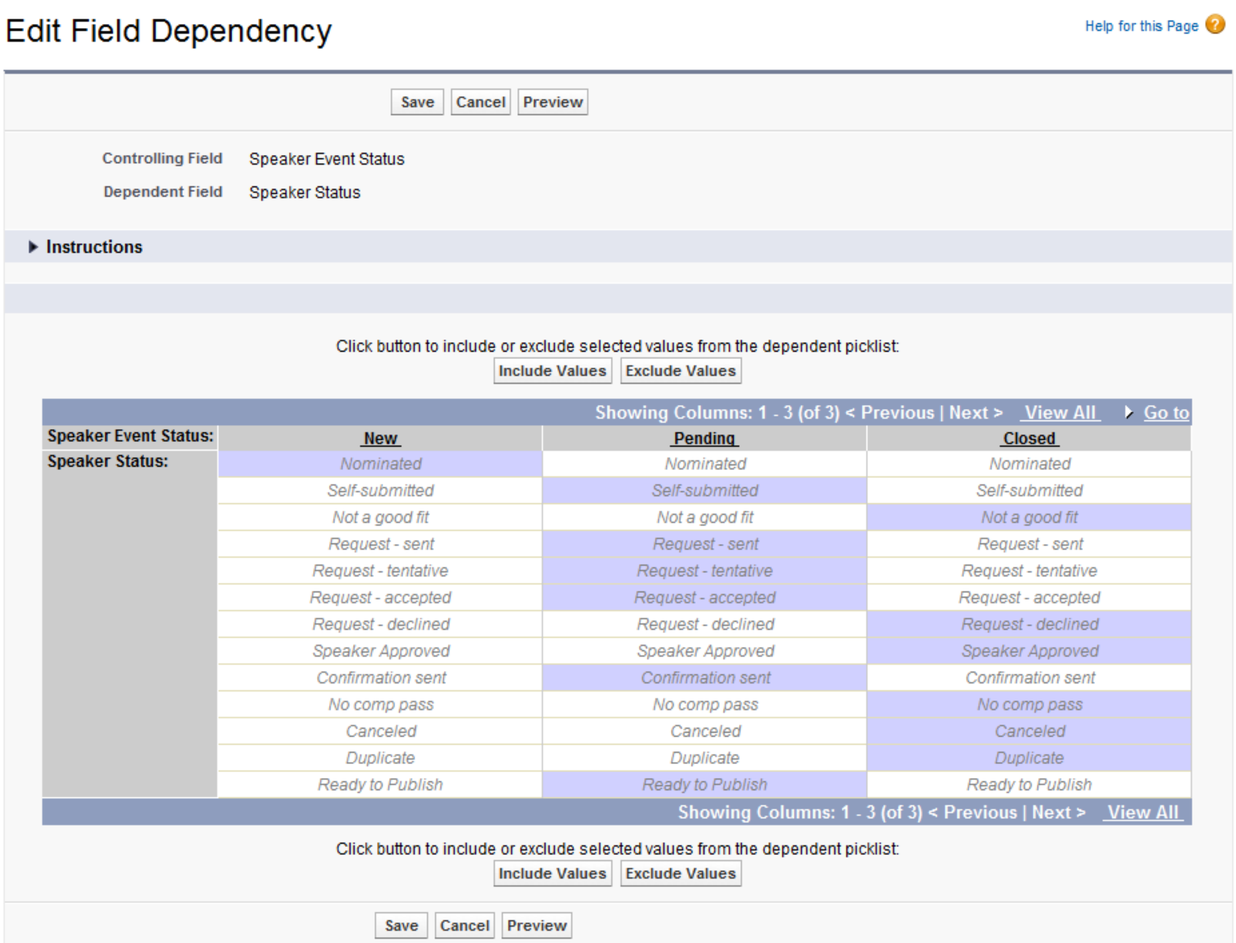
Step 2. On the following page, edit the filter rules that control the values that appear in the dependent field for each value in the controlling field.

Continue Cancel

Controlling Field: Speaker Event Status

Dependent Field: Speaker Status

Continue Cancel



Edit Field Dependency

Help for this Page

Save Cancel Preview

Controlling Field: Speaker Event Status

Dependent Field: Speaker Status

Instructions

Click button to include or exclude selected values from the dependent picklist:

Include Values Exclude Values

Showing Columns: 1 - 3 (of 3) < Previous | Next > View All Go to

Speaker Event Status:	New	Pending	Closed
Speaker Status:	Nominated	Nominated	Nominated
	Self-submitted	Self-submitted	Self-submitted
	Not a good fit	Not a good fit	Not a good fit
	Request - sent	Request - sent	Request - sent
	Request - tentative	Request - tentative	Request - tentative
	Request - accepted	Request - accepted	Request - accepted
	Request - declined	Request - declined	Request - declined
	Speaker Approved	Speaker Approved	Speaker Approved
	Confirmation sent	Confirmation sent	Confirmation sent
	No comp pass	No comp pass	No comp pass
	Canceled	Canceled	Canceled
	Duplicate	Duplicate	Duplicate
	Ready to Publish	Ready to Publish	Ready to Publish

Showing Columns: 1 - 3 (of 3) < Previous | Next > View All

Click button to include or exclude selected values from the dependent picklist:

Include Values Exclude Values

Save Cancel Preview

Edit Field Dependency

Help for this Page

Save | Cancel | Preview

Controlling Field: Speaker Event Status

Dependent Field: Speaker Status

Instructions

Click button to include or exclude selected values from the dependent picklist:

Include Values | Exclude Values

Showing Columns: 1 - 3 (of 3) < Previous | Next > View All | Go to

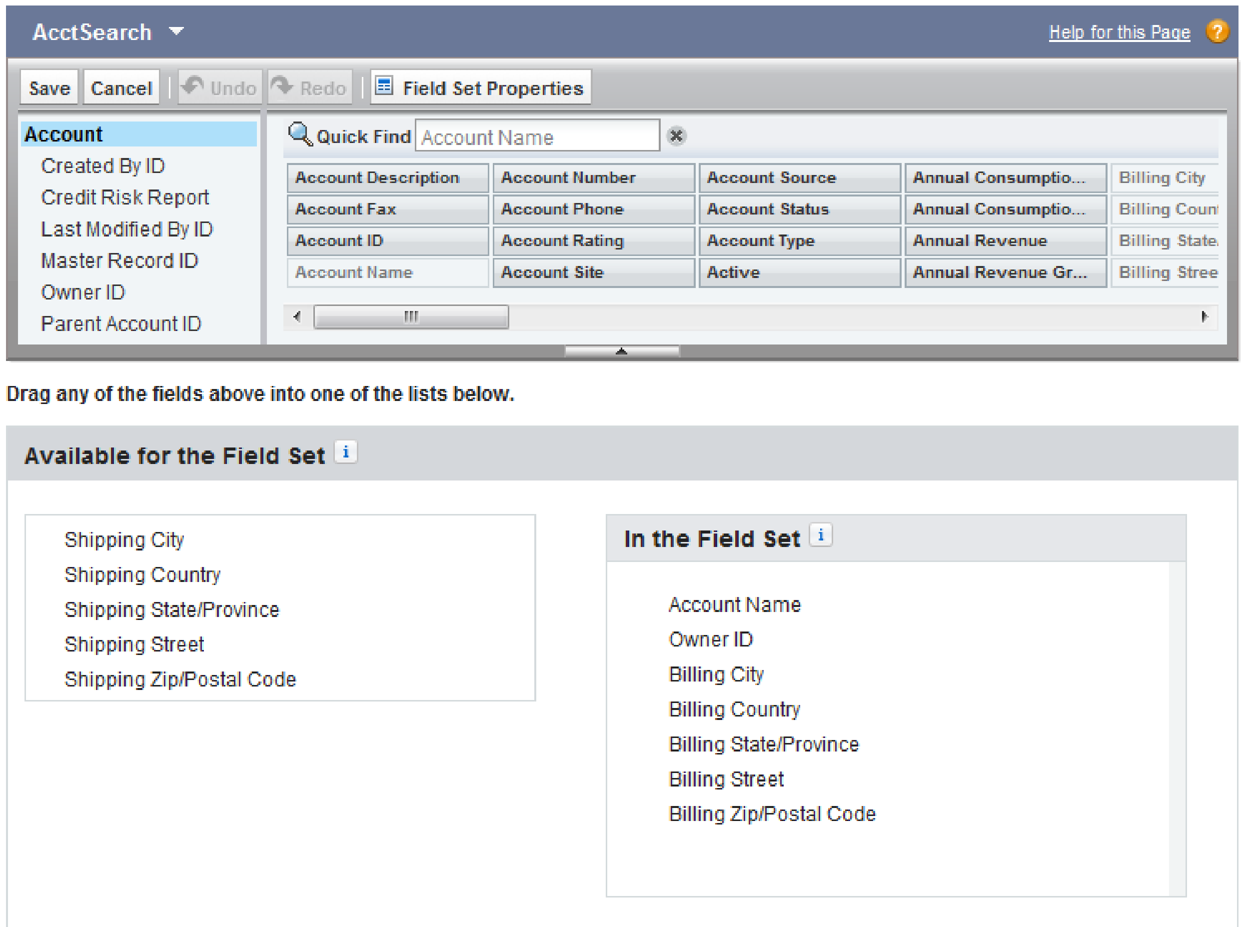
Speaker Event Status:	New	Pending	Closed
Speaker Status:	**Nominated**	*Nominated*	*Nominated*
	Self-submitted	**Self-submitted**	*Self-submitted*
	Not a good fit	*Not a good fit*	**Not a good fit**
	Request - sent	**Request - sent**	*Request - sent*
	Request - tentative	**Request - tentative**	*Request - tentative*
	Request - accepted	**Request - accepted**	*Request - accepted*
	Request - declined	*Request - declined*	**Request - declined**
	Speaker Approved	*Speaker Approved*	**Speaker Approved**
	Confirmation sent	**Confirmation sent**	*Confirmation sent*
	No comp pass	*No comp pass*	**No comp pass**
	Canceled	*Canceled*	**Canceled**
	Duplicate	*Duplicate*	**Duplicate**
	Ready to Publish	**Ready to Publish**	*Ready to Publish*

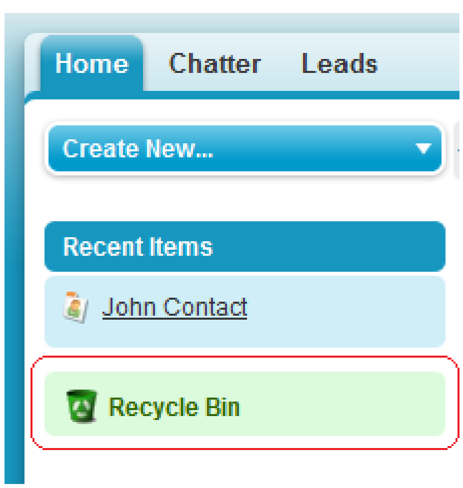
Showing Columns: 1 - 3 (of 3) < Previous | Next > View All

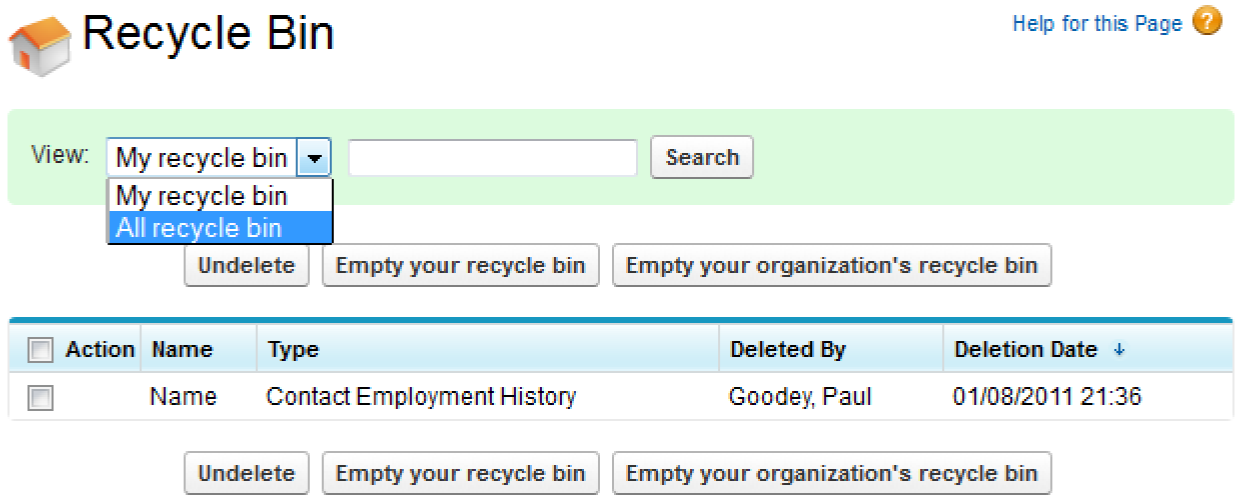
Click button to include or exclude selected values from the dependent picklist:

Include Values | Exclude Values

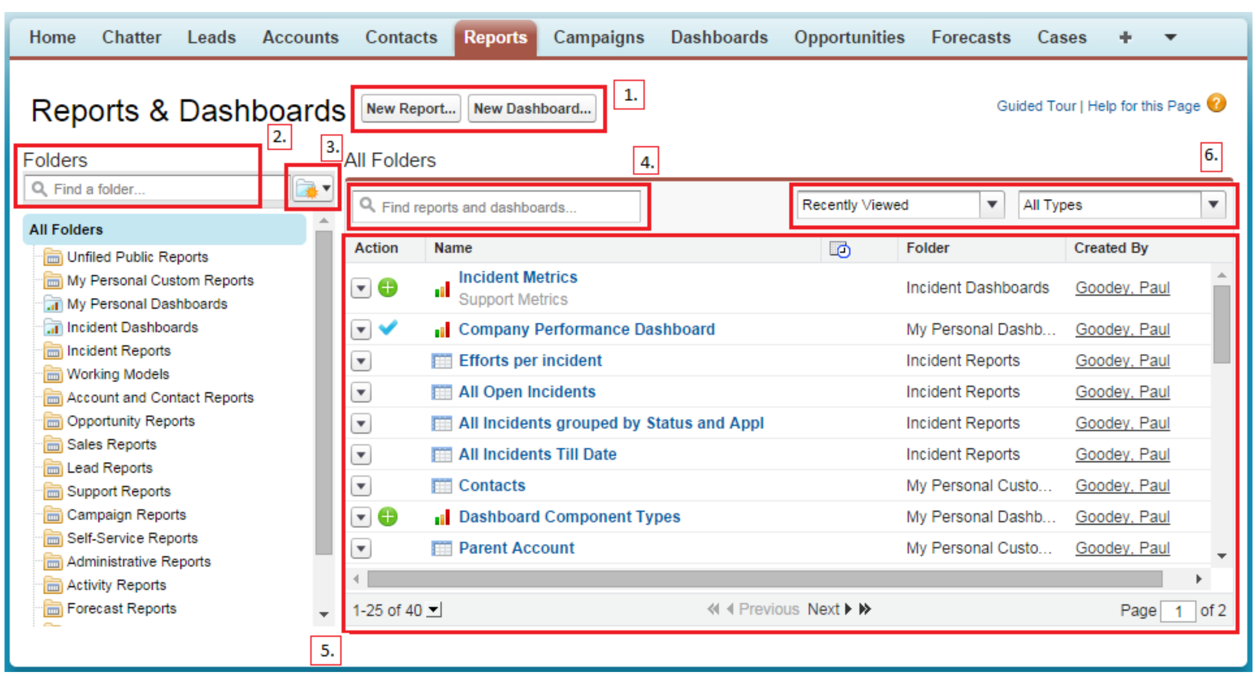
Save | Cancel | Preview

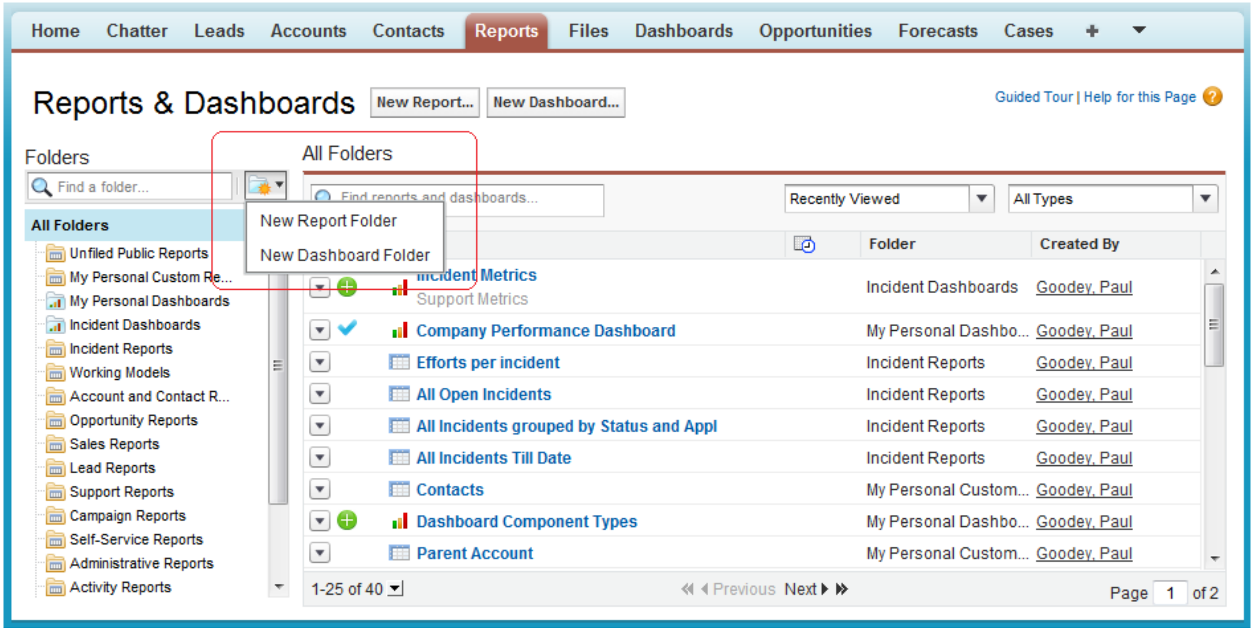

AcctSearch
Help for this Page
Save
Cancel
Undo
Redo
Field Set Properties
Account
Created By ID
Credit Risk Report
Last Modified By ID
Master Record ID
Owner ID
Parent Account ID
Quick Find
Account Name
Account Description
Account Number
Account Source
Annual Consumptio...
Billing City
Account Fax
Account Phone
Account Status
Annual Consumptio...
Billing Coun
Account ID
Account Rating
Account Type
Annual Revenue
Billing State
Account Name
Account Site
Active
Annual Revenue Gr...
Billing Stree
Drag any of the fields above into one of the lists below.
Available for the Field Set
Shipping City
Shipping Country
Shipping State/Province
Shipping Street
Shipping Zip/Postal Code
In the Field Set
Account Name
Owner ID
Billing City
Billing Country
Billing State/Province
Billing Street
Billing Zip/Postal Code


Home
Chatter
Leads
Create New...
Recent Items
John Contact
Recycle Bin

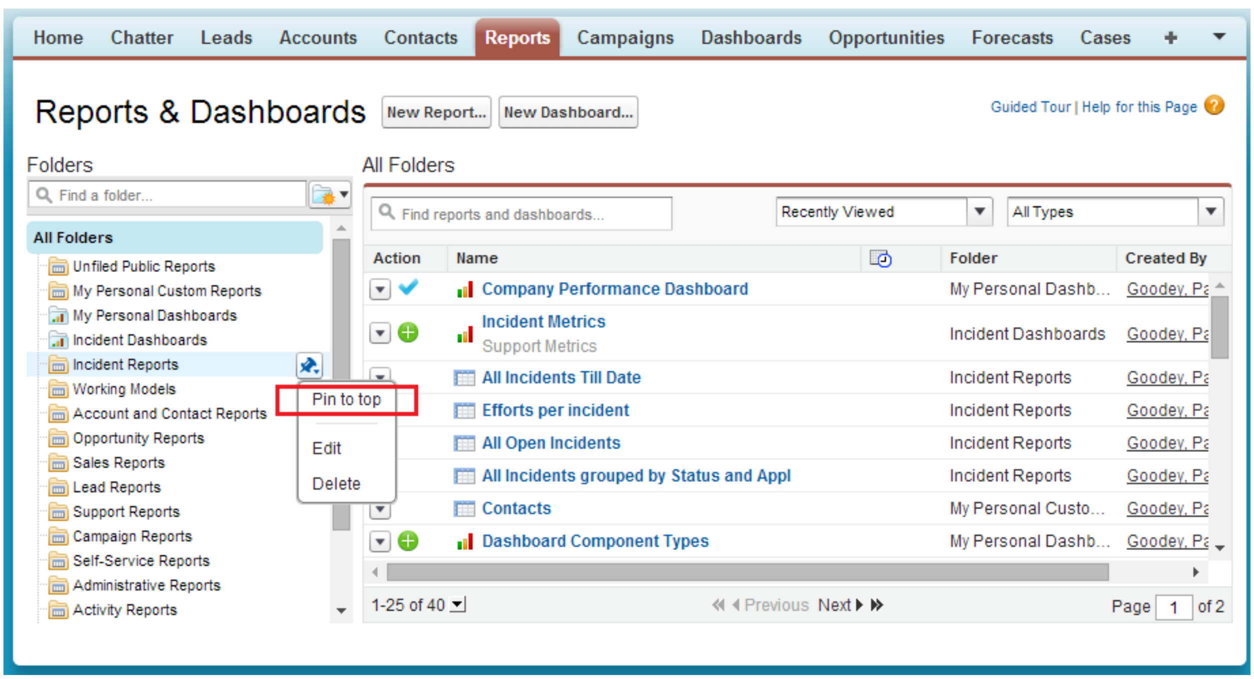

Recycle Bin
Help for this Page
View:
My recycle bin
My recycle bin
All recycle bin
Search
Undelete
Empty your recycle bin
Empty your organization's recycle bin
Action
Name
Type
Deleted By
Deletion Date
Name
Contact Employment History
Goodey, Paul
01/08/2011 21:36
Undelete
Empty your recycle bin
Empty your organization's recycle bin

Chapter 5

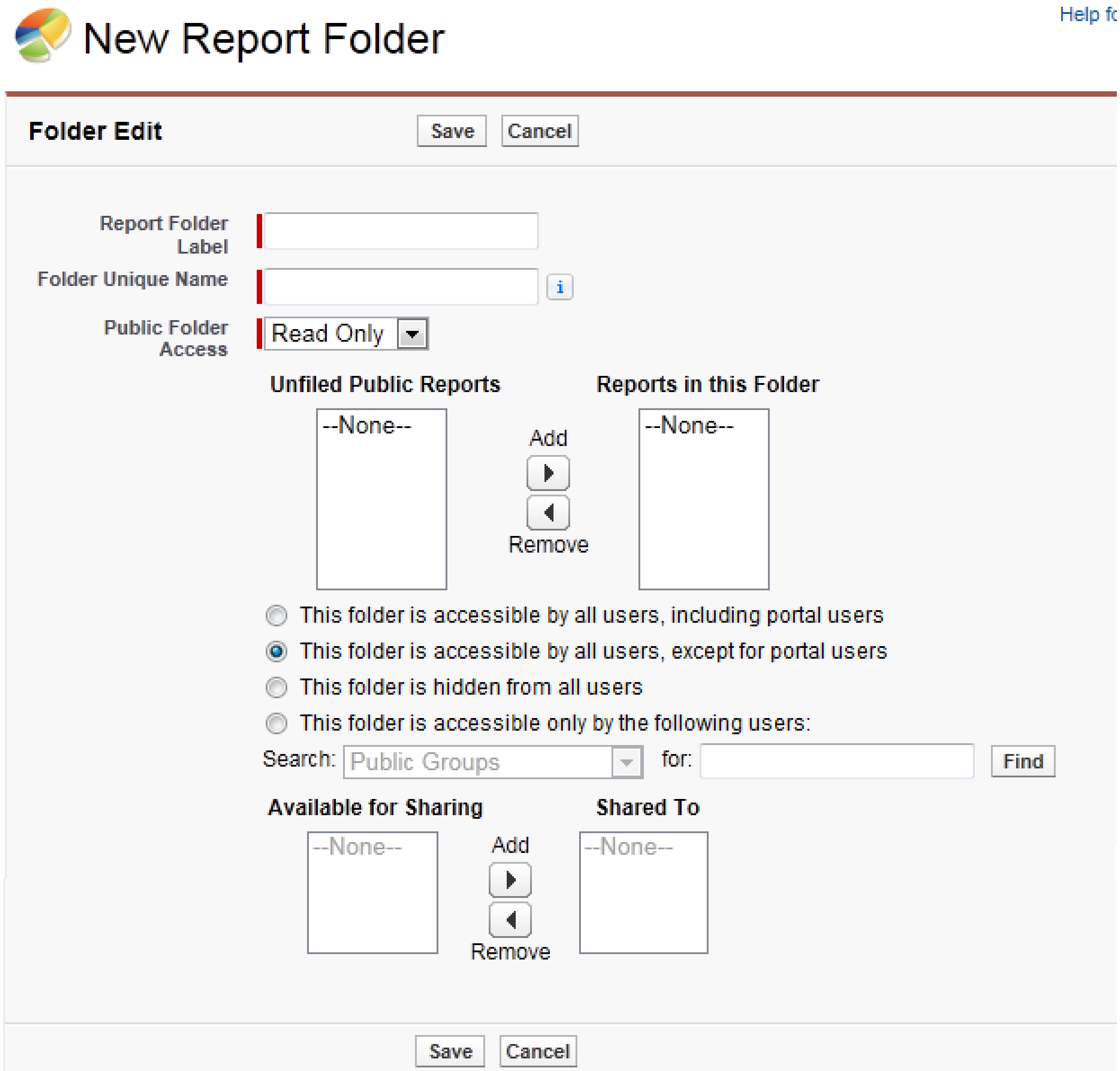

Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Dashboards
Opportunities
Forecasts
Cases
Reports & Dashboards
New Report...
New Dashboard...
1.
Guided Tour | Help for this Page
2.
3.
Folders
Find a folder...
All Folders
4.
6.
Find reports and dashboards...
Recently Viewed
All Types
All Folders
Unfiled Public Reports
My Personal Custom Reports
My Personal Dashboards
Incident Dashboards
Incident Reports
Working Models
Account and Contact Reports
Opportunity Reports
Sales Reports
Lead Reports
Support Reports
Campaign Reports
Self-Service Reports
Administrative Reports
Activity Reports
Forecast Reports
Action
Name
Folder
Created By
Incident Metrics
Support Metrics
Incident Dashboards
Goodey, Paul
Company Performance Dashboard
My Personal Dashb...
Goodey, Paul
Efforts per incident
Incident Reports
Goodey, Paul
All Open Incidents
Incident Reports
Goodey, Paul
All Incidents grouped by Status and Appl
Incident Reports
Goodey, Paul
All Incidents Till Date
Incident Reports
Goodey, Paul
Contacts
My Personal Custo...
Goodey, Paul
Dashboard Component Types
My Personal Dashb...
Goodey, Paul
Parent Account
My Personal Custo...
Goodey, Paul
1-25 of 40
Previous Next
Page 1 of 2
5.

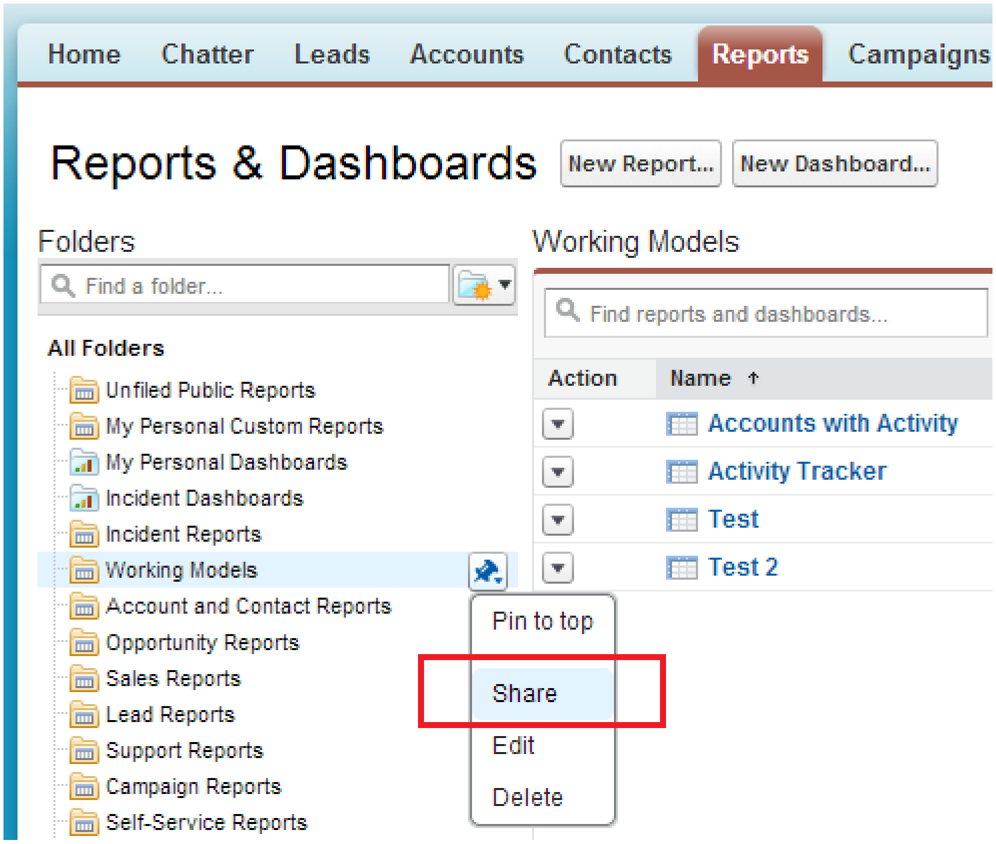


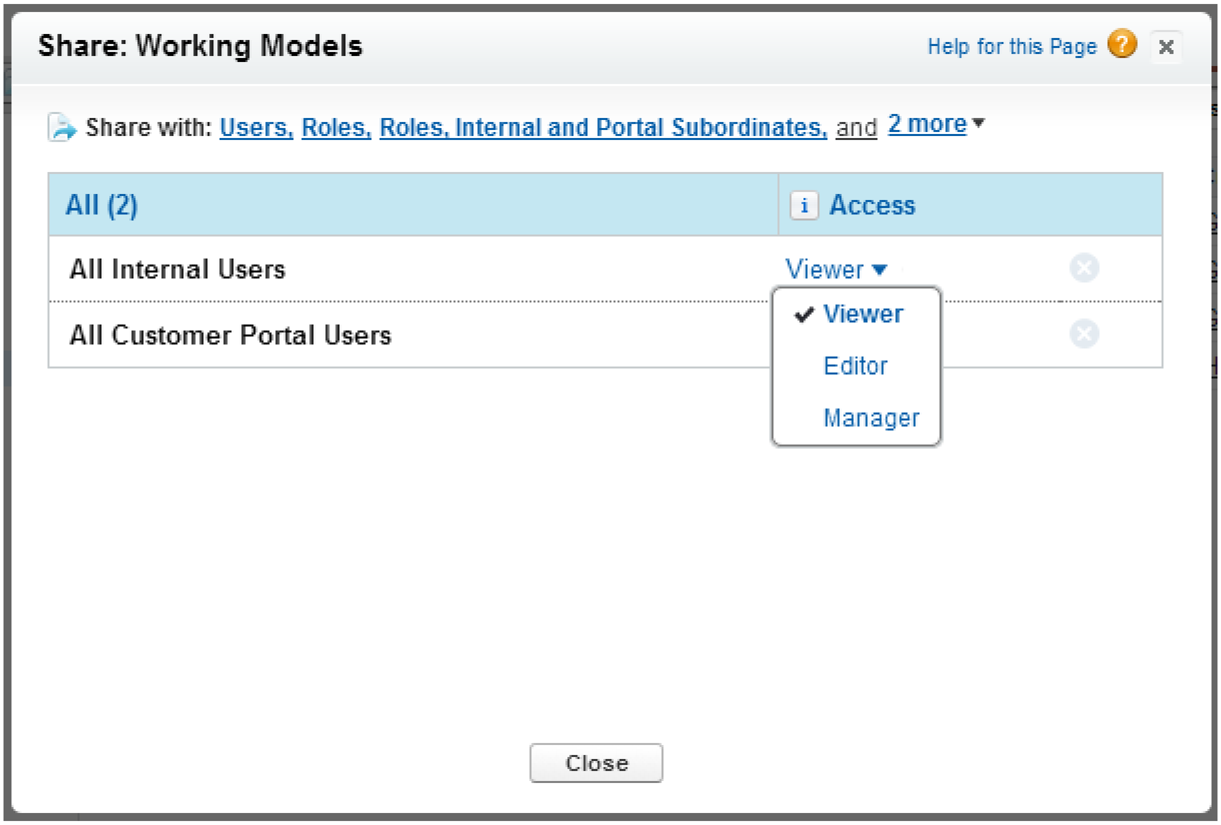
Home Chatter Leads Accounts Contacts Reports Files Dashboards Opportunities Forecasts Cases
Reports & Dashboards
New Report...
New Dashboard...
Guided Tour | Help for this Page
Folders
Find a folder...
New Report Folder
New Dashboard Folder
All Folders
Find reports and dashboards...
Recently Viewed
All Types
Folder
Created By
All Folders
Unfiled Public Reports
My Personal Custom Re...
My Personal Dashboards
Incident Dashboards
Incident Reports
Working Models
Account and Contact R...
Opportunity Reports
Sales Reports
Lead Reports
Support Reports
Campaign Reports
Self-Service Reports
Administrative Reports
Activity Reports
Incident Metrics
Support Metrics
Incident Dashboards Goodey, Paul
Company Performance Dashboard My Personal Dashbo... Goodey, Paul
Efforts per incident Incident Reports Goodey, Paul
All Open Incidents Incident Reports Goodey, Paul
All Incidents grouped by Status and Appl Incident Reports Goodey, Paul
All Incidents Till Date Incident Reports Goodey, Paul
Contacts My Personal Custom... Goodey, Paul
Dashboard Component Types My Personal Dashbo... Goodey, Paul
Parent Account My Personal Custom... Goodey, Paul
1-25 of 40
Previous Next
Page 1 of 2

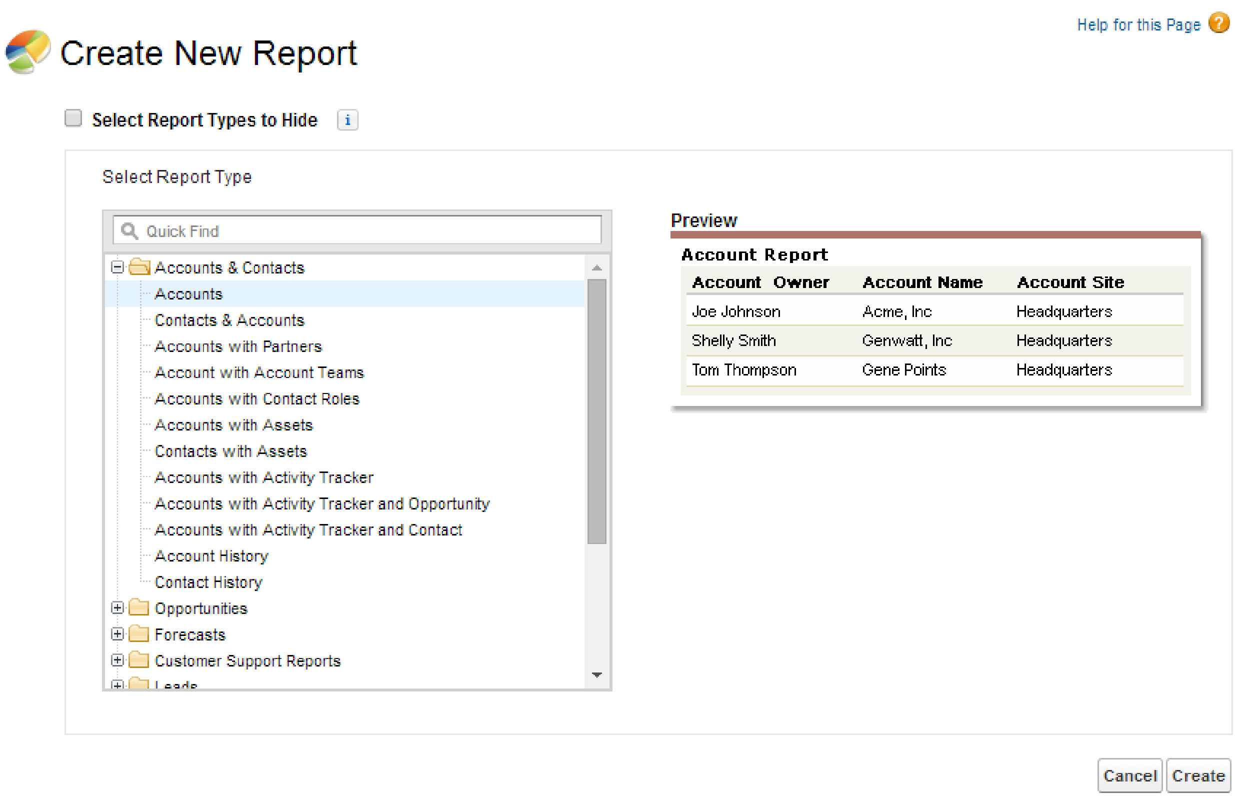


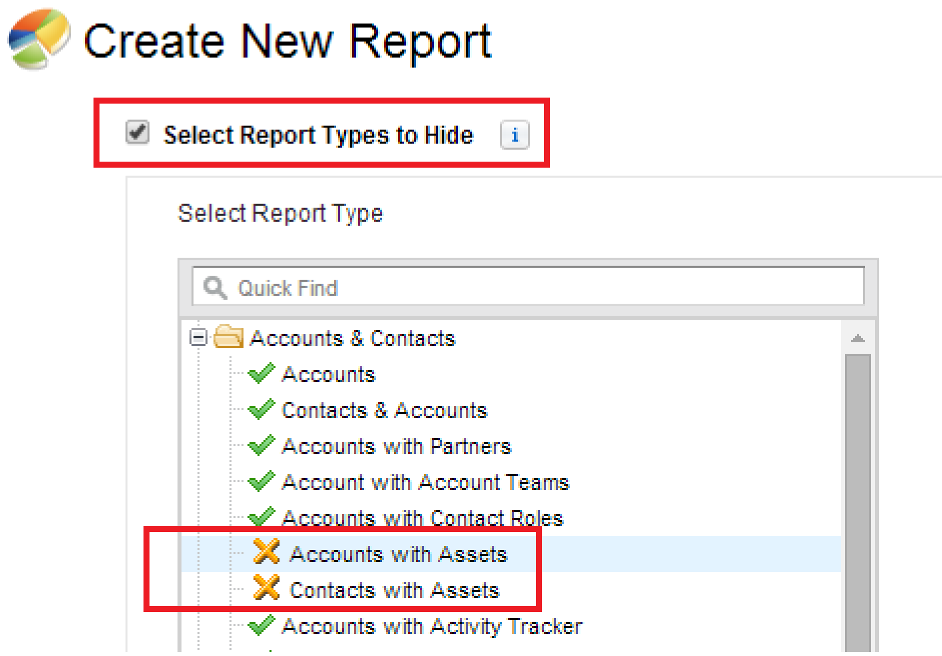
Home Chatter Leads Accounts Contacts Reports Campaigns Dashboards Opportunities Forecasts Cases
Reports & Dashboards
New Report...
New Dashboard...
Guided Tour | Help for this Page
Folders
Find a folder...
All Folders
Unfiled Public Reports
My Personal Custom Reports
My Personal Dashboards
Incident Dashboards
Incident Reports
Working Models
Account and Contact Reports
Opportunity Reports
Sales Reports
Lead Reports
Support Reports
Campaign Reports
Self-Service Reports
Administrative Reports
Activity Reports
Pin to top
Edit
Delete
All Folders
Find reports and dashboards...
Recently Viewed
All Types
Action
Name
Folder
Created By
Company Performance Dashboard My Personal Dashb... Goodey, Pa
Incident Metrics
Support Metrics
Incident Dashboards Goodey, Pa
All Incidents Till Date Incident Reports Goodey, Pa
Efforts per incident Incident Reports Goodey, Pa
All Open Incidents Incident Reports Goodey, Pa
All Incidents grouped by Status and Appl Incident Reports Goodey, Pa
Contacts My Personal Custo... Goodey, Pa
Dashboard Component Types My Personal Dashb... Goodey, Pa
1-25 of 40
Previous Next
Page 1 of 2

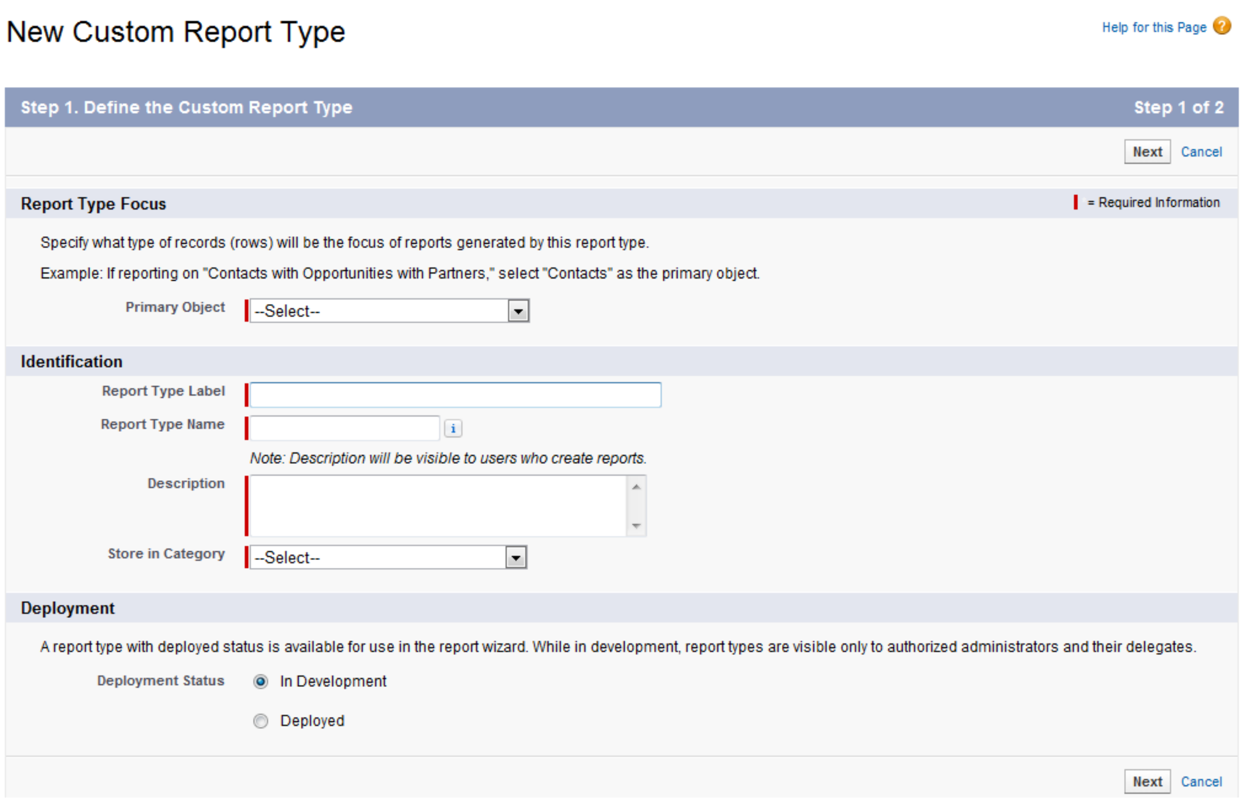

New Report Folder
Help fo
Folder Edit
Save
Cancel
Report Folder Label
Folder Unique Name
Public Folder Access
Read Only
Unfiled Public Reports
Reports in this Folder
--None--
Add
Remove
--None--
This folder is accessible by all users, including portal users
This folder is accessible by all users, except for portal users
This folder is hidden from all users
This folder is accessible only by the following users:
Search:
Public Groups
for:
Find
Available for Sharing
Shared To
--None--
Add
Remove
--None--
Save
Cancel

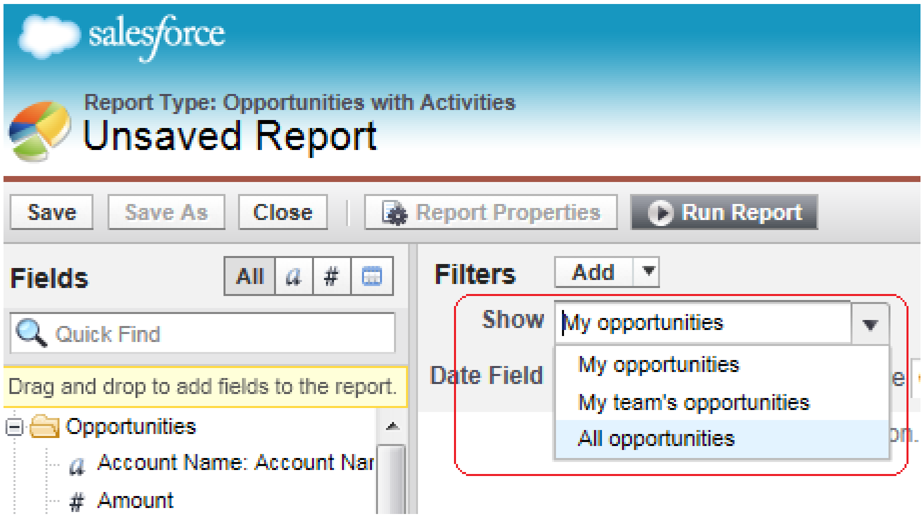

Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Reports & Dashboards
New Report...
New Dashboard...
Folders
Find a folder...
All Folders
Unfiled Public Reports
My Personal Custom Reports
My Personal Dashboards
Incident Dashboards
Incident Reports
Working Models
Account and Contact Reports
Opportunity Reports
Sales Reports
Lead Reports
Support Reports
Campaign Reports
Self-Service Reports
Pin to top
Share
Edit
Delete
Working Models
Find reports and dashboards...
Action
Name
Accounts with Activity
Activity Tracker
Test
Test 2

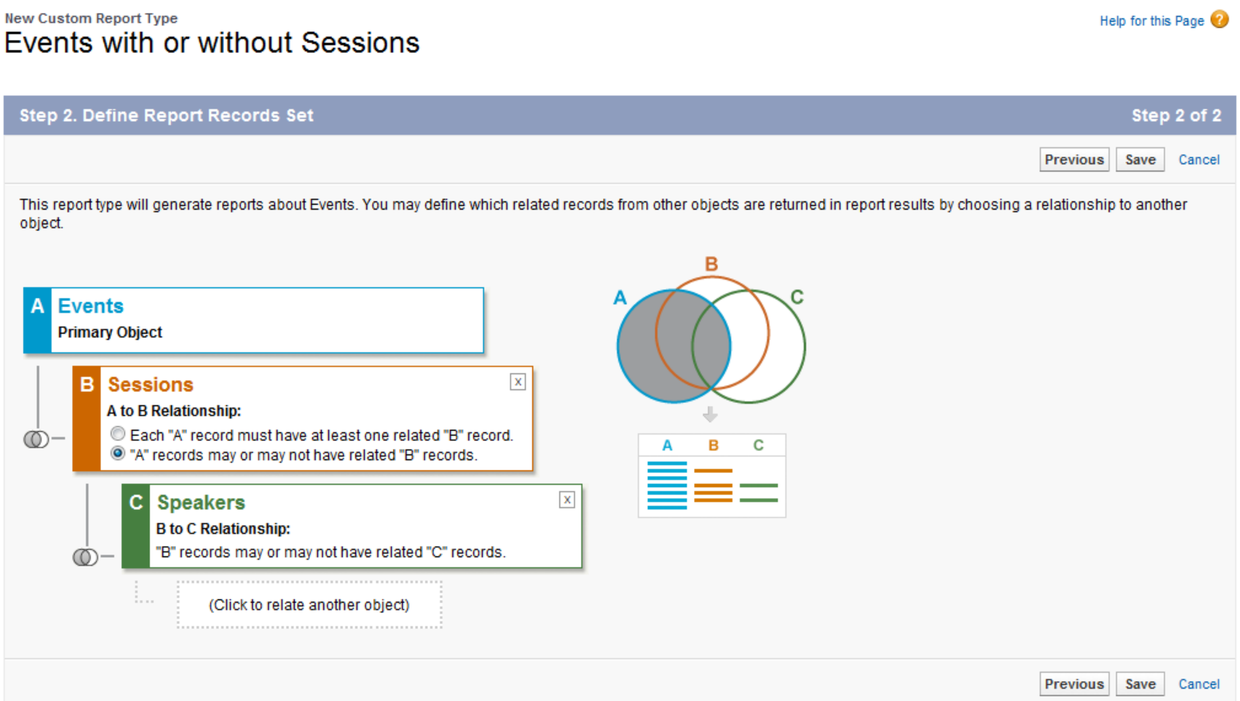

Share: Working Models
Help for this Page
Share with: Users, Roles, Roles, Internal and Portal Subordinates, and 2 more
All (2)
Access
All Internal Users
Viewer
All Customer Portal Users
Viewer
Editor
Manager
Close


Create New Report
Help for this Page
Select Report Types to Hide
Select Report Type
Quick Find
Accounts & Contacts
Accounts
Contacts & Accounts
Accounts with Partners
Account with Account Teams
Accounts with Contact Roles
Accounts with Assets
Contacts with Assets
Accounts with Activity Tracker
Accounts with Activity Tracker and Opportunity
Accounts with Activity Tracker and Contact
Account History
Contact History
Opportunities
Forecasts
Customer Support Reports
Preview
Account Report
Account Owner
Account Name
Account Site
Joe Johnson
Acme, Inc
Headquarters
Shelly Smith
Genwatt, Inc
Headquarters
Tom Thompson
Gene Points
Headquarters
Cancel
Create


Create New Report
Select Report Types to Hide
Select Report Type
Quick Find
Accounts & Contacts
Accounts
Contacts & Accounts
Accounts with Partners
Account with Account Teams
Accounts with Contact Roles
Accounts with Assets
Contacts with Assets
Accounts with Activity Tracker


New Custom Report Type
Help for this Page
Step 1. Define the Custom Report Type
Step 1 of 2
Next
Cancel
Report Type Focus
= Required Information
Specify what type of records (rows) will be the focus of reports generated by this report type.
Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.
Primary Object
--Select--
Identification
Report Type Label
Report Type Name
Note: Description will be visible to users who create reports.
Description
Store in Category
--Select--
Deployment
A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.
Deployment Status
In Development
Deployed
Next
Cancel


salesforce
Report Type: Opportunities with Activities
Unsaved Report
Save
Save As
Close
Report Properties
Run Report
Fields
All
#
Quick Find
Drag and drop to add fields to the report.
Opportunities
Account Name: Account Nar
Amount
Filters
Add
Show
My opportunities
Date Field
My opportunities
My team's opportunities
All opportunities


New Custom Report Type
Events with or without Sessions
Help for this Page
Step 2. Define Report Records Set
Step 2 of 2
Previous
Save
Cancel
This report type will generate reports about Events. You may define which related records from other objects are returned in report results by choosing a relationship to another object.
A Events
Primary Object
B Sessions
A to B Relationship:
Each "A" record must have at least one related "B" record.
"A" records may or may not have related "B" records.
C Speakers
B to C Relationship:
"B" records may or may not have related "C" records.
(Click to relate another object)
A
B
C
Previous
Save
Cancel

Custom Report Type

Events with or without Sessions

« Back to List: Custom Object Definitions

Help for this Page

Below is the information for this custom report type. You can click the buttons on this page to preview or update information for the custom report type.

Custom Report Type Definition

Edit | Delete | Clone

Report Type Label	Events with or without Sessions	Report Type Category	Other Reports
Report Type Name	Events_with_or_without_Sessions	Deployment Status	In Development
Description	Events with or without Sessions		
Created By	Paul Goodey, 18/04/2011 09:13	Modified By	Paul Goodey, 18/04/2011 09:13

Object Relationships

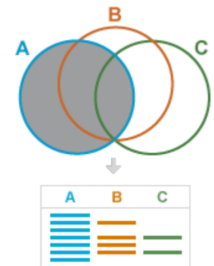
Edit

Object Relationships Help

Events (A)

with or without related records from Sessions (B)

with or without related records from Speakers (C)

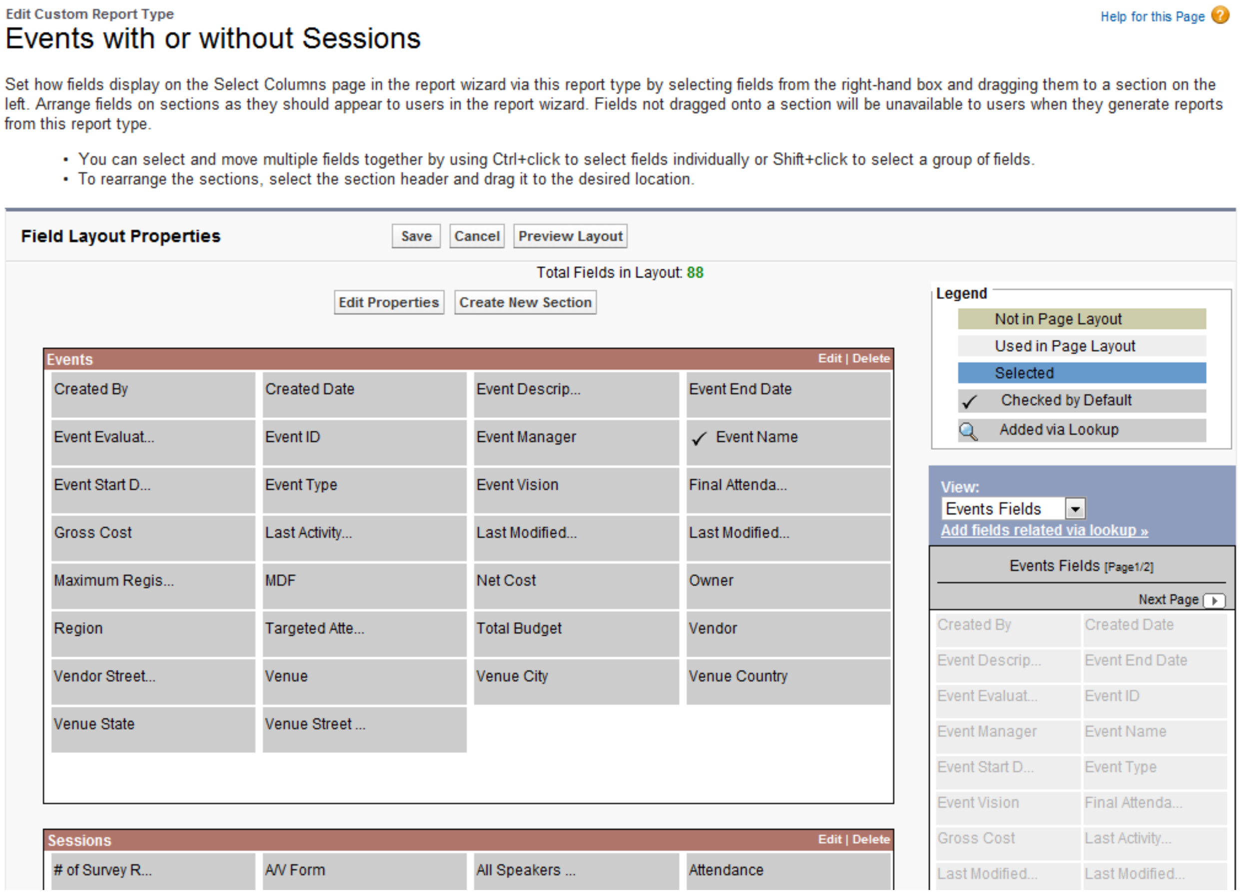


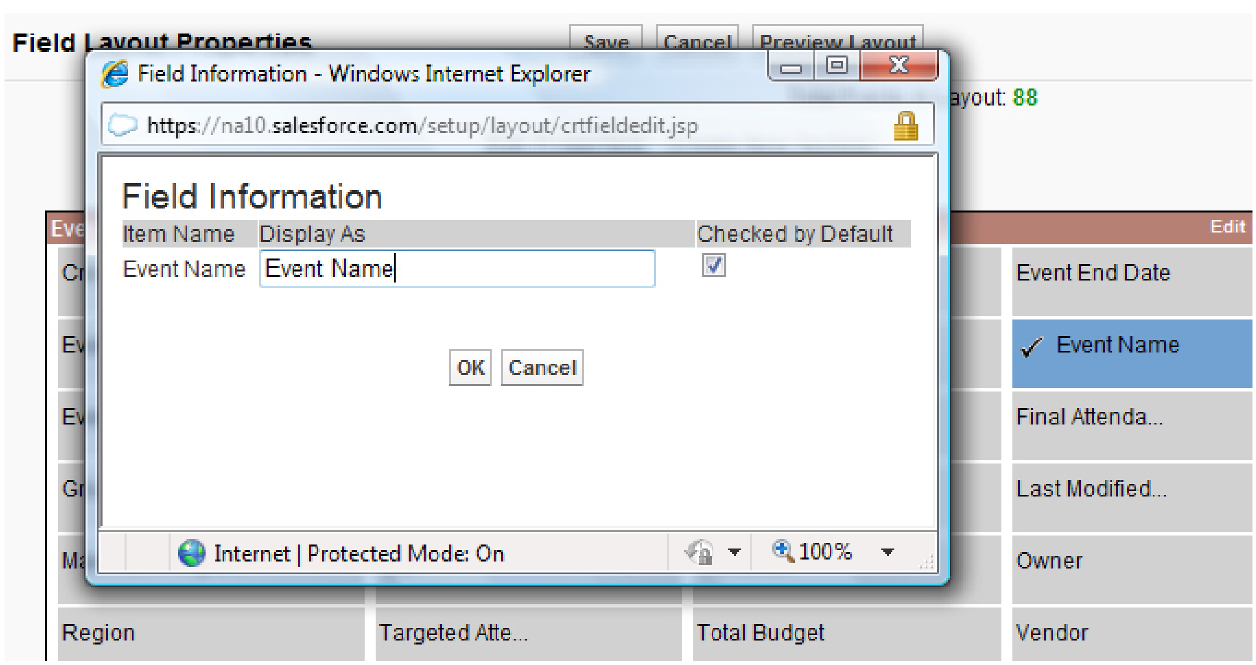
Fields Available for Reports

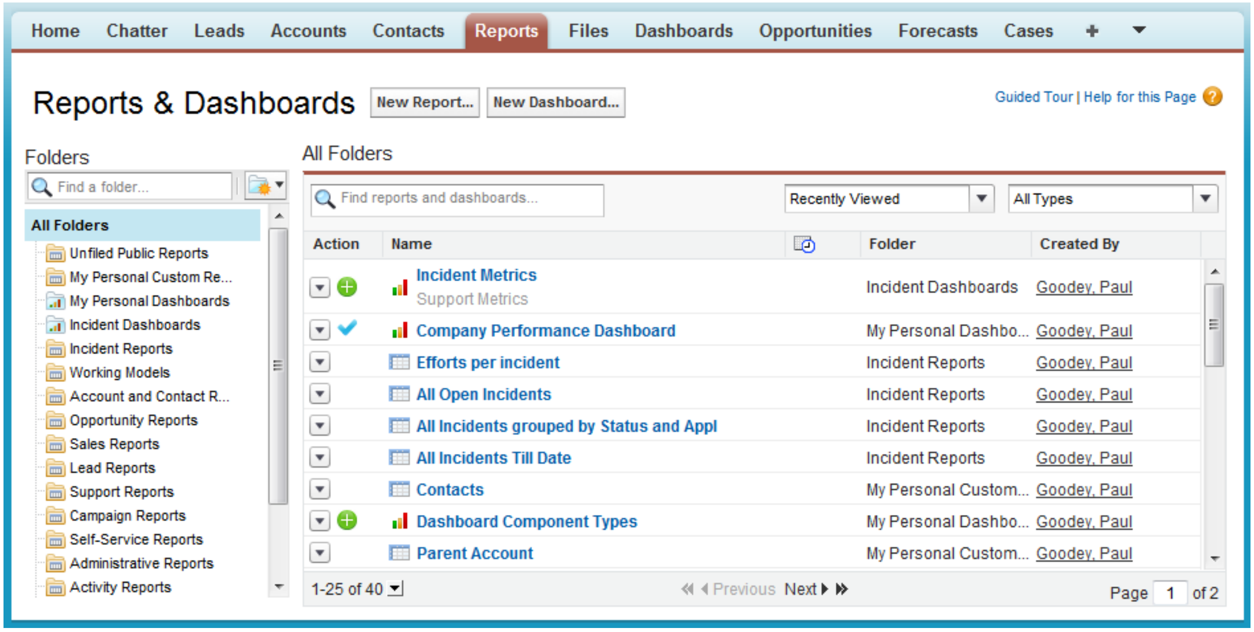
Edit Layout | Preview Layout

Fields Available for Reports Help

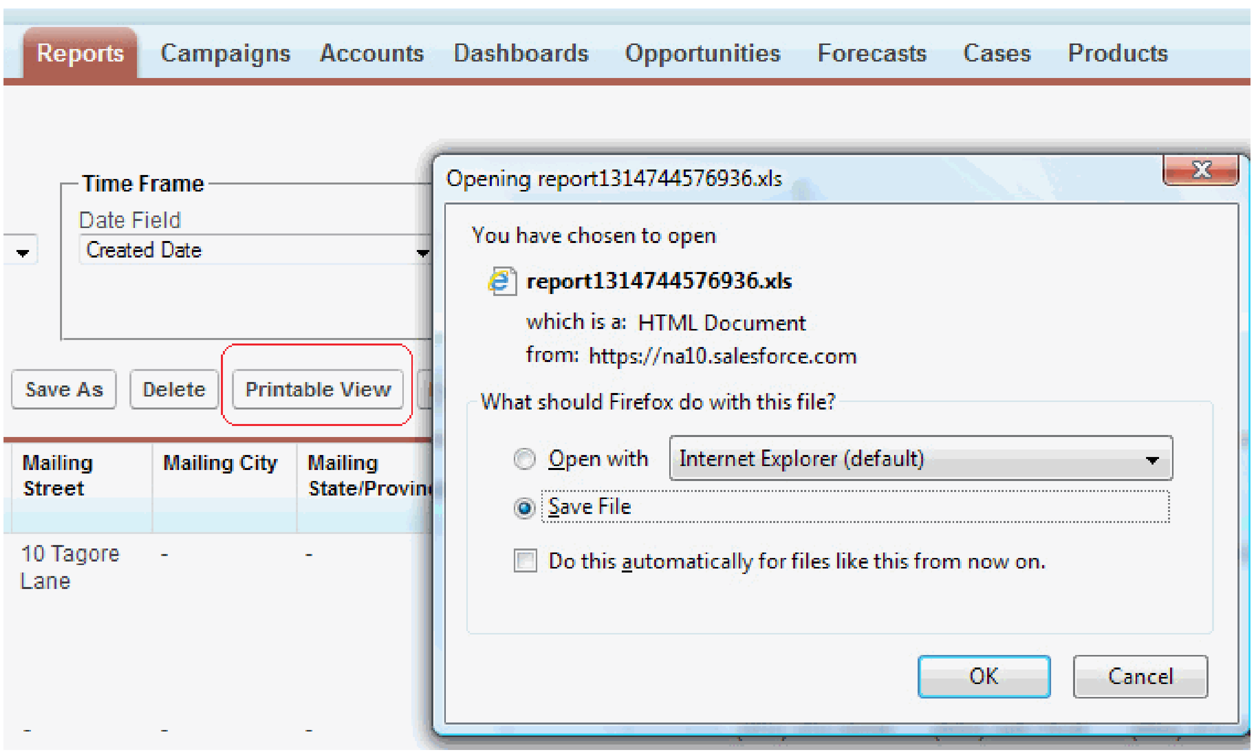
Source	Selected Fields
Events	30
Sessions	30
Speakers	28


Edit Custom Report Type
Events with or without Sessions
Help for this Page
Set how fields display on the Select Columns page in the report wizard via this report type by selecting fields from the right-hand box and dragging them to a section on the left. Arrange fields on sections as they should appear to users in the report wizard. Fields not dragged onto a section will be unavailable to users when they generate reports from this report type.
• You can select and move multiple fields together by using Ctrl+click to select fields individually or Shift+click to select a group of fields.
• To rearrange the sections, select the section header and drag it to the desired location.
Field Layout Properties
Save
Cancel
Preview Layout
Total Fields in Layout: 88
Edit Properties
Create New Section
Legend
Not in Page Layout
Used in Page Layout
Selected
Checked by Default
Added via Lookup
Events
Edit | Delete
Created By
Created Date
Event Descrip...
Event End Date
Event Evaluat...
Event ID
Event Manager
Event Name
Event Start D...
Event Type
Event Vision
Final Attenda...
Gross Cost
Last Activity...
Last Modified...
Last Modified...
Maximum Regis...
MDF
Net Cost
Owner
Region
Targeted Atte...
Total Budget
Vendor
Vendor Street...
Venue
Venue City
Venue Country
Venue State
Venue Street ...
View:
Events Fields
Add fields related via lookup »
Events Fields [Page1/2]
Next Page
Created By
Created Date
Event Descrip...
Event End Date
Event Evaluat...
Event ID
Event Manager
Event Name
Event Start D...
Event Type
Event Vision
Final Attenda...
Gross Cost
Last Activity...
Last Modified...
Last Modified...
Sessions
Edit | Delete
# of Survey R...
A/V Form
All Speakers ...
Attendance

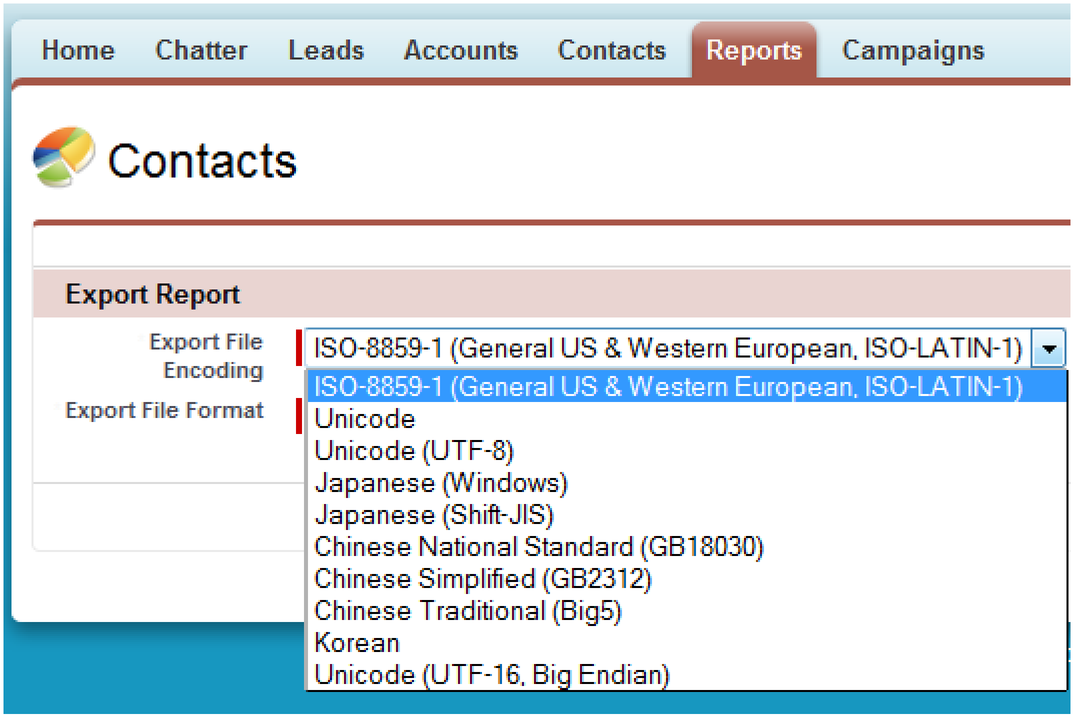

Field Layout Properties
Save
Cancel
Preview Layout
Field Information - Windows Internet Explorer
https://na10.salesforce.com/setup/layout/crtfieldedit.jsp
Field Information
Item Name
Display As
Checked by Default
Event Name
Event Name
OK
Cancel
Internet | Protected Mode: On
100%
ayout: 88
Edit
Event End Date
Event Name
Final Attenda...
Last Modified...
Owner
Region
Targeted Atte...
Total Budget
Vendor

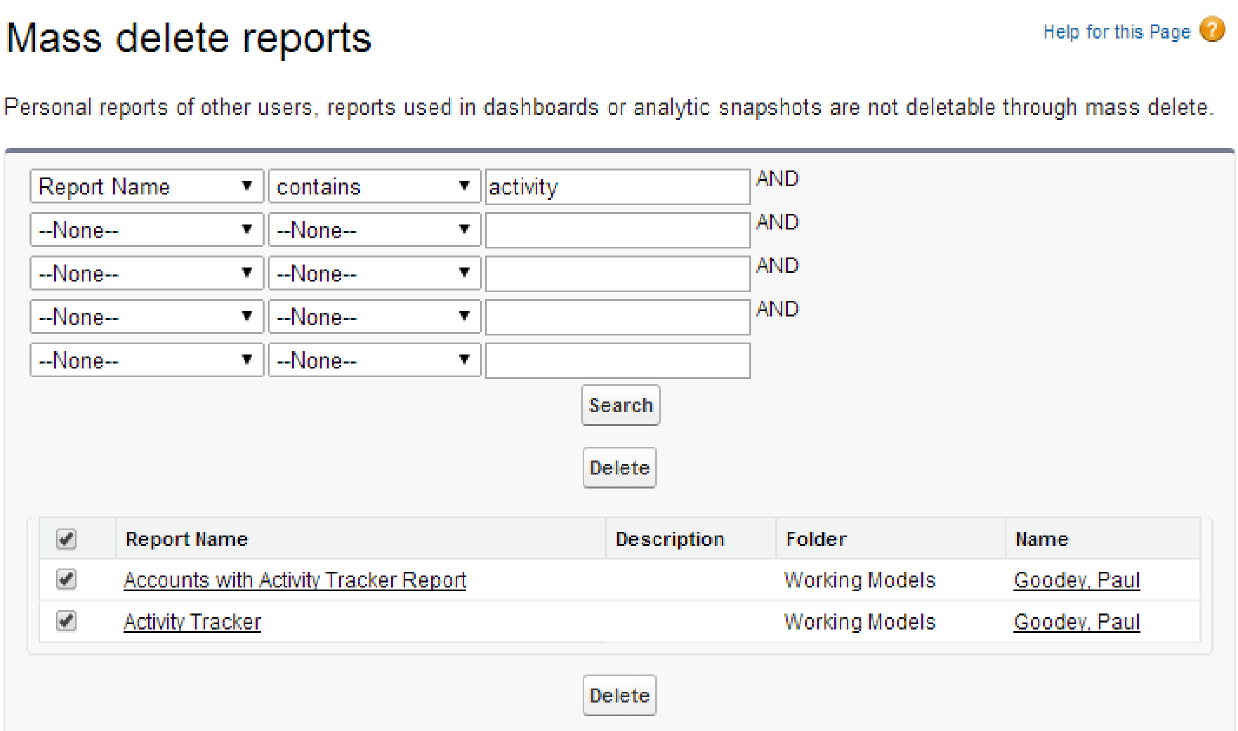


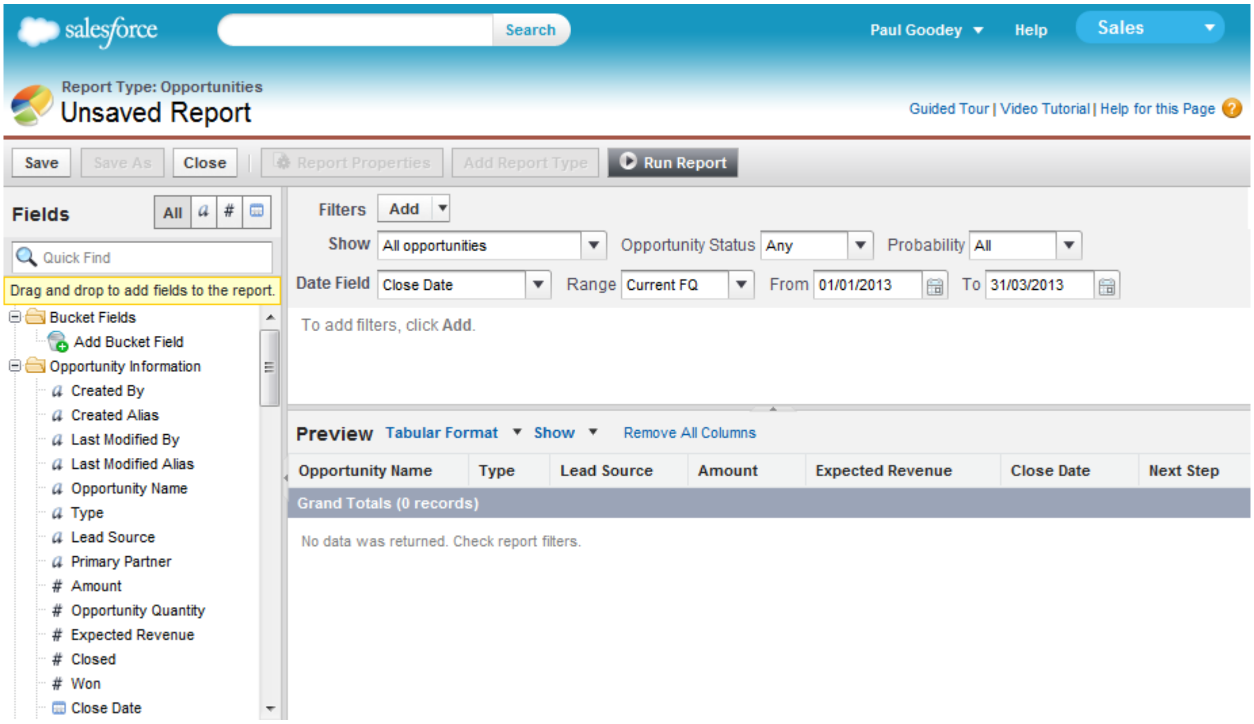
Home Chatter Leads Accounts Contacts Reports Files Dashboards Opportunities Forecasts Cases
Reports & Dashboards
New Report...
New Dashboard...
Guided Tour | Help for this Page
Folders
All Folders
Unfiled Public Reports
My Personal Custom Re...
My Personal Dashboards
Incident Dashboards
Incident Reports
Working Models
Account and Contact R...
Opportunity Reports
Sales Reports
Lead Reports
Support Reports
Campaign Reports
Self-Service Reports
Administrative Reports
Activity Reports
Recently Viewed
All Types
Action Name Folder Created By
Incident Metrics
Support Metrics
Company Performance Dashboard
Efforts per incident
All Open Incidents
All Incidents grouped by Status and Appl
All Incidents Till Date
Contacts
Dashboard Component Types
Parent Account
Goodey, Paul
1-25 of 40
Previous Next
Page 1 of 2



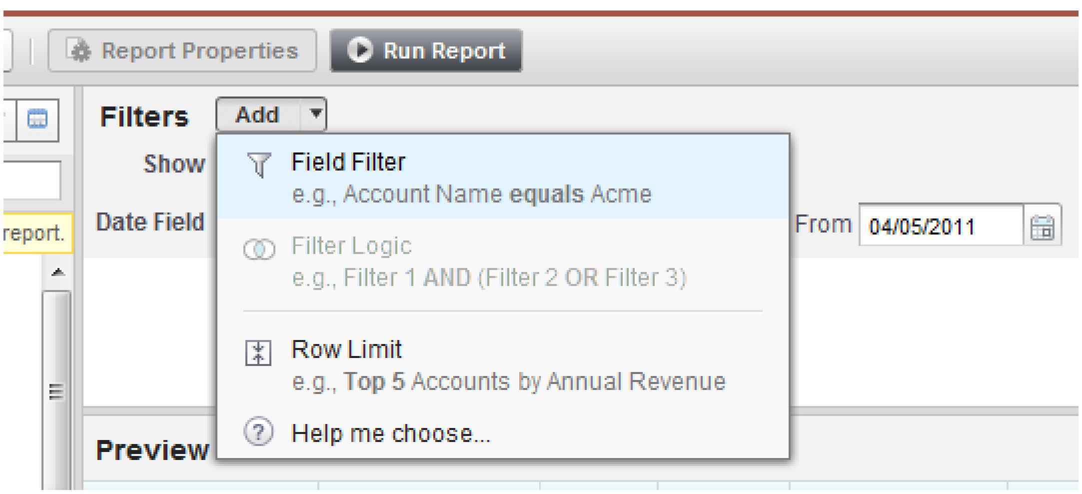
Reports Campaigns Accounts Dashboards Opportunities Forecasts Cases Products
Time Frame
Date Field
Created Date
Save As
Delete
Printable View
Mailing Street
Mailing City
Mailing State/Provin
10 Tagore Lane
Opening report1314744576936.xls
You have chosen to open
report1314744576936.xls
which is a: HTML Document
from: https://na10.salesforce.com
What should Firefox do with this file?
Open with
Internet Explorer (default)
Save File
Do this automatically for files like this from now on.
OK
Cancel


Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Contacts
Export Report
Export File Encoding
Export File Format
ISO-8859-1 (General US & Western European, ISO-LATIN-1)
ISO-8859-1 (General US & Western European, ISO-LATIN-1)
Unicode
Unicode (UTF-8)
Japanese (Windows)
Japanese (Shift-JIS)
Chinese National Standard (GB18030)
Chinese Simplified (GB2312)
Chinese Traditional (Big5)
Korean
Unicode (UTF-16, Big Endian)

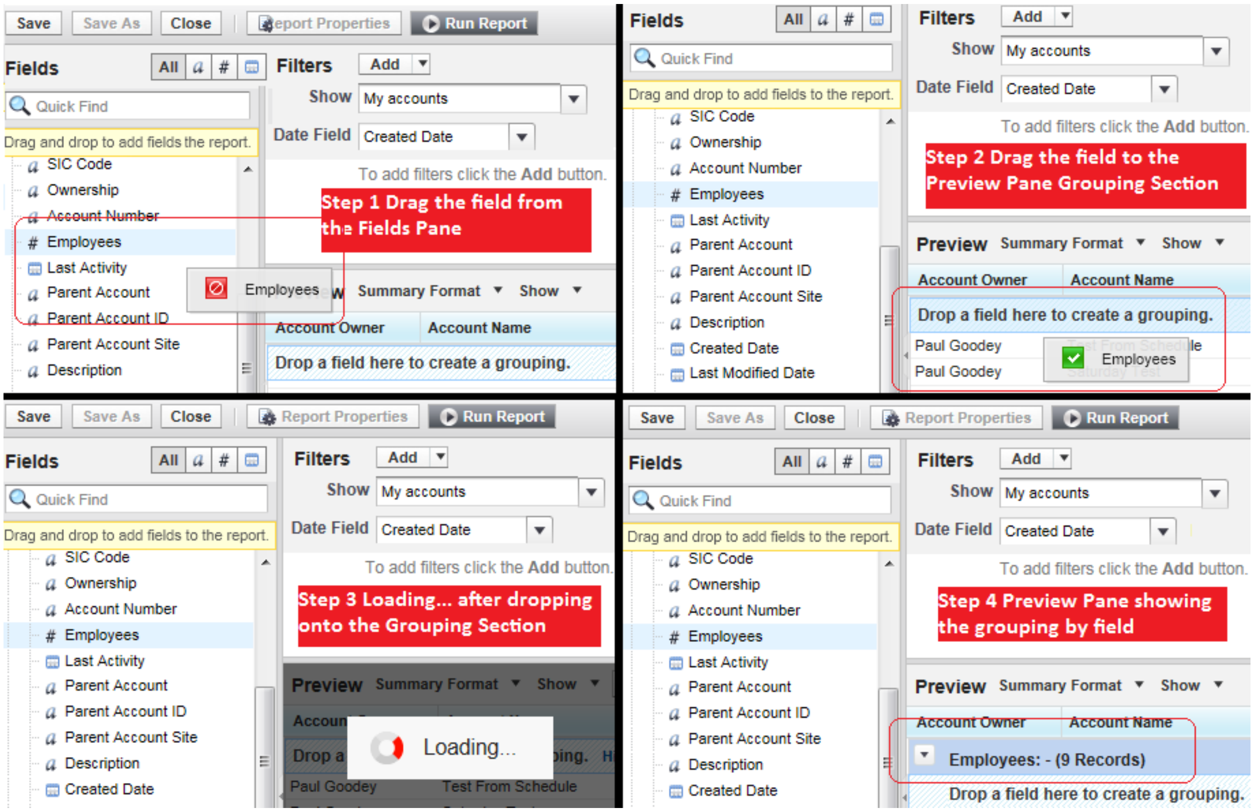

Mass delete reports
Help for this Page
Personal reports of other users, reports used in dashboards or analytic snapshots are not deletable through mass delete.
Report Name
contains
activity
AND
--None--
--None--
AND
--None--
--None--
AND
--None--
--None--
AND
--None--
--None--
Search
Delete
Report Name
Description
Folder
Name
Accounts with Activity Tracker Report
Working Models
Goodey, Paul
Activity Tracker
Working Models
Goodey, Paul
Delete

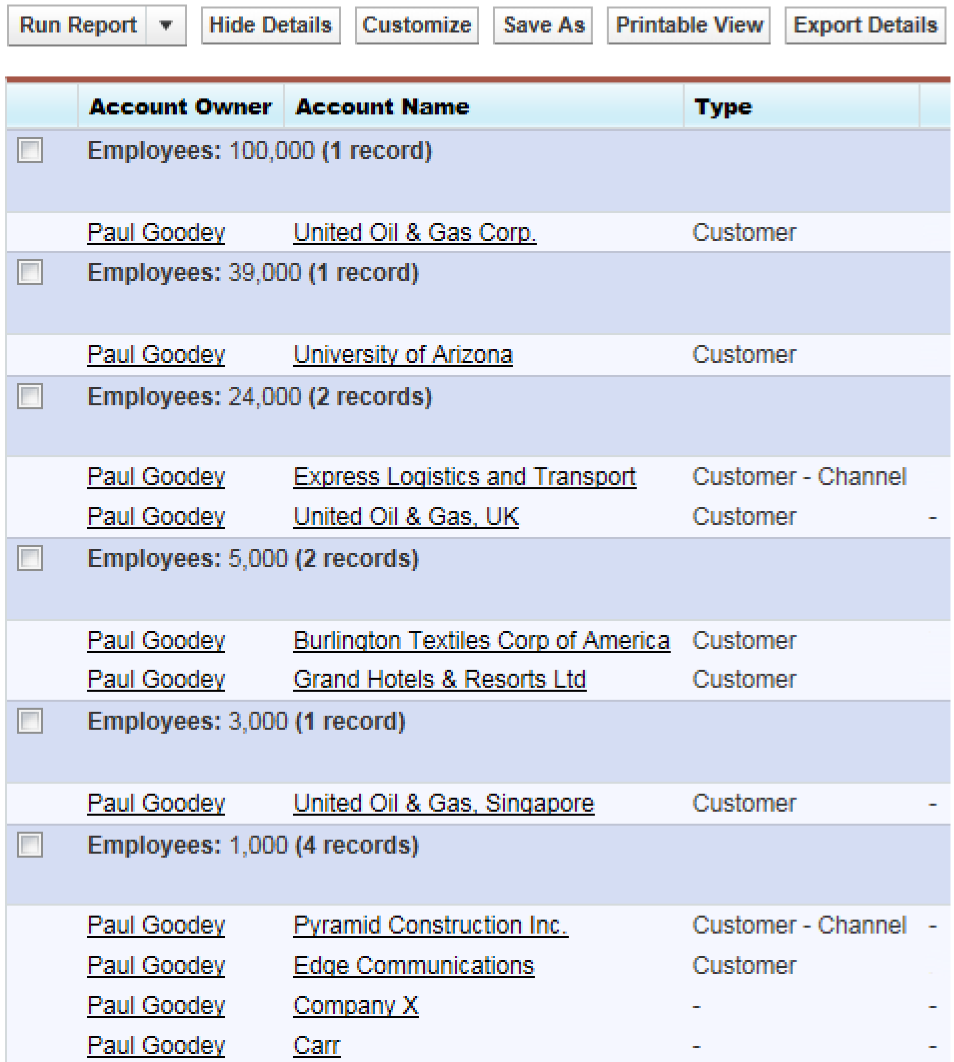


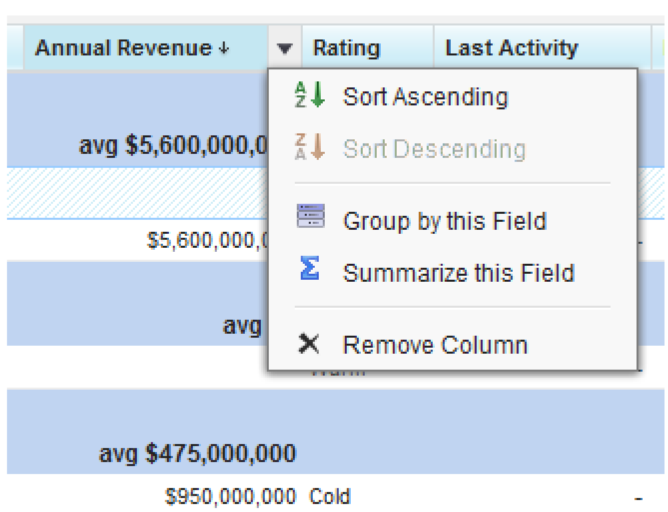
salesforce
Search
Paul Goodey
Help
Sales
Report Type: Opportunities
Unsaved Report
Guided Tour | Video Tutorial | Help for this Page
Save
Save As
Close
Report Properties
Add Report Type
Run Report
Fields
All
Quick Find
Drag and drop to add fields to the report.
Bucket Fields
Add Bucket Field
Opportunity Information
Created By
Created Alias
Last Modified By
Last Modified Alias
Opportunity Name
Type
Lead Source
Primary Partner
Amount
Opportunity Quantity
Expected Revenue
Closed
Won
Close Date
Filters
Add
Show
All opportunities
Opportunity Status
Any
Probability
All
Date Field
Close Date
Range
Current FQ
From
01/01/2013
To
31/03/2013
To add filters, click Add.
Preview
Tabular Format
Show
Remove All Columns
Opportunity Name
Type
Lead Source
Amount
Expected Revenue
Close Date
Next Step
Grand Totals (0 records)
No data was returned. Check report filters.

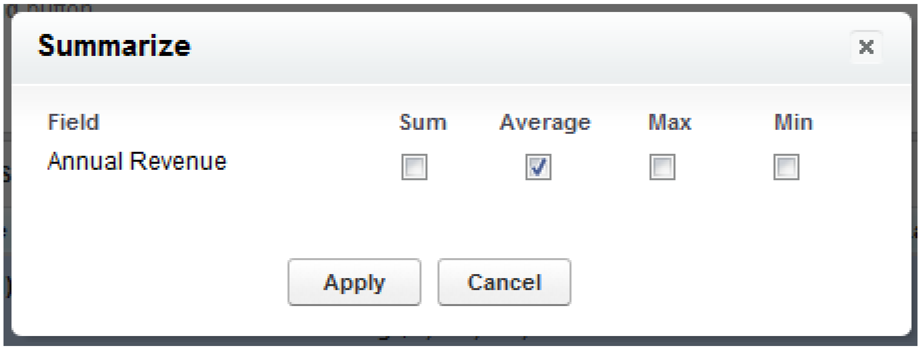


Report Properties
Run Report
Filters
Add
Show
Date Field
report.
Field Filter
e.g., Account Name equals Acme
Filter Logic
e.g., Filter 1 AND (Filter 2 OR Filter 3)
Row Limit
e.g., Top 5 Accounts by Annual Revenue
Help me choose...
From
04/05/2011
Preview

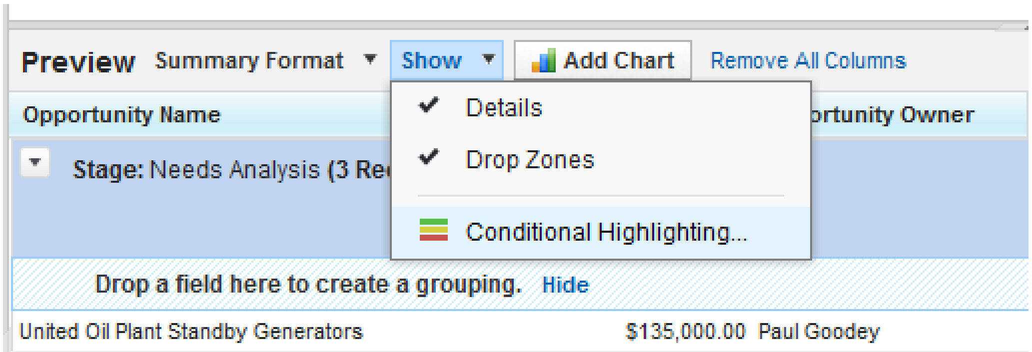

Step 1 Drag the field from the Fields Pane
Step 2 Drag the field to the Preview Pane Grouping Section
Step 3 Loading... after dropping onto the Grouping Section
Step 4 Preview Pane showing the grouping by field
Drop a field here to create a grouping.
Employees: - (9 Records)

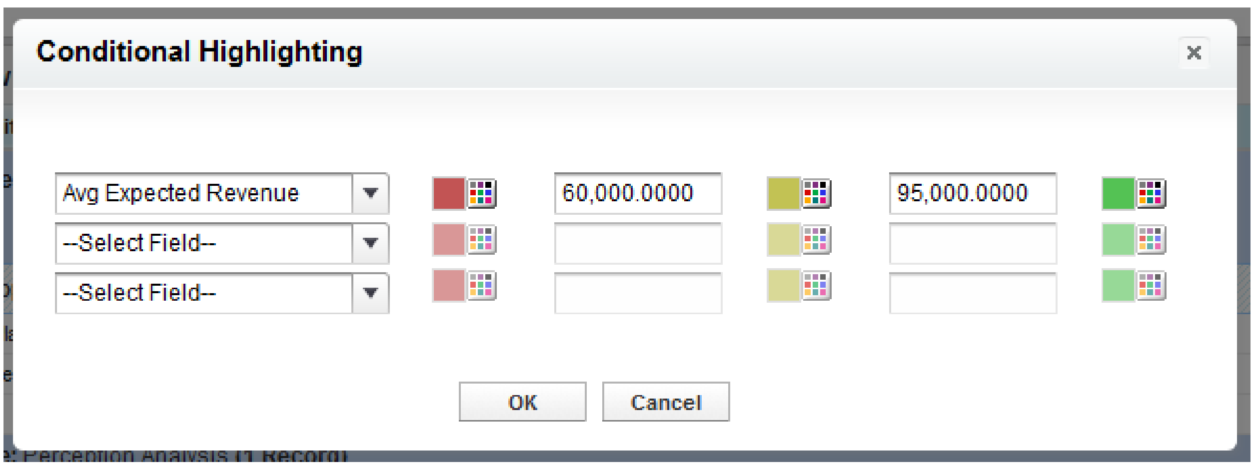

Run Report
Hide Details
Customize
Save As
Printable View
Export Details
Account Owner
Account Name
Type
Employees: 100,000 (1 record)
Paul Goodey United Oil & Gas Corp. Customer
Employees: 39,000 (1 record)
Paul Goodey University of Arizona Customer
Employees: 24,000 (2 records)
Paul Goodey Express Logistics and Transport Customer - Channel
Paul Goodey United Oil & Gas, UK Customer -
Employees: 5,000 (2 records)
Paul Goodey Burlington Textiles Corp of America Customer
Paul Goodey Grand Hotels & Resorts Ltd Customer
Employees: 3,000 (1 record)
Paul Goodey United Oil & Gas, Singapore Customer -
Employees: 1,000 (4 records)
Paul Goodey Pyramid Construction Inc. Customer - Channel -
Paul Goodey Edge Communications Customer
Paul Goodey Company X - -
Paul Goodey Carr - -

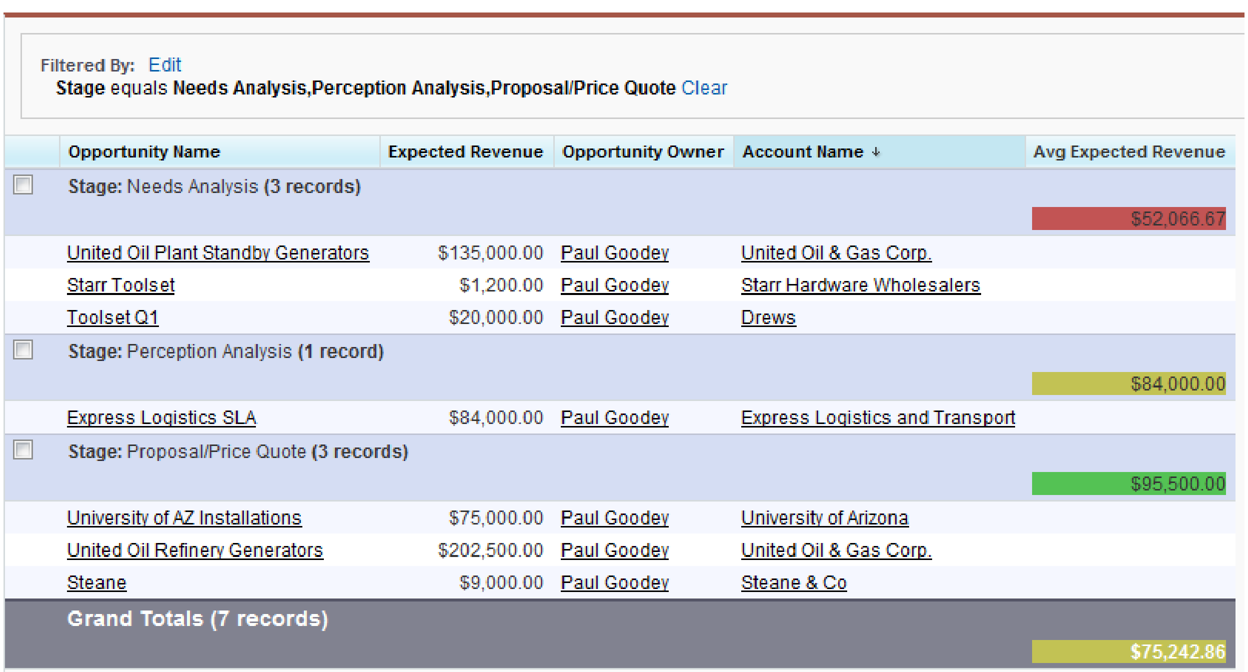

Annual Revenue
Rating
Last Activity
Sort Ascending
Sort Descending
Group by this Field
Summarize this Field
Remove Column
avg
avg $475,000,000
$950,000,000 Cold -



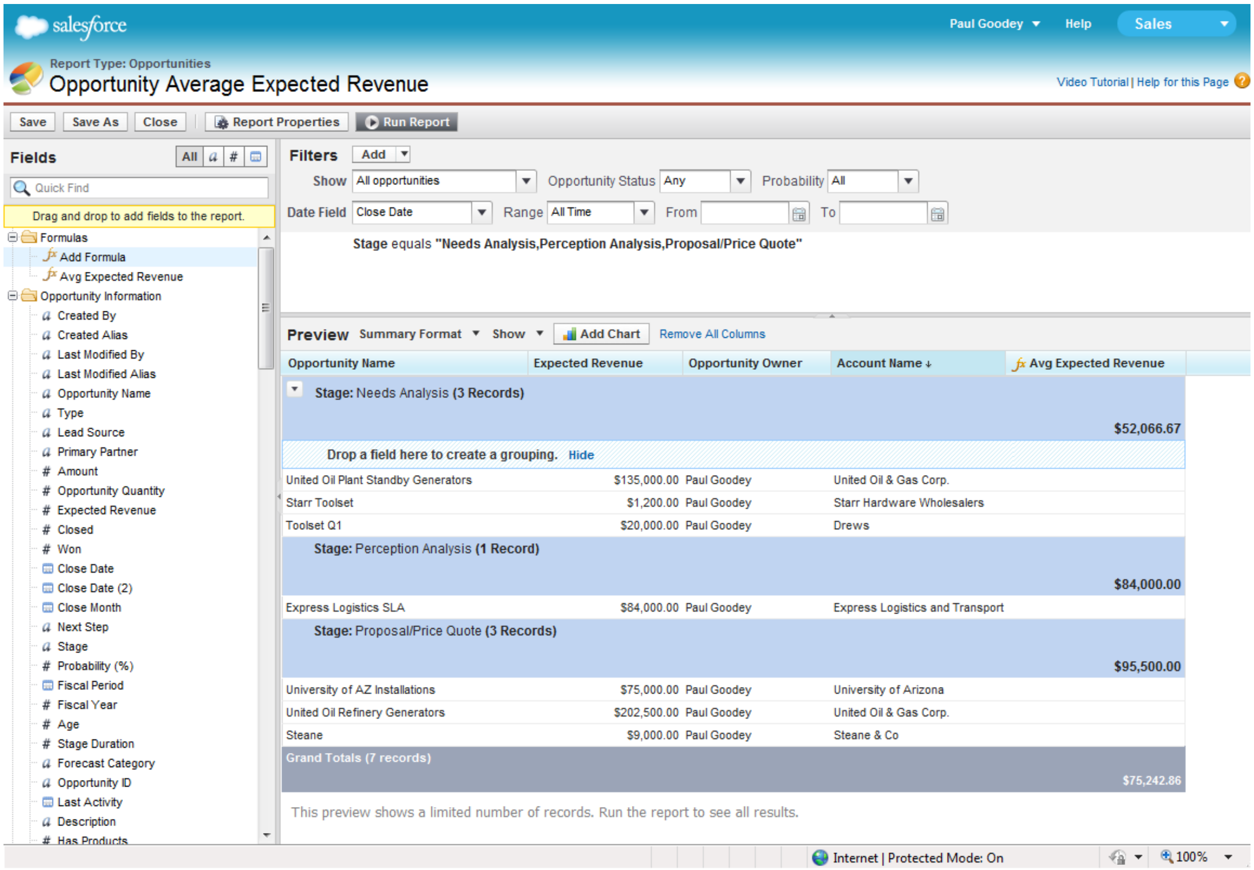
	Account Owner	Account Name	Type	Rating	Annual Revenue
	Employees: 100,000 **(1 record)**				
					avg $5,600,000,000
	Paul Goodey	United Oil & Gas Corp.	Customer	Hot	$5,600,000,000
	Employees: 39,000 **(1 record)**				
					avg $0
	Paul Goodey	University of Arizona	Customer	Warm	-
	Employees: 24,000 **(2 records)**				
					avg $475,000,000
	Paul Goodey	Express Logistics and Transport	Customer - Channel	Cold	$950,000,000
	Paul Goodey	United Oil & Gas, UK	Customer	-	-
	Employees: 5,000 **(2 records)**				
					avg $425,000,000
	Paul Goodey	Burlington Textiles Corp of America	Customer	Warm	$350,000,000
	Paul Goodey	Grand Hotels & Resorts Ltd	Customer	Warm	$500,000,000
	Employees: 3,000 **(1 record)**				
					avg $0
	Paul Goodey	United Oil & Gas, Singapore	Customer	-	-
	Employees: 1,000 **(4 records)**				
					avg $272,300,000
	Paul Goodey	Pyramid Construction Inc.	Customer - Channel	-	$950,000,000
	Paul Goodey	Edge Communications	Customer	Hot	$139,000,000
	Paul Goodey	Company X	-	-	$200,000
	Paul Goodey	Carr	-	-	-

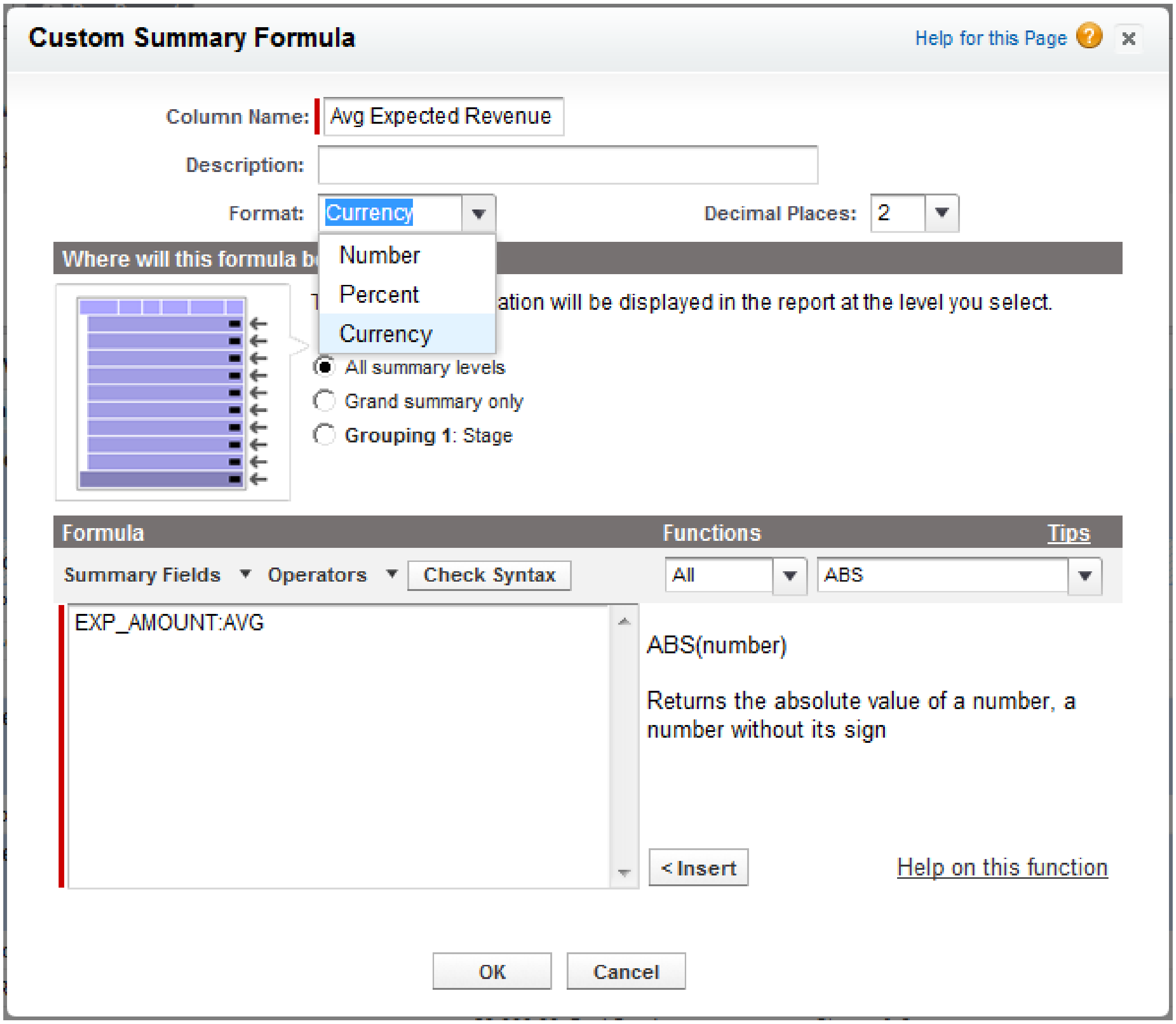





Filtered By: Edit
Stage equals Needs Analysis,Perception Analysis,Proposal/Price Quote Clear

Opportunity Name	Expected Revenue	Opportunity Owner	Account Name ↓	Avg Expected Revenue
Stage: Needs Analysis (3 records)				$52,066.67
United Oil Plant Standby Generators	$135,000.00	Paul Goodey	United Oil & Gas Corp.	
Starr Toolset	$1,200.00	Paul Goodey	Starr Hardware Wholesalers	
Toolset Q1	$20,000.00	Paul Goodey	Drews	
Stage: Perception Analysis (1 record)				$84,000.00
Express Logistics SLA	$84,000.00	Paul Goodey	Express Logistics and Transport	
Stage: Proposal/Price Quote (3 records)				$95,500.00
University of AZ Installations	$75,000.00	Paul Goodey	University of Arizona	
United Oil Refinery Generators	$202,500.00	Paul Goodey	United Oil & Gas Corp.	
Steane	$9,000.00	Paul Goodey	Steane & Co	
Grand Totals (7 records)				$75,242.86


salesforce
Paul Goodey
Help
Sales
Report Type: Opportunities
Opportunity Average Expected Revenue
Video Tutorial | Help for this Page
Save
Save As
Close
Report Properties
Run Report
Fields
All
Quick Find
Drag and drop to add fields to the report.
Formulas
Add Formula
Avg Expected Revenue
Opportunity Information
Created By
Created Alias
Last Modified By
Last Modified Alias
Opportunity Name
Type
Lead Source
Primary Partner
Amount
Opportunity Quantity
Expected Revenue
Closed
Won
Close Date
Close Date (2)
Close Month
Next Step
Stage
Probability (%)
Fiscal Period
Fiscal Year
Age
Stage Duration
Forecast Category
Opportunity ID
Last Activity
Description
Has Products
Filters
Add
Show
All opportunities
Opportunity Status
Any
Probability
All
Date Field
Close Date
Range
All Time
From
To
Stage equals "Needs Analysis,Perception Analysis,Proposal/Price Quote"
Preview
Summary Format
Show
Add Chart
Remove All Columns
Opportunity Name
Expected Revenue
Opportunity Owner
Account Name
Avg Expected Revenue
Stage: Needs Analysis (3 Records)
$52,066.67
Drop a field here to create a grouping. Hide
United Oil Plant Standby Generators $135,000.00 Paul Goodey United Oil & Gas Corp.
Starr Toolset $1,200.00 Paul Goodey Starr Hardware Wholesalers
Toolset Q1 $20,000.00 Paul Goodey Drews
Stage: Perception Analysis (1 Record)
$84,000.00
Express Logistics SLA $84,000.00 Paul Goodey Express Logistics and Transport
Stage: Proposal/Price Quote (3 Records)
$95,500.00
University of AZ Installations $75,000.00 Paul Goodey University of Arizona
United Oil Refinery Generators $202,500.00 Paul Goodey United Oil & Gas Corp.
Steane $9,000.00 Paul Goodey Steane & Co
Grand Totals (7 records)
$75,242.86
This preview shows a limited number of records. Run the report to see all results.
Internet | Protected Mode: On
100%


Custom Summary Formula
Help for this Page
Column Name:
Avg Expected Revenue
Description:
Format:
Currency
Decimal Places:
2
Number
Percent
Currency
Where will this formula b
ation will be displayed in the report at the level you select.
All summary levels
Grand summary only
Grouping 1: Stage
Formula
Functions
Tips
Summary Fields
Operators
Check Syntax
All
ABS
EXP_AMOUNT:AVG
ABS(number)
Returns the absolute value of a number, a number without its sign
< Insert
Help on this function
OK
Cancel

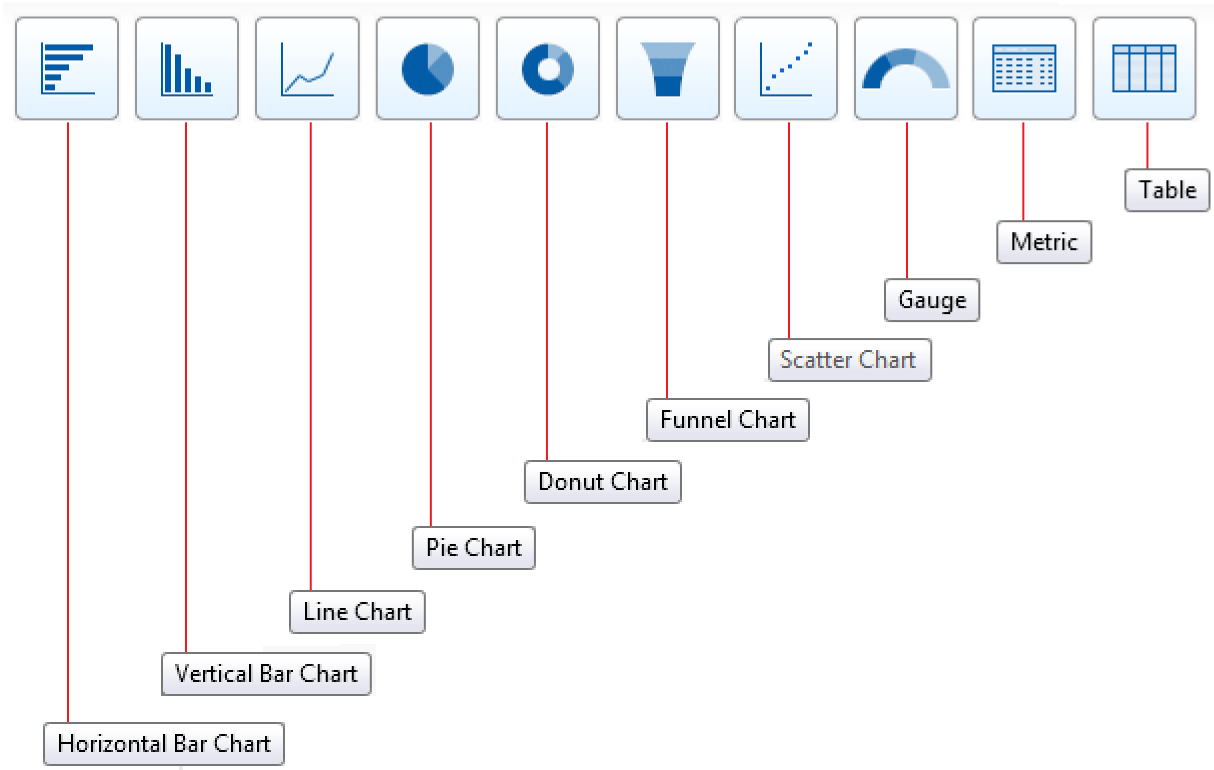
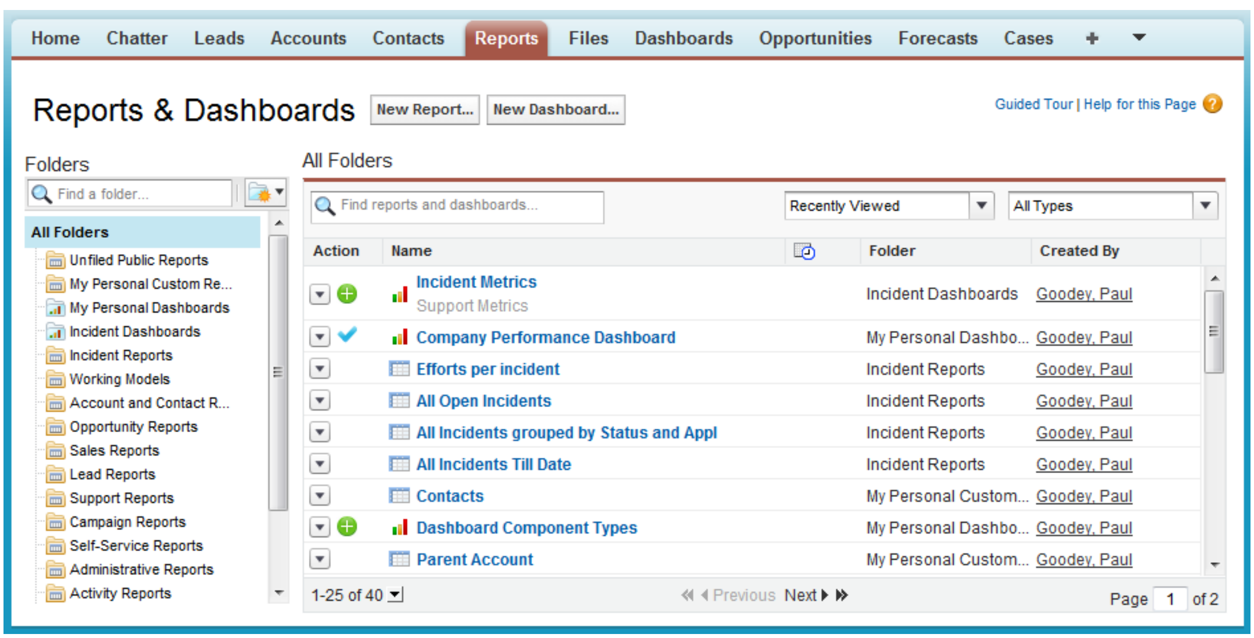
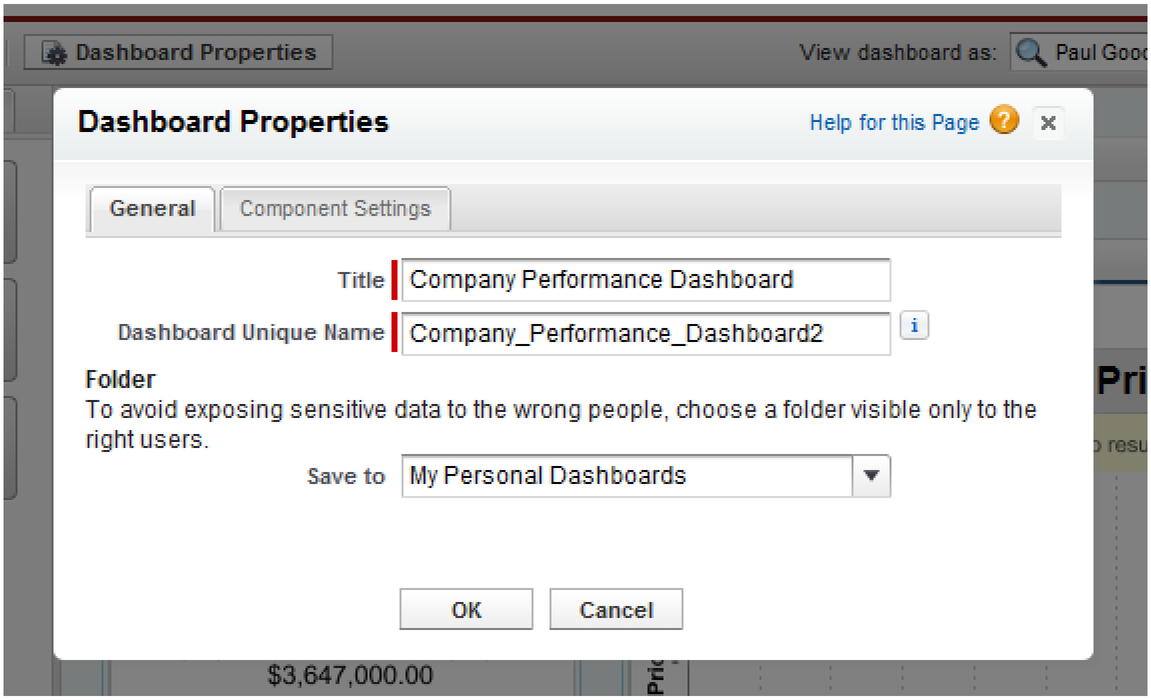
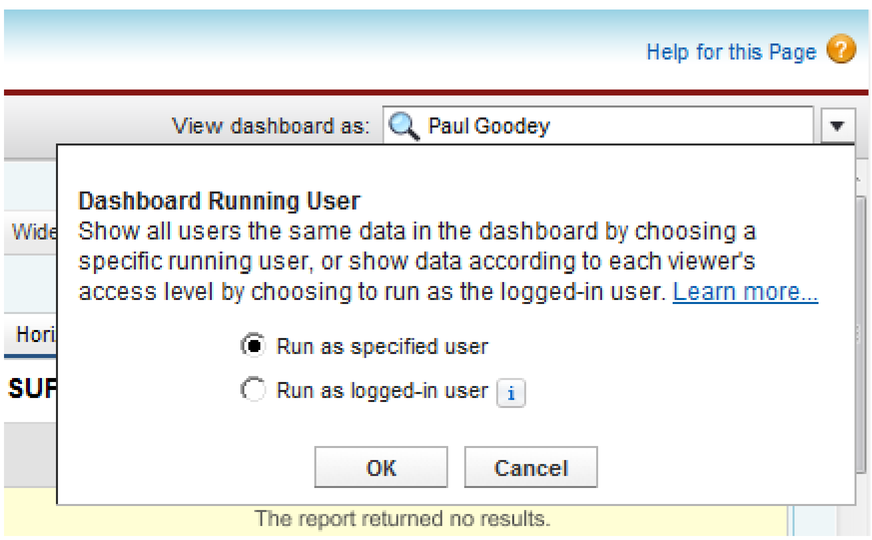
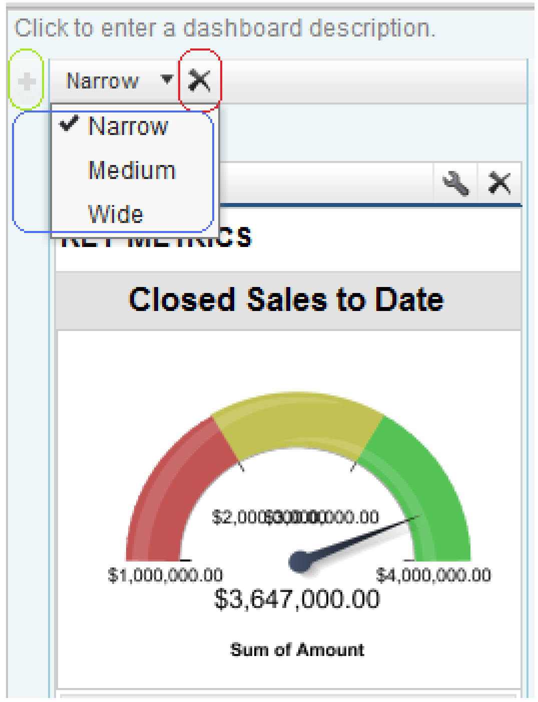


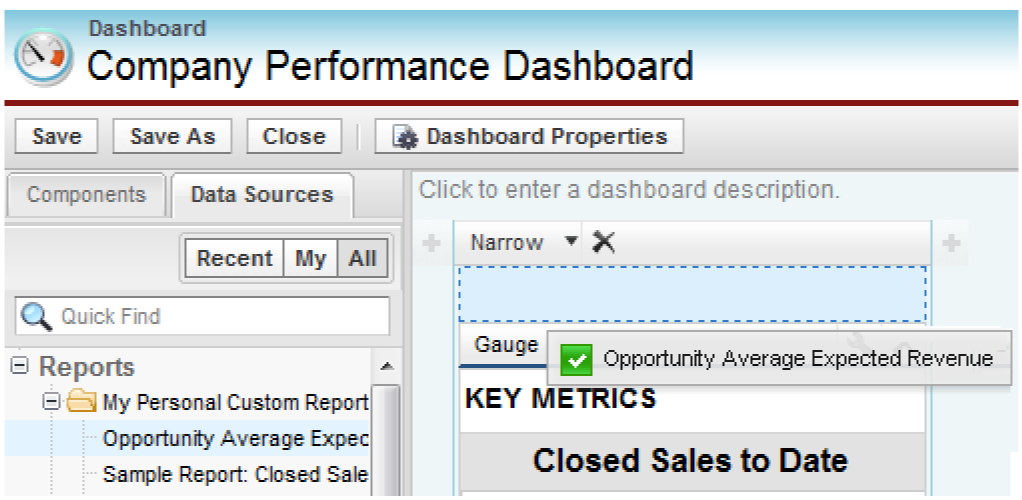
Table
Metric
Gauge
Scatter Chart
Funnel Chart
Donut Chart
Pie Chart
Line Chart
Vertical Bar Chart
Horizontal Bar Chart

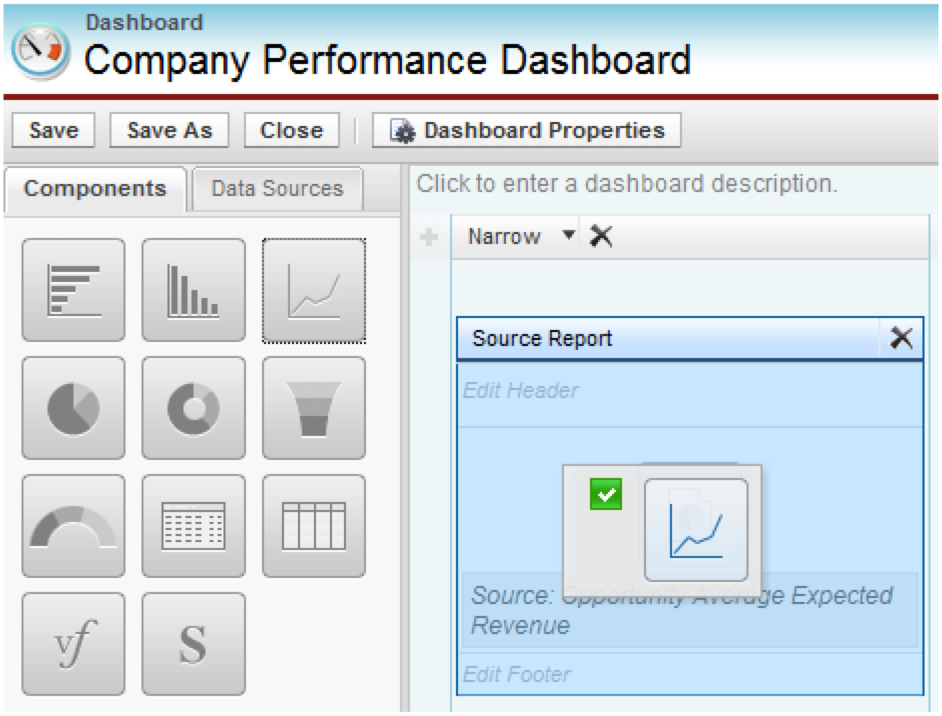

Home
Chatter
Leads
Accounts
Contacts
Reports
Files
Dashboards
Opportunities
Forecasts
Cases
Reports & Dashboards
New Report...
New Dashboard...
Guided Tour | Help for this Page
Folders
Find a folder...
All Folders
Unfiled Public Reports
My Personal Custom Re...
My Personal Dashboards
Incident Dashboards
Incident Reports
Working Models
Account and Contact R...
Opportunity Reports
Sales Reports
Lead Reports
Support Reports
Campaign Reports
Self-Service Reports
Administrative Reports
Activity Reports
All Folders
Find reports and dashboards...
Recently Viewed
All Types
Action
Name
Folder
Created By
Incident Metrics
Support Metrics
Incident Dashboards
Goodey, Paul
Company Performance Dashboard
My Personal Dashbo...
Goodey, Paul
Efforts per incident
Incident Reports
Goodey, Paul
All Open Incidents
Incident Reports
Goodey, Paul
All Incidents grouped by Status and Appl
Incident Reports
Goodey, Paul
All Incidents Till Date
Incident Reports
Goodey, Paul
Contacts
My Personal Custom...
Goodey, Paul
Dashboard Component Types
My Personal Dashbo...
Goodey, Paul
Parent Account
My Personal Custom...
Goodey, Paul
1-25 of 40
Previous
Next
Page
1
of 2

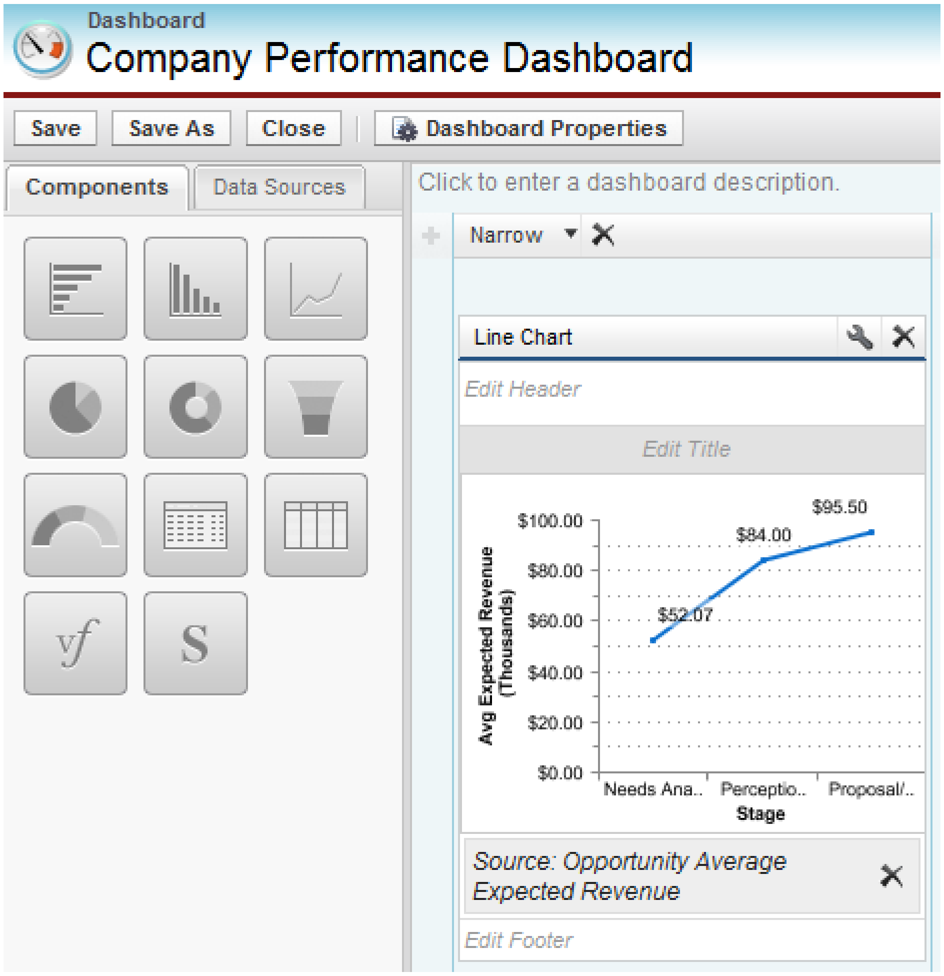

Dashboard Properties
View dashboard as:
Paul Good
Dashboard Properties
Help for this Page
General
Component Settings
Title
Company Performance Dashboard
Dashboard Unique Name
Company_Performance_Dashboard2
Folder
To avoid exposing sensitive data to the wrong people, choose a folder visible only to the right users.
Save to
My Personal Dashboards
OK
Cancel
$3,647,000.00


Help for this Page
View dashboard as:
Paul Goodey
Dashboard Running User
Show all users the same data in the dashboard by choosing a specific running user, or show data according to each viewer's access level by choosing to run as the logged-in user. Learn more...
Run as specified user
Run as logged-in user
OK
Cancel
The report returned no results.

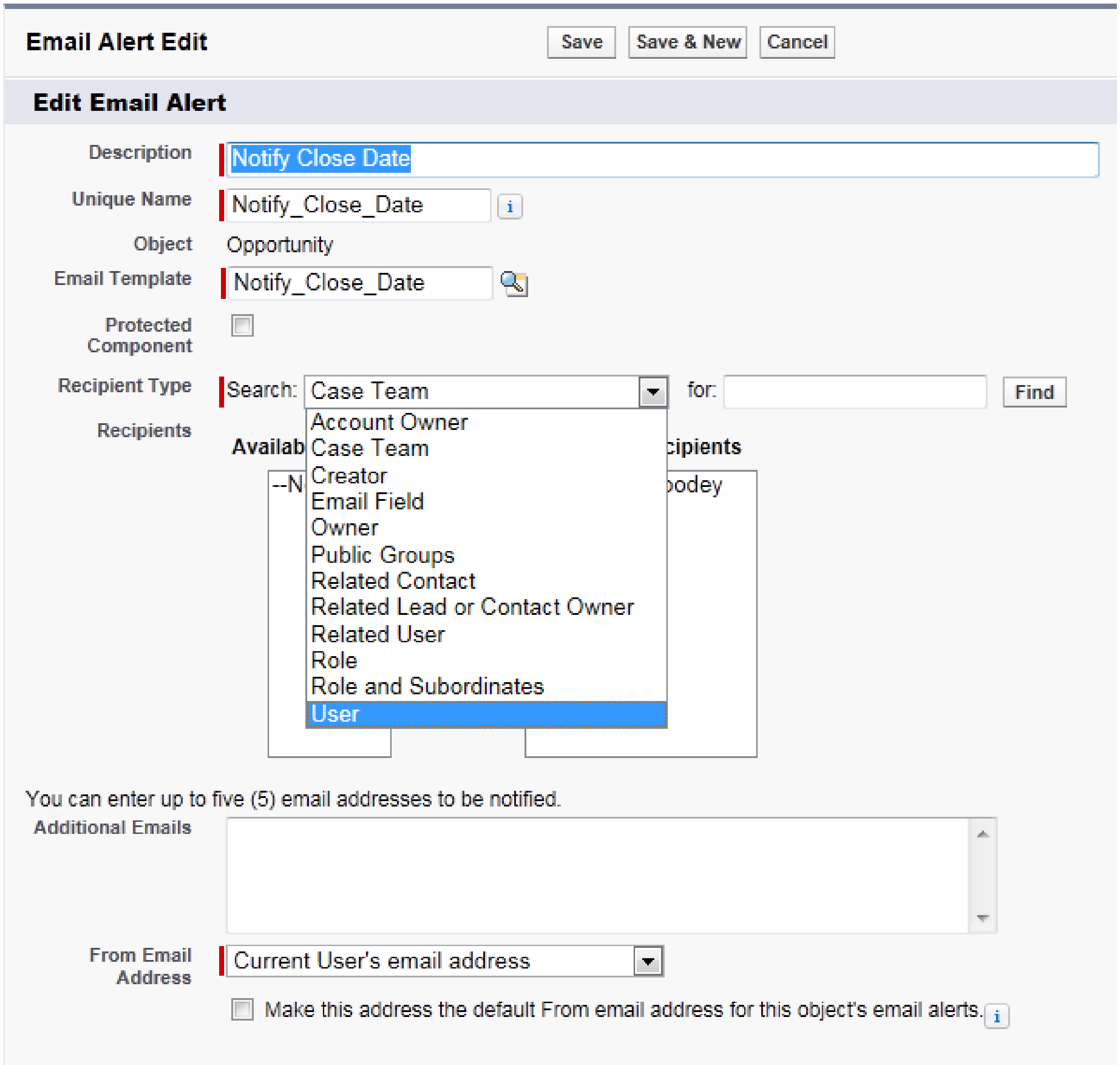

Click to enter a dashboard description.
Narrow
Narrow
Medium
Wide
KEY METRICS
Closed Sales to Date
$1,000,000.00
$4,000,000.00
$3,647,000.00
Sum of Amount

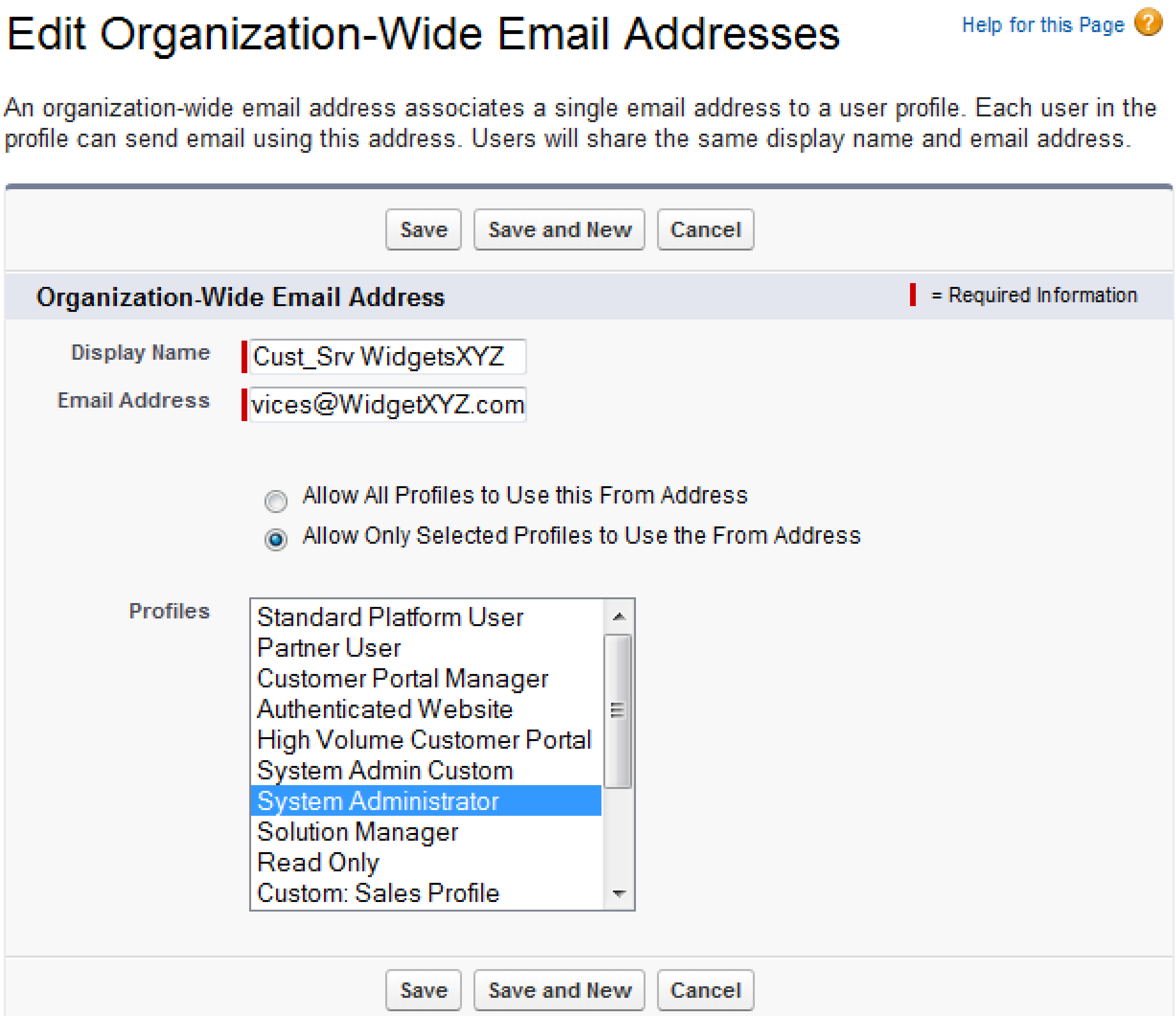

Dashboard
Company Performance Dashboard
Save
Save As
Close
Dashboard Properties
Components
Data Sources
Recent
My
All
Quick Find
Reports
My Personal Custom Report
Opportunity Average Expec
Sample Report: Closed Sale
Click to enter a dashboard description.
Narrow
Gauge
Opportunity Average Expected Revenue
KEY METRICS
Closed Sales to Date

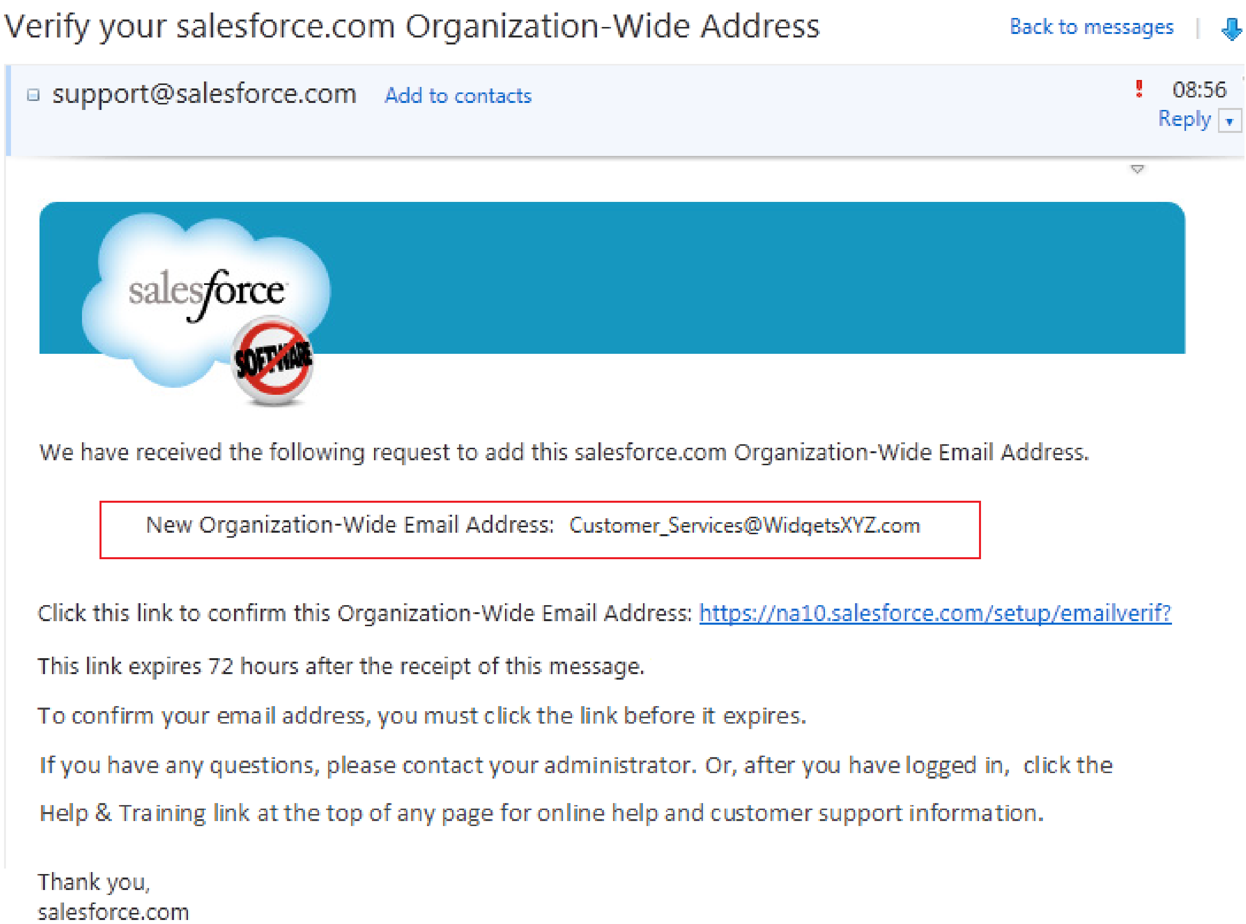

Dashboard
Company Performance Dashboard
Save
Save As
Close
Dashboard Properties
Components
Data Sources
Click to enter a dashboard description.
Narrow
Source Report
Edit Header
Source: Opportunity Average Expected Revenue
Edit Footer


Dashboard
Company Performance Dashboard
Save
Save As
Close
Dashboard Properties
Components
Data Sources
Click to enter a dashboard description.
Narrow
Line Chart
Edit Header
Edit Title
$95.50
$84.00
$52.07
$100.00
$80.00
$60.00
$40.00
$20.00
$0.00
Avg Expected Revenue (Thousands)
Needs Ana..
Perceptio..
Proposal/..
Stage
Source: Opportunity Average Expected Revenue
Edit Footer

Chapter 6


Email Alert Edit
Save
Save & New
Cancel
Edit Email Alert
Description
Notify Close Date
Unique Name
Notify_Close_Date
Object
Opportunity
Email Template
Notify_Close_Date
Protected Component
Recipient Type
Search:
Case Team
for:
Find
Account Owner
Case Team
Creator
Email Field
Owner
Public Groups
Related Contact
Related Lead or Contact Owner
Related User
Role
Role and Subordinates
User
Recipients
You can enter up to five (5) email addresses to be notified.
Additional Emails
From Email Address
Current User's email address
Make this address the default From email address for this object's email alerts.


Edit Organization-Wide Email Addresses
Help for this Page
An organization-wide email address associates a single email address to a user profile. Each user in the profile can send email using this address. Users will share the same display name and email address.
Save
Save and New
Cancel
Organization-Wide Email Address
= Required Information
Display Name
Cust_Srv WidgetsXYZ
Email Address
vices@WidgetXYZ.com
Allow All Profiles to Use this From Address
Allow Only Selected Profiles to Use the From Address
Profiles
Standard Platform User
Partner User
Customer Portal Manager
Authenticated Website
High Volume Customer Portal
System Admin Custom
System Administrator
Solution Manager
Read Only
Custom: Sales Profile
Save
Save and New
Cancel


Verify your salesforce.com Organization-Wide Address

Back to messages |

support@salesforce.com Add to contacts

08:56
Reply

We have received the following request to add this salesforce.com Organization-Wide Email Address.

New Organization-Wide Email Address: Customer_Services@WidgetsXYZ.com

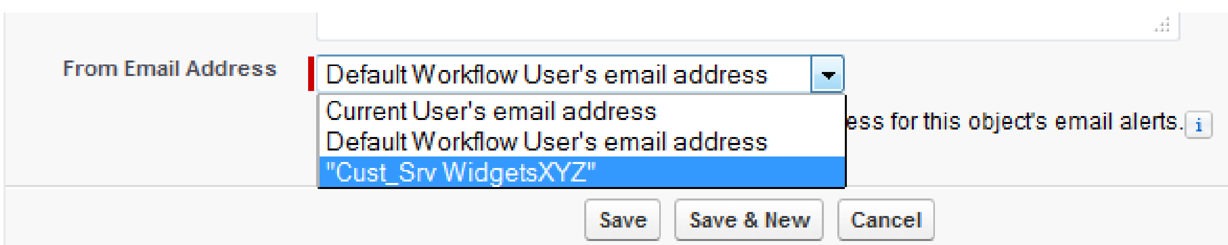
Click this link to confirm this Organization-Wide Email Address: https://na10.salesforce.com/setup/emailverif?

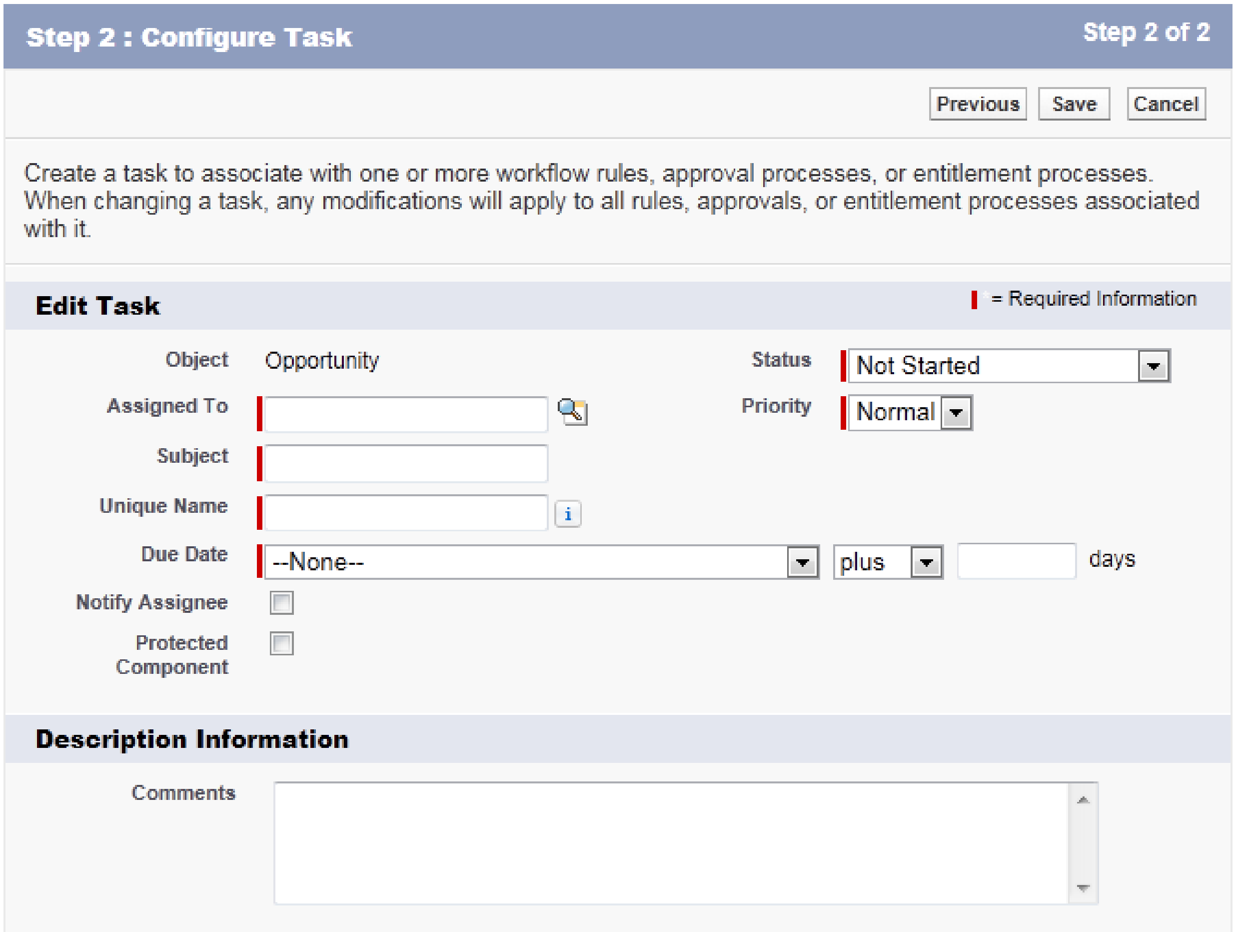
This link expires 72 hours after the receipt of this message.

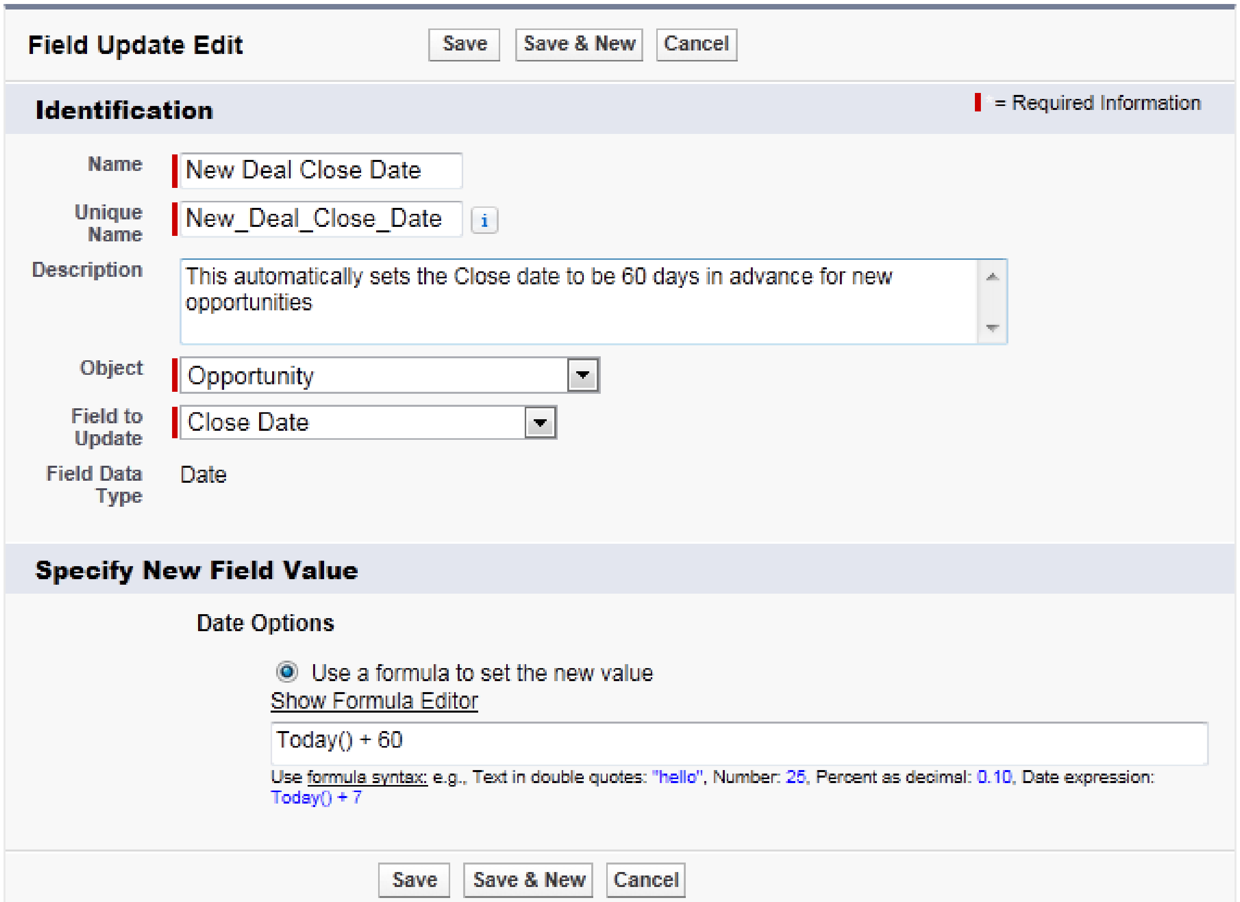
To confirm your email address, you must click the link before it expires.

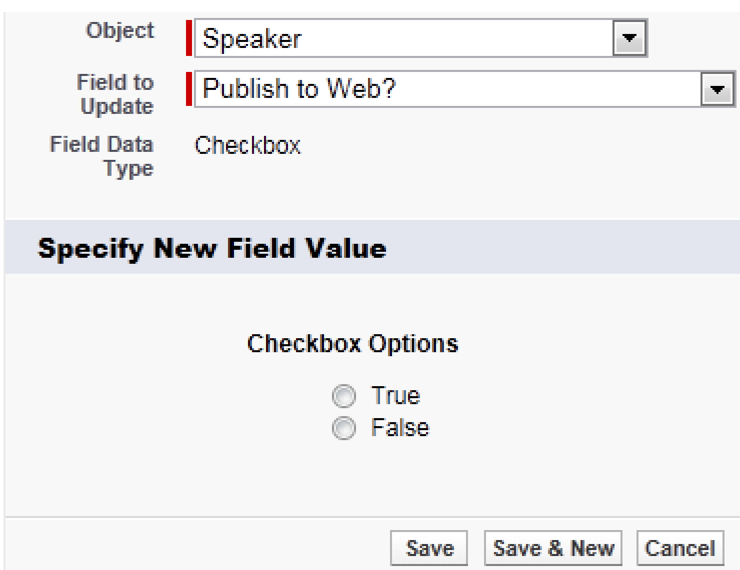
If you have any questions, please contact your administrator. Or, after you have logged in, click the Help & Training link at the top of any page for online help and customer support information.

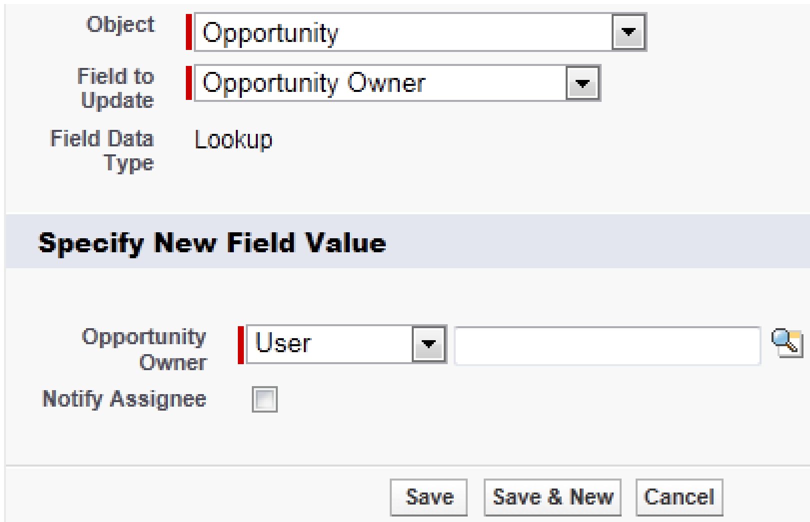
Thank you,
salesforce.com

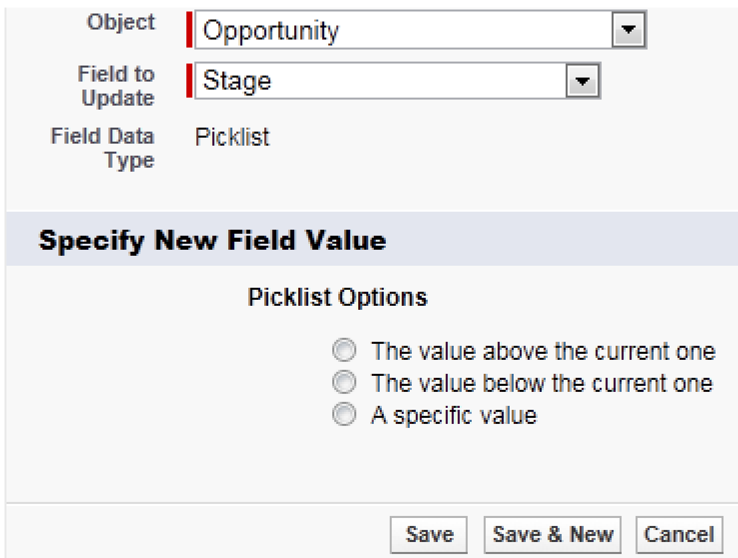


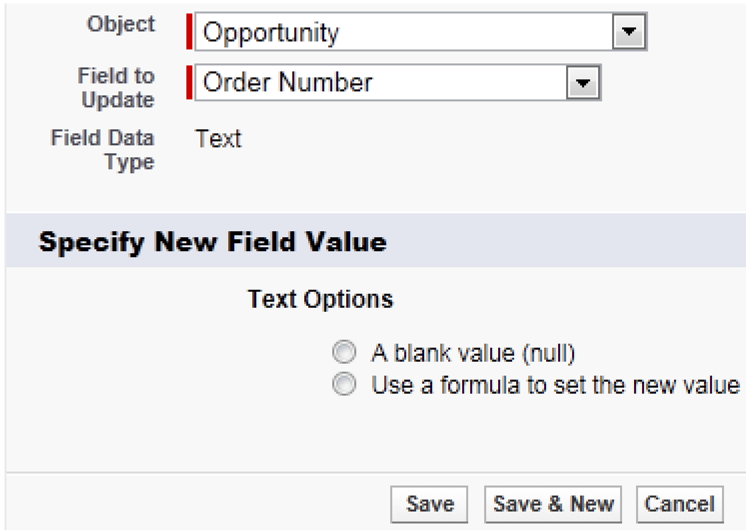

Step 2 : Configure Task
Step 2 of 2
Previous
Save
Cancel
Create a task to associate with one or more workflow rules, approval processes, or entitlement processes. When changing a task, any modifications will apply to all rules, approvals, or entitlement processes associated with it.
Edit Task
= Required Information
Object
Opportunity
Status
Not Started
Assigned To
Priority
Normal
Subject
Unique Name
Due Date
--None--
plus
days
Notify Assignee
Protected Component
Description Information
Comments

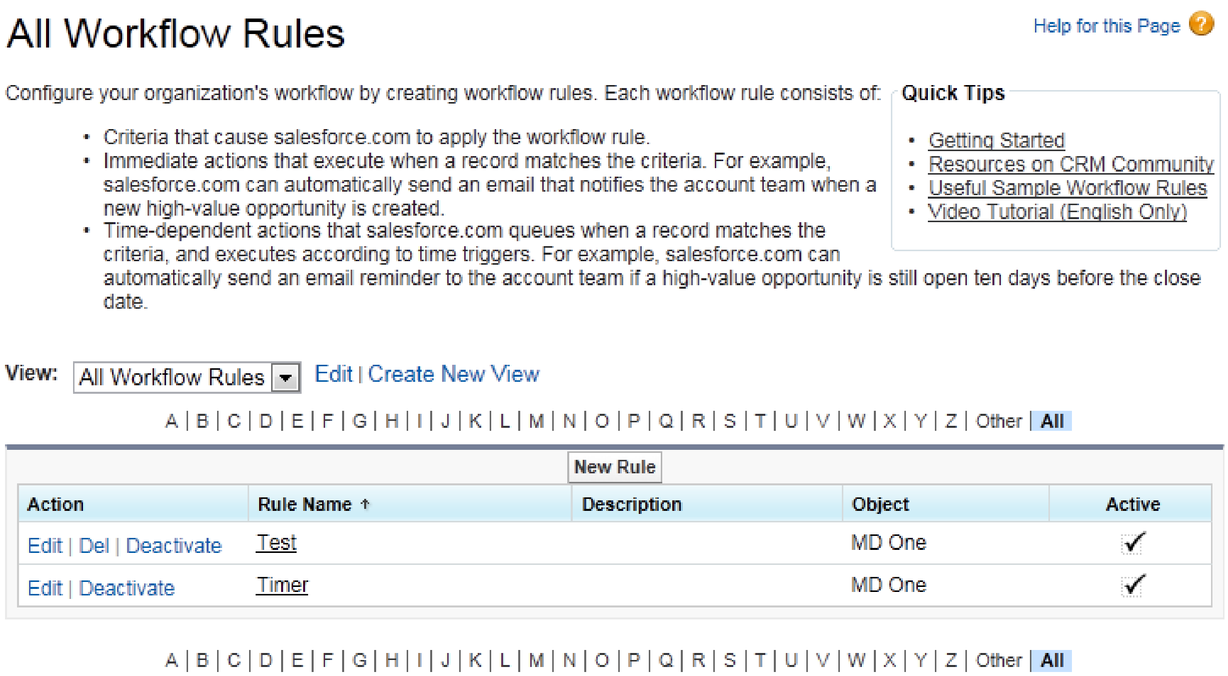

Field Update Edit
Save
Save & New
Cancel
Identification
= Required Information
Name
New Deal Close Date
Unique Name
New_Deal_Close_Date
Description
This automatically sets the Close date to be 60 days in advance for new opportunities
Object
Opportunity
Field to Update
Close Date
Field Data Type
Date
Specify New Field Value
Date Options
Use a formula to set the new value
Show Formula Editor
Today() + 60
Use formula syntax: e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7
Save
Save & New
Cancel

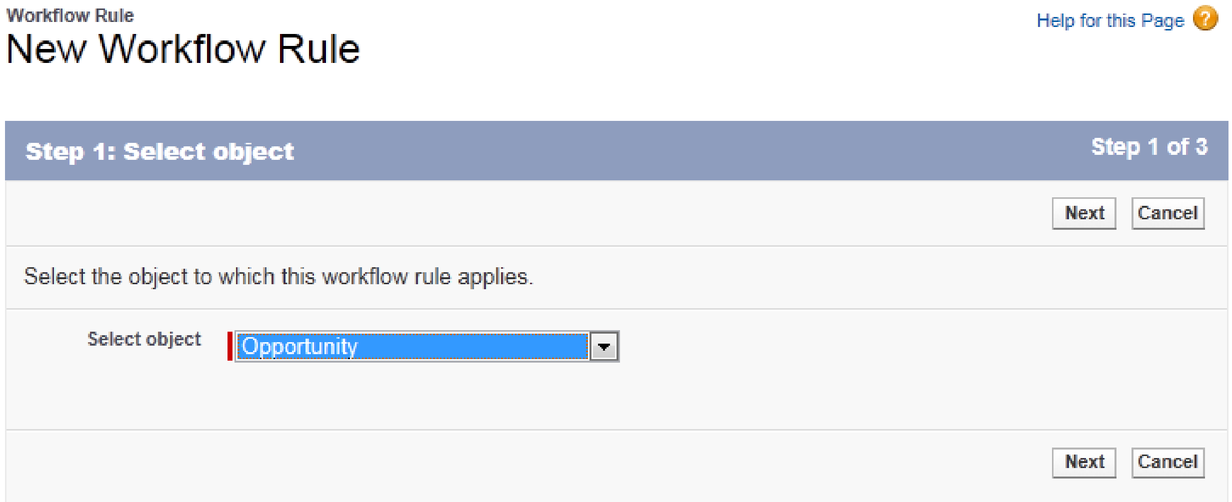

Object
Speaker
Field to Update
Publish to Web?
Field Data Type
Checkbox
Specify New Field Value
Checkbox Options
True
False
Save
Save & New
Cancel

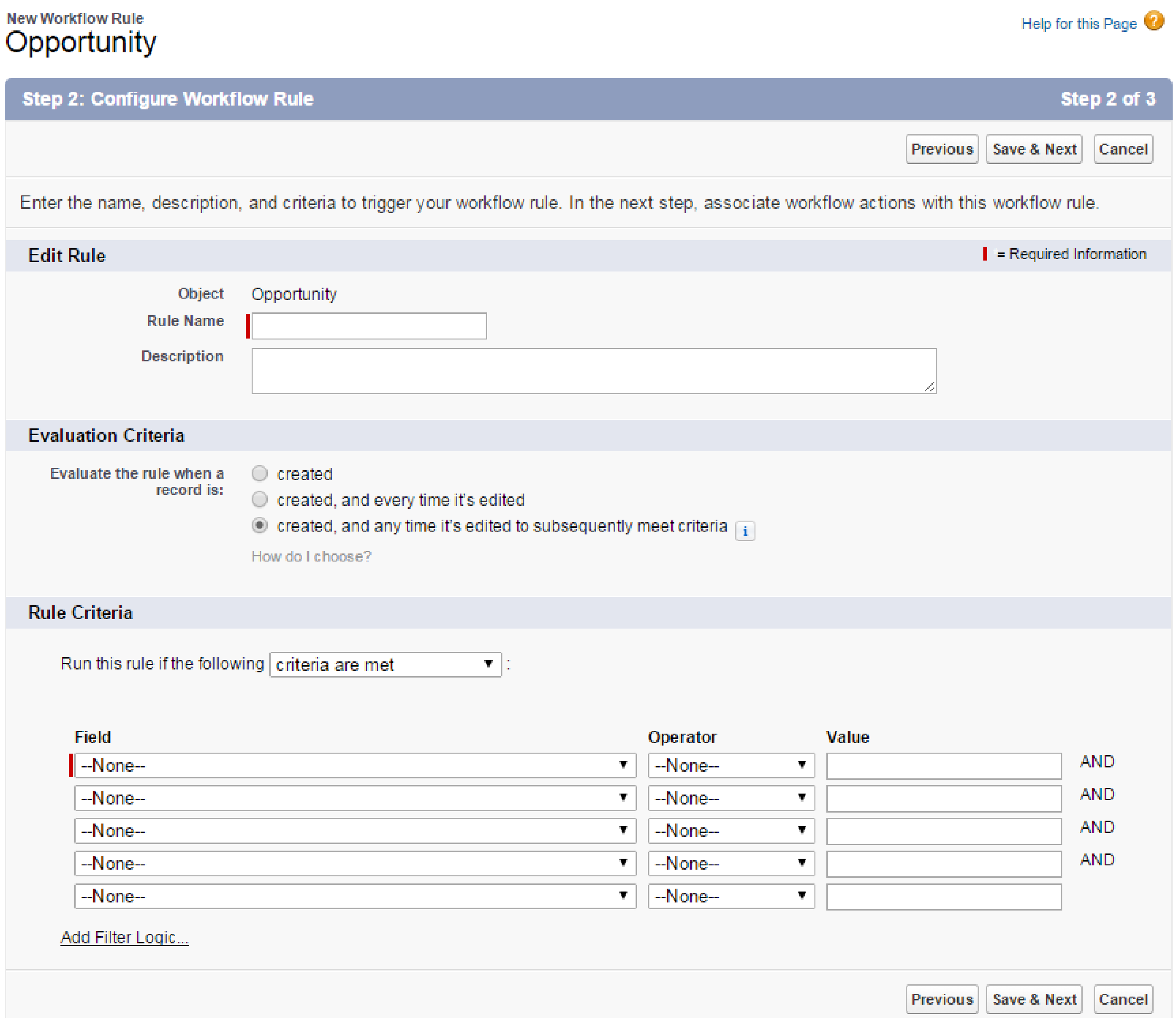

Object
Opportunity
Field to Update
Opportunity Owner
Field Data Type
Lookup
Specify New Field Value
Opportunity Owner
User
Notify Assignee
Save
Save & New
Cancel

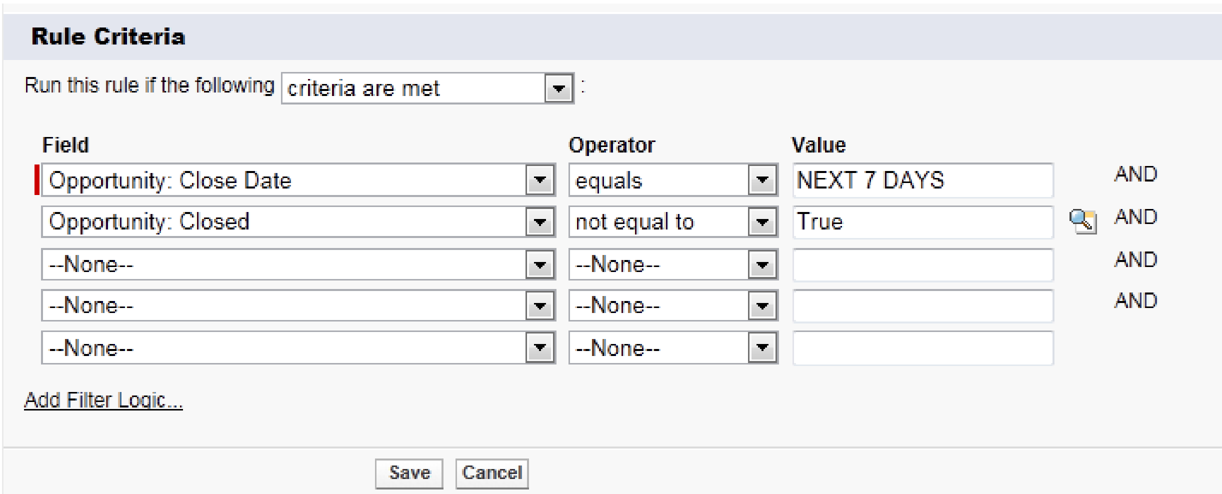

Object
Opportunity
Field to Update
Stage
Field Data Type
Picklist
Specify New Field Value
Picklist Options
The value above the current one
The value below the current one
A specific value
Save
Save & New
Cancel

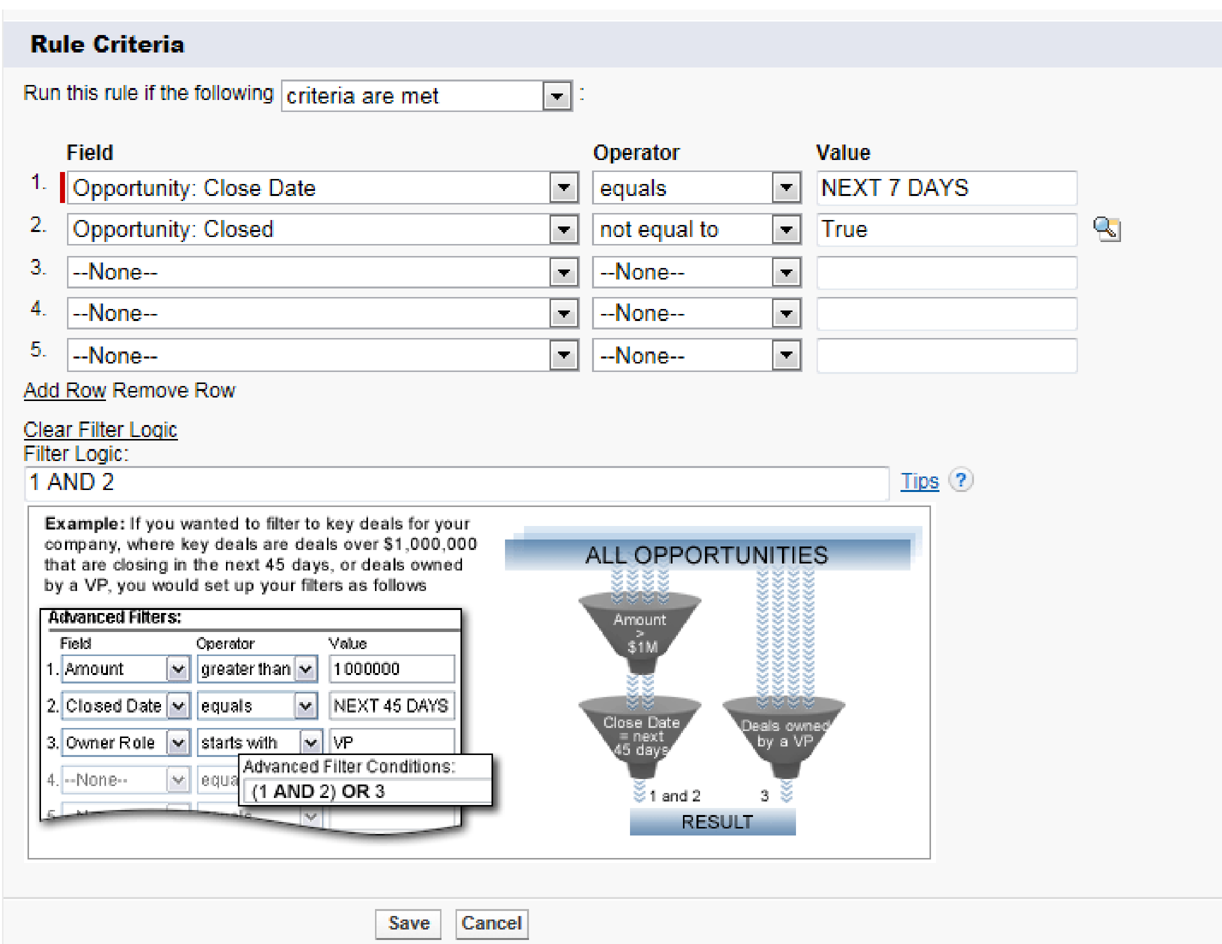

Object
Opportunity
Field to Update
Order Number
Field Data Type
Text
Specify New Field Value
Text Options
A blank value (null)
Use a formula to set the new value
Save
Save & New
Cancel

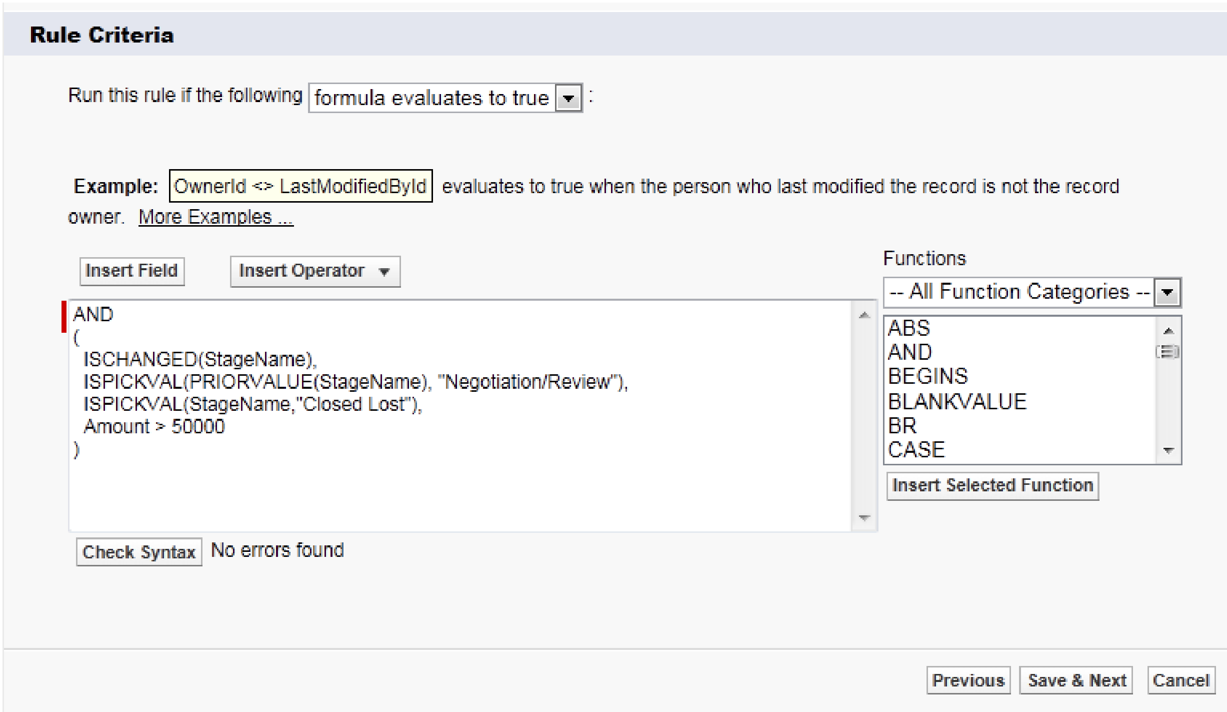

All Workflow Rules
Help for this Page
Configure your organization's workflow by creating workflow rules. Each workflow rule consists of:
Criteria that cause salesforce.com to apply the workflow rule.
Immediate actions that execute when a record matches the criteria. For example, salesforce.com can automatically send an email that notifies the account team when a new high-value opportunity is created.
Time-dependent actions that salesforce.com queues when a record matches the criteria, and executes according to time triggers. For example, salesforce.com can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.
Quick Tips
Getting Started
Resources on CRM Community
Useful Sample Workflow Rules
Video Tutorial (English Only)
View: All Workflow Rules
Edit | Create New 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
New Rule
Action | Rule Name | Description | Object | Active
Edit | Del | Deactivate | Test | MD One
Edit | Deactivate | Timer | MD One
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

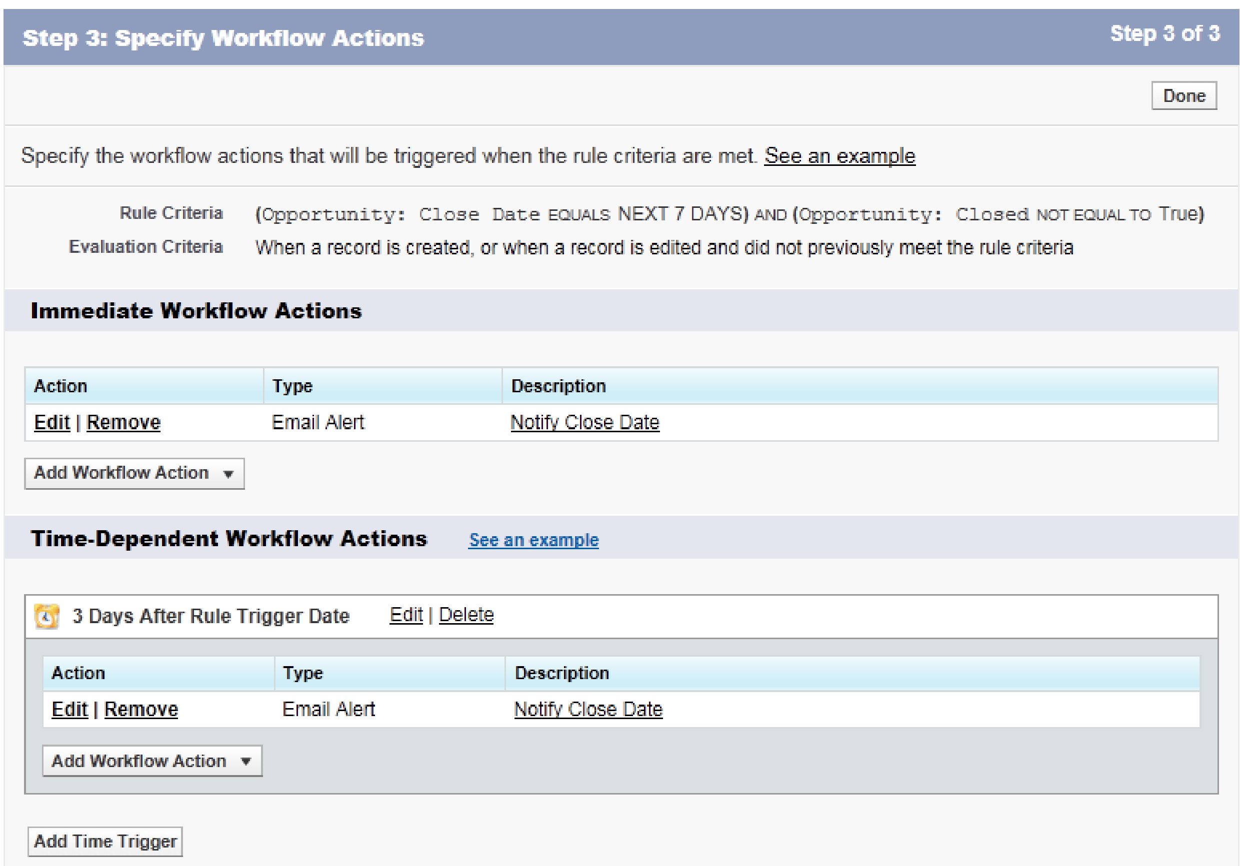

Workflow Rule
New Workflow Rule
Help for this Page
Step 1: Select object
Step 1 of 3
Next
Cancel
Select the object to which this workflow rule applies.
Select object
Opportunity
Next
Cancel

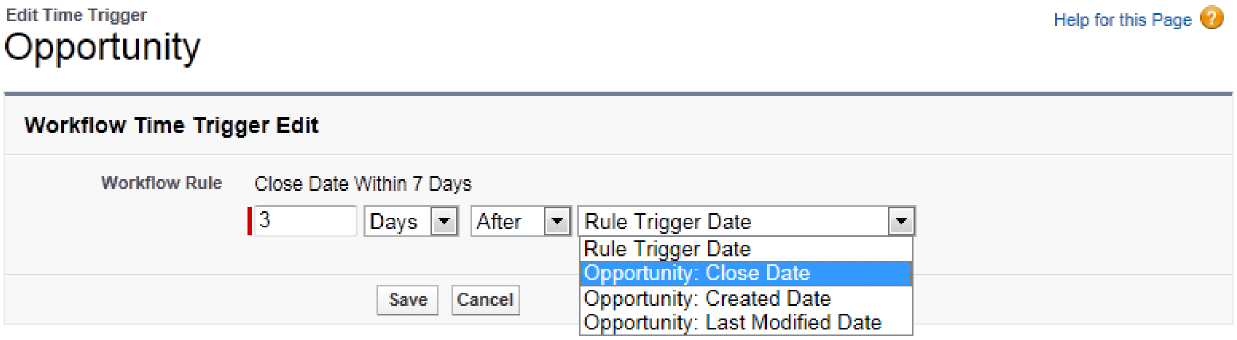

New Workflow Rule
Opportunity
Help for this Page
Step 2: Configure Workflow Rule
Step 2 of 3
Previous
Save & Next
Cancel
Enter the name, description, and criteria to trigger your workflow rule. In the next step, associate workflow actions with this workflow rule.
Edit Rule
= Required Information
Object
Opportunity
Rule Name
Description
Evaluation Criteria
Evaluate the rule when a record is:
created
created, and every time it's edited
created, and any time it's edited to subsequently meet criteria
How do I choose?
Rule Criteria
Run this rule if the following
criteria are met
Field
Operator
Value
--None--
AND
Add Filter Logic...
Previous
Save & Next
Cancel

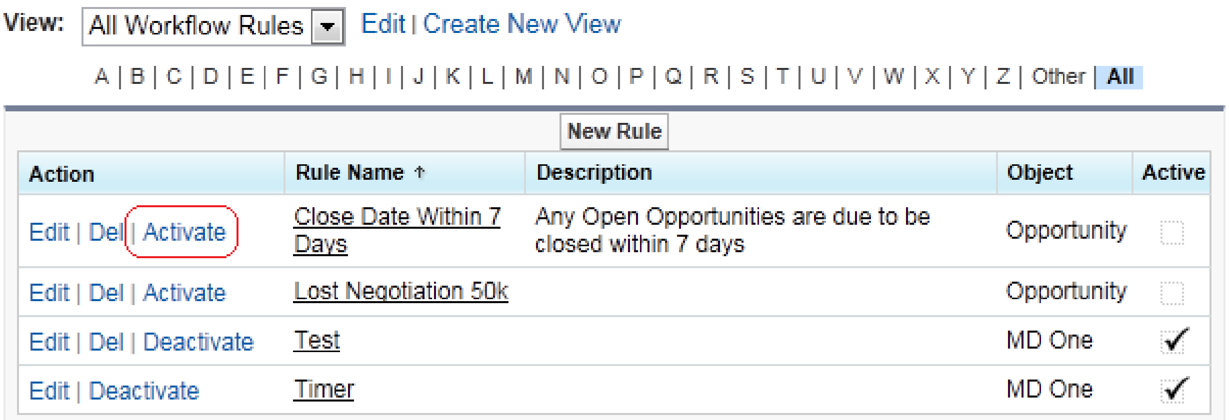

Rule Criteria
Run this rule if the following criteria are met :
Field
Operator
Value
Opportunity: Close Date
equals
NEXT 7 DAYS
AND
Opportunity: Closed
not equal to
True
AND
--None--
--None--
AND
--None--
--None--
AND
--None--
--None--
Add Filter Logic...
Save
Cancel

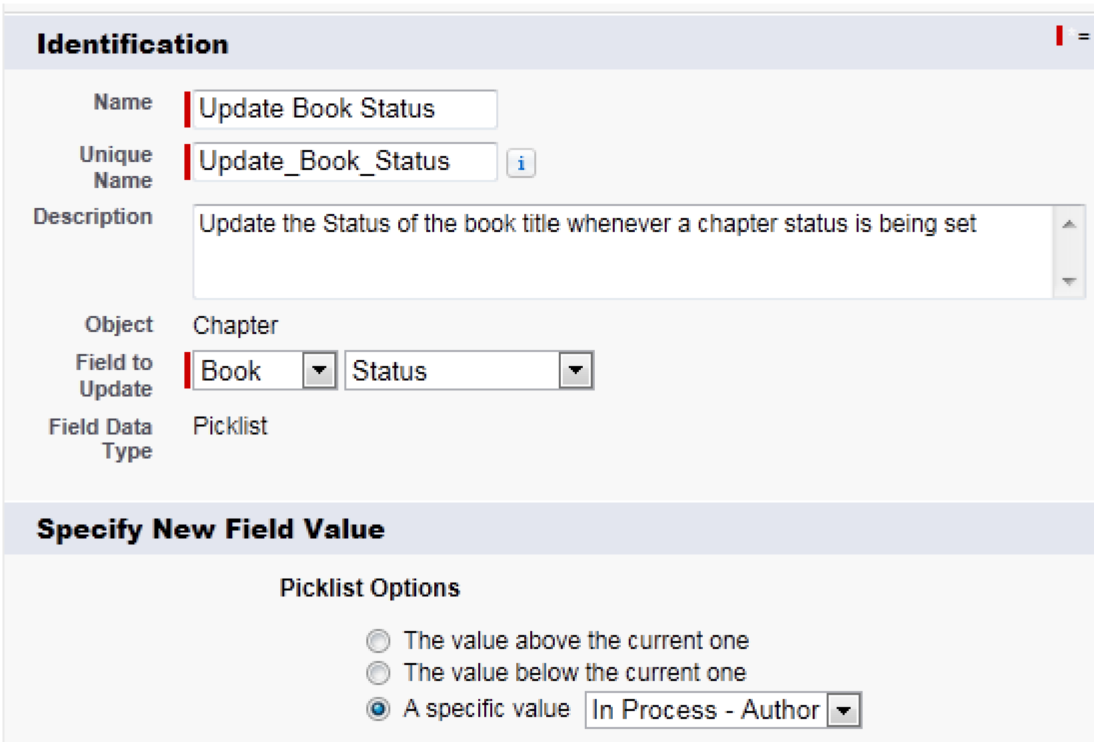

Rule Criteria
Run this rule if the following criteria are met :
Field
Operator
Value
1. Opportunity: Close Date
equals
NEXT 7 DAYS
2. Opportunity: Closed
not equal to
True
3. --None--
--None--
4. --None--
--None--
5. --None--
--None--
Add Row Remove Row
Clear Filter Logic
Filter Logic:
1 AND 2
Tips
Example: If you wanted to filter to key deals for your company, where key deals are deals over $1,000,000 that are closing in the next 45 days, or deals owned by a VP, you would set up your filters as follows
Advanced Filters:
Field
Operator
Value
1. Amount
greater than
1000000
2. Closed Date
equals
NEXT 45 DAYS
3. Owner Role
starts with
VP
Advanced Filter Conditions:
(1 AND 2) OR 3
ALL OPPORTUNITIES
Amount > $1M
Close Date = next 45 days
Deals owned by a VP
1 and 2
3
RESULT
Save
Cancel

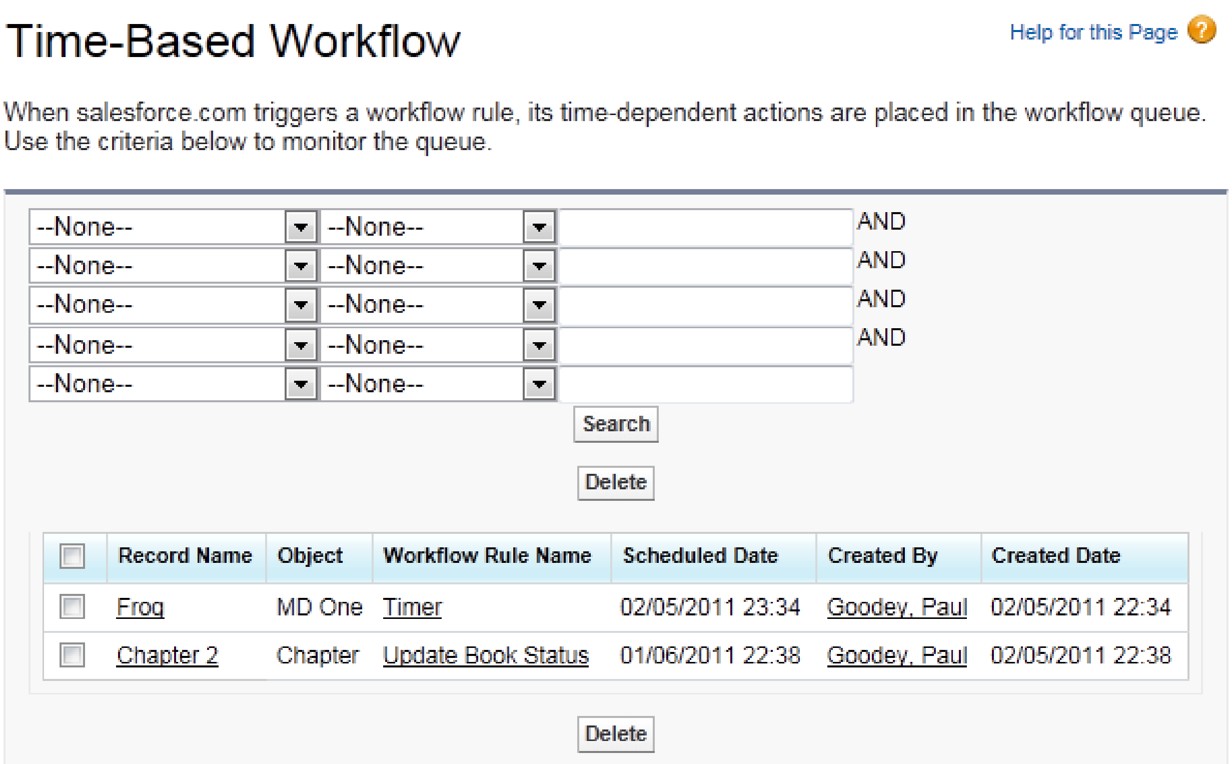

Rule Criteria
Run this rule if the following formula evaluates to true :
Example: OwnerId <> LastModifiedById evaluates to true when the person who last modified the record is not the record owner. More Examples ...
Insert Field
Insert Operator
Functions
-- All Function Categories --
ABS
AND
BEGINS
BLANKVALUE
BR
CASE
Insert Selected Function
AND
(
ISCHANGED(StageName),
ISPICKVAL(PRIORVALUE(StageName), "Negotiation/Review"),
ISPICKVAL(StageName,"Closed Lost"),
Amount > 50000
)
Check Syntax
No errors found
Previous
Save & Next
Cancel


Step 3: Specify Workflow Actions
Step 3 of 3
Done
Specify the workflow actions that will be triggered when the rule criteria are met. See an example
Rule Criteria
(Opportunity: Close Date EQUALS NEXT 7 DAYS) AND (Opportunity: Closed NOT EQUAL TO True)
Evaluation Criteria
When a record is created, or when a record is edited and did not previously meet the rule criteria
Immediate Workflow Actions
Action
Type
Description
Edit | Remove
Email Alert
Notify Close Date
Add Workflow Action
Time-Dependent Workflow Actions
See an example
3 Days After Rule Trigger Date
Edit | Delete
Action
Type
Description
Edit | Remove
Email Alert
Notify Close Date
Add Workflow Action
Add Time Trigger

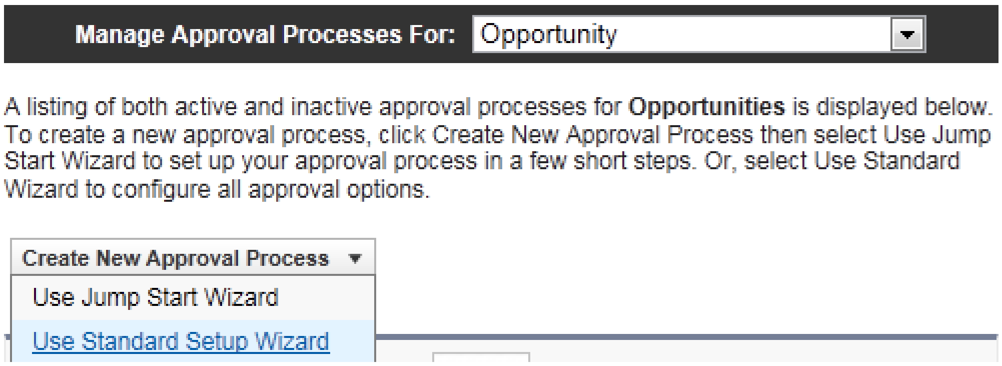

Edit Time Trigger
Opportunity
Help for this Page
Workflow Time Trigger Edit
Workflow Rule
Close Date Within 7 Days
3
Days
After
Rule Trigger Date
Rule Trigger Date
Opportunity: Close Date
Opportunity: Created Date
Opportunity: Last Modified Date
Save
Cancel

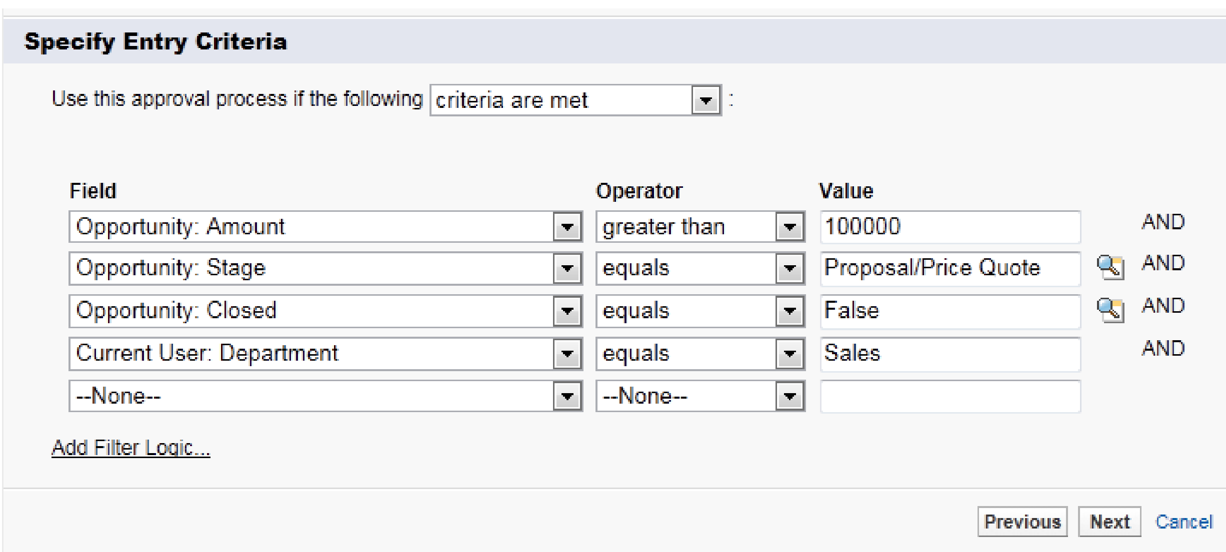

View:
All Workflow Rules
Edit | Create New View
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
New Rule
Action
Rule Name
Description
Object
Active
Edit | Del | Activate
Close Date Within 7 Days
Any Open Opportunities are due to be closed within 7 days
Opportunity
Edit | Del | Activate
Lost Negotiation 50k
Opportunity
Edit | Del | Deactivate
Test
MD One
Edit | Deactivate
Timer
MD One

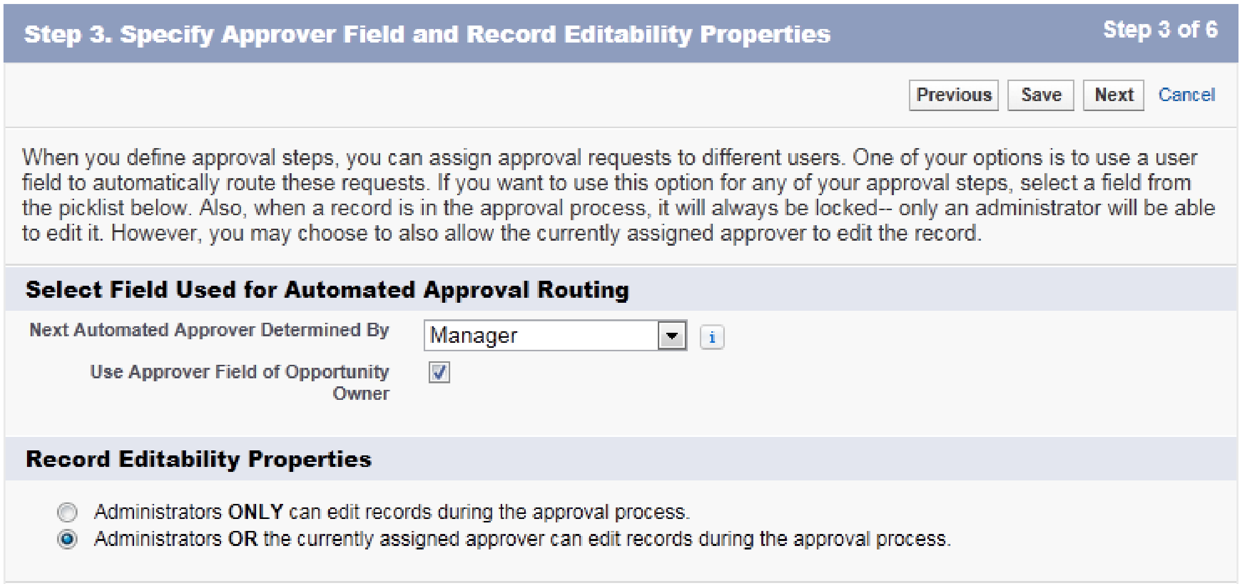

Identification
Name
Update Book Status
Unique Name
Update_Book_Status
Description
Update the Status of the book title whenever a chapter status is being set
Object
Chapter
Field to Update
Book
Status
Field Data Type
Picklist
Specify New Field Value
Picklist Options
The value above the current one
The value below the current one
A specific value
In Process - Author


Time-Based Workflow
Help for this Page
When salesforce.com triggers a workflow rule, its time-dependent actions are placed in the workflow queue. Use the criteria below to monitor the queue.
--None--
--None--
AND
--None--
--None--
AND
--None--
--None--
AND
--None--
--None--
AND
--None--
--None--
Search
Delete
Record Name
Object
Workflow Rule Name
Scheduled Date
Created By
Created Date
Frog
MD One
Timer
02/05/2011 23:34
Goodey, Paul
02/05/2011 22:34
Chapter 2
Chapter
Update Book Status
01/06/2011 22:38
Goodey, Paul
02/05/2011 22:38
Delete

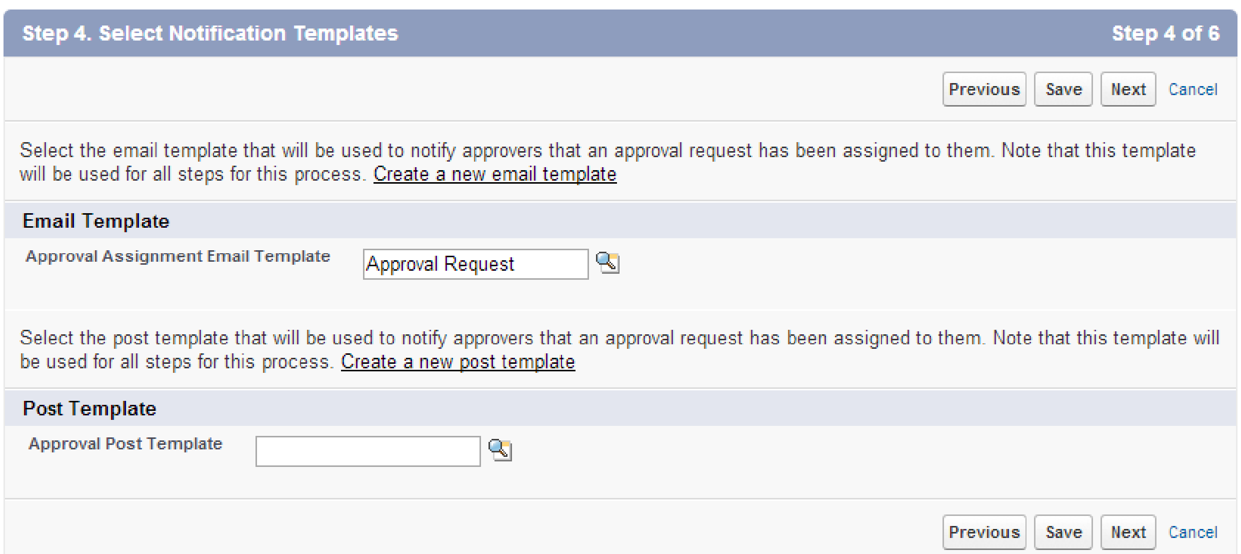

Approval Posts
Allow users to receive approval requests as posts.
Allow Approvals


Manage Approval Processes For:
Opportunity
A listing of both active and inactive approval processes for Opportunities is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to set up your approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options.
Create New Approval Process
Use Jump Start Wizard
Use Standard Setup Wizard

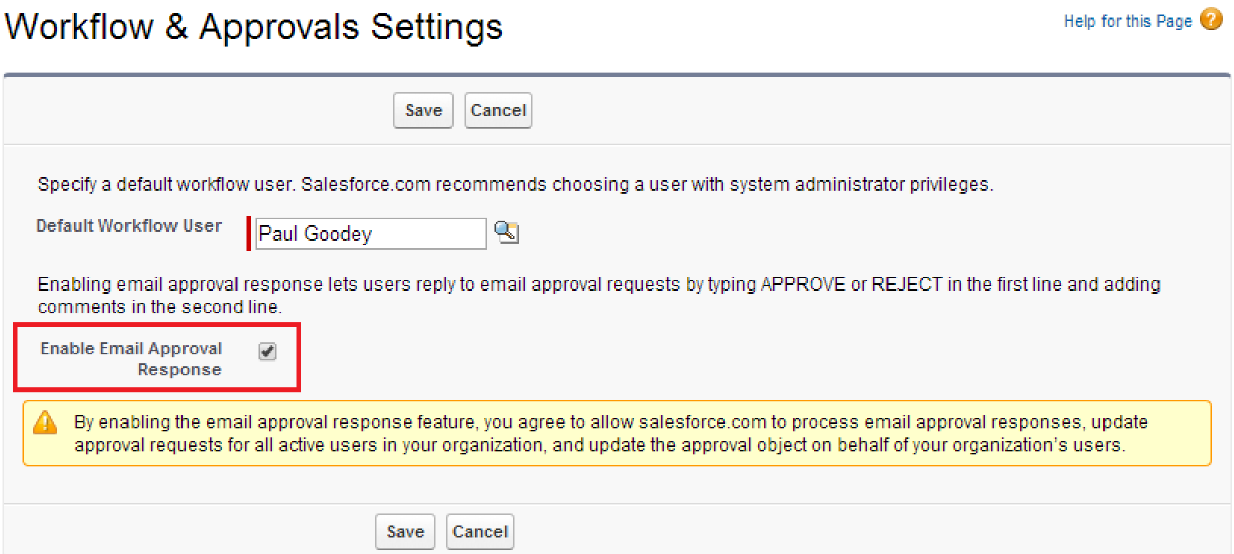

Specify Entry Criteria
Use this approval process if the following
criteria are met
:
Field
Operator
Value
Opportunity: Amount
greater than
100000
AND
Opportunity: Stage
equals
Proposal/Price Quote
AND
Opportunity: Closed
equals
False
AND
Current User: Department
equals
Sales
AND
--None--
--None--
Add Filter Logic...
Previous
Next
Cancel

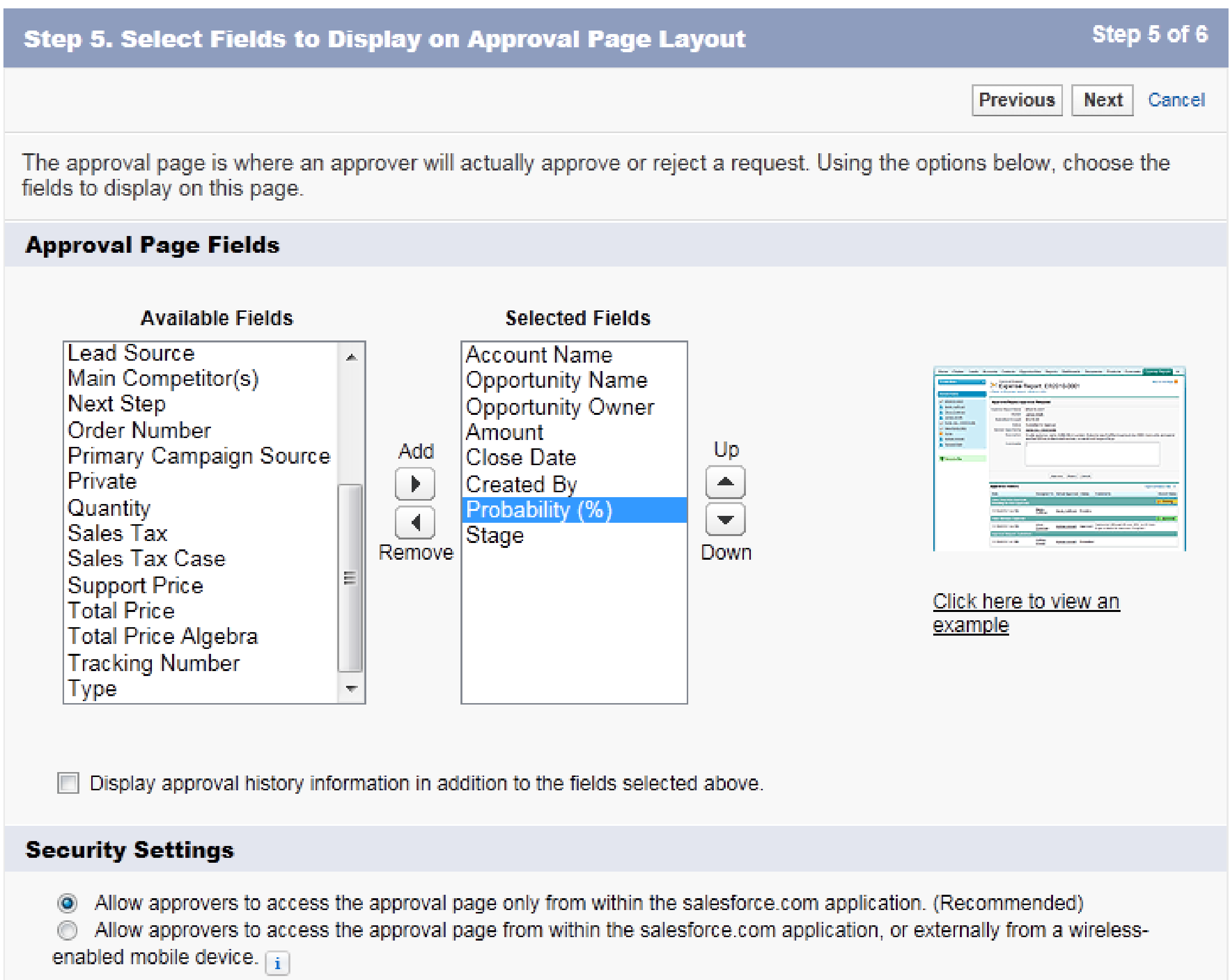


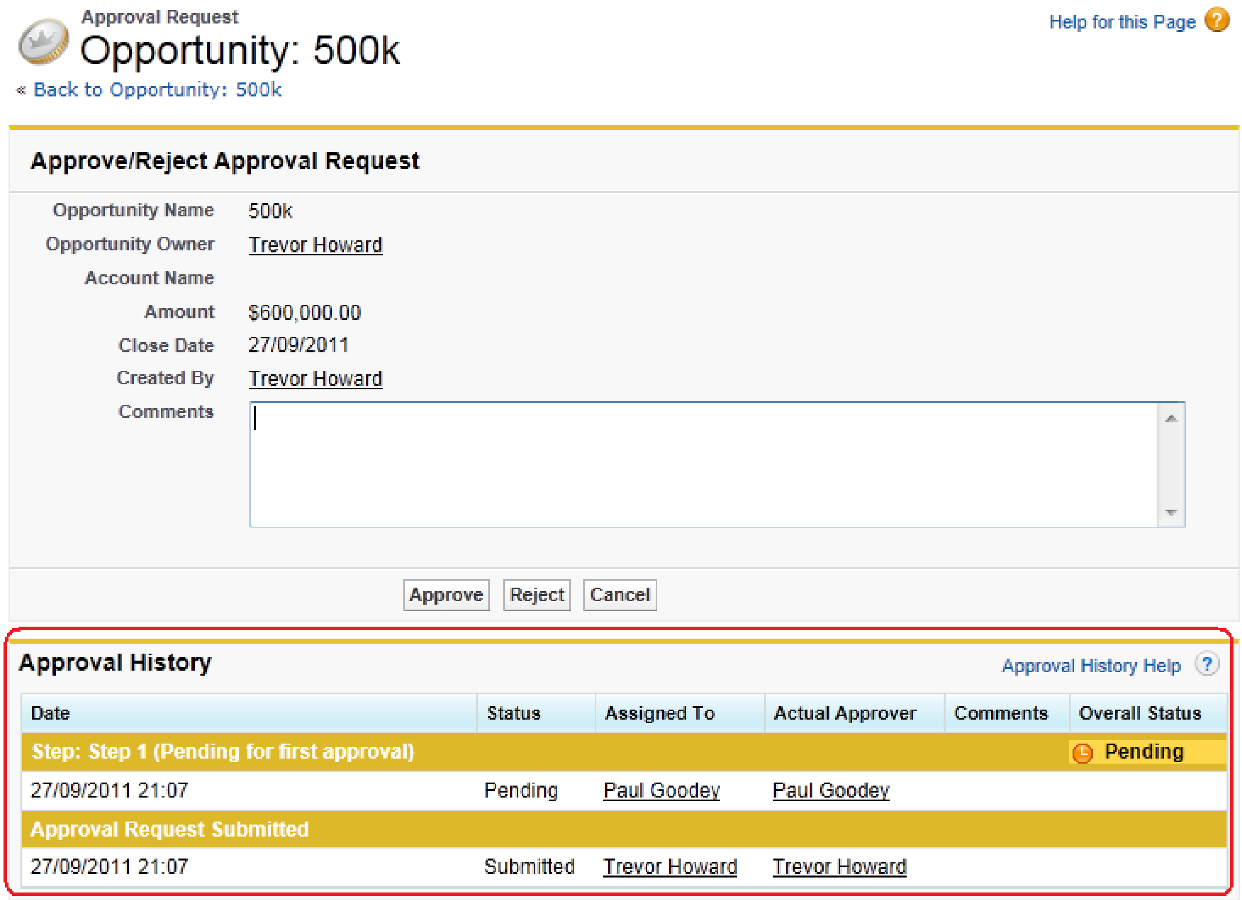
Step 3. Specify Approver Field and Record Editability Properties
Step 3 of 6
Previous
Save
Next
Cancel
When you define approval steps, you can assign approval requests to different users. One of your options is to use a user field to automatically route these requests. If you want to use this option for any of your approval steps, select a field from the picklist below. Also, when a record is in the approval process, it will always be locked-- only an administrator will be able to edit it. However, you may choose to also allow the currently assigned approver to edit the record.
Select Field Used for Automated Approval Routing
Next Automated Approver Determined By
Manager
Use Approver Field of Opportunity Owner
Record Editability Properties
Administrators ONLY can edit records during the approval process.
Administrators OR the currently assigned approver can edit records during the approval process.

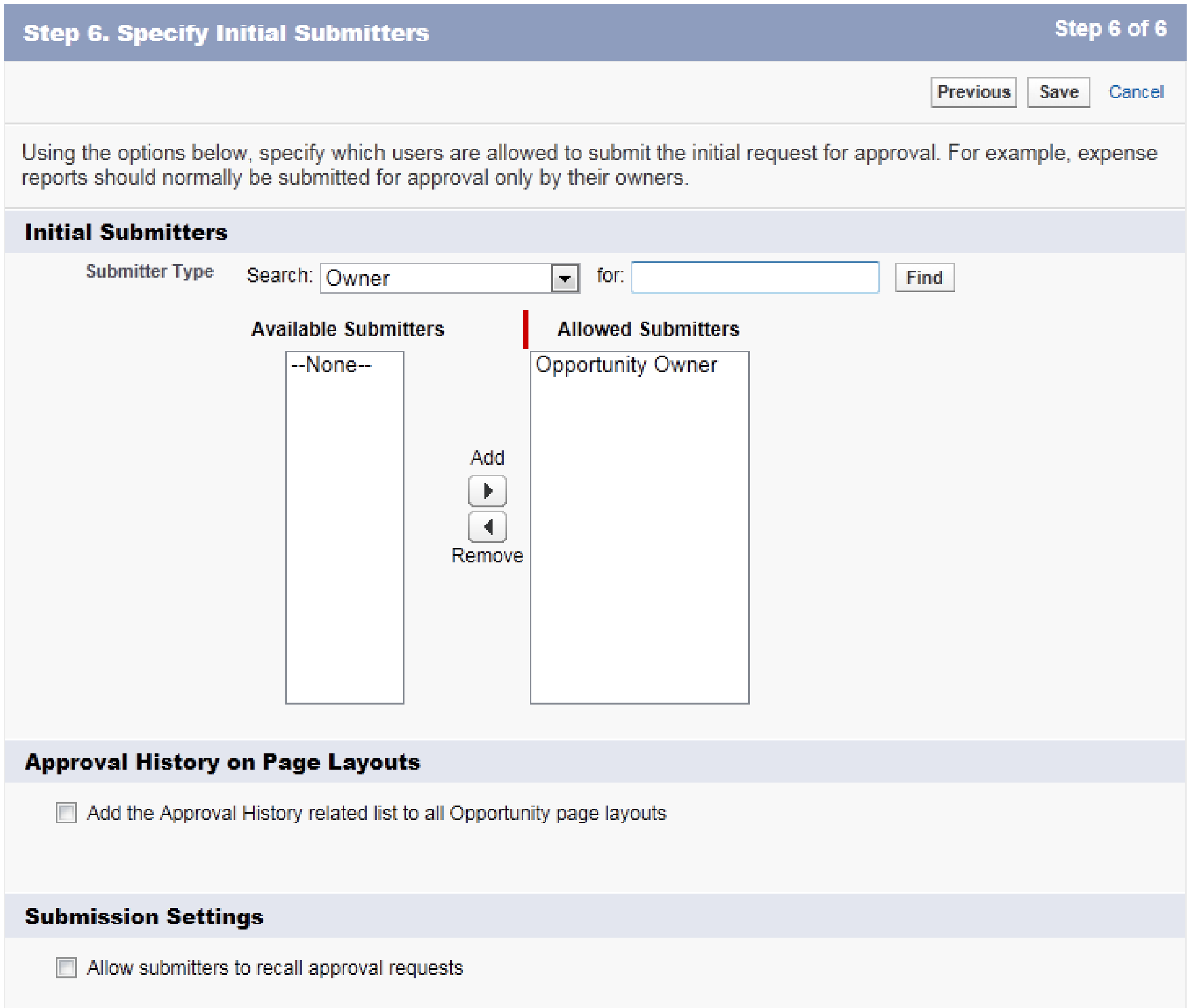


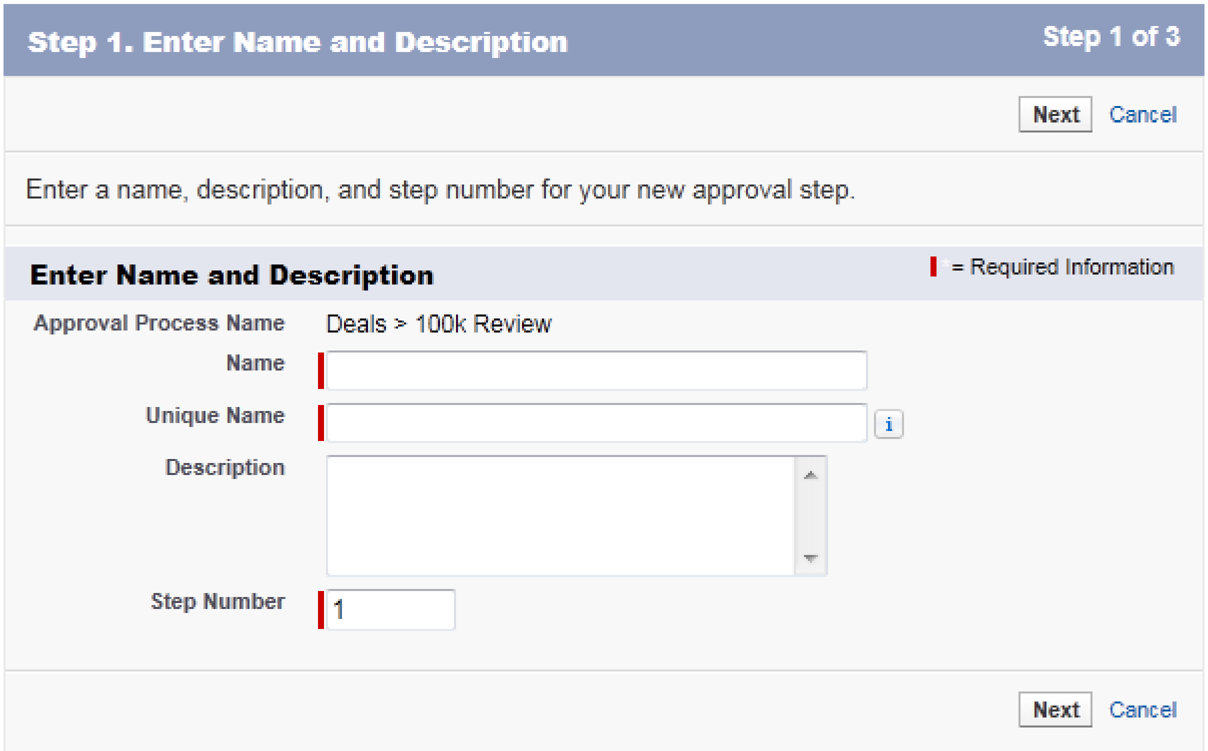
Step 4. Select Notification Templates
Step 4 of 6
Previous
Save
Next
Cancel
Select the email template that will be used to notify approvers that an approval request has been assigned to them. Note that this template will be used for all steps for this process. Create a new email template
Email Template
Approval Assignment Email Template
Approval Request
Select the post template that will be used to notify approvers that an approval request has been assigned to them. Note that this template will be used for all steps for this process. Create a new post template
Post Template
Approval Post Template
Previous
Save
Next
Cancel


Workflow & Approvals Settings
Help for this Page
Save Cancel
Specify a default workflow user. Salesforce.com recommends choosing a user with system administrator privileges.
Default Workflow User
Paul Goodey
Enabling email approval response lets users reply to email approval requests by typing APPROVE or REJECT in the first line and adding comments in the second line.
Enable Email Approval Response
By enabling the email approval response feature, you agree to allow salesforce.com to process email approval responses, update approval requests for all active users in your organization, and update the approval object on behalf of your organization's users.
Save Cancel

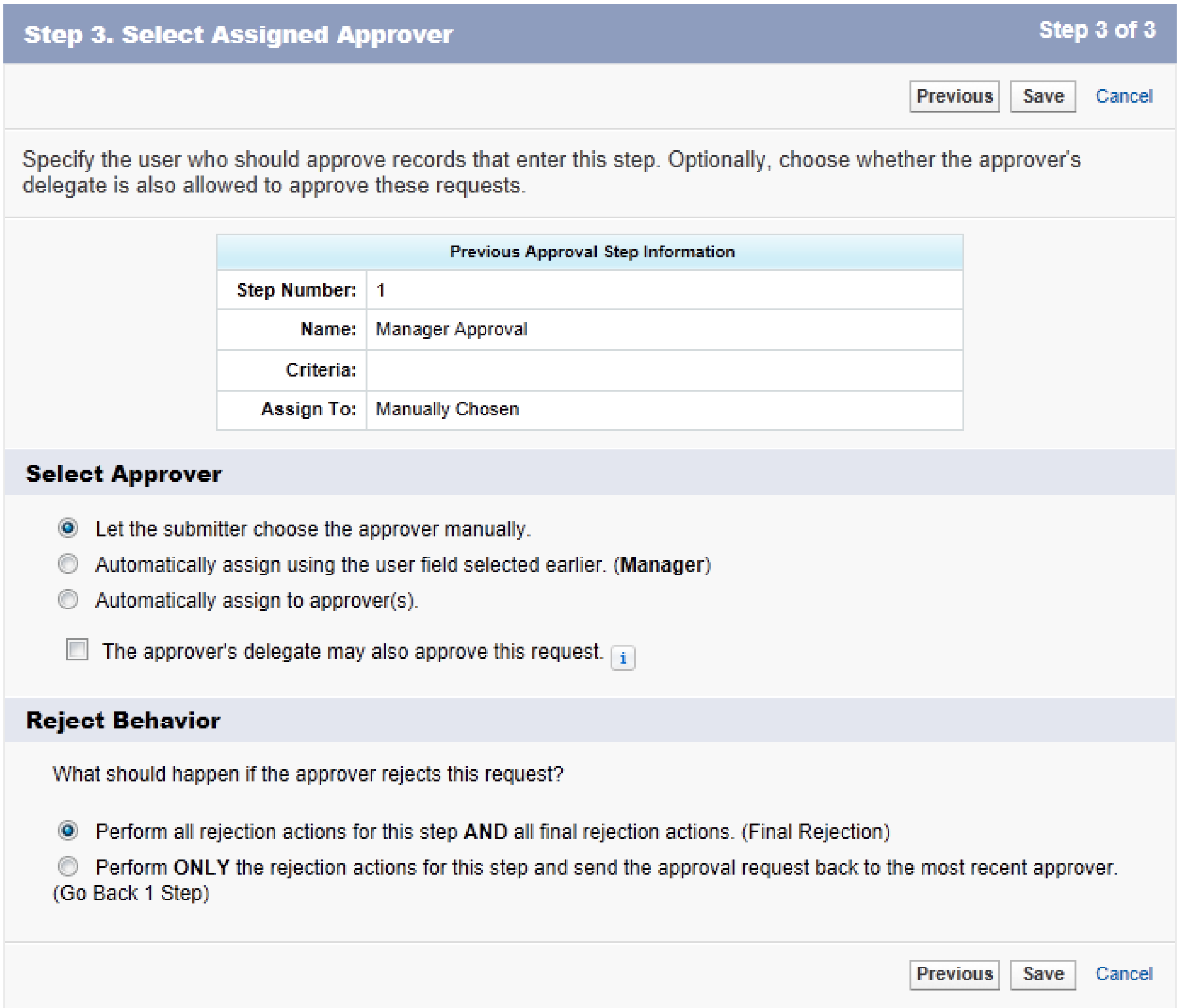

Step 5. Select Fields to Display on Approval Page Layout
Step 5 of 6
Previous Next Cancel
The approval page is where an approver will actually approve or reject a request. Using the options below, choose the fields to display on this page.
Approval Page Fields
Available Fields
Lead Source
Main Competitor(s)
Next Step
Order Number
Primary Campaign Source
Private
Quantity
Sales Tax
Sales Tax Case
Support Price
Total Price
Total Price Algebra
Tracking Number
Type
Add
Remove
Selected Fields
Account Name
Opportunity Name
Opportunity Owner
Amount
Close Date
Created By
Probability (%)
Stage
Up
Down
Click here to view an example
Display approval history information in addition to the fields selected above.
Security Settings
Allow approvers to access the approval page only from within the salesforce.com application. (Recommended)
Allow approvers to access the approval page from within the salesforce.com application, or externally from a wireless-enabled mobile device.


Approval Request
Opportunity: 500k
« Back to Opportunity: 500k
Help for this Page
Approve/Reject Approval Request
Opportunity Name 500k
Opportunity Owner Trevor Howard
Account Name
Amount $600,000.00
Close Date 27/09/2011
Created By Trevor Howard
Comments
Approve Reject Cancel
Approval History
Approval History Help
Date Status Assigned To Actual Approver Comments Overall Status
Step: Step 1 (Pending for first approval) Pending
27/09/2011 21:07 Pending Paul Goodey Paul Goodey
Approval Request Submitted
27/09/2011 21:07 Submitted Trevor Howard Trevor Howard


Step 6. Specify Initial Submitters
Step 6 of 6
Previous
Save
Cancel
Using the options below, specify which users are allowed to submit the initial request for approval. For example, expense reports should normally be submitted for approval only by their owners.
Initial Submitters
Submitter Type
Search:
Owner
for:
Find
Available Submitters
Allowed Submitters
--None--
Opportunity Owner
Add
Remove
Approval History on Page Layouts
Add the Approval History related list to all Opportunity page layouts
Submission Settings
Allow submitters to recall approval requests


Step 1. Enter Name and Description
Step 1 of 3
Next
Cancel
Enter a name, description, and step number for your new approval step.
Enter Name and Description
= Required Information
Approval Process Name
Deals > 100k Review
Name
Unique Name
Description
Step Number
1
Next
Cancel


Step 2. Specify Step Criteria
Step 2 of 3
Previous
Next
Cancel
Specify whether a record must meet certain criteria before entering this approval step. If these criteria are not met, the approval process can skip to the next step, if one exists. Learn more
Specify Step Criteria
All records should enter this step.
Enter this step if the following
criteria are met
, else
approve record
:
Previous
Next
Cancel



Step 3. Select Assigned Approver — Step 3 of 3

Previous | Save | Cancel

Specify the user who should approve records that enter this step. Optionally, choose whether the approver's delegate is also allowed to approve these requests.

Previous Approval Step Information	
Step Number:	1
Name:	Manager Approval
Criteria:	
Assign To:	Manually Chosen

Select Approver

- (●) Let the submitter choose the approver manually.
- ( ) Automatically assign using the user field selected earlier. (**Manager**)
- ( ) Automatically assign to approver(s).

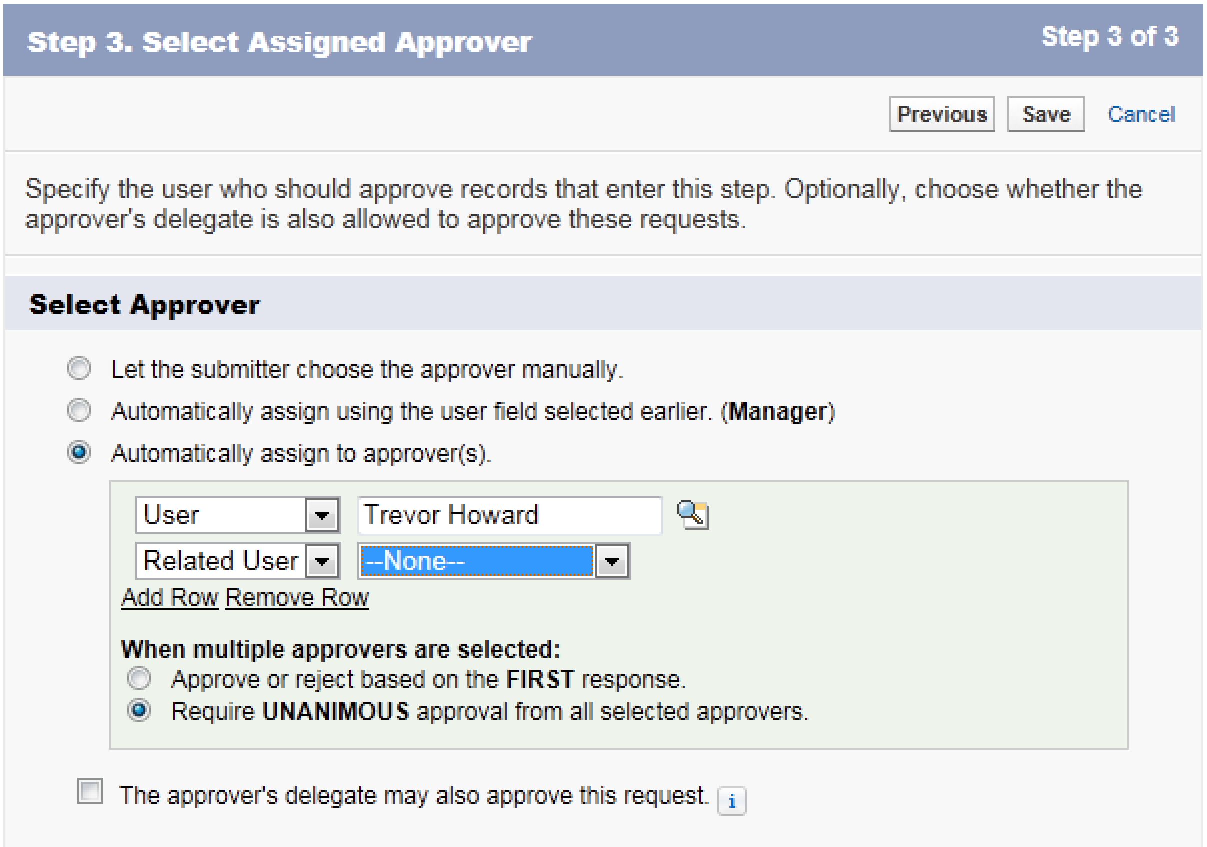
[ ] The approver's delegate may also approve this request. i

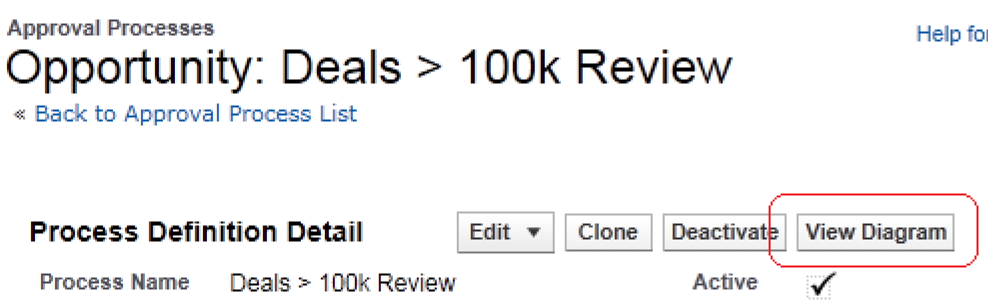
Reject Behavior

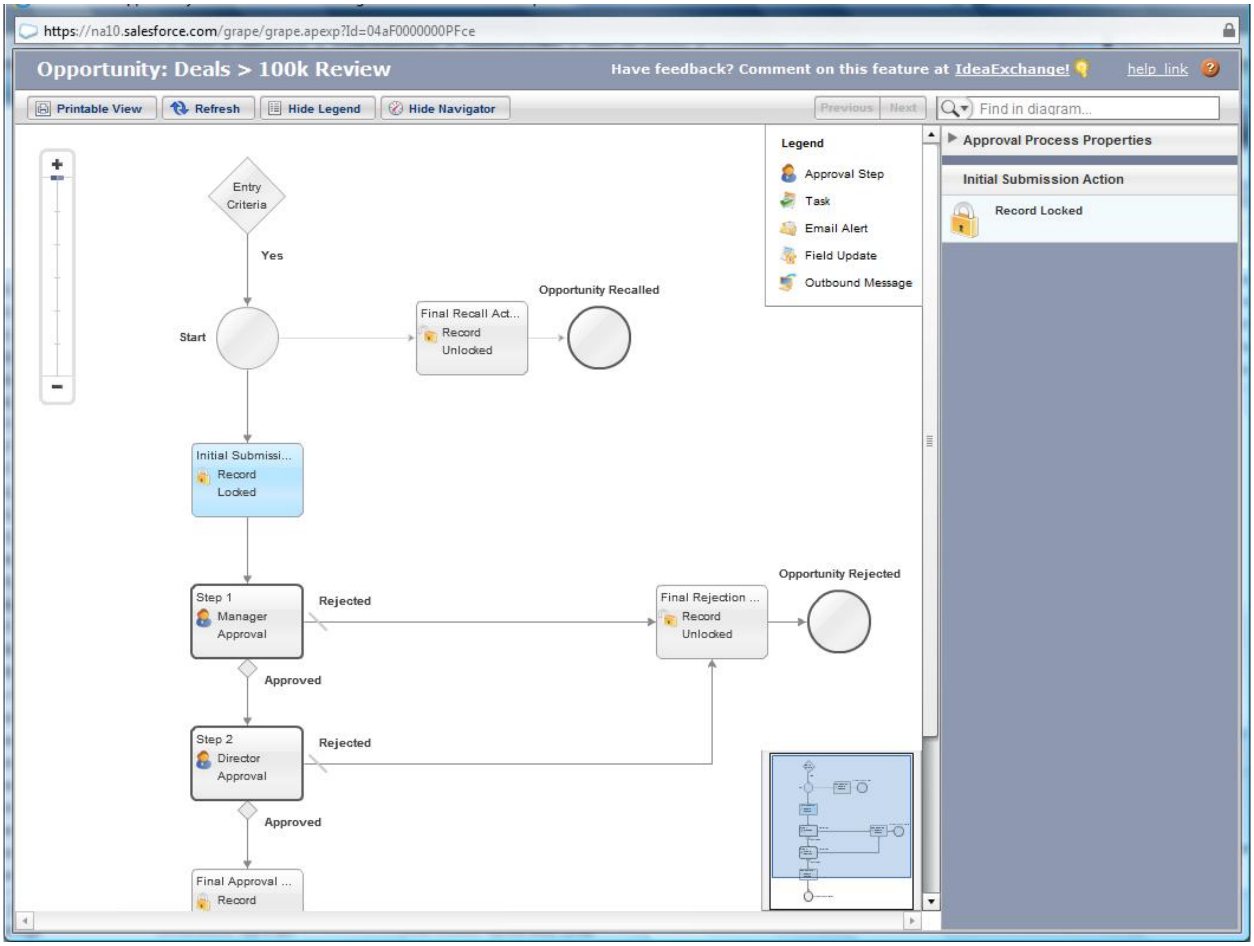
What should happen if the approver rejects this request?

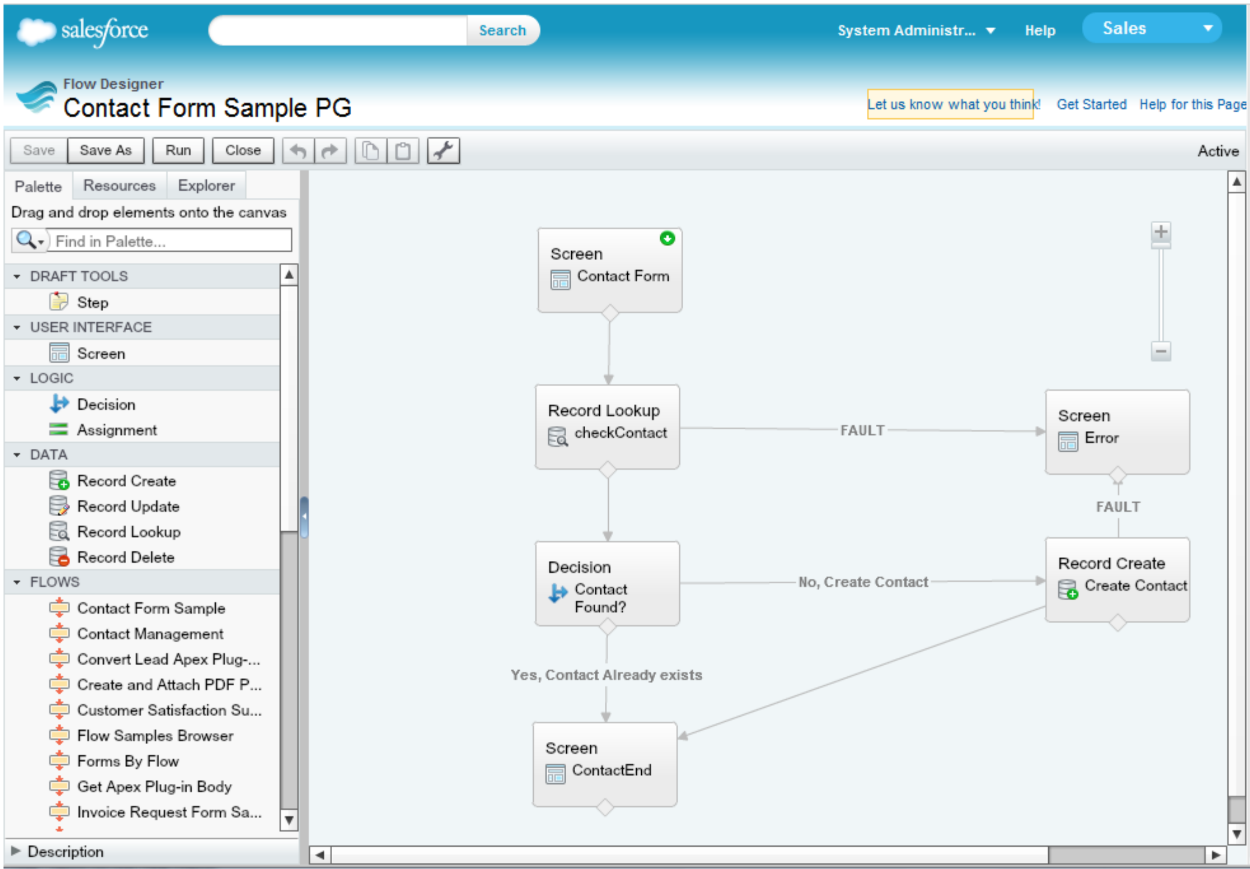
- (●) Perform all rejection actions for this step **AND** all final rejection actions. (Final Rejection)
- ( ) Perform **ONLY** the rejection actions for this step and send the approval request back to the most recent approver. (Go Back 1 Step)

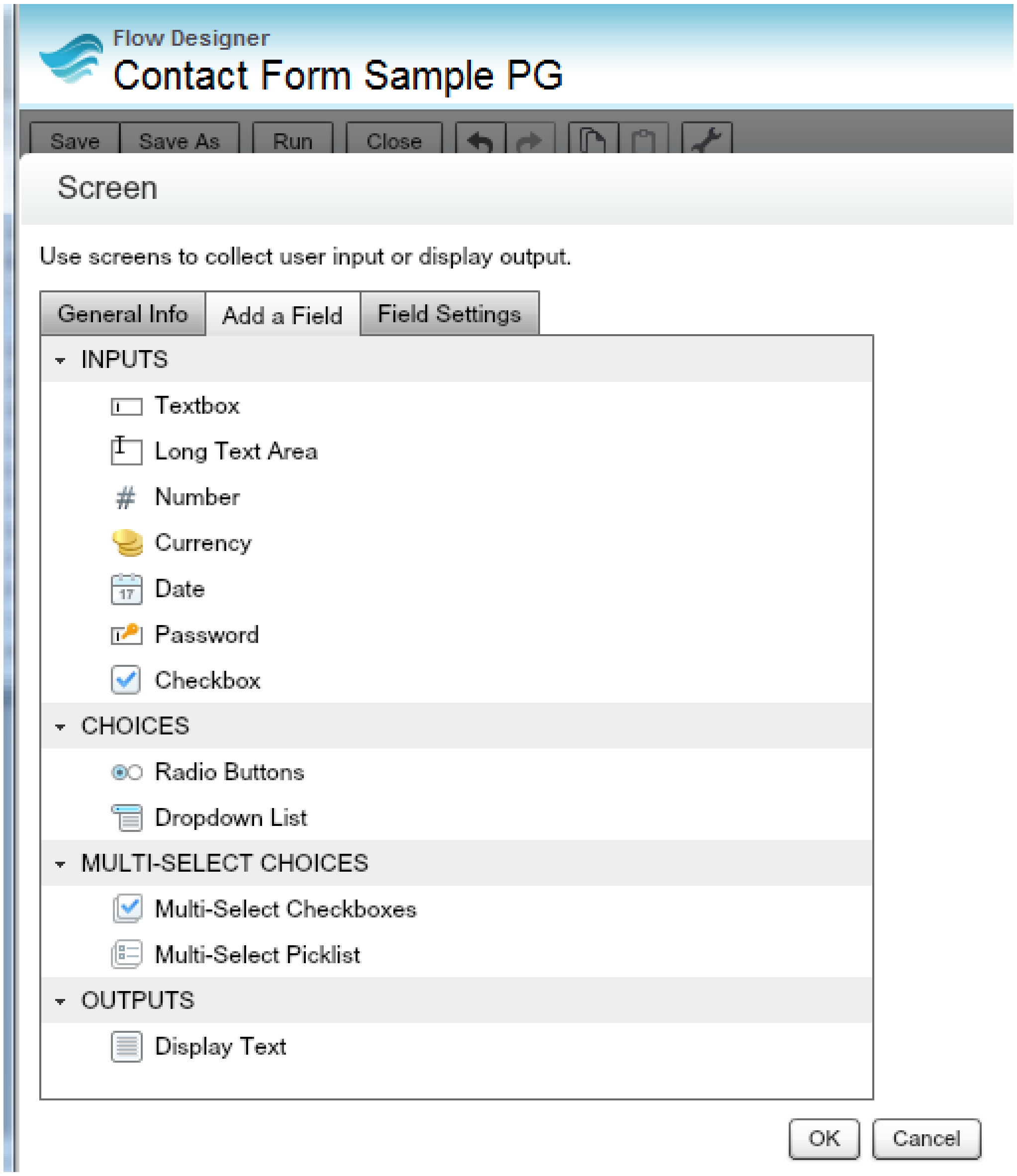
Previous | Save | Cancel

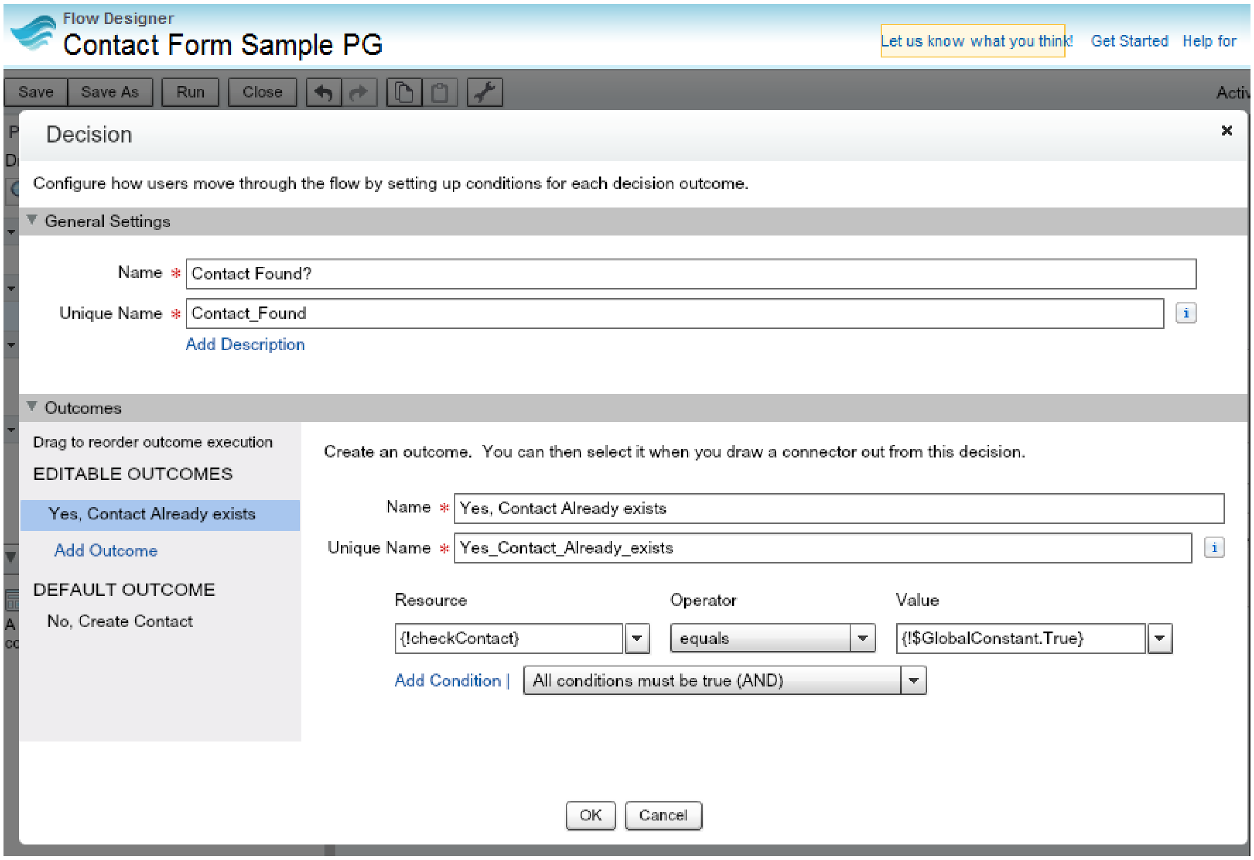

Step 3. Select Assigned Approver
Step 3 of 3
Previous
Save
Cancel
Specify the user who should approve records that enter this step. Optionally, choose whether the approver's delegate is also allowed to approve these requests.
Select Approver
Let the submitter choose the approver manually.
Automatically assign using the user field selected earlier. (Manager)
Automatically assign to approver(s).
User
Trevor Howard
Related User
--None--
Add Row Remove Row
When multiple approvers are selected:
Approve or reject based on the FIRST response.
Require UNANIMOUS approval from all selected approvers.
The approver's delegate may also approve this request.

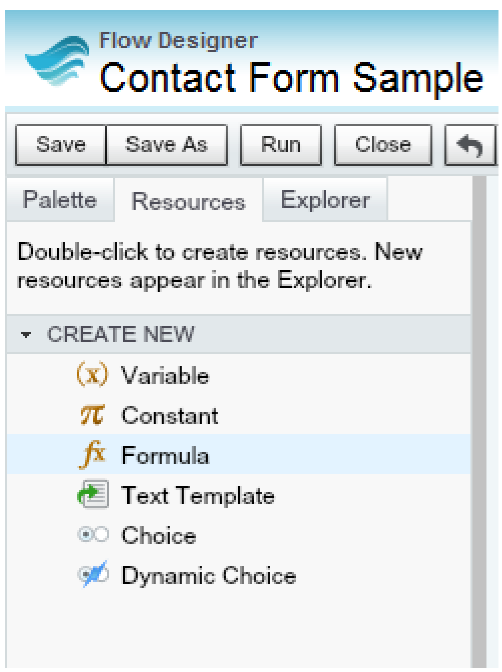

Approval Processes
Opportunity: Deals > 100k Review
« Back to Approval Process List
Help for
Process Definition Detail
Edit
Clone
Deactivate
View Diagram
Process Name
Deals > 100k Review
Active

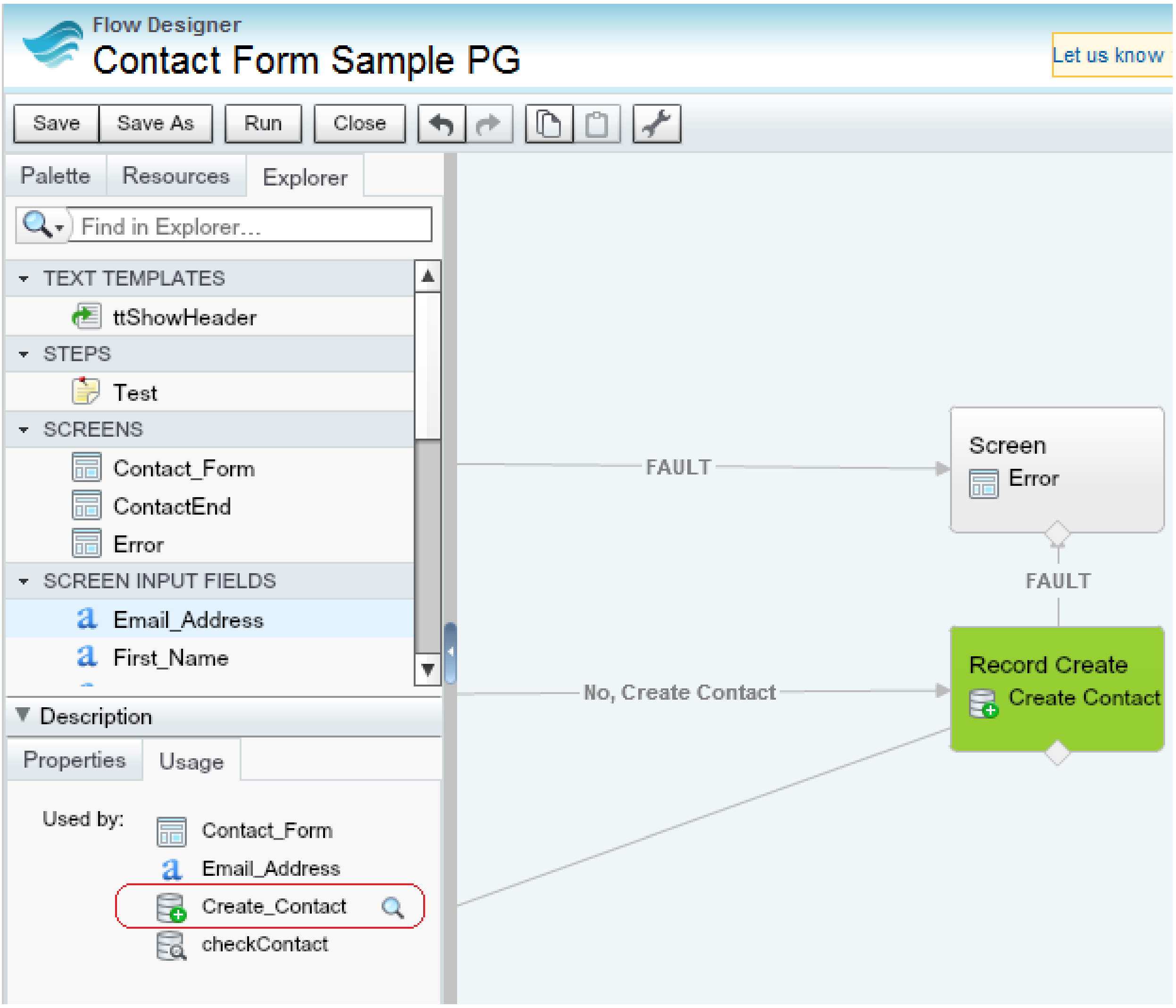

https://na10.salesforce.com/grape/grape.apexp?Id=04aF0000000PFce
Opportunity: Deals > 100k Review
Have feedback? Comment on this feature at IdeaExchange!
help link
Printable View
Refresh
Hide Legend
Hide Navigator
Previous
Next
Find in diagram...
Legend
Approval Step
Task
Email Alert
Field Update
Outbound Message
Approval Process Properties
Initial Submission Action
Record Locked
Entry Criteria
Yes
Start
Final Recall Act...
Record Unlocked
Opportunity Recalled
Initial Submissi...
Record Locked
Step 1
Manager Approval
Rejected
Final Rejection ...
Record Unlocked
Opportunity Rejected
Approved
Step 2
Director Approval
Rejected
Approved
Final Approval ...
Record

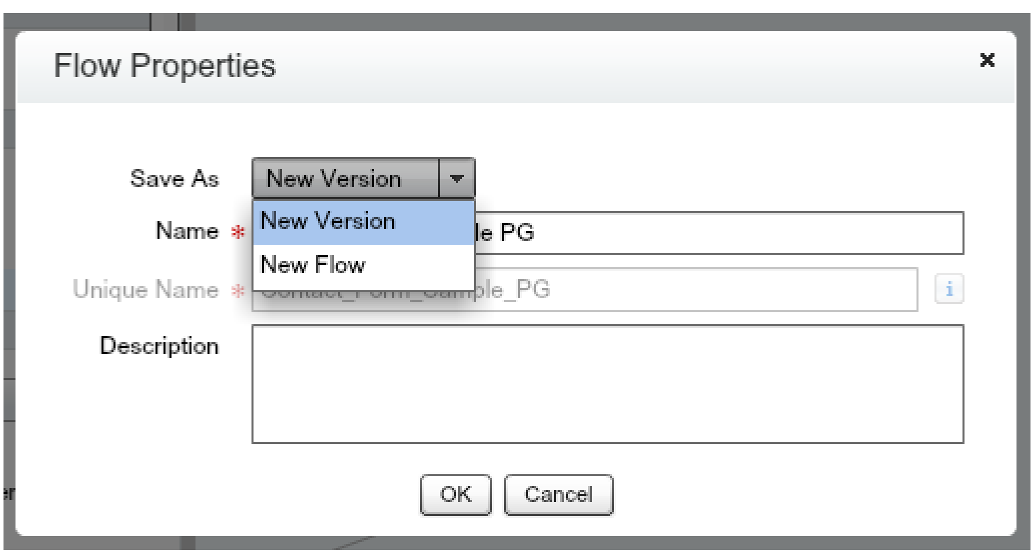

salesforce
Search
System Administr...
Help
Sales
Flow Designer
Contact Form Sample PG
Let us know what you think!
Get Started
Help for this Page
Save
Save As
Run
Close
Active
Palette
Resources
Explorer
Drag and drop elements onto the canvas
Find in Palette...
DRAFT TOOLS
Step
USER INTERFACE
Screen
LOGIC
Decision
Assignment
DATA
Record Create
Record Update
Record Lookup
Record Delete
FLOWS
Contact Form Sample
Contact Management
Convert Lead Apex Plug-...
Create and Attach PDF P...
Customer Satisfaction Su...
Flow Samples Browser
Forms By Flow
Get Apex Plug-in Body
Invoice Request Form Sa...
Description
Screen
Contact Form
Record Lookup
checkContact
FAULT
Screen
Error
FAULT
Decision
Contact Found?
No, Create Contact
Record Create
Create Contact
Yes, Contact Already exists
Screen
ContactEnd


Flow Designer
Contact Form Sample PG
Save
Save As
Run
Close
Screen
Use screens to collect user input or display output.
General Info
Add a Field
Field Settings
INPUTS
Textbox
Long Text Area
Number
Currency
Date
Password
Checkbox
CHOICES
Radio Buttons
Dropdown List
MULTI-SELECT CHOICES
Multi-Select Checkboxes
Multi-Select Picklist
OUTPUTS
Display Text
OK
Cancel

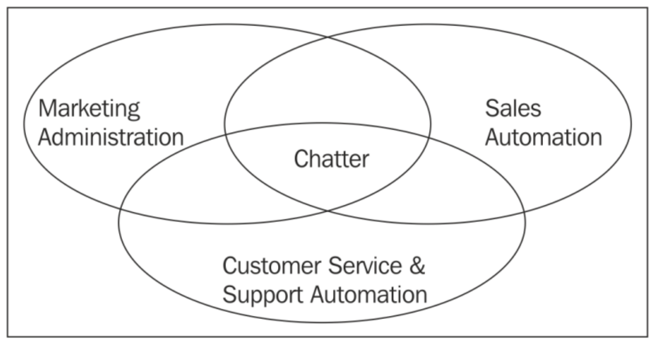

Flow Designer
Contact Form Sample PG
Let us know what you think!
Get Started
Help for
Save
Save As
Run
Close
Decision
Configure how users move through the flow by setting up conditions for each decision outcome.
General Settings
Name
Contact Found?
Unique Name
Contact_Found
Add Description
Outcomes
Drag to reorder outcome execution
EDITABLE OUTCOMES
Yes, Contact Already exists
Add Outcome
DEFAULT OUTCOME
No, Create Contact
Create an outcome. You can then select it when you draw a connector out from this decision.
Name
Yes, Contact Already exists
Unique Name
Yes_Contact_Already_exists
Resource
Operator
Value
{!checkContact}
equals
{!$GlobalConstant.True}
Add Condition |
All conditions must be true (AND)
OK
Cancel

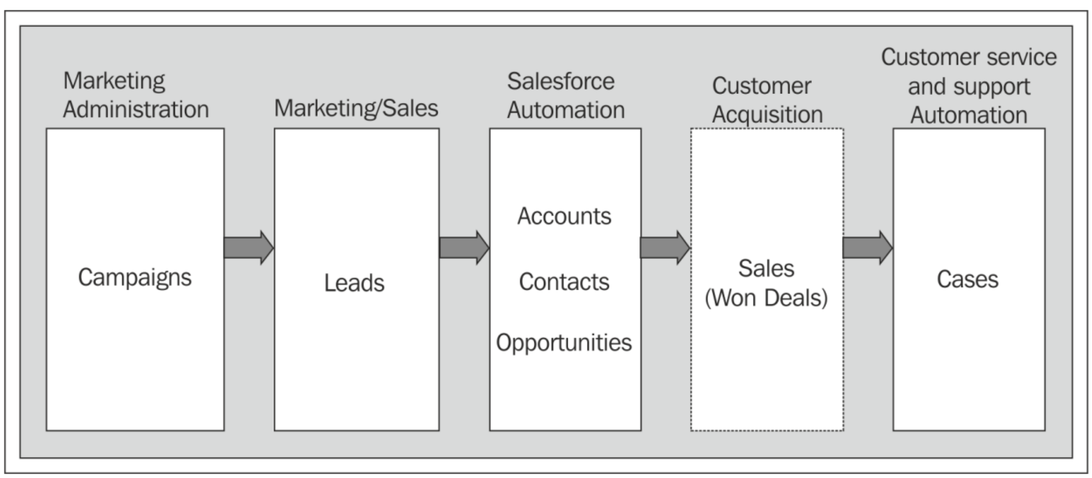

Flow Designer
Contact Form Sample
Save
Save As
Run
Close
Palette
Resources
Explorer
Double-click to create resources. New resources appear in the Explorer.
CREATE NEW
Variable
Constant
Formula
Text Template
Choice
Dynamic Choice

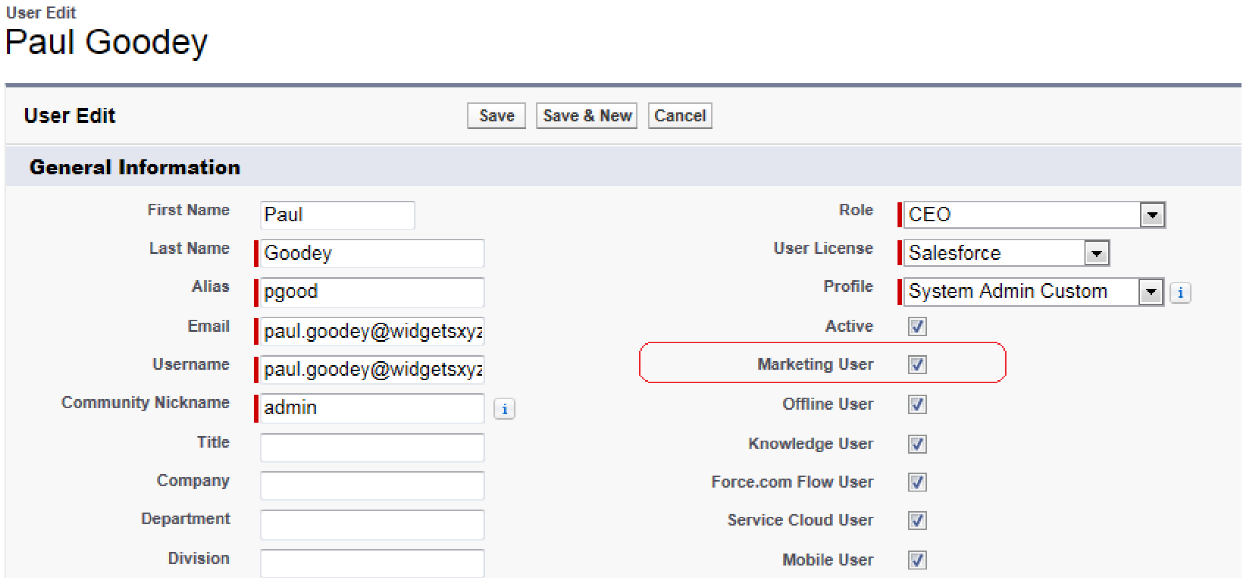

Flow Designer
Contact Form Sample PG
Let us know
Save
Save As
Run
Close
Palette
Resources
Explorer
Find in Explorer...
TEXT TEMPLATES
ttShowHeader
STEPS
Test
SCREENS
Contact_Form
ContactEnd
Error
SCREEN INPUT FIELDS
Email_Address
First_Name
Description
Properties
Usage
Used by:
Contact_Form
Email_Address
Create_Contact
checkContact
FAULT
Screen
Error
FAULT
No, Create Contact
Record Create
Create Contact

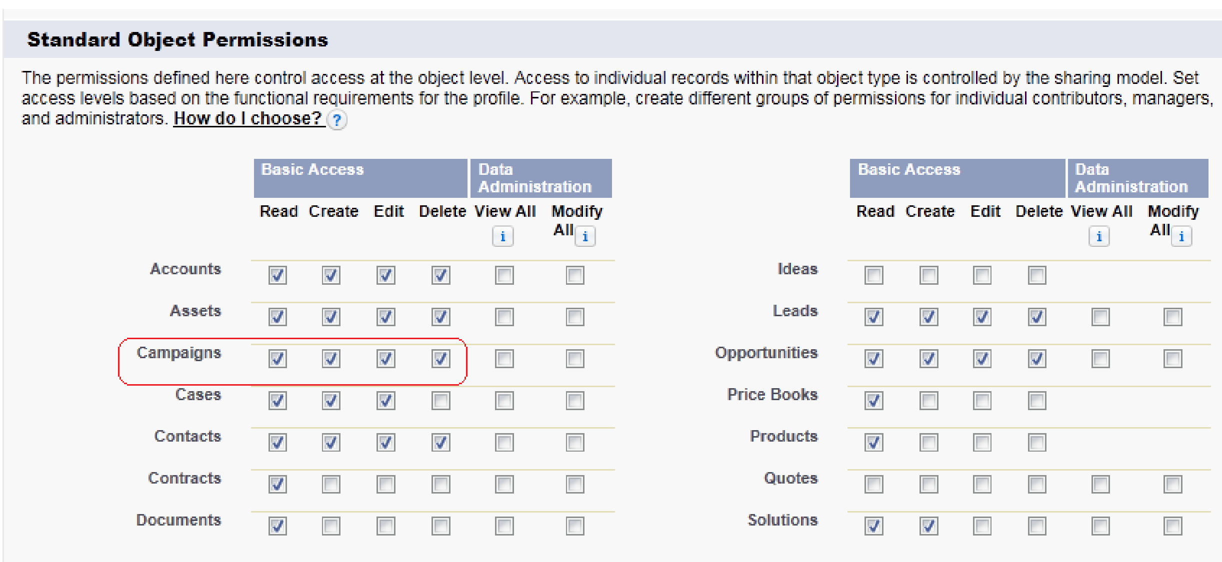

Flow Properties
Save As
New Version
New Version
New Flow
Name
le PG
Unique Name
ple_PG
Description
OK
Cancel

Chapter 7


Marketing
Administration
Sales
Automation
Chatter
Customer Service &
Support Automation


Marketing
Administration
Marketing/Sales
Salesforce
Automation
Customer
Acquisition
Customer service
and support
Automation
Campaigns
Leads
Accounts
Contacts
Opportunities
Sales
(Won Deals)
Cases


User Edit
Paul Goodey
User Edit
Save
Save & New
Cancel
General Information
First Name
Paul
Last Name
Goodey
Alias
pgood
Email
paul.goodey@widgetsxyz
Username
paul.goodey@widgetsxyz
Community Nickname
admin
Title
Company
Department
Division
Role
CEO
User License
Salesforce
Profile
System Admin Custom
Active
Marketing User
Offline User
Knowledge User
Force.com Flow User
Service Cloud User
Mobile User


Standard Object Permissions
The permissions defined here control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators. How do I choose?
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Accounts
Assets
Campaigns
Cases
Contacts
Contracts
Documents
Ideas
Leads
Opportunities
Price Books
Products
Quotes
Solutions

Campaign Fields

Help for this Page

This page allows you to specify the fields that can appear on the Campaign page. You can create up to 500 Campaign custom fields.

Note that deleting a custom field will delete any filters that use the custom field. It may also change the result of Assignment or Escalation Rules that rely on the custom field data.

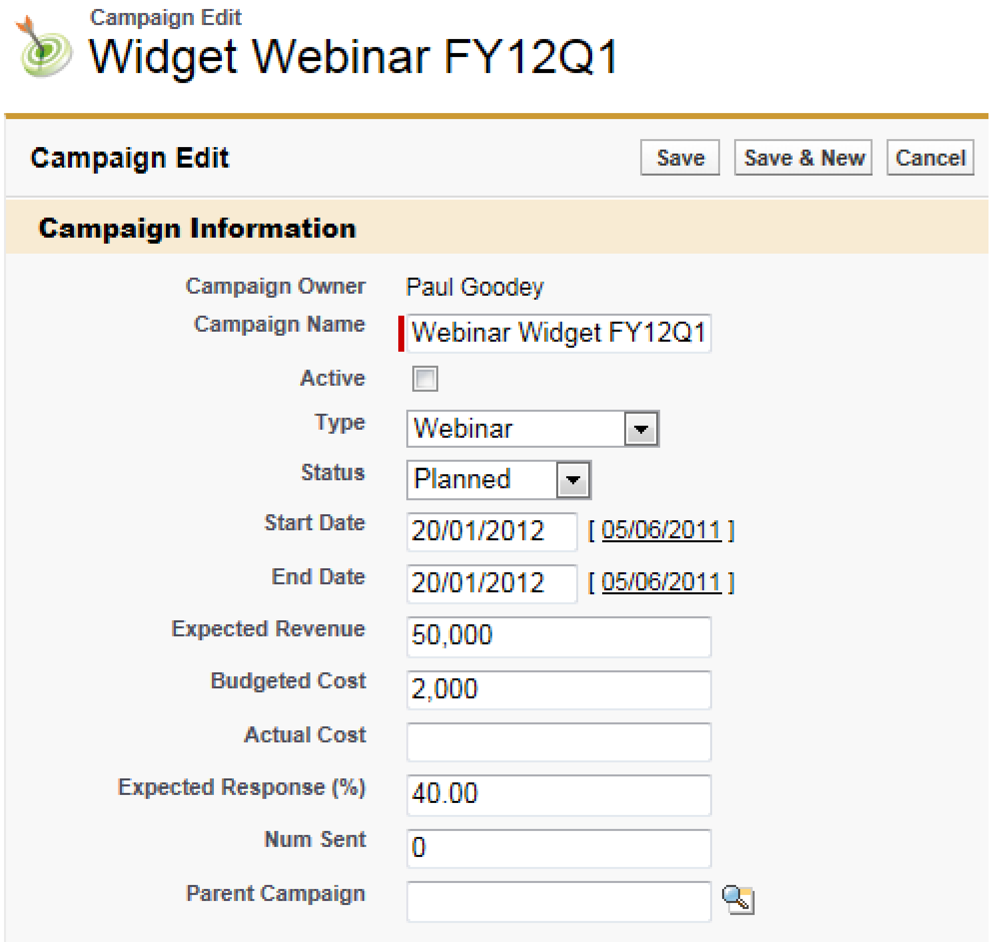
Campaign Standard Fields

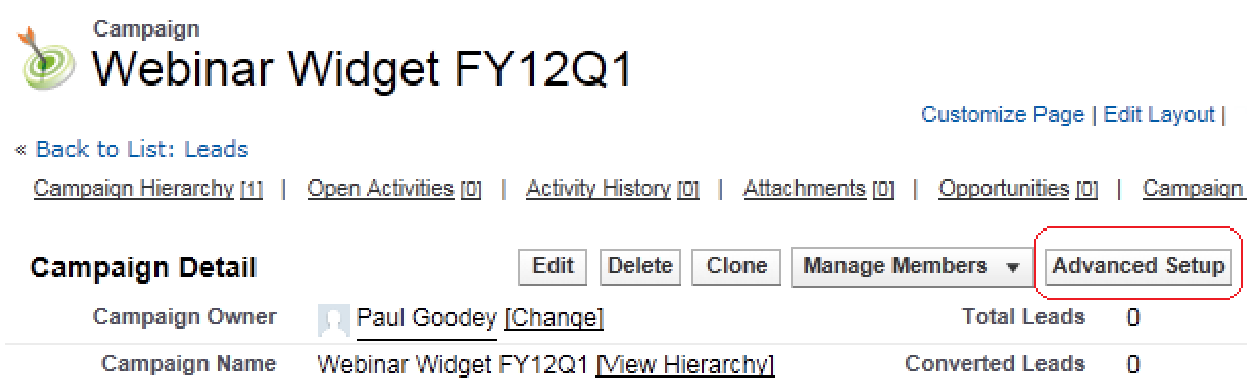
Campaign Standard Fields Help

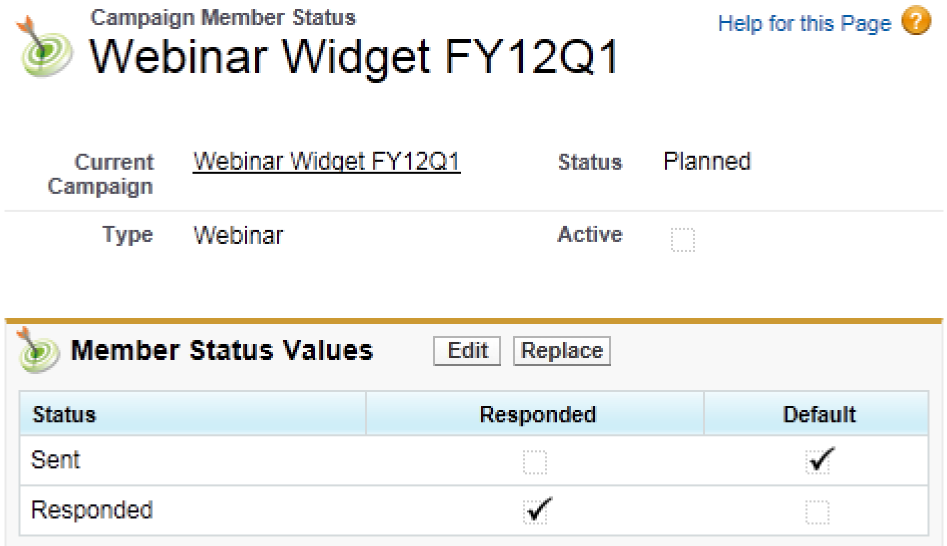
Action	Field Label	Field Name	Data Type	Controlling Field
Edit	Active	IsActive	Checkbox	
Edit	Actual Cost	ActualCost	Currency(18, 0)	
Edit	Budgeted Cost	BudgetedCost	Currency(18, 0)	
Edit	Campaign Member Type	CampaignMemberRecordType	Lookup(Record Type)	
Edit	Campaign Name	Name	Text(80)	
Edit	Campaign Owner	Owner	Lookup(User)	
Edit	Converted Leads	NumberOfConvertedLeads	Number(9, 0)	
	Created By	CreatedBy	Lookup(User)	
Edit	Description	Description	Long Text Area(32000)	
Edit	End Date	EndDate	Date	
Edit	Expected Response (%)	ExpectedResponse	Percent(8, 2)	
Edit	Expected Revenue	ExpectedRevenue	Currency(18, 0)	
	Last Modified By	LastModifiedBy	Lookup(User)	
Edit	Num Sent	NumberSent	Number(18, 0)	
Edit	Num Total Opportunities	NumberOfOpportunities	Number(9, 0)	
Edit	Num Won Opportunities	NumberOfWonOpportunities	Number(9, 0)	
Edit	Parent Campaign	Parent	Lookup(Campaign)	
Edit	Start Date	StartDate	Date	
Replace | Edit	Status	Status	Picklist	
Edit	Total Actual Cost in Hierarchy	HierarchyActualCost	Currency(18, 0)	
Edit	Total Budgeted Cost in Hierarchy	HierarchyBudgetedCost	Currency(18, 0)	
Edit	Total Contacts	NumberOfContacts	Number(9, 0)	
Edit	Total Contacts in Hierarchy	HierarchyNumberOfContacts	Number(9, 0)	
Edit	Total Converted Leads in Hierarchy	HierarchyNumberOfConvertedLeads	Number(9, 0)	
Edit	Total Expected Revenue in Hierarchy	HierarchyExpectedRevenue	Currency(18, 0)	
Edit	Total Leads	NumberOfLeads	Number(9, 0)	
Edit	Total Leads in Hierarchy	HierarchyNumberOfLeads	Number(9, 0)	
Edit	Total Num Sent in Hierarchy	HierarchyNumberSent	Number(18, 0)	
Edit	Total Opportunities in Hierarchy	HierarchyNumberOfOpportunities	Number(9, 0)	
Edit	Total Responses	NumberOfResponses	Number(9, 0)	
Edit	Total Responses in Hierarchy	HierarchyNumberOfResponses	Number(9, 0)	
Edit	Total Value Opportunities	AmountAllOpportunities	Currency(18, 0)	
Edit	Total Value Opportunities in Hierarchy	HierarchyAmountAllOpportunities	Currency(18, 0)	
Edit	Total Value Won Opportunities	AmountWonOpportunities	Currency(18, 0)	
Edit	Total Value Won Opportunities in Hierarchy	HierarchyAmountWonOpportunities	Currency(18, 0)	
Edit	Total Won Opportunities in Hierarchy	HierarchyNumberOfWonOpportunities	Number(9, 0)	
Replace | Edit	Type	Type	Picklist	

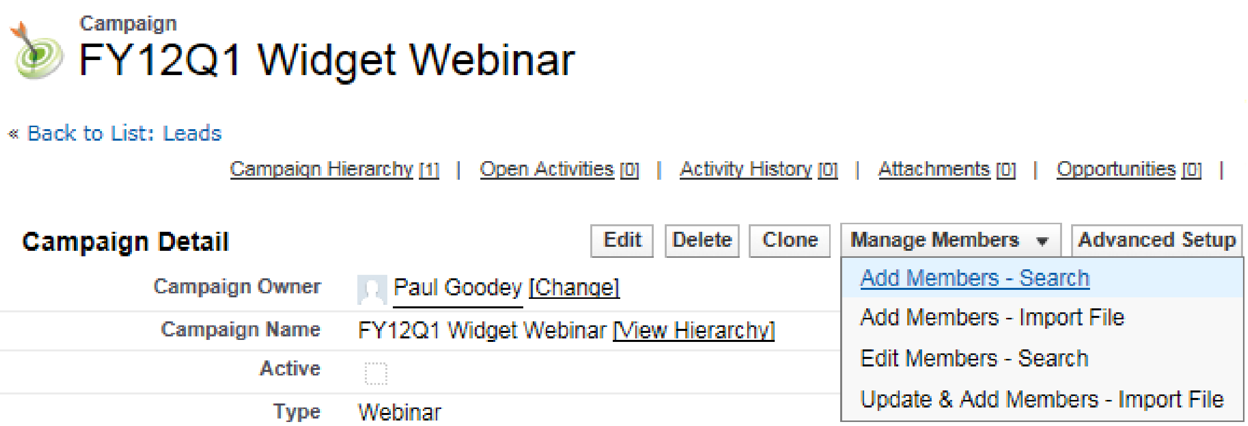
Campaign Member Standard Fields Campaign Member Standard Fields Help

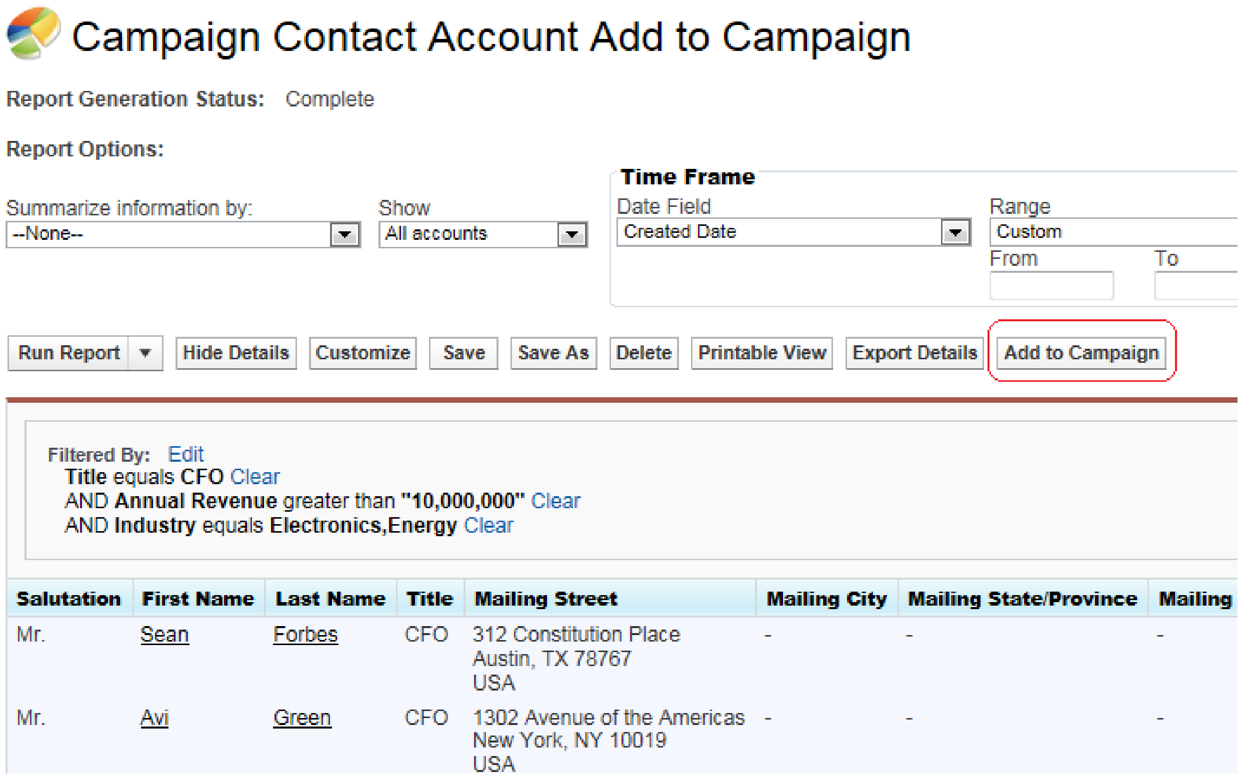
Action	Field Label	Field Name	Data Type	Controlling Field
Edit	Campaign	Campaign	Lookup(Campaign)	
Edit	City	City	Text(40)	
Edit	Company (Account)	CompanyOrAccount	Text(255)	
Edit	Contact	Contact	Lookup(Contact)	
Edit	Country	Country	Text(80)	
	Created By	CreatedBy	Lookup(User)	
	Created Date	CreatedDate	Date/Time	
Edit	Description	Description	Text(255)	
Edit	Do Not Call	DoNotCall	Checkbox	
Edit	Email	Email	Email	
Edit	Email Opt Out	HasOptedOutOfEmail	Checkbox	
Edit	Fax	Fax	Fax	
Edit	Fax Opt Out	HasOptedOutOfFax	Checkbox	
Edit	First Name	FirstName	Text(40)	
Edit	First Responded Date	FirstRespondedDate	Date	
	Last Modified By	LastModifiedBy	Lookup(User)	
	Last Modified Date	LastModifiedDate	Date/Time	
Edit	Last Name	LastName	Text(40)	
Edit	Lead	Lead	Lookup(Lead)	
Replace | Edit	Lead Source	LeadSource	Picklist	
Edit	Mobile	MobilePhone	Phone	
Edit	Phone	Phone	Phone	
Edit	Responded	HasResponded	Checkbox	
Replace | Edit	Salutation	Salutation	Picklist	
Edit	State/Province	State	Text(40)	
Replace | Edit	Status	Status	Picklist	
Edit	Street	Street	Text(255)	
Edit	Title	Title	Text(80)	
Edit	Zip/Postal Code	PostalCode	Text(20)	

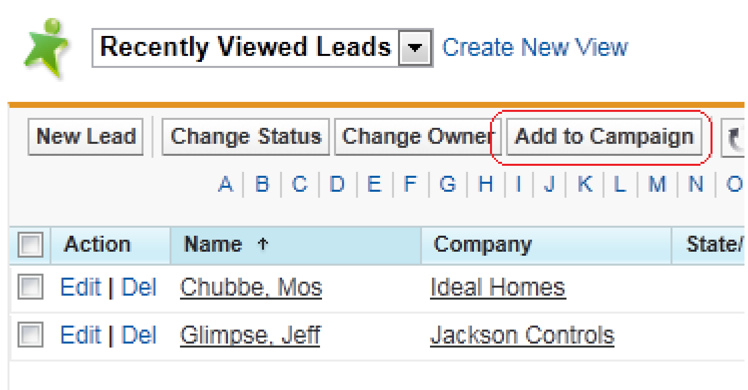

Campaign Edit
Widget Webinar FY12Q1
Campaign Edit
Save
Save & New
Cancel
Campaign Information
Campaign Owner
Paul Goodey
Campaign Name
Webinar Widget FY12Q1
Active
Type
Webinar
Status
Planned
Start Date
20/01/2012
[05/06/2011]
End Date
20/01/2012
[05/06/2011]
Expected Revenue
50,000
Budgeted Cost
2,000
Actual Cost
Expected Response (%)
40.00
Num Sent
0
Parent Campaign

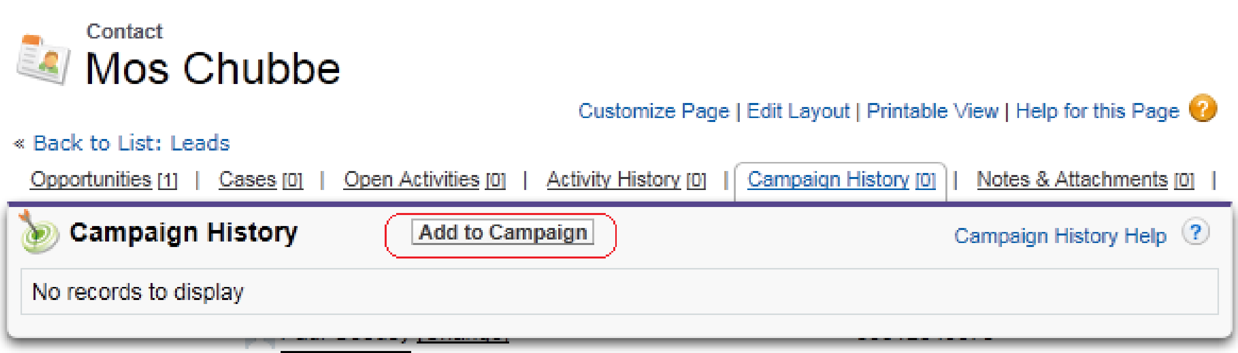

Campaign
Webinar Widget FY12Q1
Customize Page | Edit Layout |
« Back to List: Leads
Campaign Hierarchy [1] | Open Activities [0] | Activity History [0] | Attachments [0] | Opportunities [0] | Campaign
Campaign Detail
Edit
Delete
Clone
Manage Members
Advanced Setup
Campaign Owner
Paul Goodey [Change]
Total Leads
0
Campaign Name
Webinar Widget FY12Q1 [View Hierarchy]
Converted Leads
0

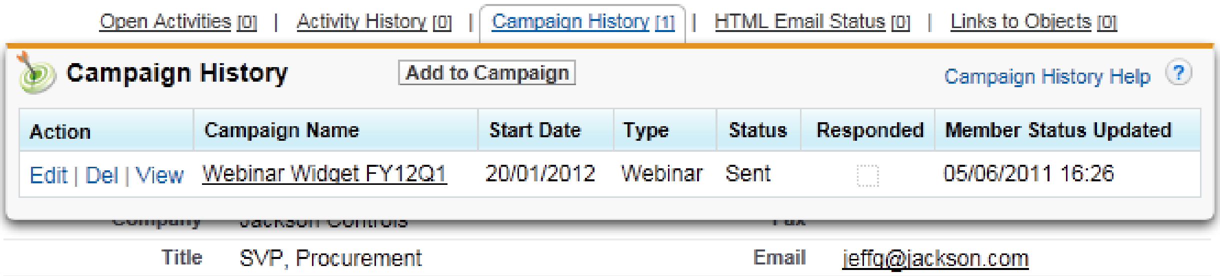

Campaign Member Status
Webinar Widget FY12Q1
Help for this Page
Current Campaign
Webinar Widget FY12Q1
Status
Planned
Type
Webinar
Active
Member Status Values
Edit
Replace
Status
Responded
Default
Sent
Responded


Campaign
FY12Q1 Widget Webinar
« Back to List: Leads
Campaign Hierarchy [1] | Open Activities [0] | Activity History [0] | Attachments [0] | Opportunities [0] |
Campaign Detail
Edit
Delete
Clone
Manage Members
Advanced Setup
Campaign Owner
Paul Goodey [Change]
Campaign Name
FY12Q1 Widget Webinar [View Hierarchy]
Active
Type
Webinar
Add Members - Search
Add Members - Import File
Edit Members - Search
Update & Add Members - Import File


Campaign Contact Account Add to Campaign
Report Generation Status: Complete
Report Options:
Summarize information by:
--None--
Show
All accounts
Time Frame
Date Field
Created Date
Range
Custom
From
To
Run Report
Hide Details
Customize
Save
Save As
Delete
Printable View
Export Details
Add to Campaign
Filtered By: Edit
Title equals CFO Clear
AND Annual Revenue greater than "10,000,000" Clear
AND Industry equals Electronics,Energy Clear
Salutation
First Name
Last Name
Title
Mailing Street
Mailing City
Mailing State/Province
Mailing
Mr. Sean Forbes CFO 312 Constitution Place Austin, TX 78767 USA - - -
Mr. Avi Green CFO 1302 Avenue of the Americas New York, NY 10019 USA - - -


Recently Viewed Leads
Create New View
New Lead
Change Status
Change Owner
Add to Campaign
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O
Action
Name ↑
Company
State/
Edit | Del Chubbe, Mos Ideal Homes
Edit | Del Glimpse, Jeff Jackson Controls


Contact
Mos Chubbe
Customize Page | Edit Layout | Printable View | Help for this Page
« Back to List: Leads
Opportunities [1] | Cases [0] | Open Activities [0] | Activity History [0] | Campaign History [0] | Notes & Attachments [0] |
Campaign History
Add to Campaign
Campaign History Help
No records to display

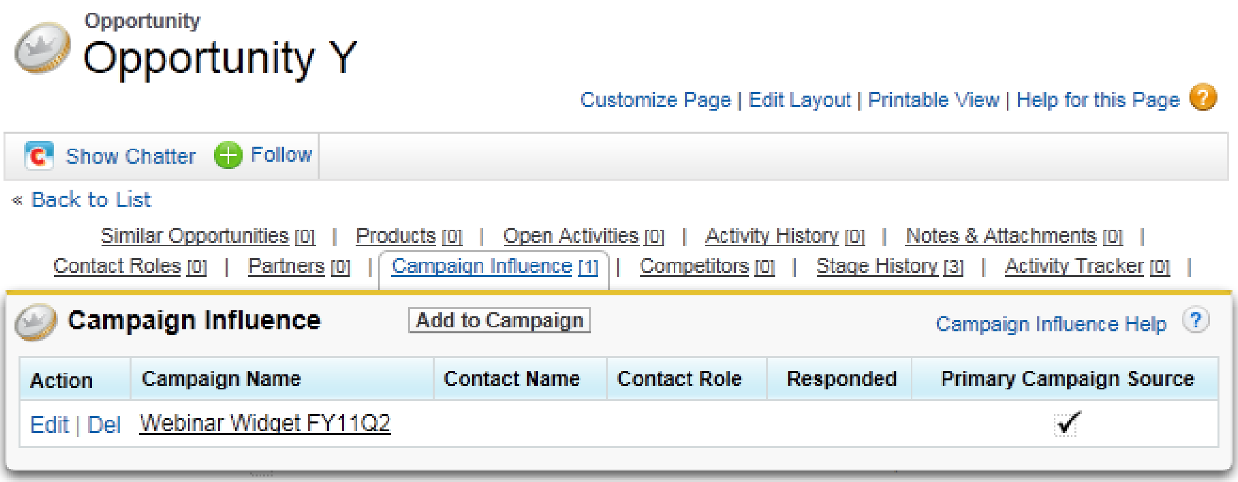


Open Activities [0] | Activity History [0] | Campaign History [1] | HTML Email Status [0] | Links to Objects [0]

Campaign History Add to Campaign Campaign History Help

Action	Campaign Name	Start Date	Type	Status	Responded	Member Status Updated
Edit | Del | View	Webinar Widget FY12Q1	20/01/2012	Webinar	Sent		05/06/2011 16:26

Title SVP, Procurement Email jeffg@jackson.com



Opportunity

Opportunity Y

Customize Page | Edit Layout | Printable View | Help for this Page

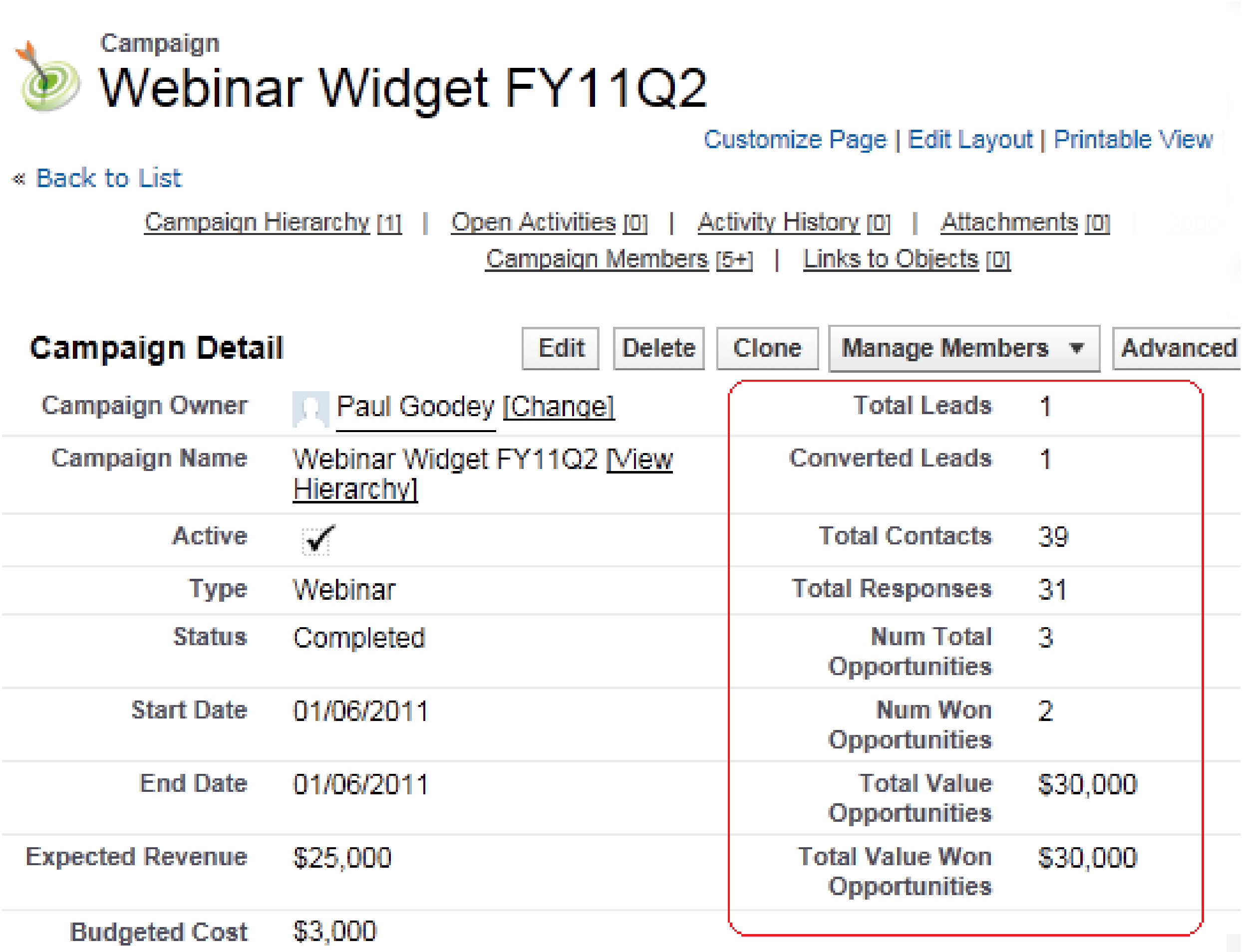
Show Chatter Follow

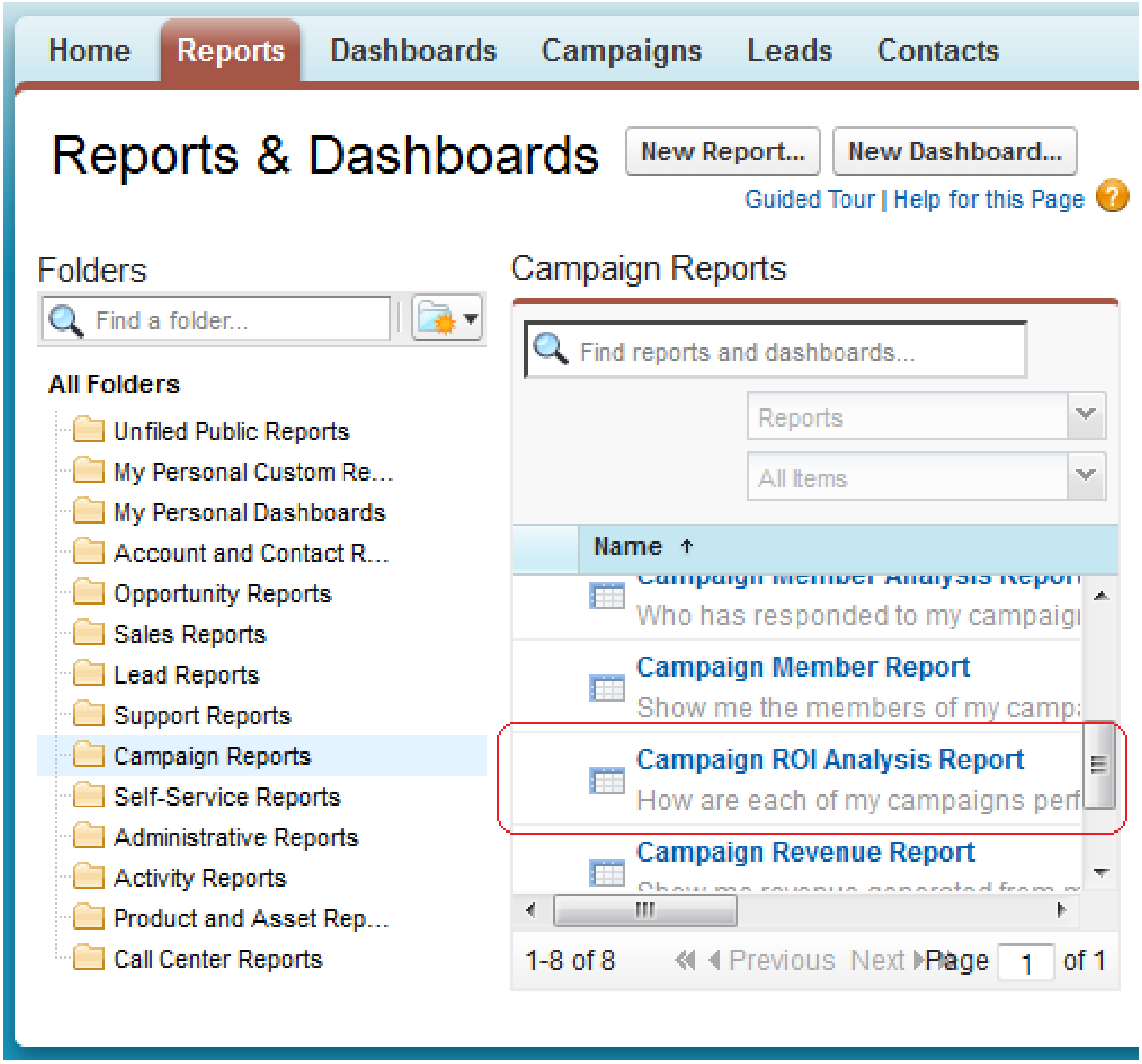
« Back to List

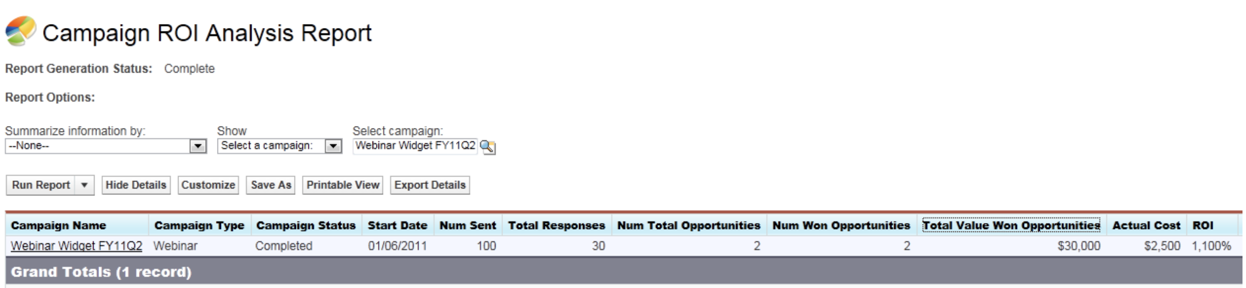
Similar Opportunities [0] | Products [0] | Open Activities [0] | Activity History [0] | Notes & Attachments [0] |
Contact Roles [0] | Partners [0] | Campaign Influence [1] | Competitors [0] | Stage History [3] | Activity Tracker [0] |

Campaign Influence Add to Campaign Campaign Influence Help

Action	Campaign Name	Contact Name	Contact Role	Responded	Primary Campaign Source
Edit | Del	Webinar Widget FY11Q2				✓


Campaign
Webinar Widget FY11Q2
Customize Page | Edit Layout | Printable View
« Back to List
Campaign Hierarchy [1] | Open Activities [0] | Activity History [0] | Attachments [0]
Campaign Members [5+] | Links to Objects [0]
Campaign Detail
Edit
Delete
Clone
Manage Members
Advanced
Campaign Owner
Paul Goodey [Change]
Campaign Name
Webinar Widget FY11Q2 [View Hierarchy]
Active
Type
Webinar
Status
Completed
Start Date
01/06/2011
End Date
01/06/2011
Expected Revenue
$25,000
Budgeted Cost
$3,000
Total Leads
1
Converted Leads
1
Total Contacts
39
Total Responses
31
Num Total Opportunities
3
Num Won Opportunities
2
Total Value Opportunities
$30,000
Total Value Won Opportunities
$30,000

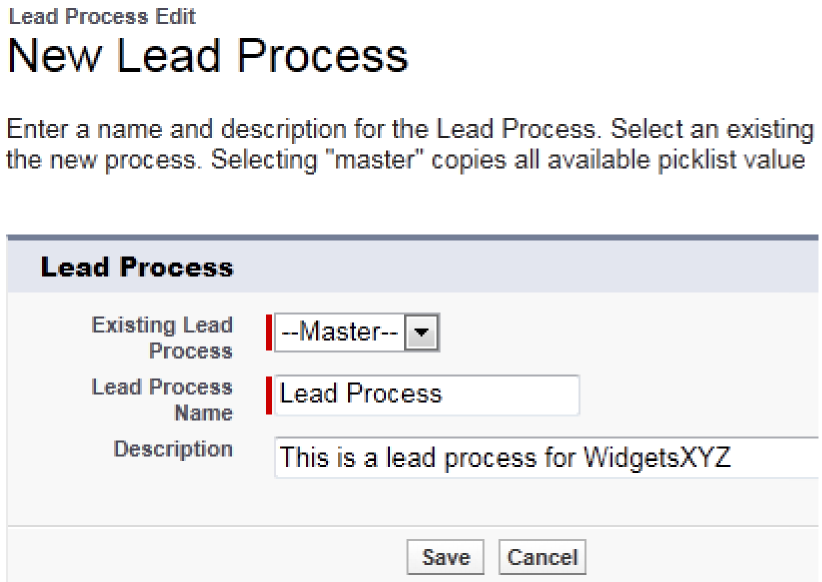


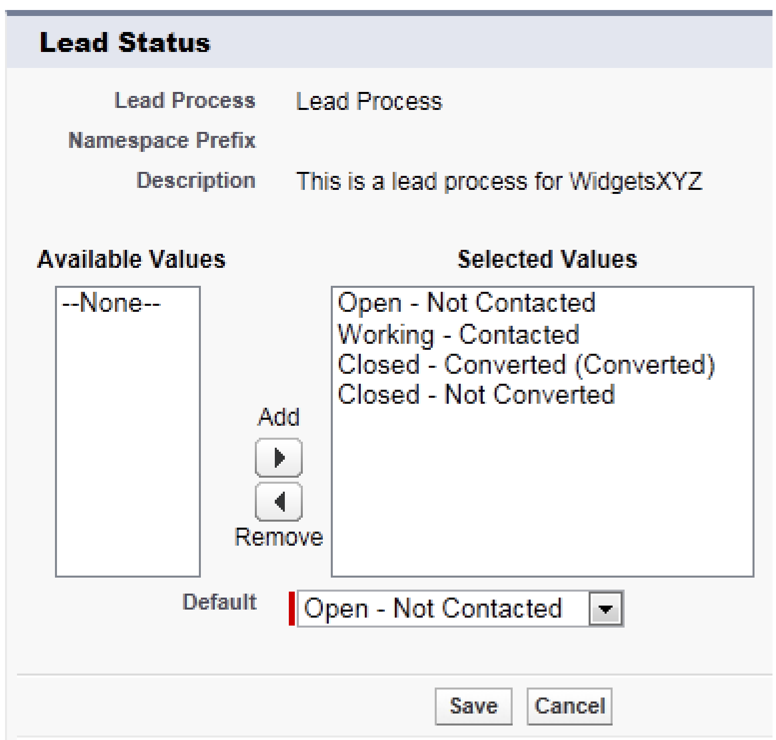


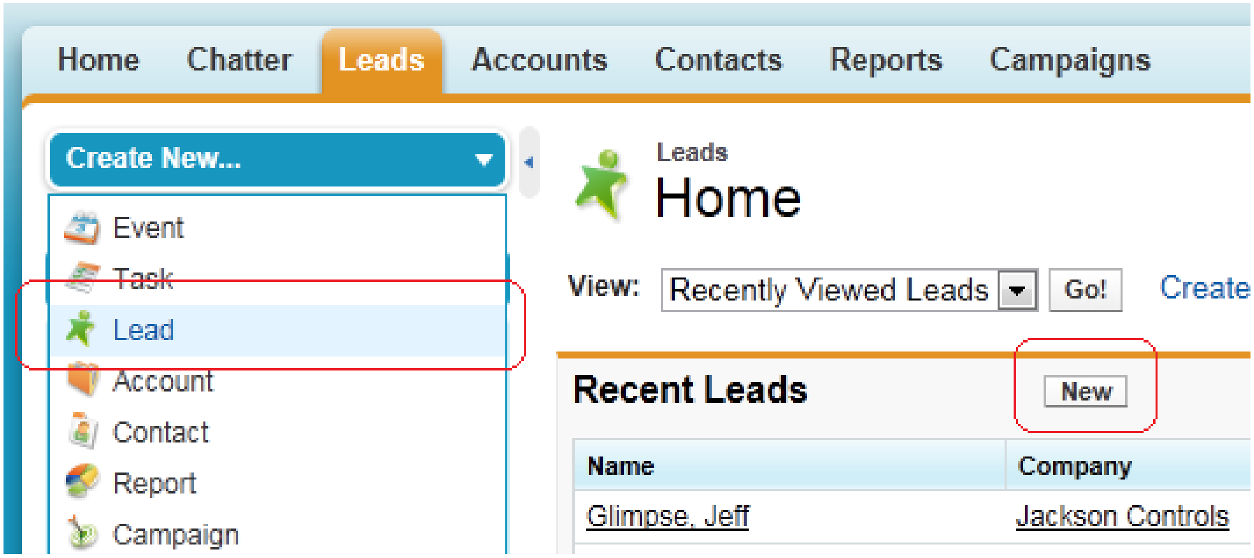
Campaign Name	Campaign Type	Campaign Status	Start Date	Num Sent	Total Responses	Num Total Opportunities	Num Won Opportunities	Total Value Won Opportunities	Actual Cost	ROI
Webinar Widget FY11Q2	Webinar	Completed	01/06/2011	100	30	2	2	$30,000	$2,500	1,100%
Grand Totals (1 record)										

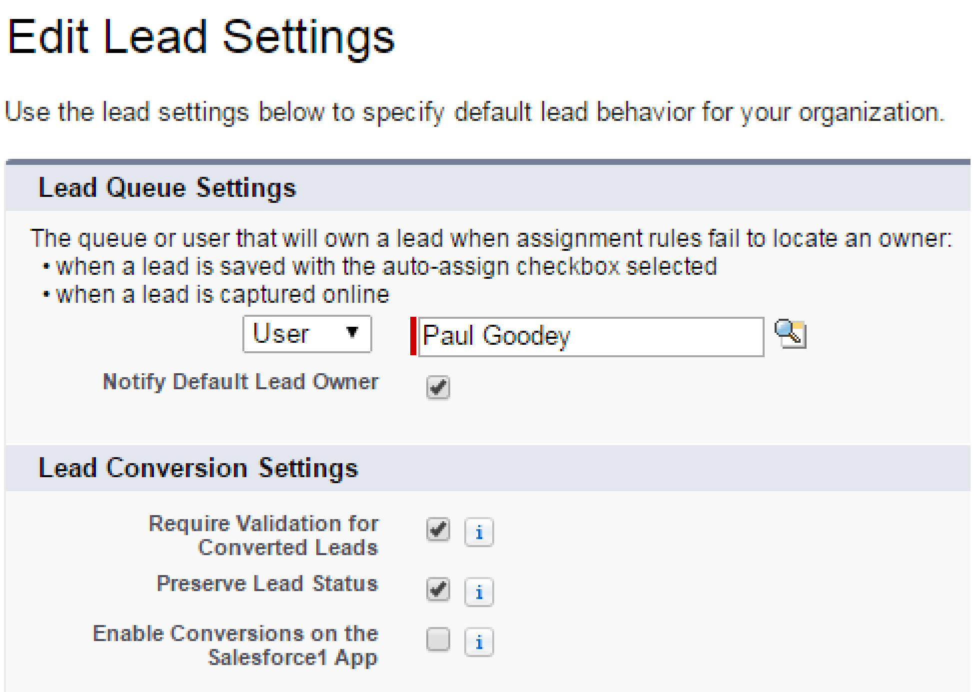
Lead Standard Fields

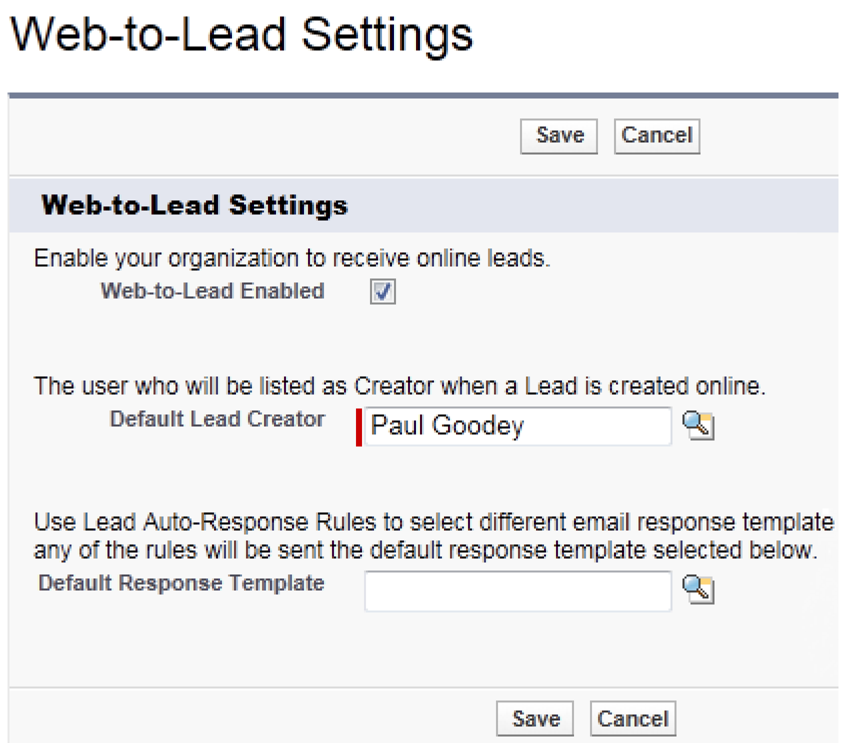
Action	Field Label	Field Name	Data Type
	Address	Address	Address
Edit	Annual Revenue	AnnualRevenue	Currency(18, 0)
Edit	Campaign	Campaign	Lookup(Campaign)
Edit	Company	Company	Text(255)
	Created By	CreatedBy	Lookup(User)
Edit	Description	Description	Long Text Area(32000)
Edit	Do Not Call	DoNotCall	Checkbox
Edit	Email	Email	Email
Edit	Email Opt Out	HasOptedOutOfEmail	Checkbox
Edit	Fax	Fax	Fax
Edit	Fax Opt Out	HasOptedOutOfFax	Checkbox
Replace | Edit	Industry	Industry	Picklist
	Last Modified By	LastModifiedBy	Lookup(User)
Edit	Last Transfer Date	LastTransferDate	Date
Edit	Lead Owner	Owner	Lookup(User,Queue)
Replace | Edit	Lead Source	LeadSource	Picklist
Replace | Edit	Lead Status	Status	Picklist
Edit	Mobile	MobilePhone	Phone
	Name	Name	Name
Edit | Replace	Salutation	Picklist	
	First Name	Text(40)	
	Last Name	Text(80)	
Edit	No. of Employees	NumberOfEmployees	Number(8, 0)
Edit	Phone	Phone	Phone
Replace | Edit	Rating	Rating	Picklist
Edit	Title	Title	Text(80)
Edit	Website	Website	URL(255)

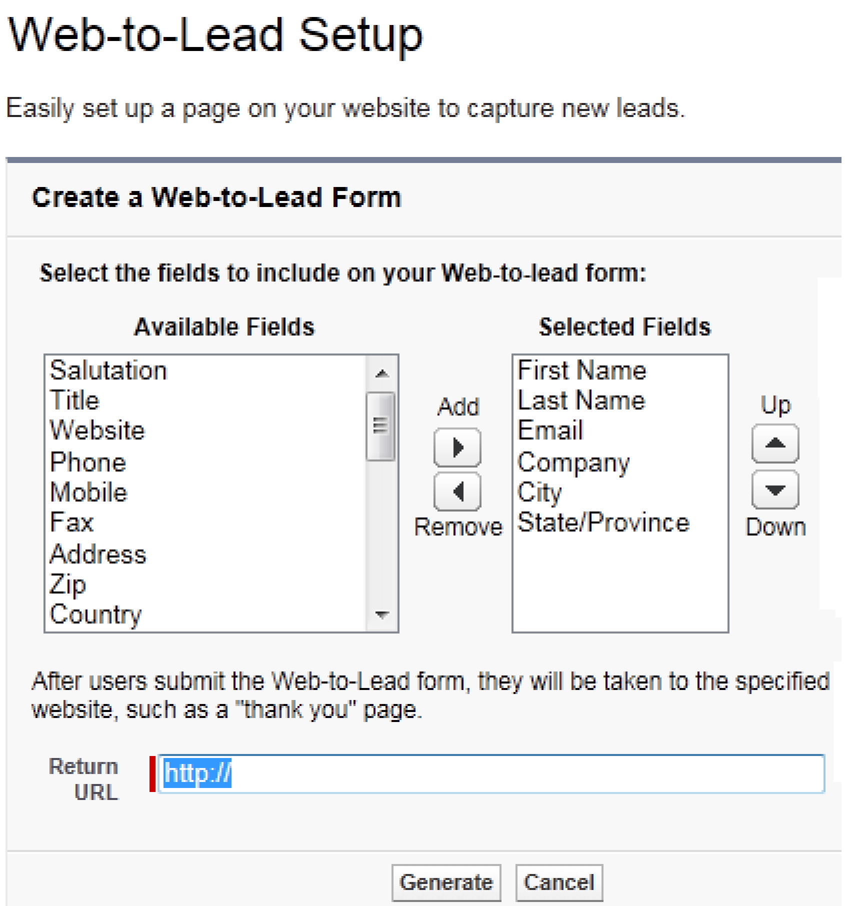

Lead Process Edit
New Lead Process
Enter a name and description for the Lead Process. Select an existing
the new process. Selecting "master" copies all available picklist value
Lead Process
Existing Lead Process
--Master--
Lead Process Name
Lead Process
Description
This is a lead process for WidgetsXYZ
Save
Cancel

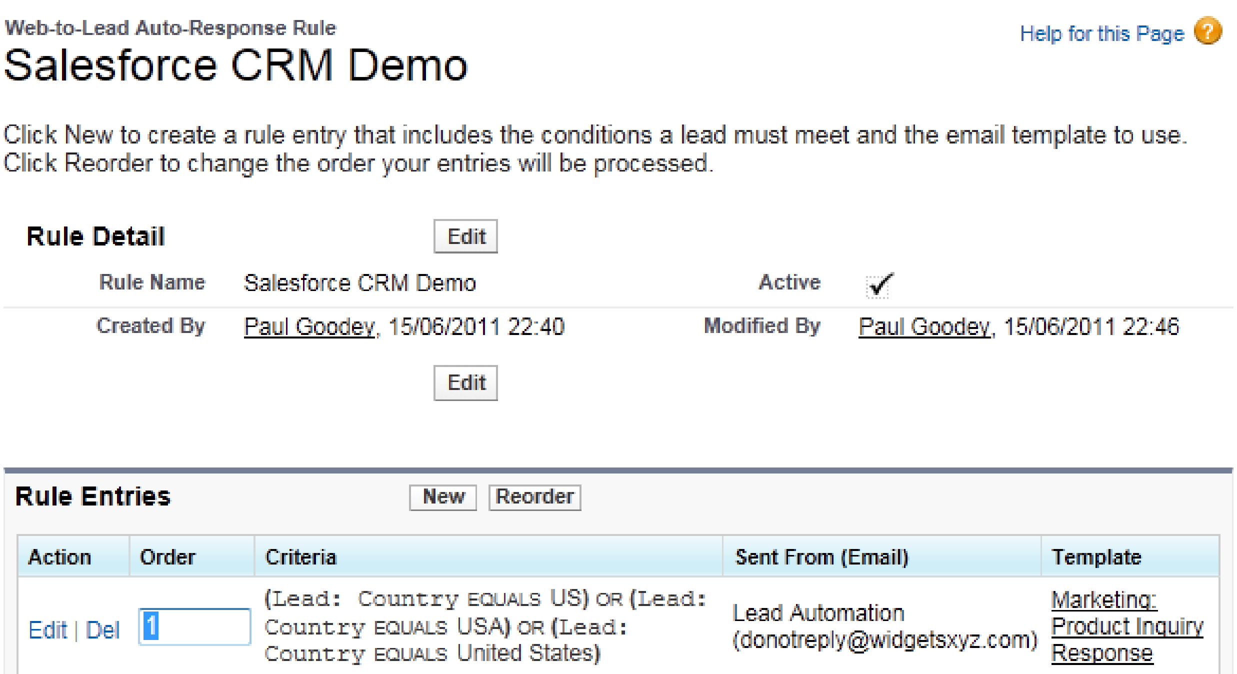

Lead Status
Lead Process
Lead Process
Namespace Prefix
Description
This is a lead process for WidgetsXYZ
Available Values
Selected Values
--None--
Open - Not Contacted
Working - Contacted
Closed - Converted (Converted)
Closed - Not Converted
Add
Remove
Default
Open - Not Contacted
Save
Cancel

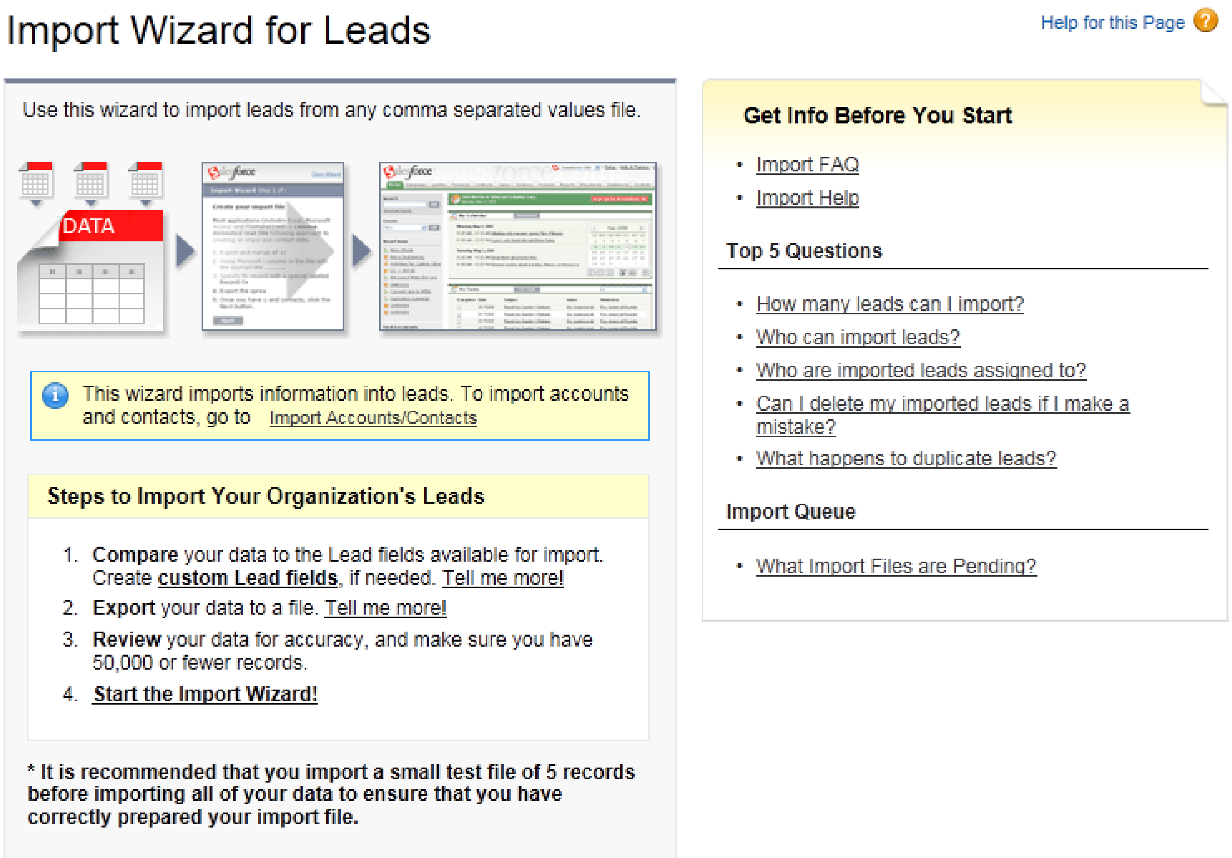

Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Create New...
Event
Task
Lead
Account
Contact
Report
Campaign
Leads
Home
View:
Recently Viewed Leads
Go!
Create
Recent Leads
New
Name
Company
Glimpse, Jeff
Jackson Controls

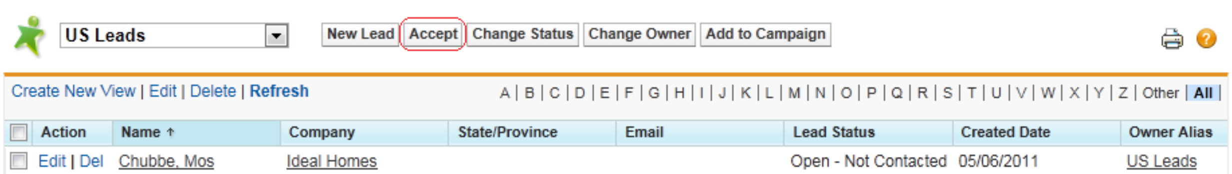

Edit Lead Settings
Use the lead settings below to specify default lead behavior for your organization.
Lead Queue Settings
The queue or user that will own a lead when assignment rules fail to locate an owner:
• when a lead is saved with the auto-assign checkbox selected
• when a lead is captured online
User
Paul Goodey
Notify Default Lead Owner
Lead Conversion Settings
Require Validation for Converted Leads
Preserve Lead Status
Enable Conversions on the Salesforce1 App

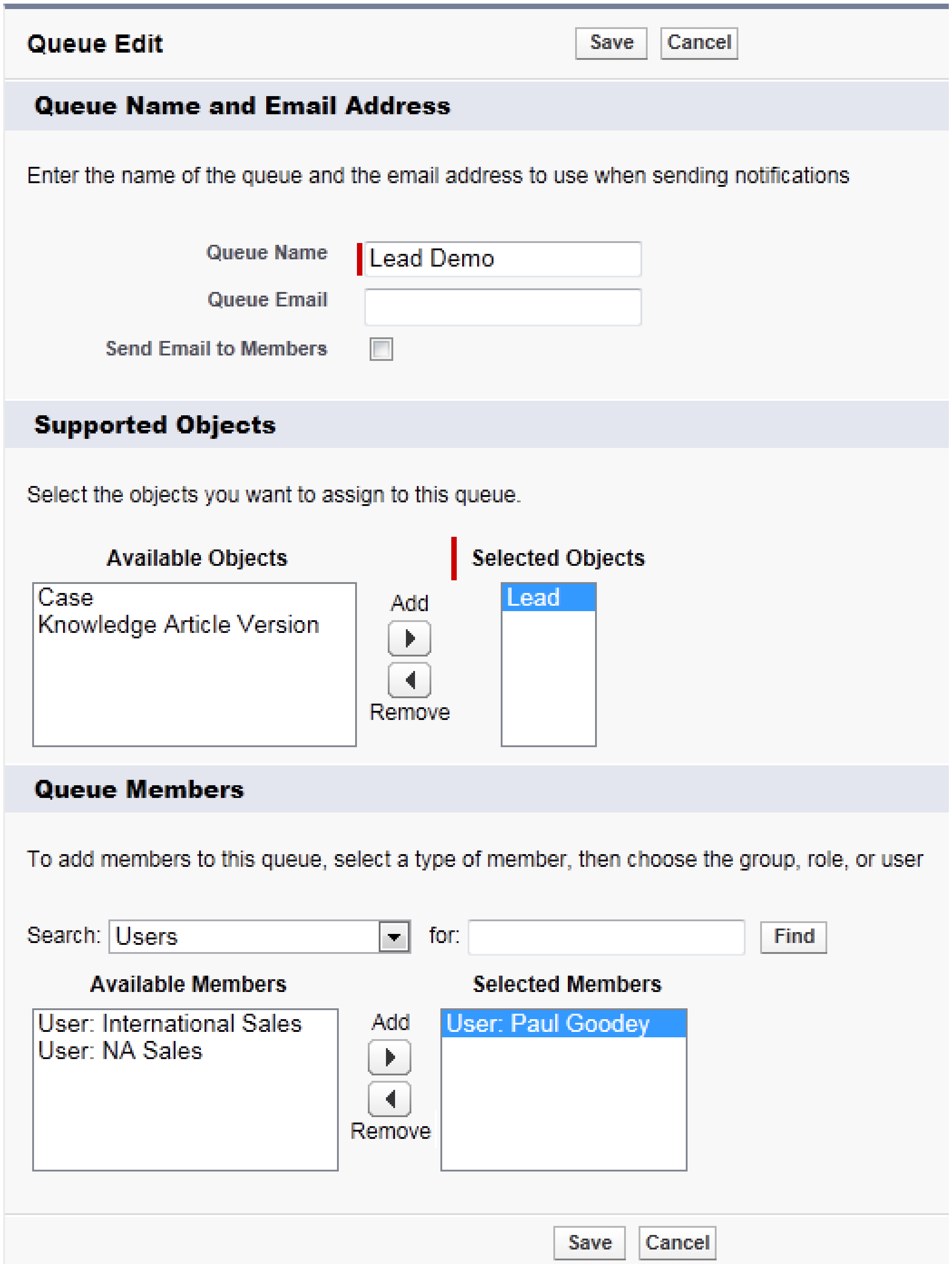

Web-to-Lead Settings
Save
Cancel
Web-to-Lead Settings
Enable your organization to receive online leads.
Web-to-Lead Enabled
The user who will be listed as Creator when a Lead is created online.
Default Lead Creator
Paul Goodey
Use Lead Auto-Response Rules to select different email response template
any of the rules will be sent the default response template selected below.
Default Response Template
Save
Cancel


Web-to-Lead Setup
Easily set up a page on your website to capture new leads.
Create a Web-to-Lead Form
Select the fields to include on your Web-to-lead form:
Available Fields
Salutation
Title
Website
Phone
Mobile
Fax
Address
Zip
Country
Add
Remove
Selected Fields
First Name
Last Name
Email
Company
City
State/Province
Up
Down
After users submit the Web-to-Lead form, they will be taken to the specified website, such as a "thank you" page.
Return URL
http://
Generate
Cancel


Web-to-Lead Auto-Response Rule
Salesforce CRM Demo
Help for this Page
Click New to create a rule entry that includes the conditions a lead must meet and the email template to use.
Click Reorder to change the order your entries will be processed.
Rule Detail
Edit
Rule Name
Salesforce CRM Demo
Active
Created By
Paul Goodey, 15/06/2011 22:40
Modified By
Paul Goodey, 15/06/2011 22:46
Edit
Rule Entries
New
Reorder
Action
Order
Criteria
Sent From (Email)
Template
Edit | Del
1
(Lead: Country EQUALS US) OR (Lead: Country EQUALS USA) OR (Lead: Country EQUALS United States)
Lead Automation (donotreply@widgetsxyz.com)
Marketing: Product Inquiry Response


Import Wizard for Leads
Help for this Page
Use this wizard to import leads from any comma separated values file.
DATA
This wizard imports information into leads. To import accounts and contacts, go to Import Accounts/Contacts
Steps to Import Your Organization's Leads
1. Compare your data to the Lead fields available for import. Create custom Lead fields, if needed. Tell me more!
2. Export your data to a file. Tell me more!
3. Review your data for accuracy, and make sure you have 50,000 or fewer records.
4. Start the Import Wizard!
* It is recommended that you import a small test file of 5 records before importing all of your data to ensure that you have correctly prepared your import file.
Get Info Before You Start
Import FAQ
Import Help
Top 5 Questions
How many leads can I import?
Who can import leads?
Who are imported leads assigned to?
Can I delete my imported leads if I make a mistake?
What happens to duplicate leads?
Import Queue
What Import Files are Pending?


US Leads
New Lead
Accept
Change Status
Change Owner
Add to Campaign
Create New View | Edit | Delete | Refresh
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 ↑
Company
State/Province
Email
Lead Status
Created Date
Owner Alias
Edit | Del
Chubbe, Mos
Ideal Homes
Open - Not Contacted
05/06/2011
US Leads


Queue Edit
Save
Cancel
Queue Name and Email Address
Enter the name of the queue and the email address to use when sending notifications
Queue Name
Lead Demo
Queue Email
Send Email to Members
Supported Objects
Select the objects you want to assign to this queue.
Available Objects
Selected Objects
Case
Knowledge Article Version
Add
Remove
Lead
Queue Members
To add members to this queue, select a type of member, then choose the group, role, or user
Search:
Users
for:
Find
Available Members
Selected Members
User: International Sales
User: NA Sales
Add
Remove
User: Paul Goodey
Save
Cancel

Lead Assignment Rules

Help for this Page

Lead Assignment Rules allow you to automatically route leads to the appropriate users or queues. A Lead Assignment Rule consists of multiple rule entries that define the conditions and order for assigning leads.

New

Action	Rule Name	Active	Created By	Created On
Rename | Del	Standard	✓	Paul Goodey	19/12/2009
Rename | Del	test		Paul Goodey	03/02/2010

Lead Assignment Rule

Standard

Help for this Page

Create the rule entries to automatically assign leads to users or queues based on the criteria specified in the rule entries. You can reorder the entries from this page after creating them.

Rule Detail

Edit

Rule Name	Standard	Active	✓
Created By	Paul Goodey, 19/12/2009 13:01	Modified By	Paul Goodey, 15/06/2011 20:45

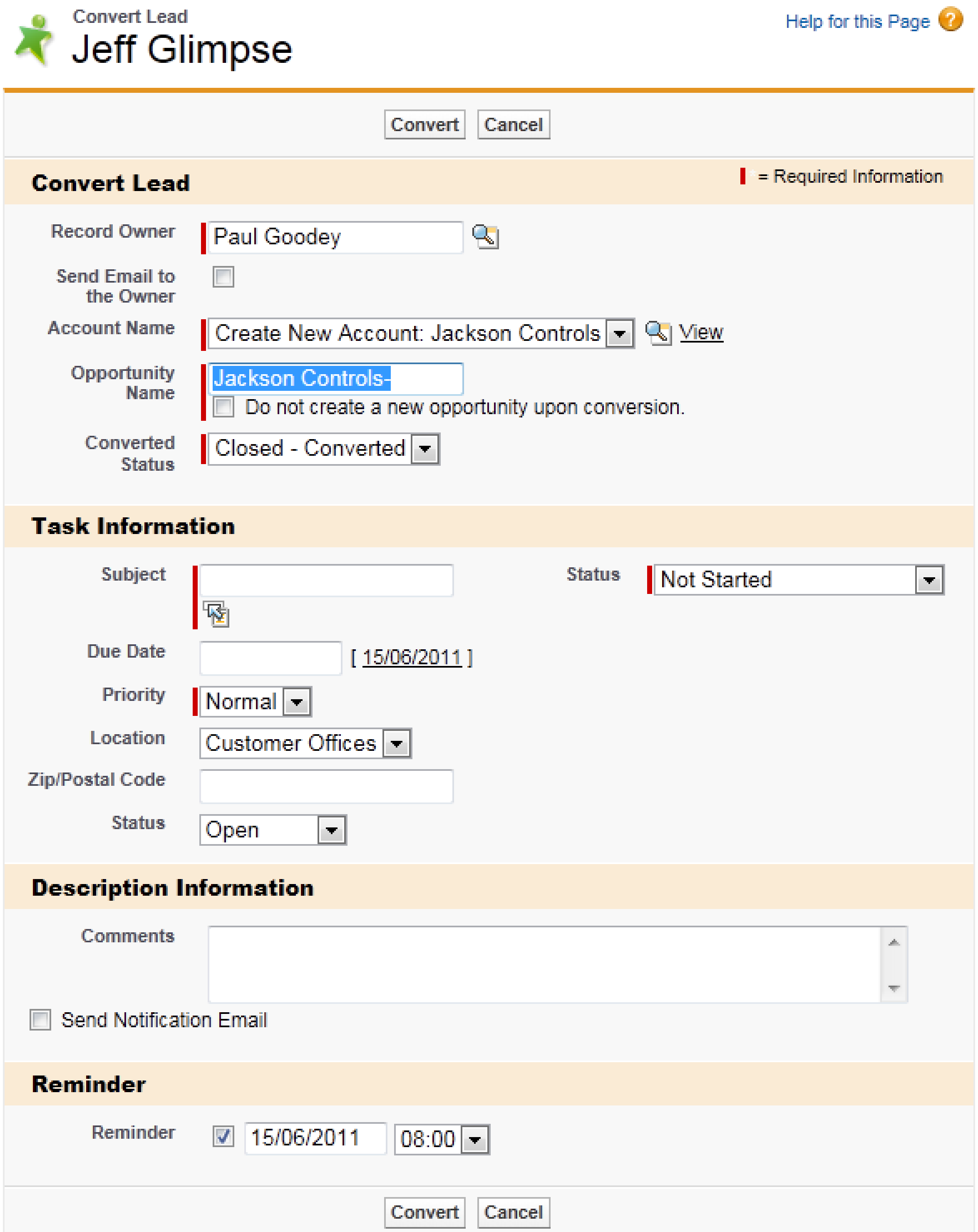
Edit

Rule Entries

New Reorder

Action	Order	Criteria	Assign To	Email
Edit | Del	1	Lead: Country EQUALS US,USA,United States,United States of America	Paul Goodey	
Edit | Del	2	Lead: Country NOT EQUAL TO US,USA,United States,United States of America	Trevor Howard	


Lead
Mr Jeff Glimpse
Customize
« Back to List: Leads
Open Activities [0] | Activity History [0] | Campaign History [1]
Lead Detail
Edit
Delete
Convert
Lead Owner
Paul Goodey [Change]
Name
Mr Jeff Glimpse
Company
Jackson Controls



Convert Lead

Jeff Glimpse

Help for this Page

Convert | Cancel

Convert Lead

= Required Information

Record Owner: Paul Goodey

Send Email to the Owner: ☐

Account Name: Create New Account: Jackson Controls | View

Opportunity Name: Jackson Controls-

☐ Do not create a new opportunity upon conversion.

Converted Status: Closed - Converted

Task Information

Subject:

Status: Not Started

Due Date: [15/06/2011]

Priority: Normal

Location: Customer Offices

Zip/Postal Code:

Status: Open

Description Information

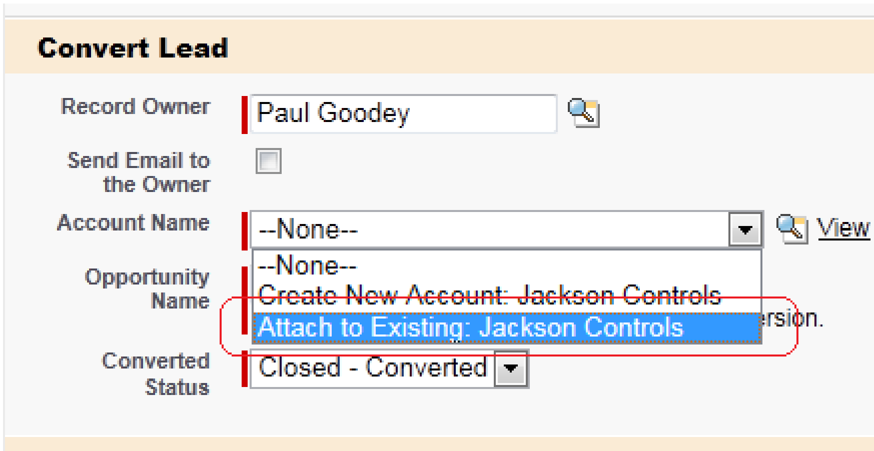
Comments:

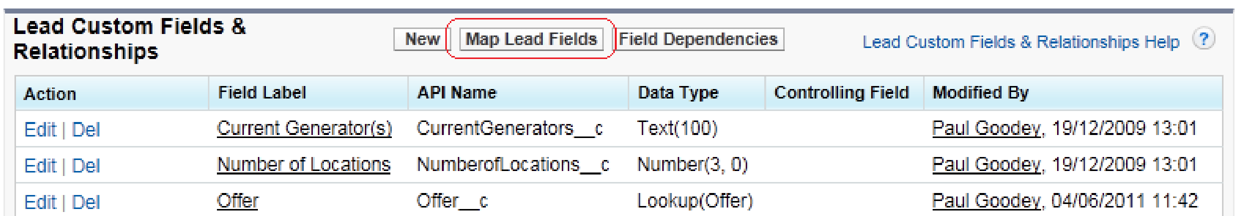
☐ Send Notification Email

Reminder

Reminder: ☑ 15/06/2011 08:00

Convert | Cancel

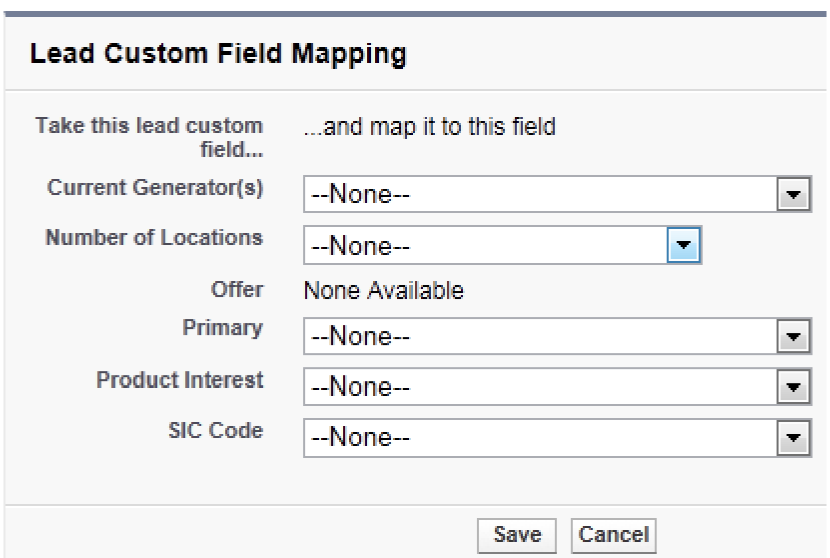


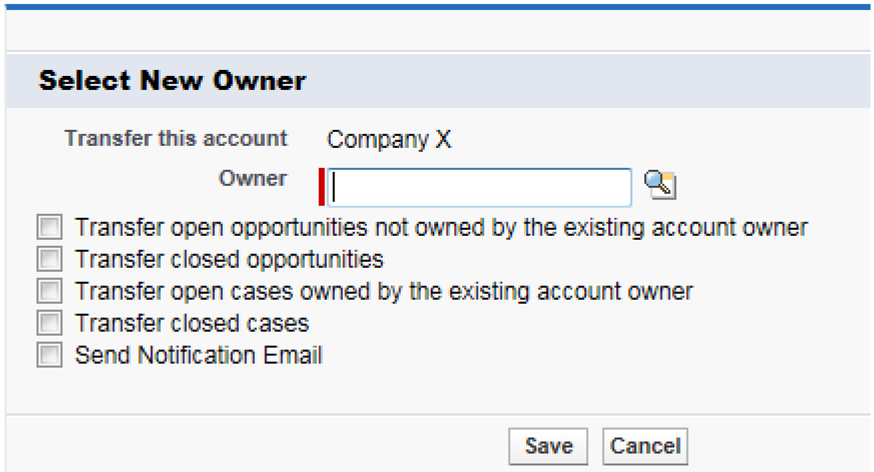

Lead Custom Fields & Relationships
New | Map Lead Fields | Field Dependencies
Lead Custom Fields & Relationships Help

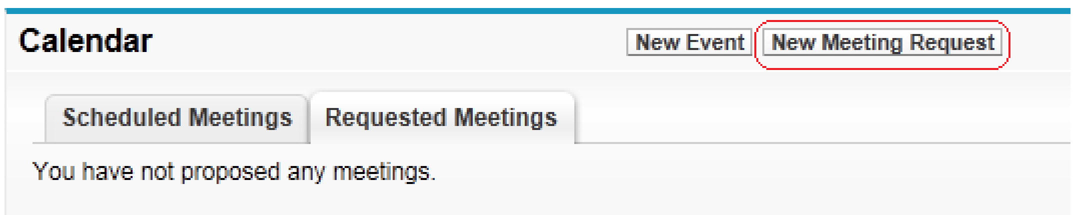
Action	Field Label	API Name	Data Type	Controlling Field	Modified By
Edit | Del	Current Generator(s)	CurrentGenerators__c	Text(100)		Paul Goodey, 19/12/2009 13:01
Edit | Del	Number of Locations	NumberofLocations__c	Number(3, 0)		Paul Goodey, 19/12/2009 13:01
Edit | Del	Offer	Offer__c	Lookup(Offer)		Paul Goodey, 04/06/2011 11:42

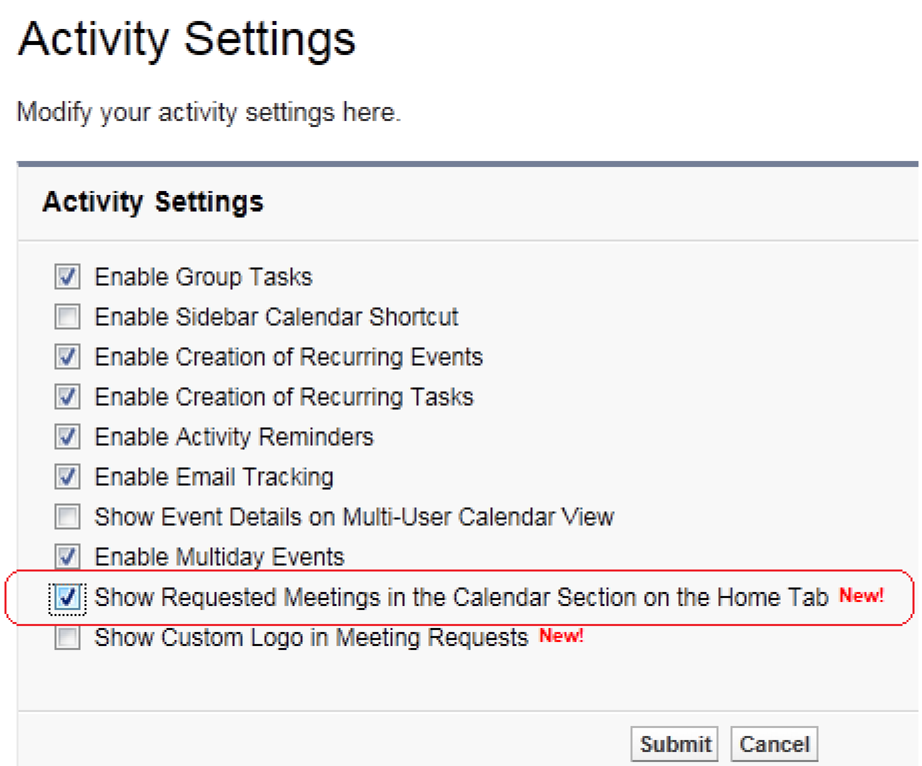
Lead Custom Field Mapping

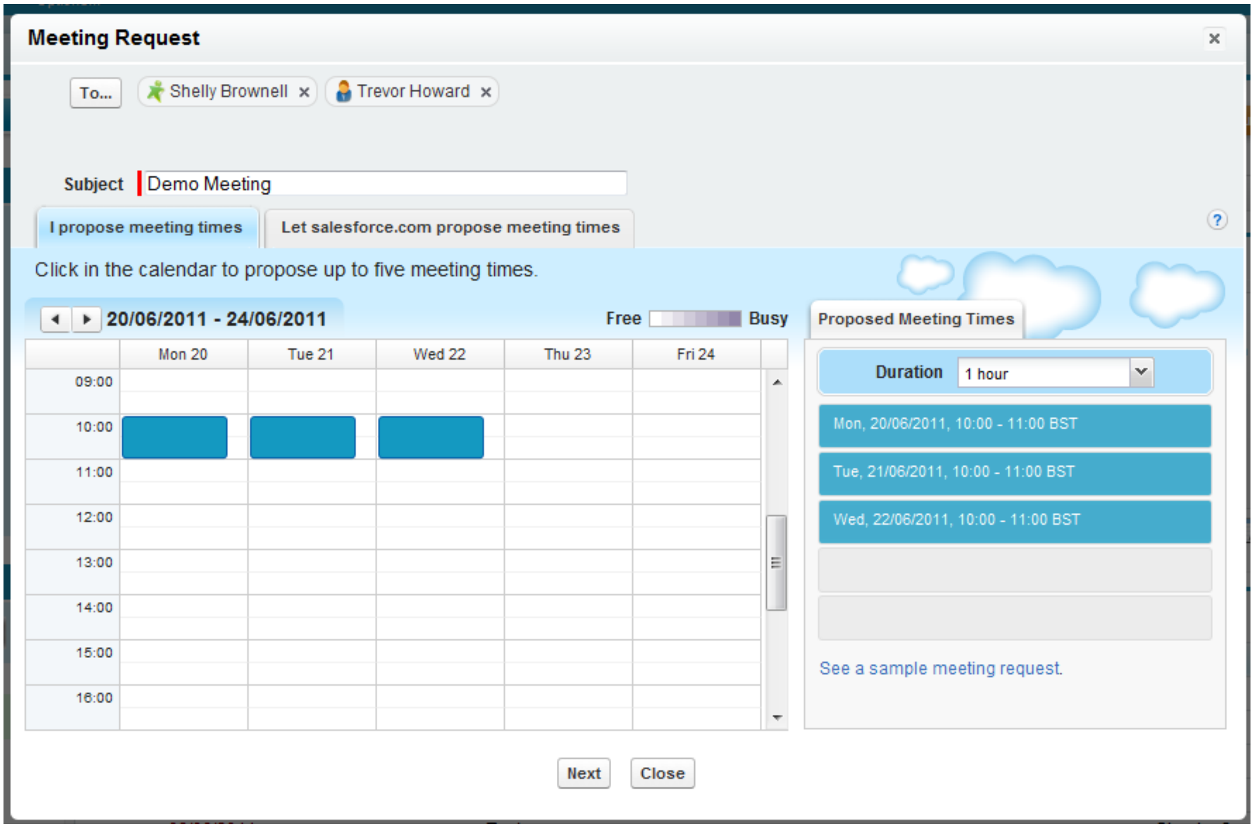
Map each of your organization's lead custom fields to one of your custom account, contact, or opportunity fields. These mappings will be used when you convert leads.

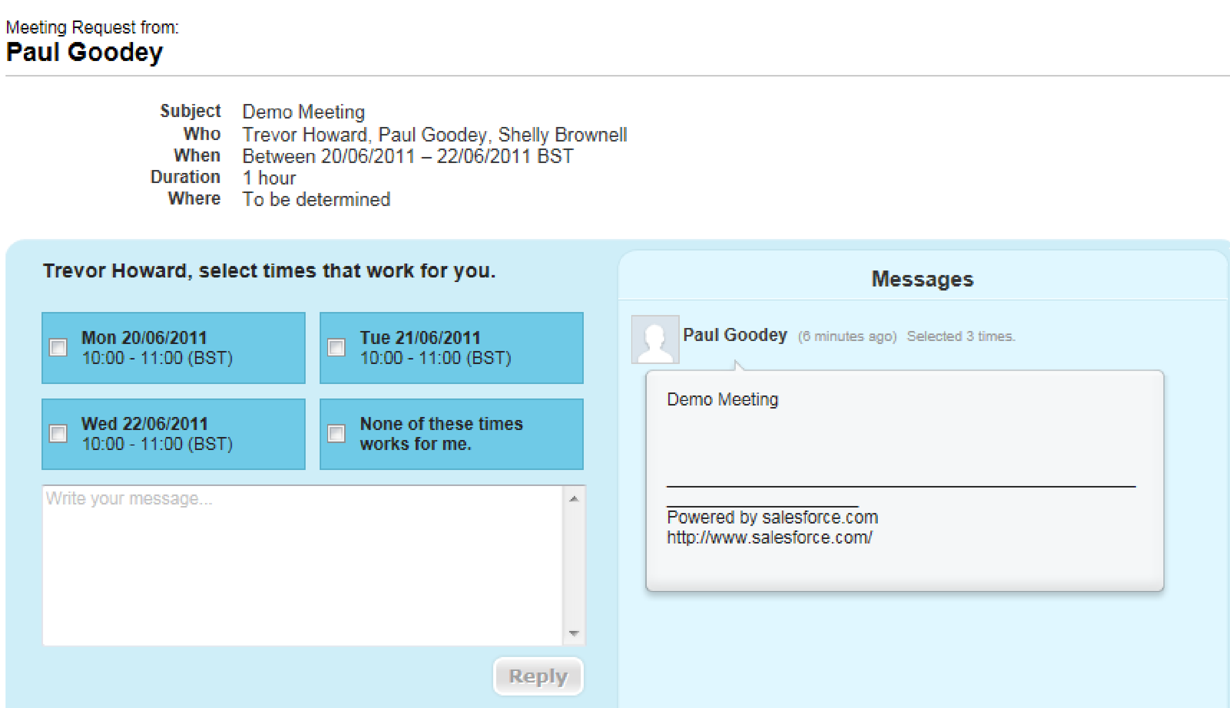


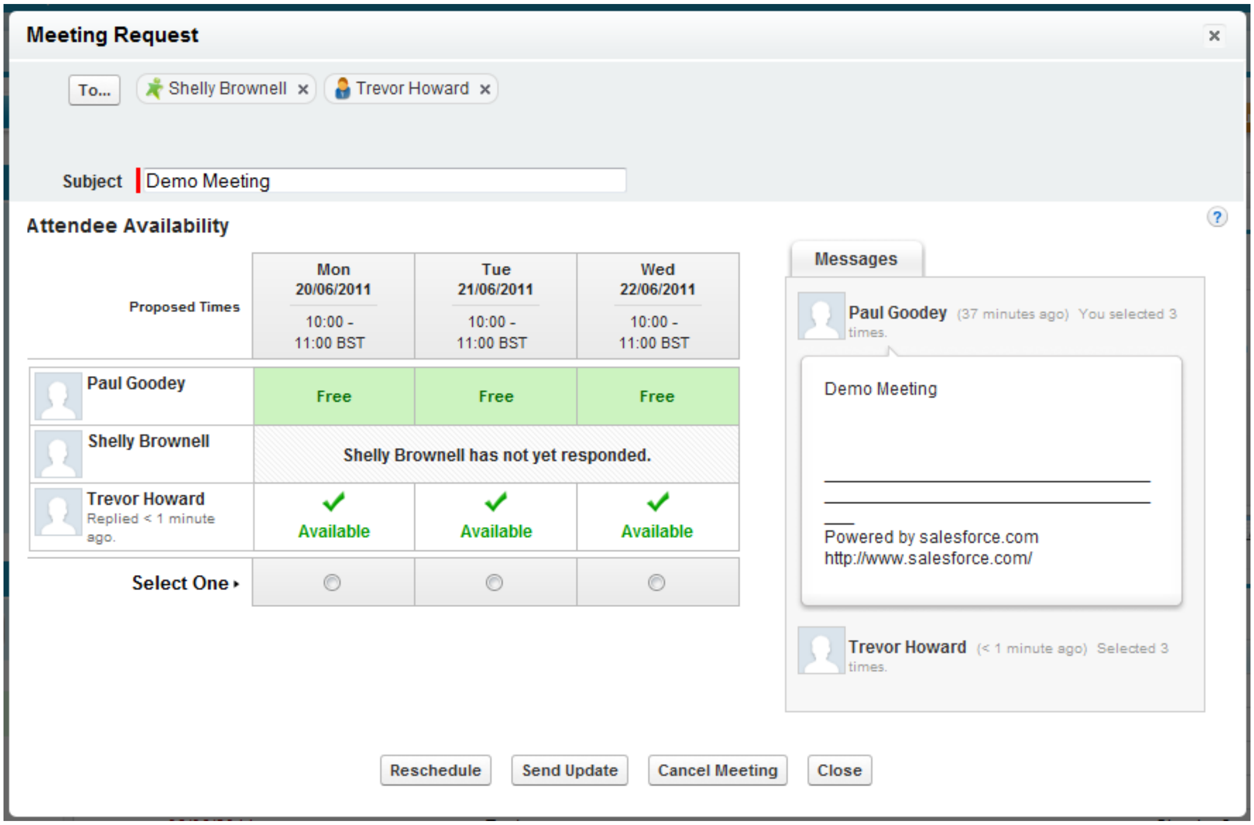

Select New Owner
Transfer this account
Company X
Owner
Transfer open opportunities not owned by the existing account owner
Transfer closed opportunities
Transfer open cases owned by the existing account owner
Transfer closed cases
Send Notification Email
Save
Cancel

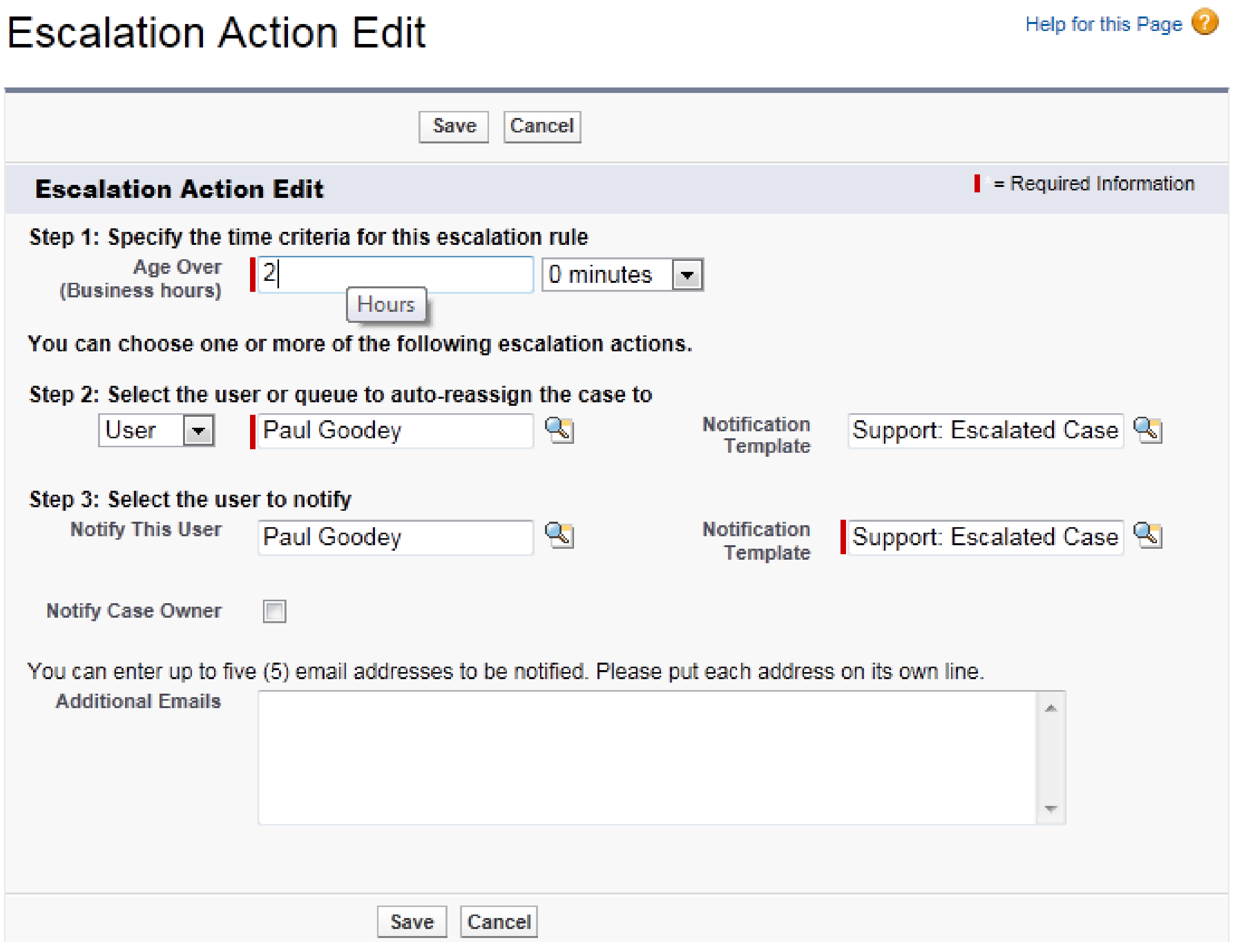

Calendar
New Event
New Meeting Request
Scheduled Meetings
Requested Meetings
You have not proposed any meetings.

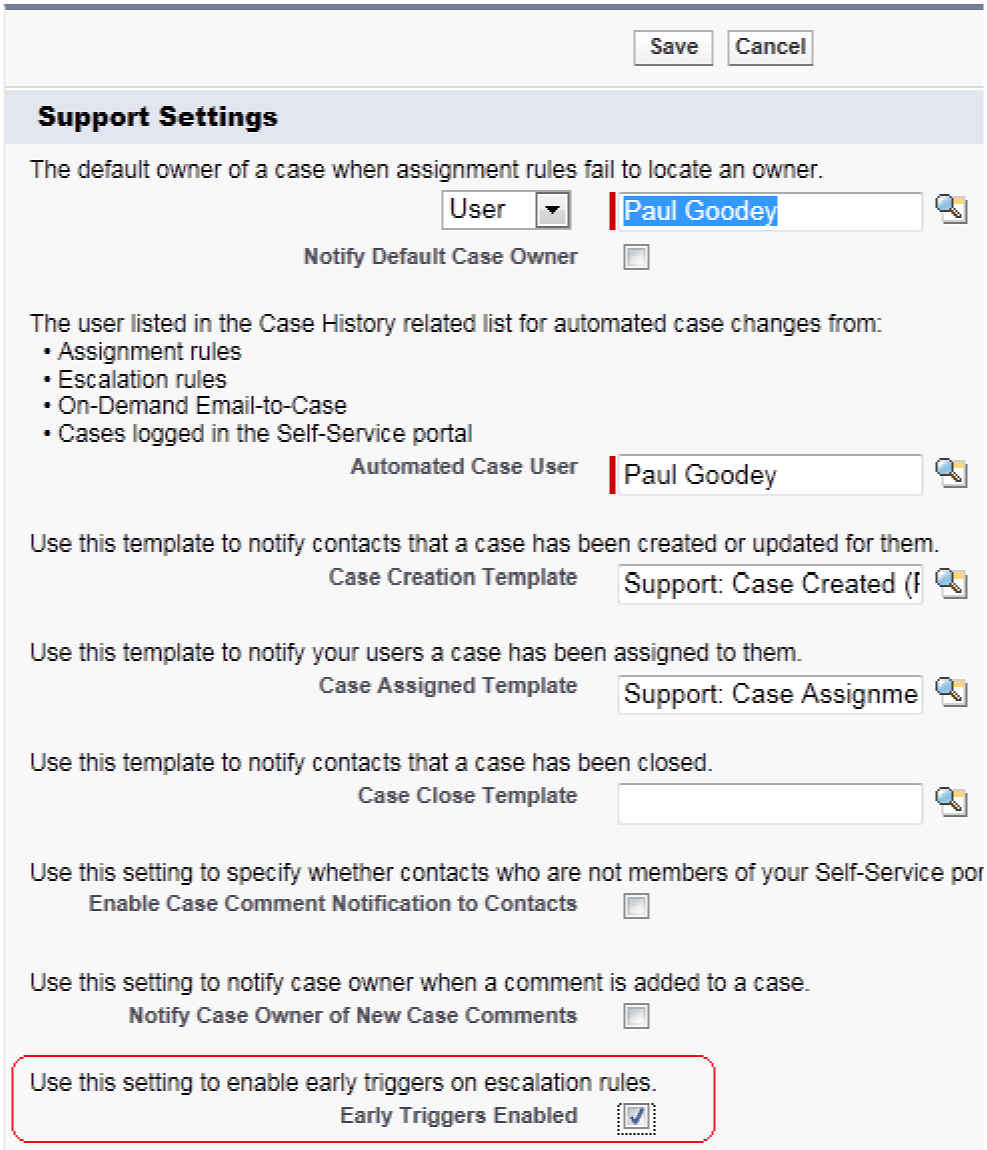

Activity Settings
Modify your activity settings here.
Activity Settings
Enable Group Tasks
Enable Sidebar Calendar Shortcut
Enable Creation of Recurring Events
Enable Creation of Recurring Tasks
Enable Activity Reminders
Enable Email Tracking
Show Event Details on Multi-User Calendar View
Enable Multiday Events
Show Requested Meetings in the Calendar Section on the Home Tab
New!
Show Custom Logo in Meeting Requests
New!
Submit
Cancel


Meeting Request
To...
Shelly Brownell
Trevor Howard
Subject
Demo Meeting
I propose meeting times
Let salesforce.com propose meeting times
Click in the calendar to propose up to five meeting times.
20/06/2011 - 24/06/2011
Free
Busy
Mon 20
Tue 21
Wed 22
Thu 23
Fri 24
09:00
10:00
11:00
12:00
13:00
14:00
15:00
16:00
Proposed Meeting Times
Duration
1 hour
Mon, 20/06/2011, 10:00 - 11:00 BST
Tue, 21/06/2011, 10:00 - 11:00 BST
Wed, 22/06/2011, 10:00 - 11:00 BST
See a sample meeting request.
Next
Close

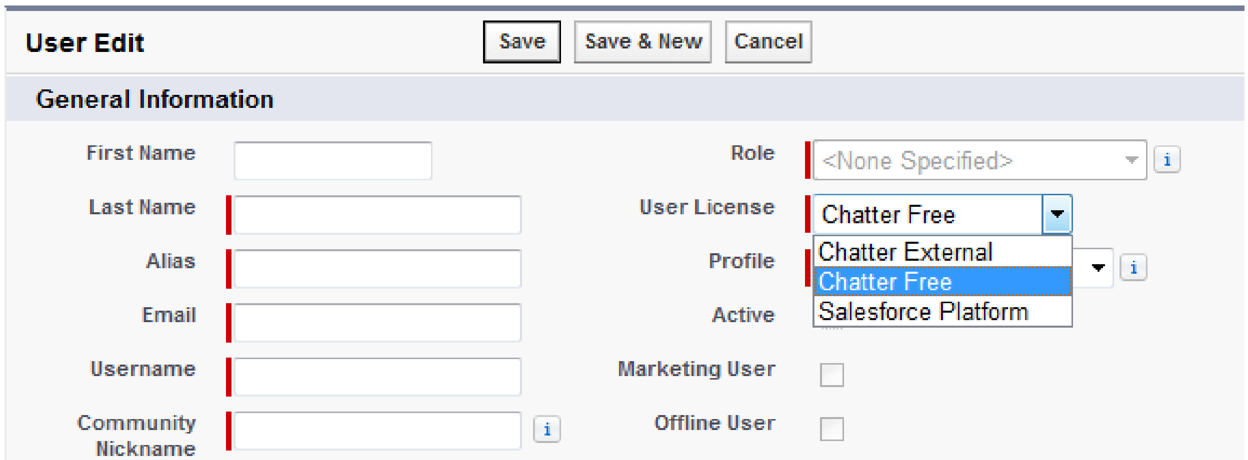

Meeting Request from:
Paul Goodey
Subject Demo Meeting
Who Trevor Howard, Paul Goodey, Shelly Brownell
When Between 20/06/2011 – 22/06/2011 BST
Duration 1 hour
Where To be determined
Trevor Howard, select times that work for you.
Mon 20/06/2011 10:00 - 11:00 (BST)
Tue 21/06/2011 10:00 - 11:00 (BST)
Wed 22/06/2011 10:00 - 11:00 (BST)
None of these times works for me.
Write your message...
Reply
Messages
Paul Goodey (6 minutes ago) Selected 3 times.
Demo Meeting
Powered by salesforce.com
http://www.salesforce.com/

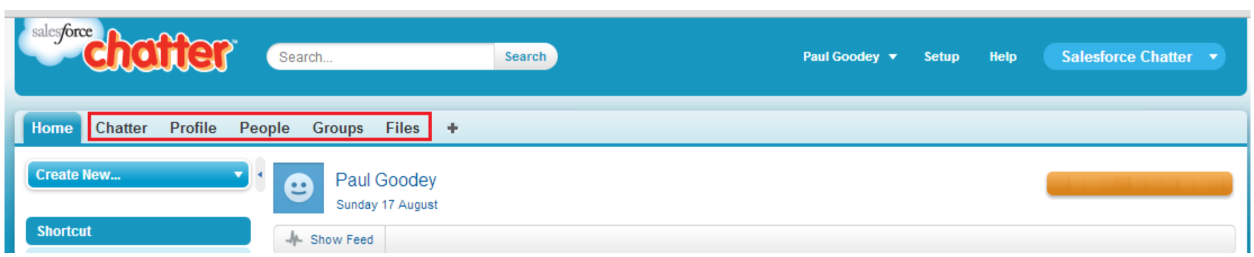

Meeting Request
To...
Shelly Brownell
Trevor Howard
Subject
Demo Meeting
Attendee Availability
Proposed Times
Mon 20/06/2011 10:00 - 11:00 BST
Tue 21/06/2011 10:00 - 11:00 BST
Wed 22/06/2011 10:00 - 11:00 BST
Paul Goodey
Free
Free
Free
Shelly Brownell
Shelly Brownell has not yet responded.
Trevor Howard
Replied < 1 minute ago.
Available
Available
Available
Select One
Messages
Paul Goodey (37 minutes ago) You selected 3 times.
Demo Meeting
Powered by salesforce.com
http://www.salesforce.com/
Trevor Howard (< 1 minute ago) Selected 3 times.
Reschedule
Send Update
Cancel Meeting
Close

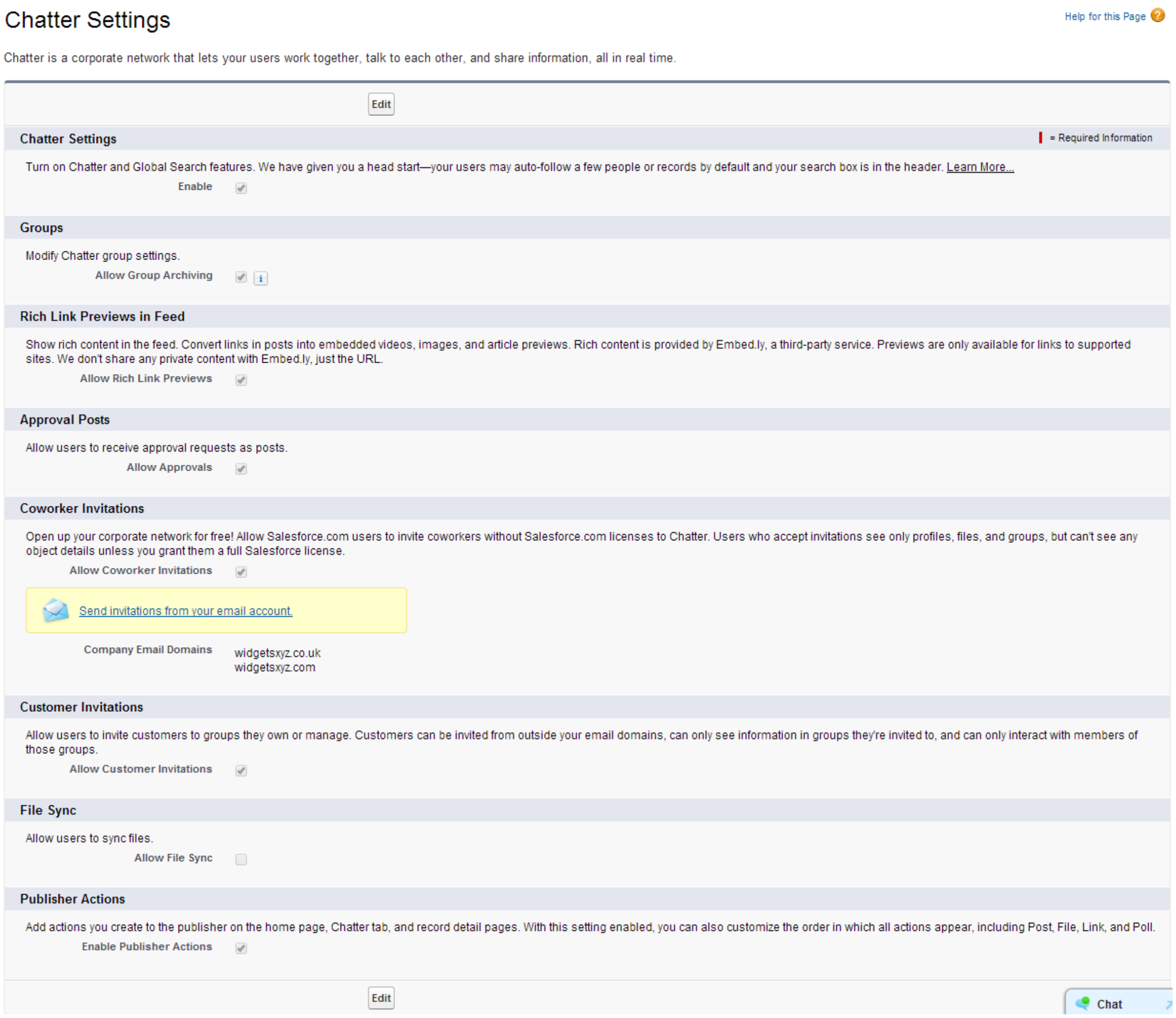

Escalation Action Edit
Help for this Page
Save
Cancel
Escalation Action Edit
= Required Information
Step 1: Specify the time criteria for this escalation rule
Age Over (Business hours)
2
Hours
0 minutes
You can choose one or more of the following escalation actions.
Step 2: Select the user or queue to auto-reassign the case to
User
Paul Goodey
Notification Template
Support: Escalated Case
Step 3: Select the user to notify
Notify This User
Paul Goodey
Notification Template
Support: Escalated Case
Notify Case Owner
You can enter up to five (5) email addresses to be notified. Please put each address on its own line.
Additional Emails
Save
Cancel


Save
Cancel
Support Settings
The default owner of a case when assignment rules fail to locate an owner.
User
Paul Goodey
Notify Default Case Owner
The user listed in the Case History related list for automated case changes from:
• Assignment rules
• Escalation rules
• On-Demand Email-to-Case
• Cases logged in the Self-Service portal
Automated Case User
Paul Goodey
Use this template to notify contacts that a case has been created or updated for them.
Case Creation Template
Support: Case Created (F
Use this template to notify your users a case has been assigned to them.
Case Assigned Template
Support: Case Assignme
Use this template to notify contacts that a case has been closed.
Case Close Template
Use this setting to specify whether contacts who are not members of your Self-Service por
Enable Case Comment Notification to Contacts
Use this setting to notify case owner when a comment is added to a case.
Notify Case Owner of New Case Comments
Use this setting to enable early triggers on escalation rules.
Early Triggers Enabled

New User


User Edit
Save
Save & New
Cancel
General Information
First Name
Last Name
Alias
Email
Username
Community Nickname
Role
<None Specified>
User License
Chatter Free
Chatter External
Chatter Free
Salesforce Platform
Profile
Active
Marketing User
Offline User

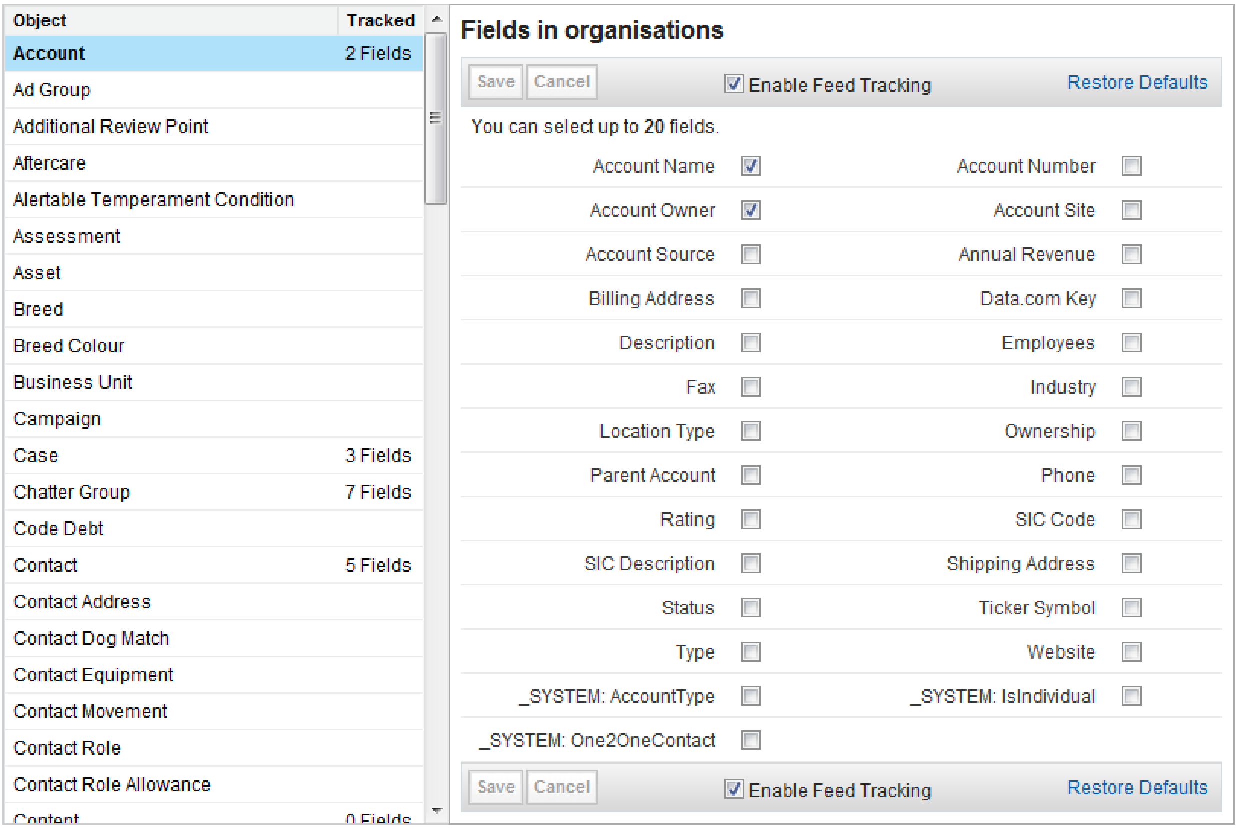

salesforce chatter
Search...
Search
Paul Goodey
Setup
Help
Salesforce Chatter
Home
Chatter
Profile
People
Groups
Files
Create New...
Paul Goodey
Sunday 17 August
Shortcut
Show Feed

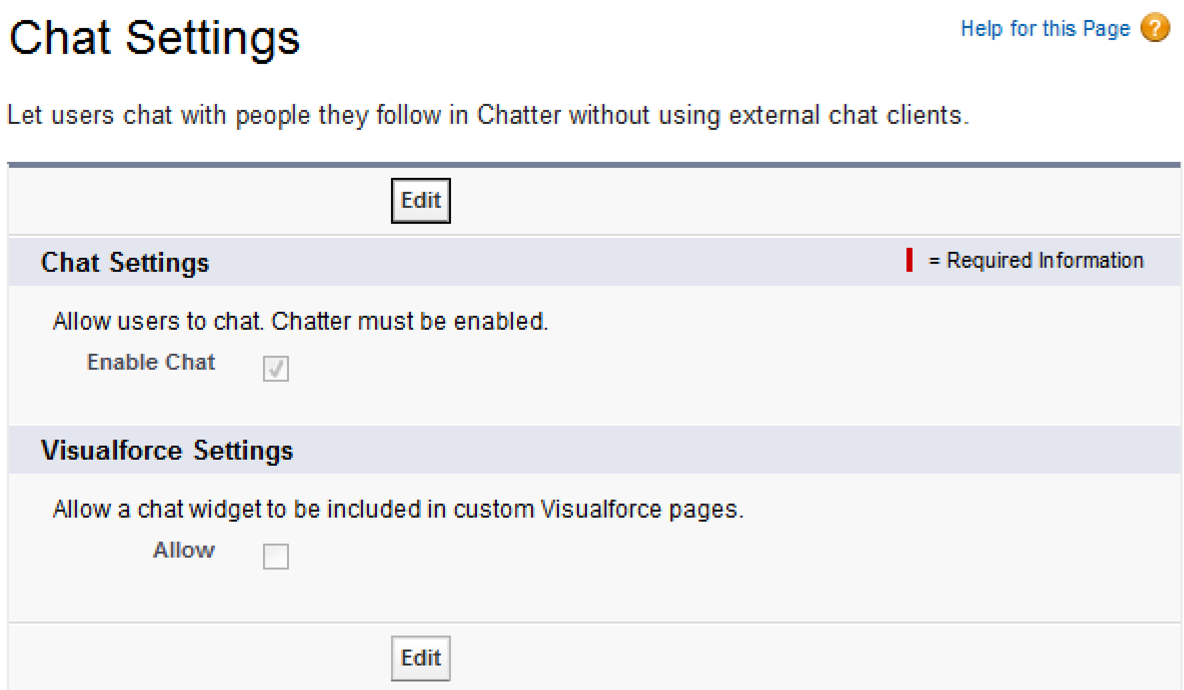

Chatter Settings
Help for this Page
Chatter is a corporate network that lets your users work together, talk to each other, and share information, all in real time.
Edit
Chatter Settings
= Required Information
Turn on Chatter and Global Search features. We have given you a head start—your users may auto-follow a few people or records by default and your search box is in the header. Learn More...
Enable
Groups
Modify Chatter group settings.
Allow Group Archiving
Rich Link Previews in Feed
Show rich content in the feed. Convert links in posts into embedded videos, images, and article previews. Rich content is provided by Embed.ly, a third-party service. Previews are only available for links to supported sites. We don't share any private content with Embed.ly, just the URL.
Allow Rich Link Previews
Approval Posts
Allow users to receive approval requests as posts.
Allow Approvals
Coworker Invitations
Open up your corporate network for free! Allow Salesforce.com users to invite coworkers without Salesforce.com licenses to Chatter. Users who accept invitations see only profiles, files, and groups, but can't see any object details unless you grant them a full Salesforce license.
Allow Coworker Invitations
Send invitations from your email account.
Company Email Domains
widgetsxyz.co.uk
widgetsxyz.com
Customer Invitations
Allow users to invite customers to groups they own or manage. Customers can be invited from outside your email domains, can only see information in groups they're invited to, and can only interact with members of those groups.
Allow Customer Invitations
File Sync
Allow users to sync files.
Allow File Sync
Publisher Actions
Add actions you create to the publisher on the home page, Chatter tab, and record detail pages. With this setting enabled, you can also customize the order in which all actions appear, including Post, File, Link, and Poll.
Enable Publisher Actions
Edit
Chat

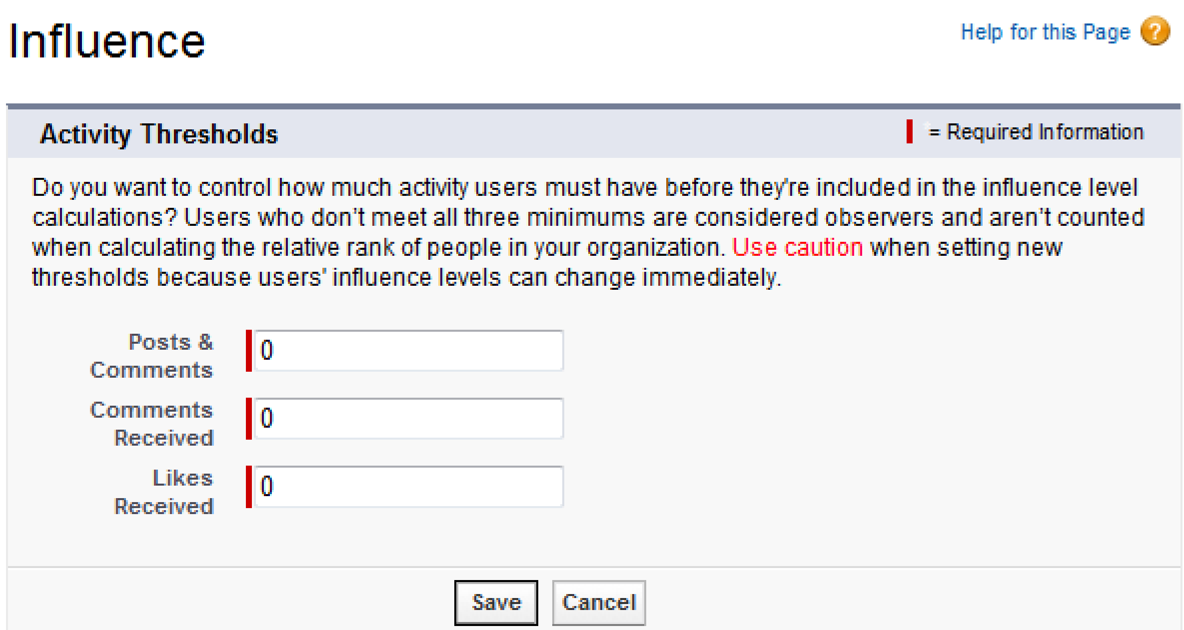
Feed Tracking

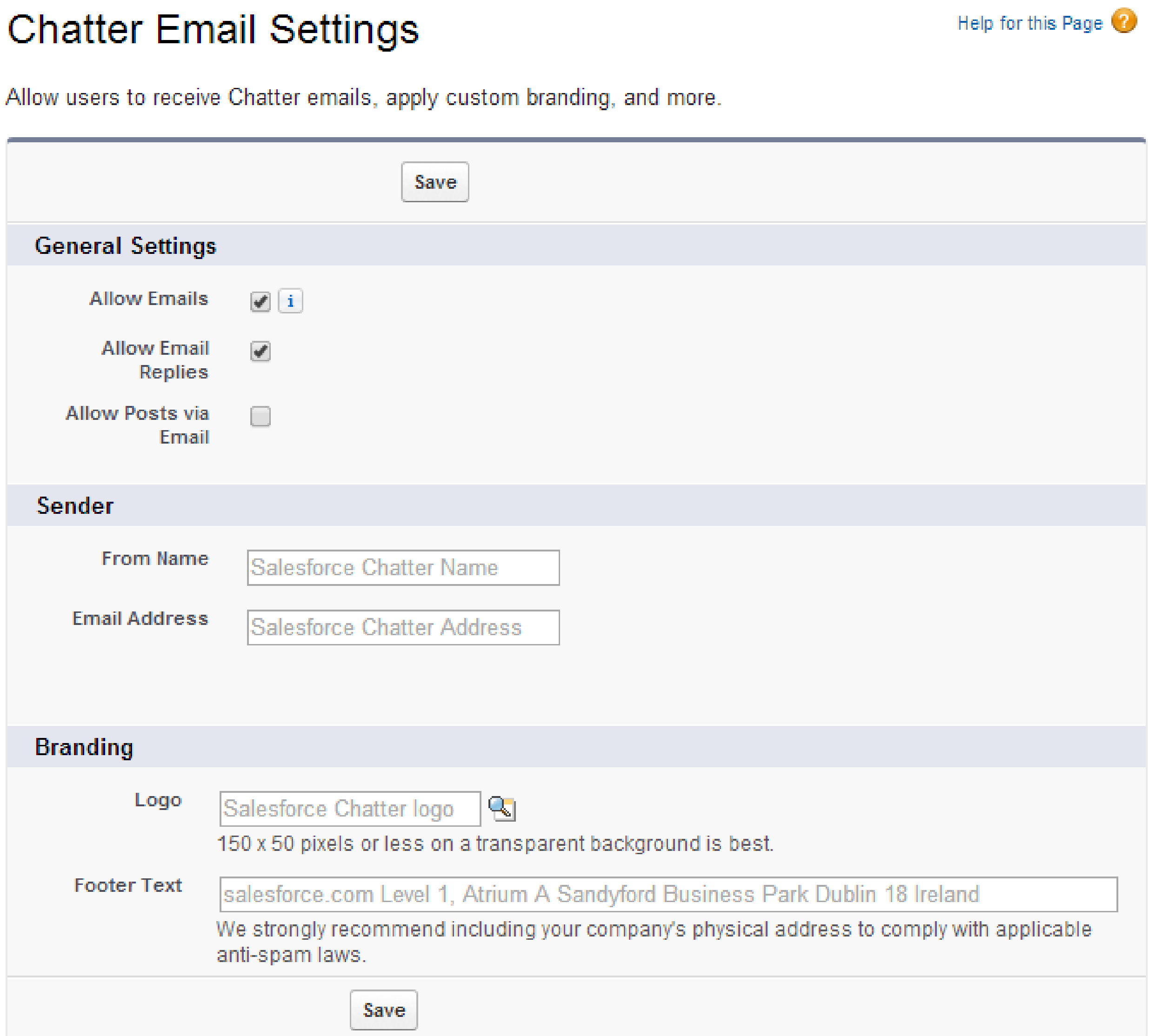
Help for this Page

Enable feed tracking for objects so users can follow records of that object type. Select fields to track so users can see feed updates when those fields are changed on records they follow.




Chat Settings
Help for this Page
Let users chat with people they follow in Chatter without using external chat clients.
Edit
Chat Settings
= Required Information
Allow users to chat. Chatter must be enabled.
Enable Chat
Visualforce Settings
Allow a chat widget to be included in custom Visualforce pages.
Allow
Edit


Influence
Help for this Page
Activity Thresholds
= Required Information
Do you want to control how much activity users must have before they're included in the influence level calculations? Users who don't meet all three minimums are considered observers and aren't counted when calculating the relative rank of people in your organization. Use caution when setting new thresholds because users' influence levels can change immediately.
Posts & Comments
0
Comments Received
0
Likes Received
0
Save
Cancel


Chatter Email Settings
Help for this Page
Allow users to receive Chatter emails, apply custom branding, and more.
Save
General Settings
Allow Emails
Allow Email Replies
Allow Posts via Email
Sender
From Name
Salesforce Chatter Name
Email Address
Salesforce Chatter Address
Branding
Logo
Salesforce Chatter logo
150 x 50 pixels or less on a transparent background is best.
Footer Text
salesforce.com Level 1, Atrium A Sandyford Business Park Dublin 18 Ireland
We strongly recommend including your company's physical address to comply with applicable anti-spam laws.
Save

Chapter 8

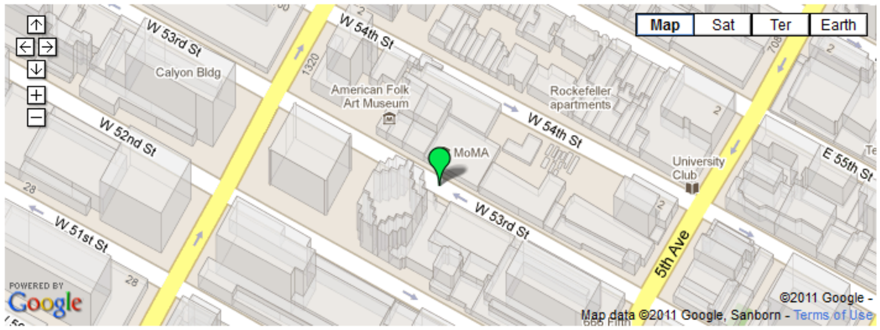
http://www.moma.org/visit/plan/gettinghere

GETTING HERE

- Hours & Admission
- **Getting Here**
- At the Museum
- Visiting with a Family
- Visitors with Disabilities
- Groups & Museum Tours
- Offers & Discounts
- Tips for Visiting
- Restaurants & Cafés at MoMA
- MoMA Stores

Buy Tickets
Skip the line at the Museum

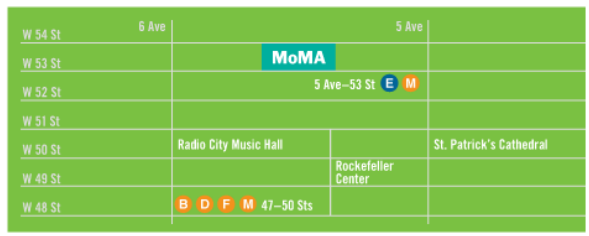
The Museum of Modern Art
11 West 53 Street
New York, NY 10019-5497
(212) 708-9400 | Contact Us



MoMA is located in midtown Manhattan, New York City, at 11 West Fifty-third Street, between Fifth and Sixth avenues.

MoMA Store locations | MTA NYC Transit maps | Local directions via Hopstop | Driving directions via Google

- By Subway
- By Bus
- By Car
- From the Airport
- Parking

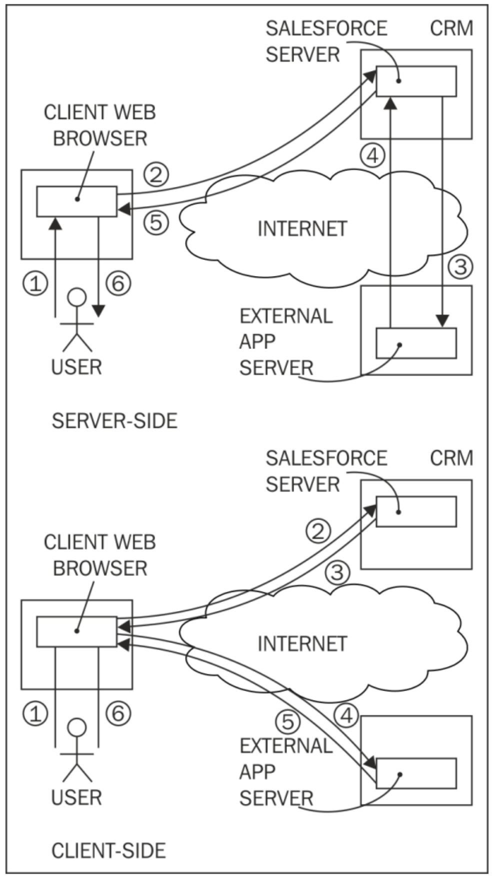


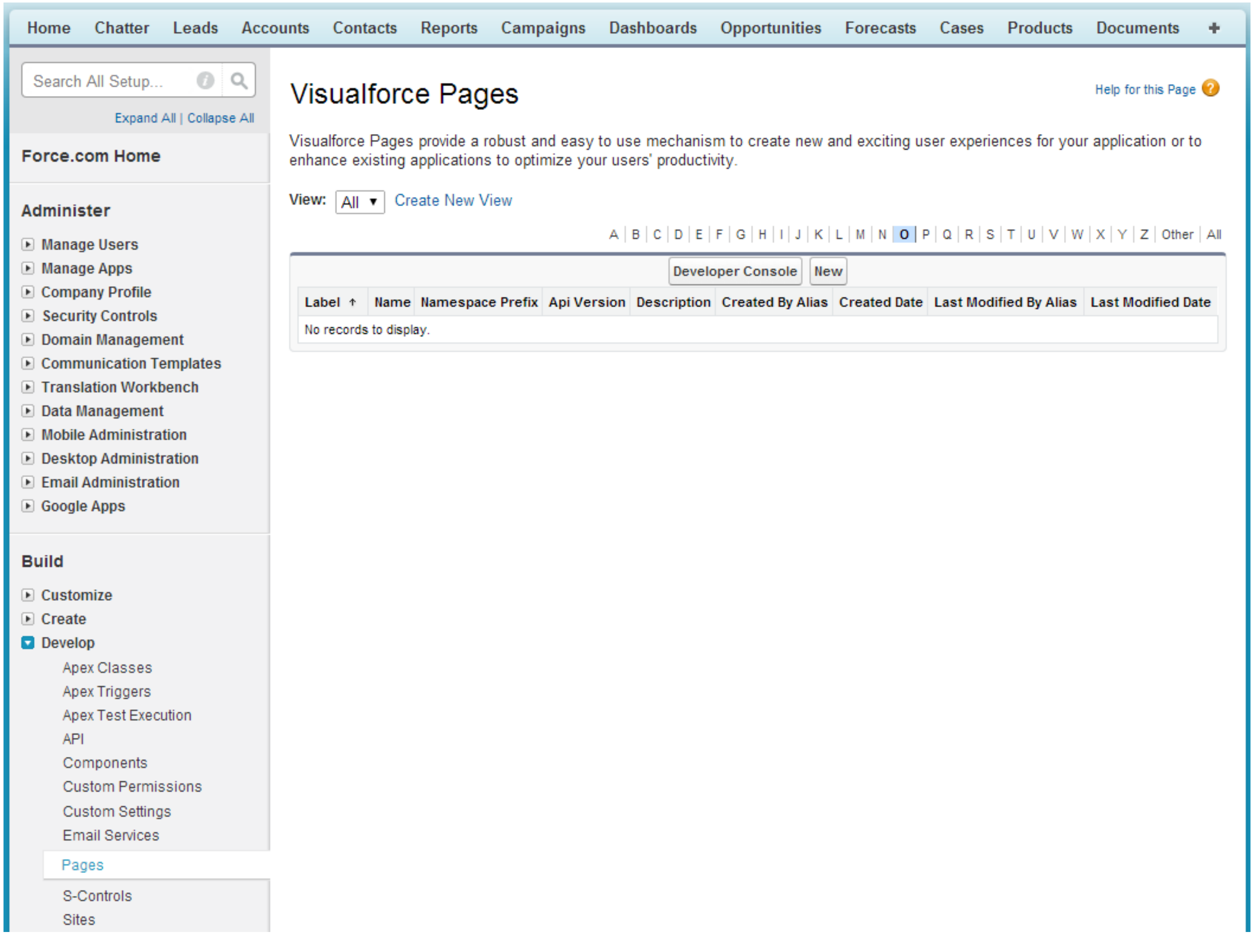
MoMA PS1

VISIT | EXPLORE | LEARN | SUPPORT | SHOP

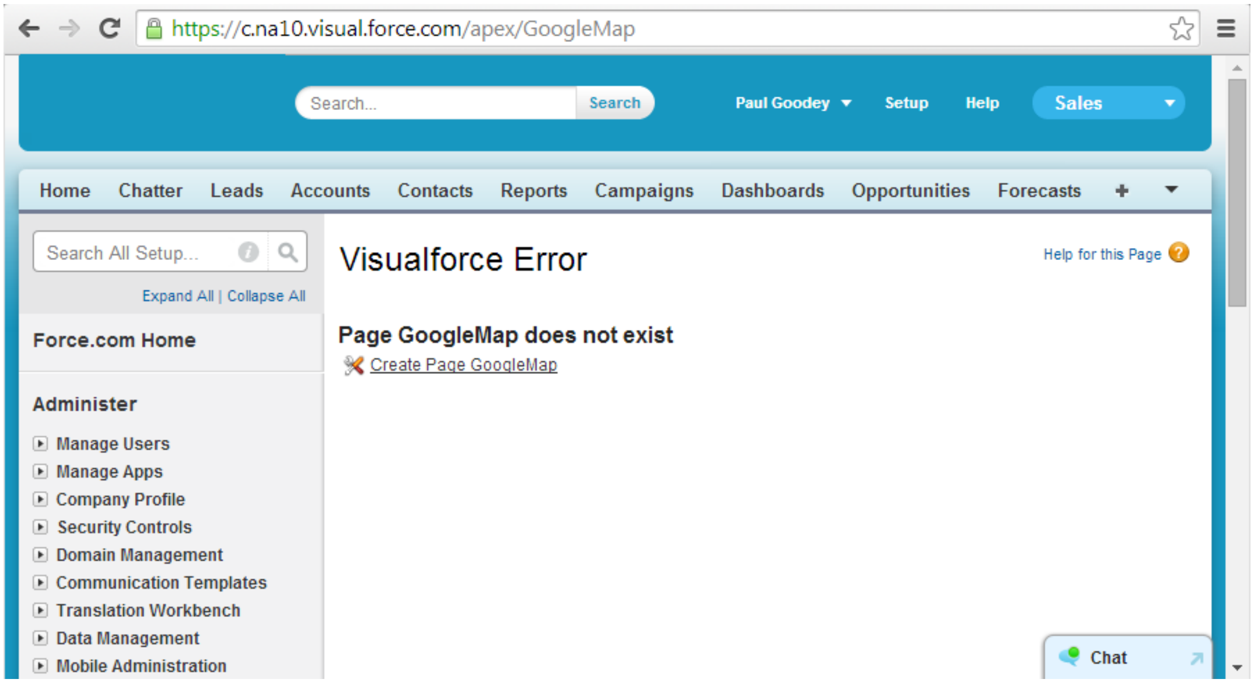
Search

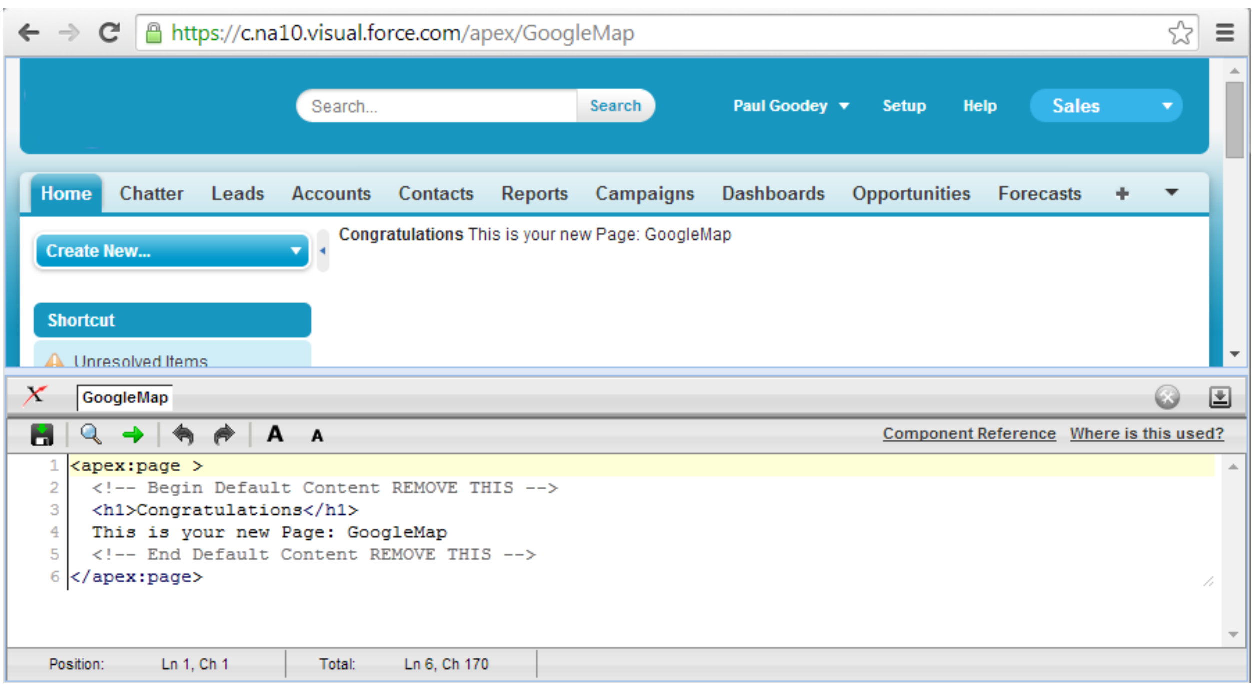
Sign in here | Welcome. Are you...? | Register to save your favorite pages


SALESFORCE SERVER
CRM
CLIENT WEB BROWSER
②
⑤
④
INTERNET
③
①
⑥
EXTERNAL APP SERVER
USER
SERVER-SIDE
SALESFORCE SERVER
CRM
②
CLIENT WEB BROWSER
③
INTERNET
①
⑥
⑤
④
EXTERNAL APP SERVER
USER
CLIENT-SIDE

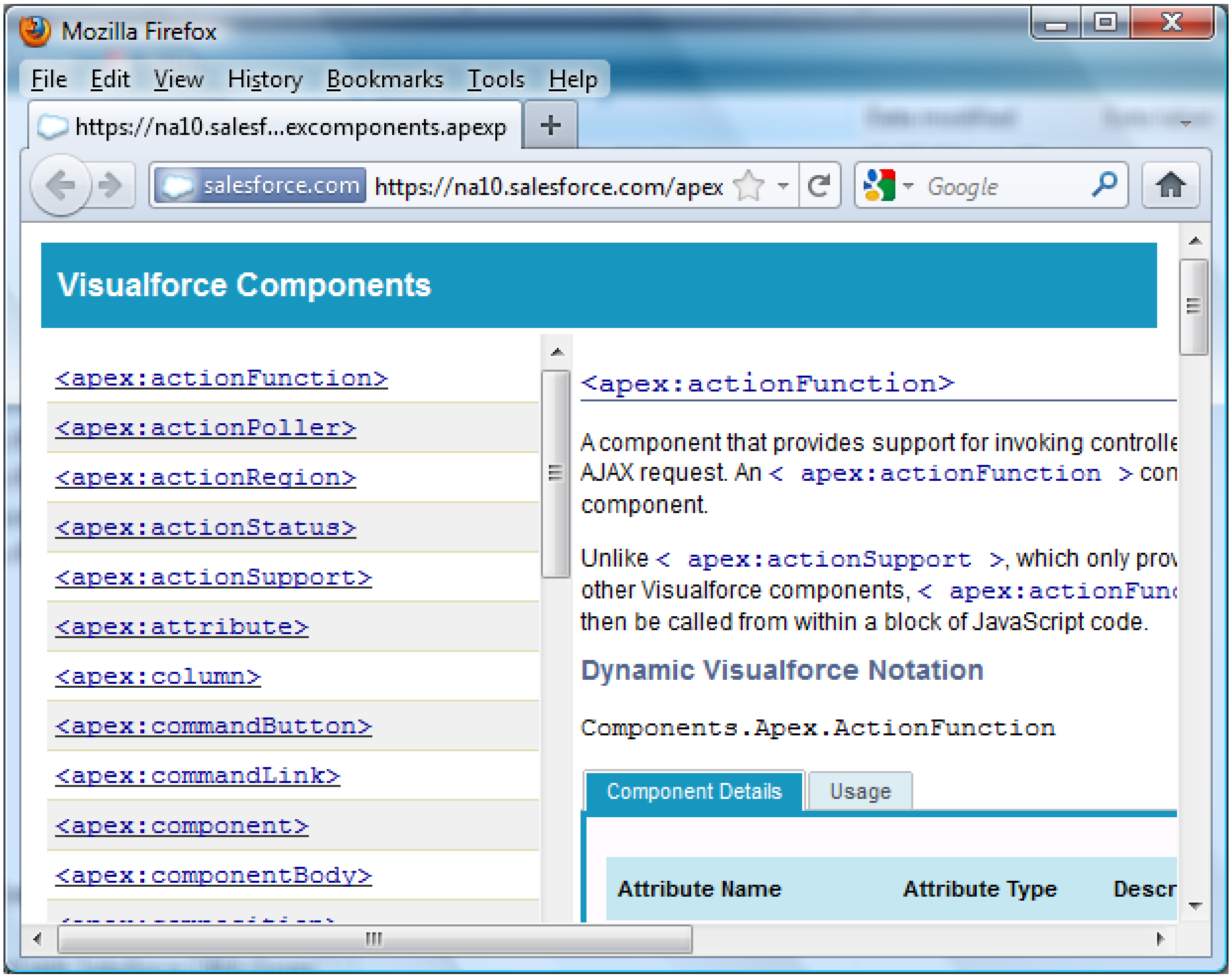

Home Chatter Leads Accounts Contacts Reports Campaigns Dashboards Opportunities Forecasts Cases Products Documents +
Search All Setup...
Expand All | Collapse All
Force.com Home
Administer
Manage Users
Manage Apps
Company Profile
Security Controls
Domain Management
Communication Templates
Translation Workbench
Data Management
Mobile Administration
Desktop Administration
Email Administration
Google Apps
Build
Customize
Create
Develop
Apex Classes
Apex Triggers
Apex Test Execution
API
Components
Custom Permissions
Custom Settings
Email Services
Pages
S-Controls
Sites
Visualforce Pages
Help for this Page
Visualforce Pages provide a robust and easy to use mechanism to create new and exciting user experiences for your application or to enhance existing applications to optimize your users' productivity.
View: All Create New 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
Developer Console New
Label Name Namespace Prefix Api Version Description Created By Alias Created Date Last Modified By Alias Last Modified Date
No records to display.

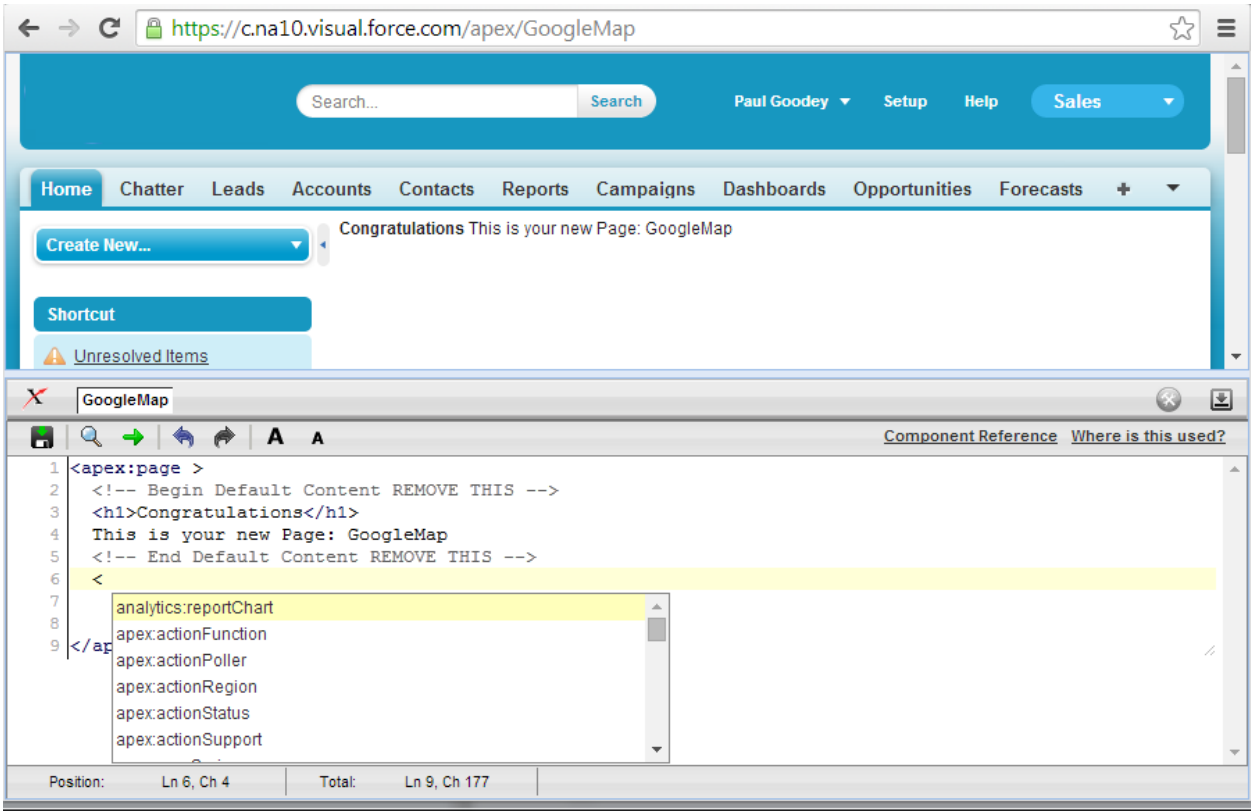

Development Mode

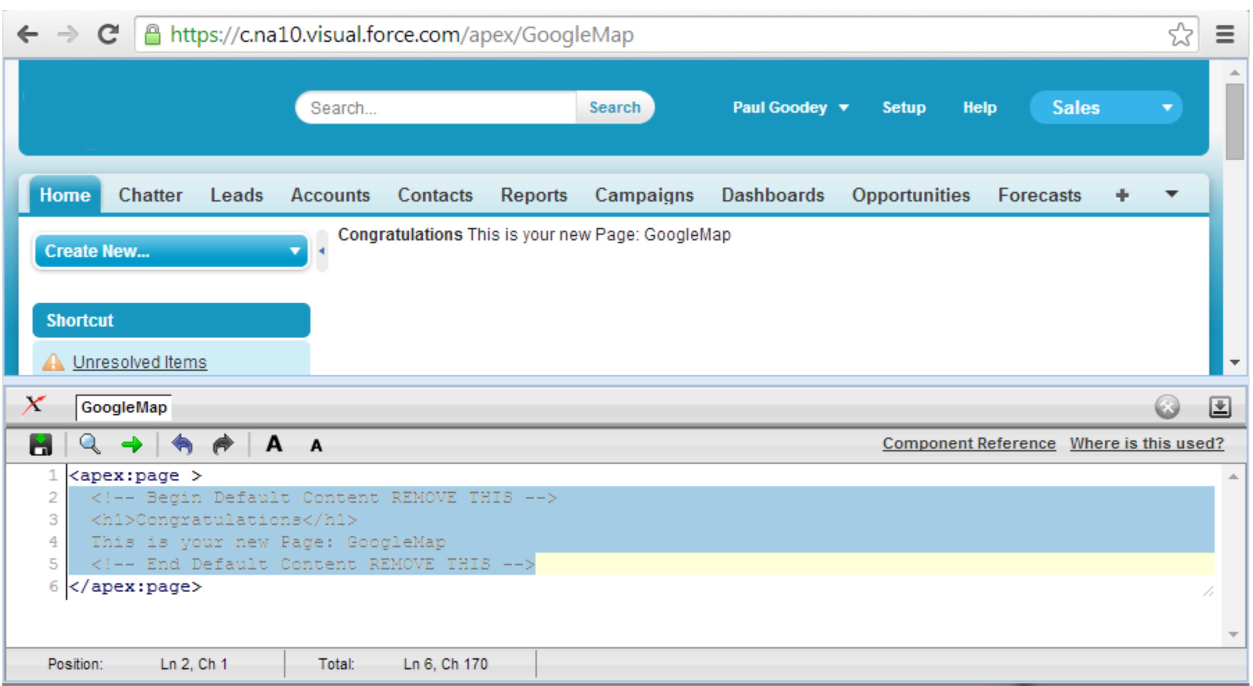

https://c.na10.visual.force.com/apex/GoogleMap
Search...
Search
Paul Goodey
Setup
Help
Sales
Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Dashboards
Opportunities
Forecasts
Search All Setup...
Expand All | Collapse All
Force.com Home
Administer
Manage Users
Manage Apps
Company Profile
Security Controls
Domain Management
Communication Templates
Translation Workbench
Data Management
Mobile Administration
Visualforce Error
Help for this Page
Page GoogleMap does not exist
Create Page GoogleMap
Chat

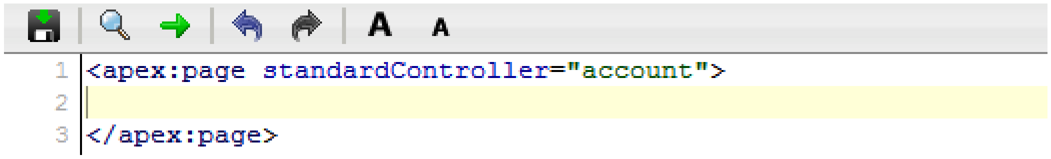

https://c.na10.visual.force.com/apex/GoogleMap
Search...
Search
Paul Goodey
Setup
Help
Sales
Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Dashboards
Opportunities
Forecasts
Create New...
Shortcut
Unresolved Items
Congratulations This is your new Page: GoogleMap
GoogleMap
Component Reference
Where is this used?
<apex:page >
<!-- Begin Default Content REMOVE THIS -->
<h1>Congratulations</h1>
This is your new Page: GoogleMap
<!-- End Default Content REMOVE THIS -->
</apex:page>
Position: Ln 1, Ch 1
Total: Ln 6, Ch 170


A
A
Component Reference

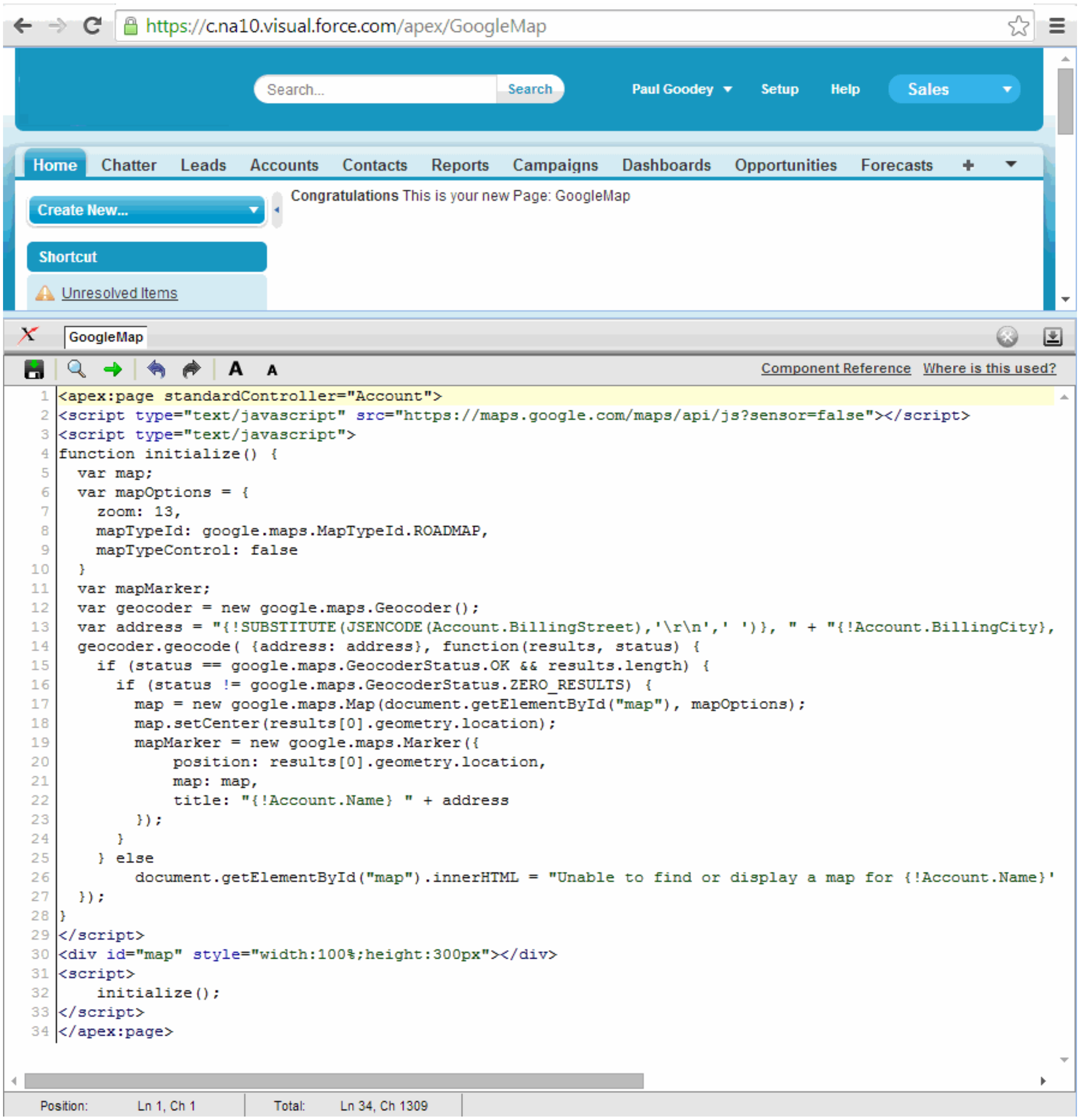

Mozilla Firefox
File Edit View History Bookmarks Tools Help
https://na10.salesf...excomponents.apexp
salesforce.com https://na10.salesforce.com/apex
Google
Visualforce Components
<apex:actionFunction>
<apex:actionPoller>
<apex:actionRegion>
<apex:actionStatus>
<apex:actionSupport>
<apex:attribute>
<apex:column>
<apex:commandButton>
<apex:commandLink>
<apex:component>
<apex:componentBody>
<apex:actionFunction>
A component that provides support for invoking controlle
AJAX request. An < apex:actionFunction > con
component.
Unlike < apex:actionSupport >, which only prov
other Visualforce components, < apex:actionFunc
then be called from within a block of JavaScript code.
Dynamic Visualforce Notation
Components.Apex.ActionFunction
Component Details
Usage
Attribute Name
Attribute Type
Descr


https://c.na10.visual.force.com/apex/GoogleMap
Search...
Search
Paul Goodey
Setup
Help
Sales
Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Dashboards
Opportunities
Forecasts
Create New...
Congratulations This is your new Page: GoogleMap
Shortcut
Unresolved Items
GoogleMap
Component Reference
Where is this used?
<apex:page >
<!-- Begin Default Content REMOVE THIS -->
<h1>Congratulations</h1>
This is your new Page: GoogleMap
<!-- End Default Content REMOVE THIS -->
<
</ap
analytics:reportChart
apex:actionFunction
apex:actionPoller
apex:actionRegion
apex:actionStatus
apex:actionSupport
Position:
Ln 6, Ch 4
Total:
Ln 9, Ch 177

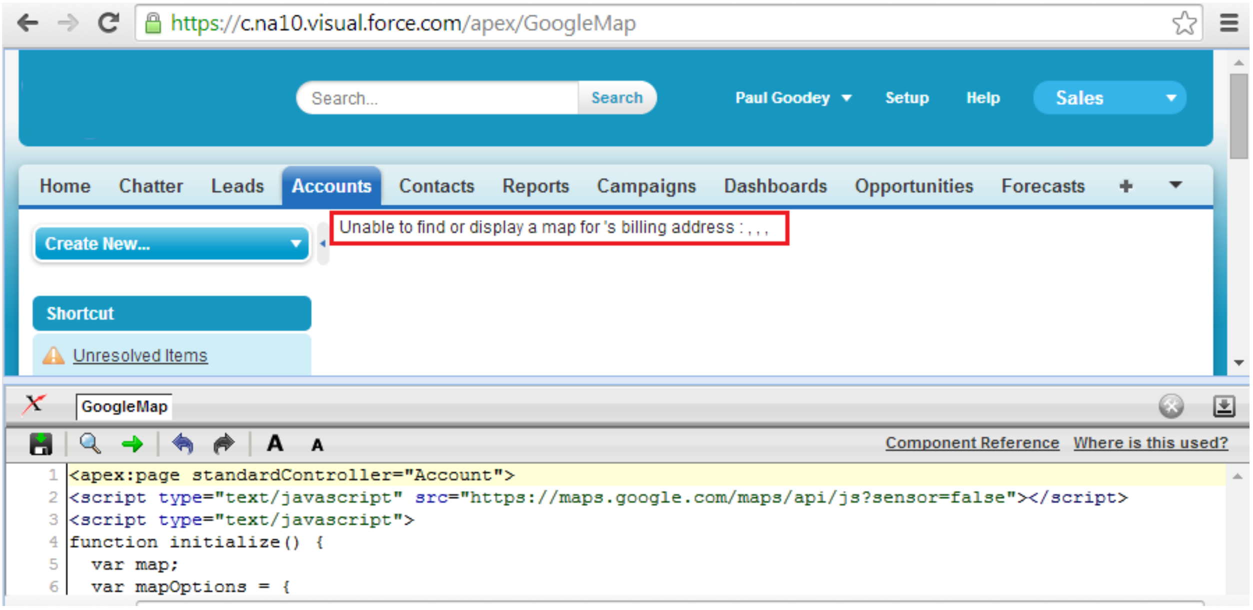

https://c.na10.visual.force.com/apex/GoogleMap
Search...
Search
Paul Goodey
Setup
Help
Sales
Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Dashboards
Opportunities
Forecasts
Create New...
Congratulations This is your new Page: GoogleMap
Shortcut
Unresolved Items
GoogleMap
Component Reference
Where is this used?
<apex:page >
<!-- Begin Default Content REMOVE THIS -->
<h1>Congratulations</h1>
This is your new Page: GoogleMap
<!-- End Default Content REMOVE THIS -->
</apex:page>
Position:
Ln 2, Ch 1
Total:
Ln 6, Ch 170



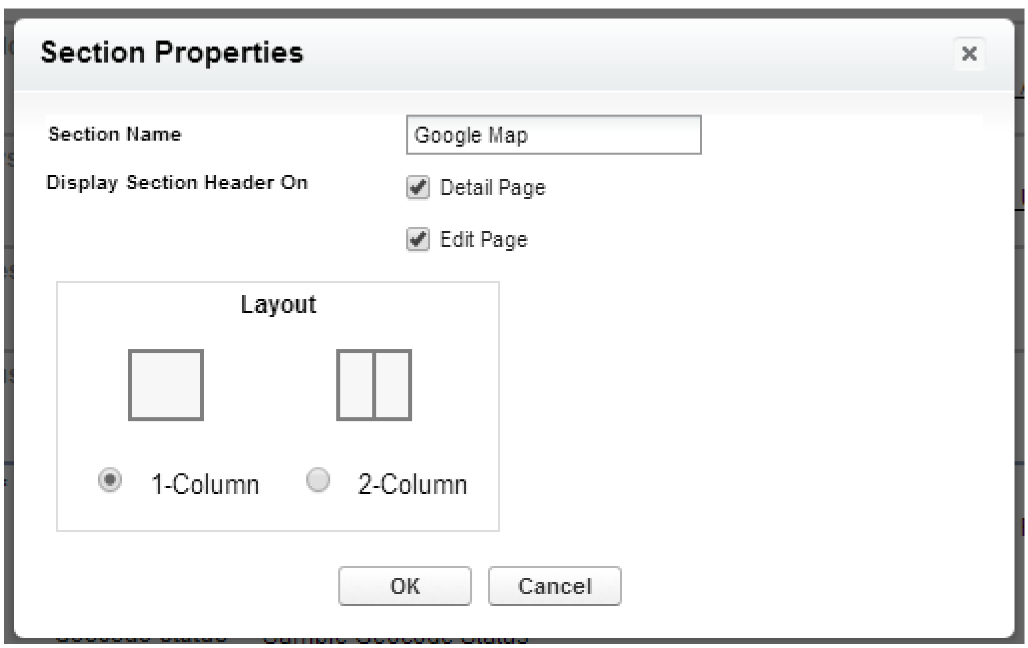
<apex:page standardController="account">
</apex:page>



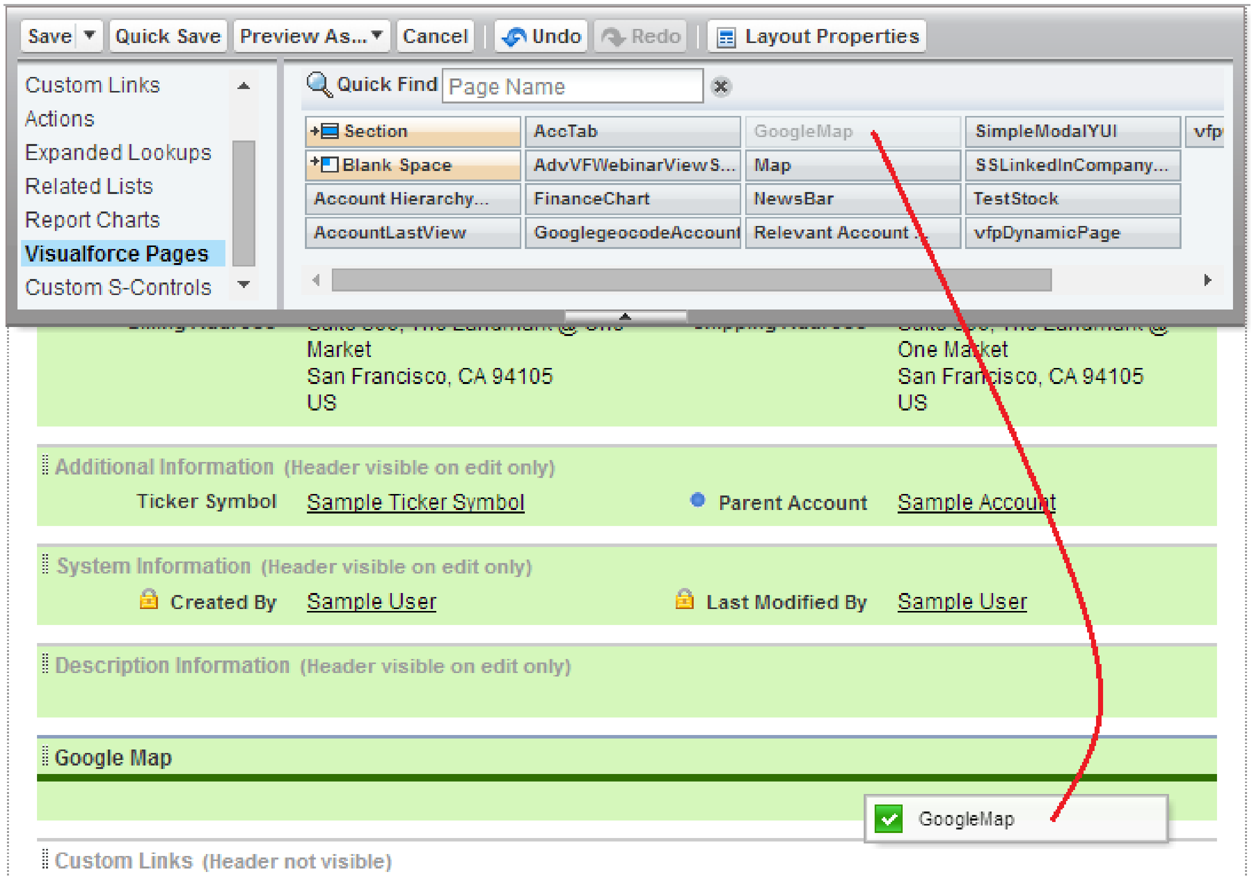
https://c.na10.visual.force.com/apex/GoogleMap
Search...
Search
Paul Goodey
Setup
Help
Sales
Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Dashboards
Opportunities
Forecasts
Create New...
Congratulations This is your new Page: GoogleMap
Shortcut
Unresolved Items
GoogleMap
Component Reference
Where is this used?
<apex:page standardController="Account">
<script type="text/javascript" src="https://maps.google.com/maps/api/js?sensor=false"></script>
<script type="text/javascript">
function initialize() {
var map;
var mapOptions = {
zoom: 13,
mapTypeId: google.maps.MapTypeId.ROADMAP,
mapTypeControl: false
}
var mapMarker;
var geocoder = new google.maps.Geocoder();
var address = "{!SUBSTITUTE(JSENCODE(Account.BillingStreet),'\r\n',' ')}, " + "{!Account.BillingCity},
geocoder.geocode({address: address}, function(results, status) {
if (status == google.maps.GeocoderStatus.OK && results.length) {
if (status != google.maps.GeocoderStatus.ZERO_RESULTS) {
map = new google.maps.Map(document.getElementById("map"), mapOptions);
map.setCenter(results[0].geometry.location);
mapMarker = new google.maps.Marker({
position: results[0].geometry.location,
map: map,
title: "{!Account.Name} " + address
});
}
} else
document.getElementById("map").innerHTML = "Unable to find or display a map for {!Account.Name}'
});
}
</script>
<div id="map" style="width:100%;height:300px"></div>
<script>
initialize();
</script>
</apex:page>
Position:
Ln 1, Ch 1
Total:
Ln 34, Ch 1309



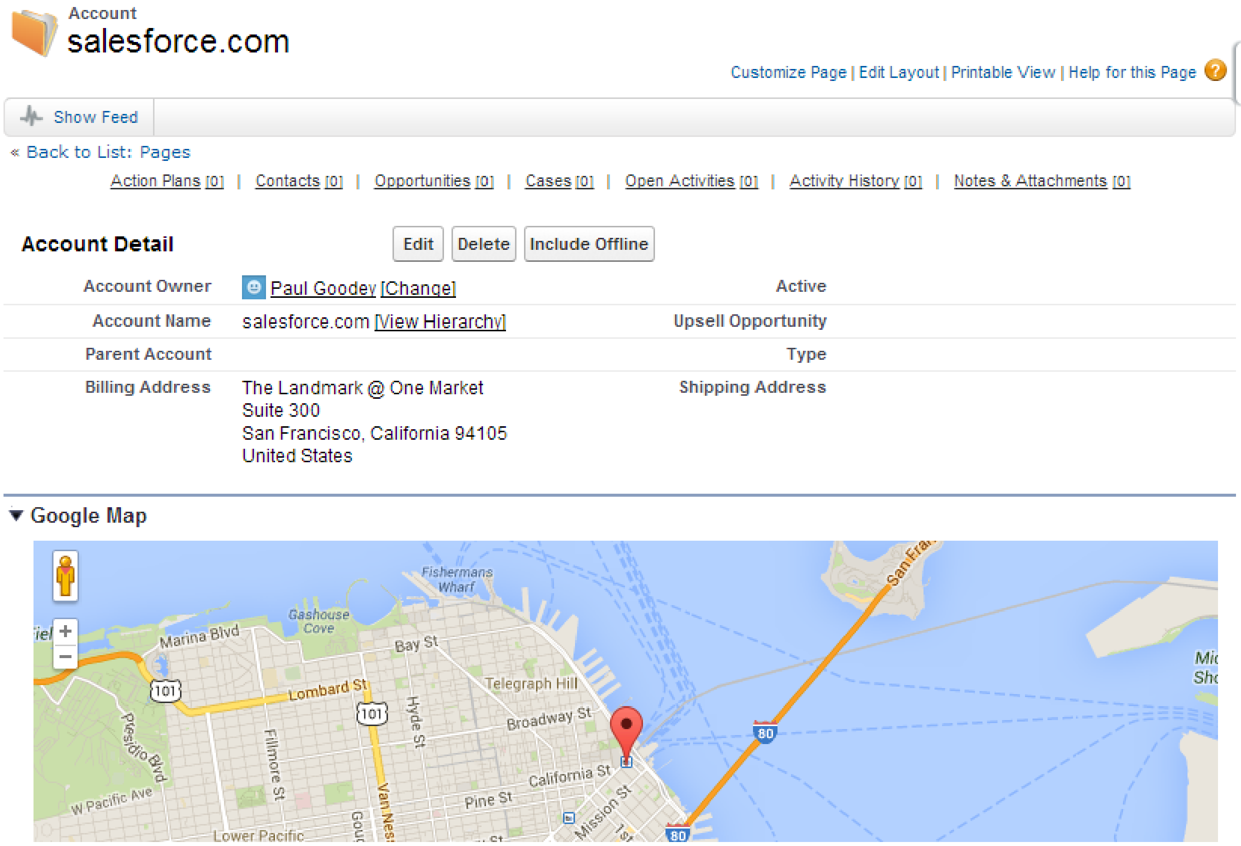
https://c.na10.visual.force.com/apex/GoogleMap
Search...
Search
Paul Goodey
Setup
Help
Sales
Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Dashboards
Opportunities
Forecasts
Create New...
Unable to find or display a map for 's billing address : , , ,
Shortcut
Unresolved Items
GoogleMap
Component Reference
Where is this used?
<apex:page standardController="Account">
<script type="text/javascript" src="https://maps.google.com/maps/api/js?sensor=false"></script>
<script type="text/javascript">
function initialize() {
var map;
var mapOptions = {

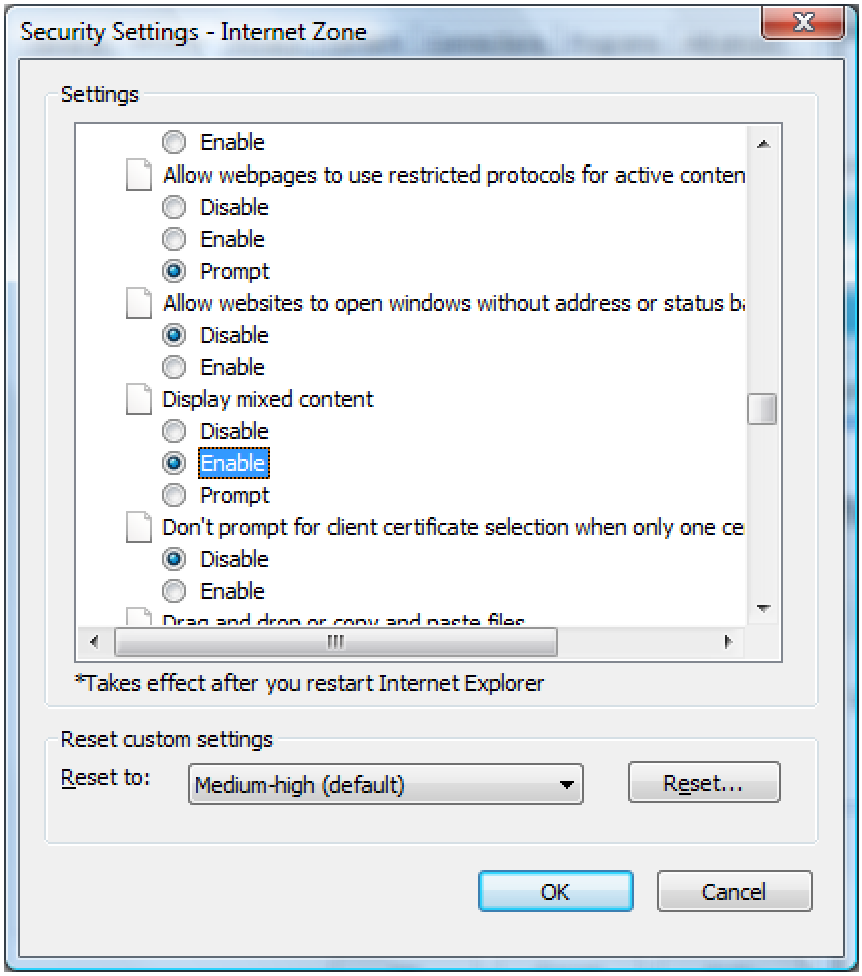


Section Properties
Section Name
Google Map
Display Section Header On
Detail Page
Edit Page
Layout
1-Column
2-Column
OK
Cancel

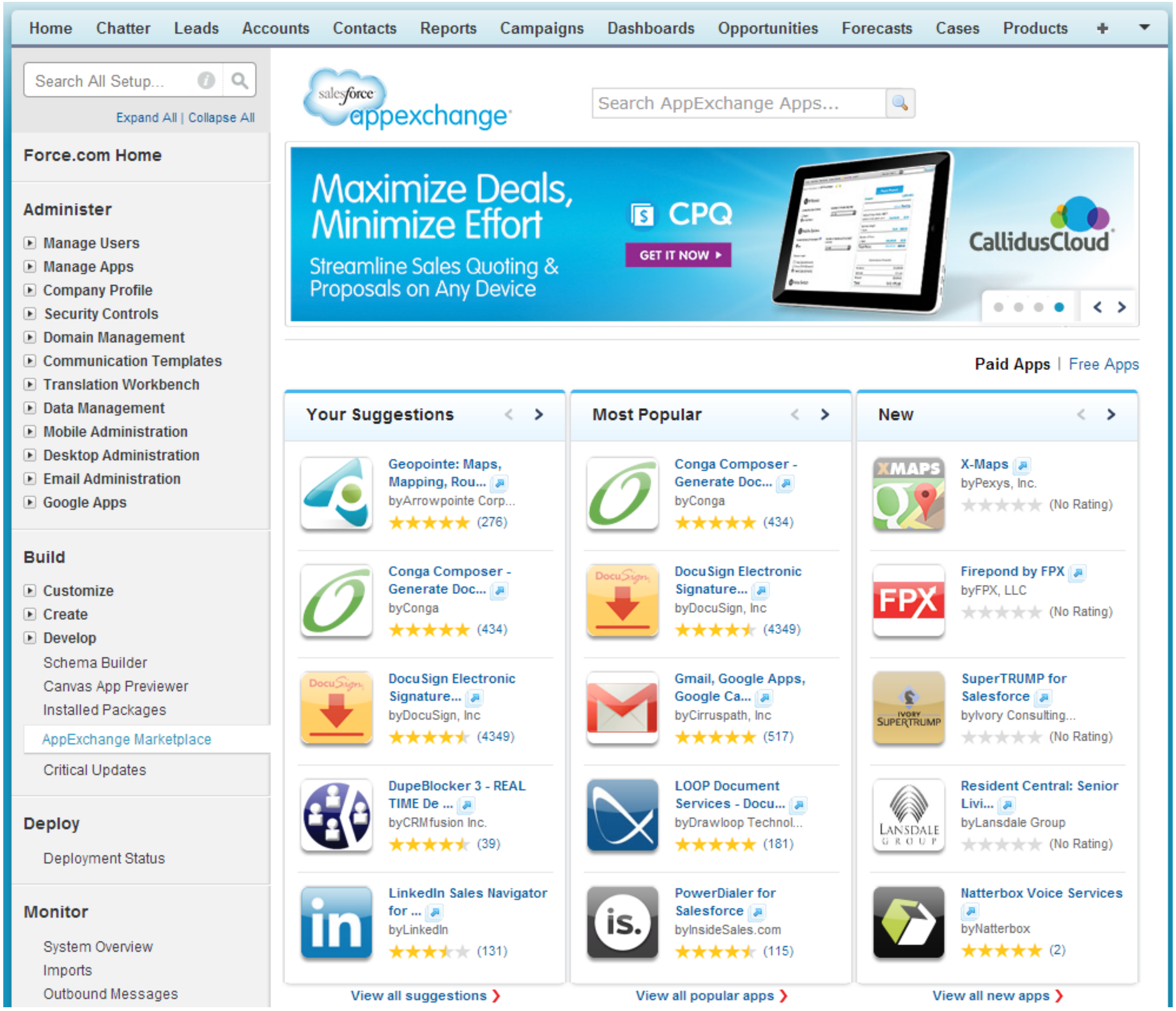


Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Custom Links
Actions
Expanded Lookups
Related Lists
Report Charts
Visualforce Pages
Custom S-Controls
Quick Find
Page Name
Section
AccTab
GoogleMap
SimpleModalYUI
Blank Space
AdvVFWebinarViewS...
Map
SSLinkedInCompany...
Account Hierarchy...
FinanceChart
NewsBar
TestStock
AccountLastView
GooglegeocodeAccount
vfpDynamicPage
Market
San Francisco, CA 94105
US
One Market
San Francisco, CA 94105
US
Additional Information (Header visible on edit only)
Ticker Symbol
Sample Ticker Symbol
Parent Account
Sample Account
System Information (Header visible on edit only)
Created By
Sample User
Last Modified By
Sample User
Description Information (Header visible on edit only)
Google Map
GoogleMap
Custom Links (Header not visible)

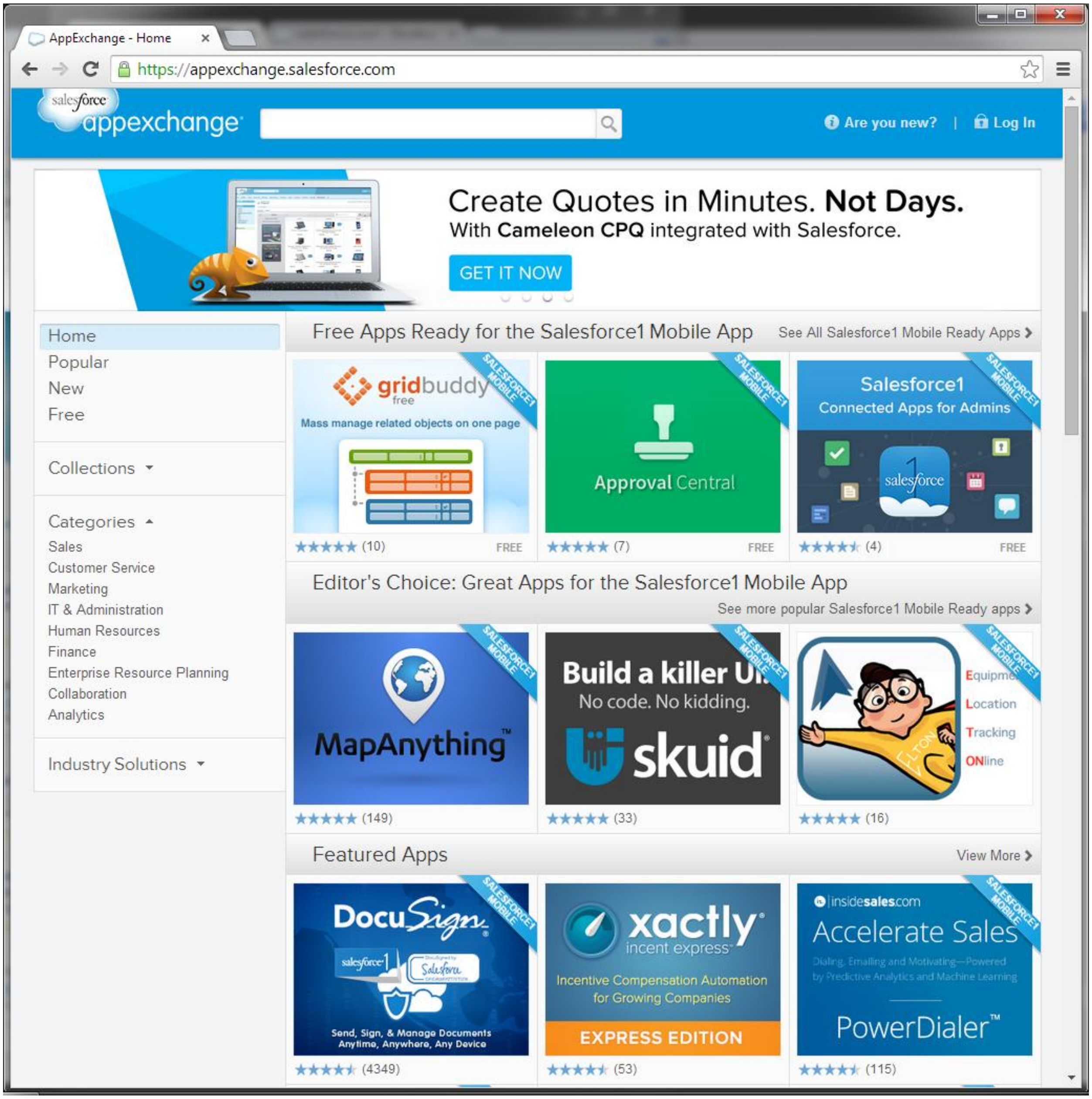

Account
salesforce.com
Customize Page | Edit Layout | Printable View | Help for this Page
Show Feed
« Back to List: Pages
Action Plans [0] | Contacts [0] | Opportunities [0] | Cases [0] | Open Activities [0] | Activity History [0] | Notes & Attachments [0]
Account Detail
Edit
Delete
Include Offline
Account Owner
Paul Goodey [Change]
Active
Account Name
salesforce.com [View Hierarchy]
Upsell Opportunity
Parent Account
Type
Billing Address
The Landmark @ One Market
Suite 300
San Francisco, California 94105
United States
Shipping Address
Google Map
Fishermans Wharf
Gashouse Cove
Marina Blvd
Bay St
Lombard St
Telegraph Hill
Broadway St
Hyde St
Fillmore St
Presidio Blvd
W Pacific Ave
California St
Pine St
Van Ness
Mission St
Lower Pacific
101
80

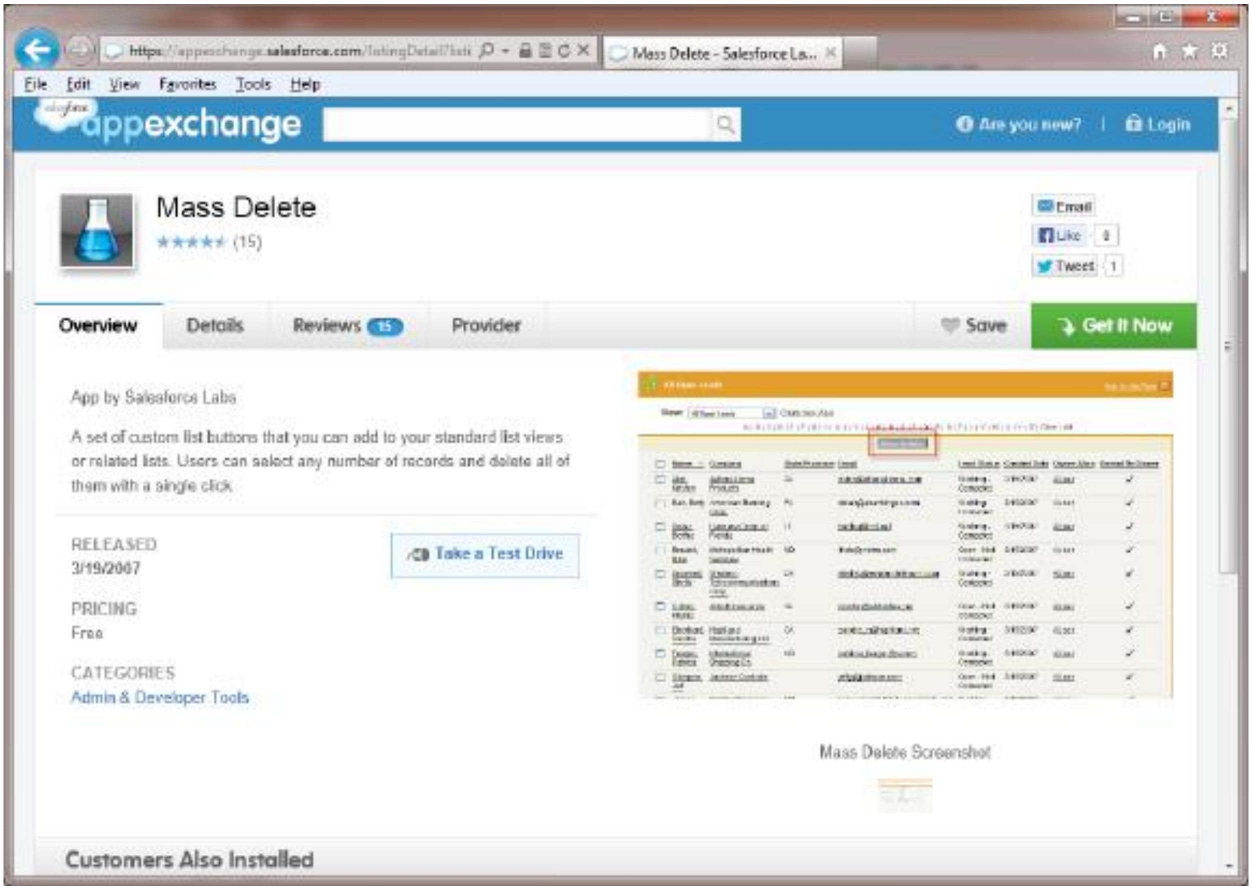

Security Settings - Internet Zone
Settings
Enable
Allow webpages to use restricted protocols for active conten
Disable
Enable
Prompt
Allow websites to open windows without address or status b
Disable
Enable
Display mixed content
Disable
Enable
Prompt
Don't prompt for client certificate selection when only one ce
Disable
Enable
*Takes effect after you restart Internet Explorer
Reset custom settings
Reset to:
Medium-high (default)
Reset...
OK
Cancel

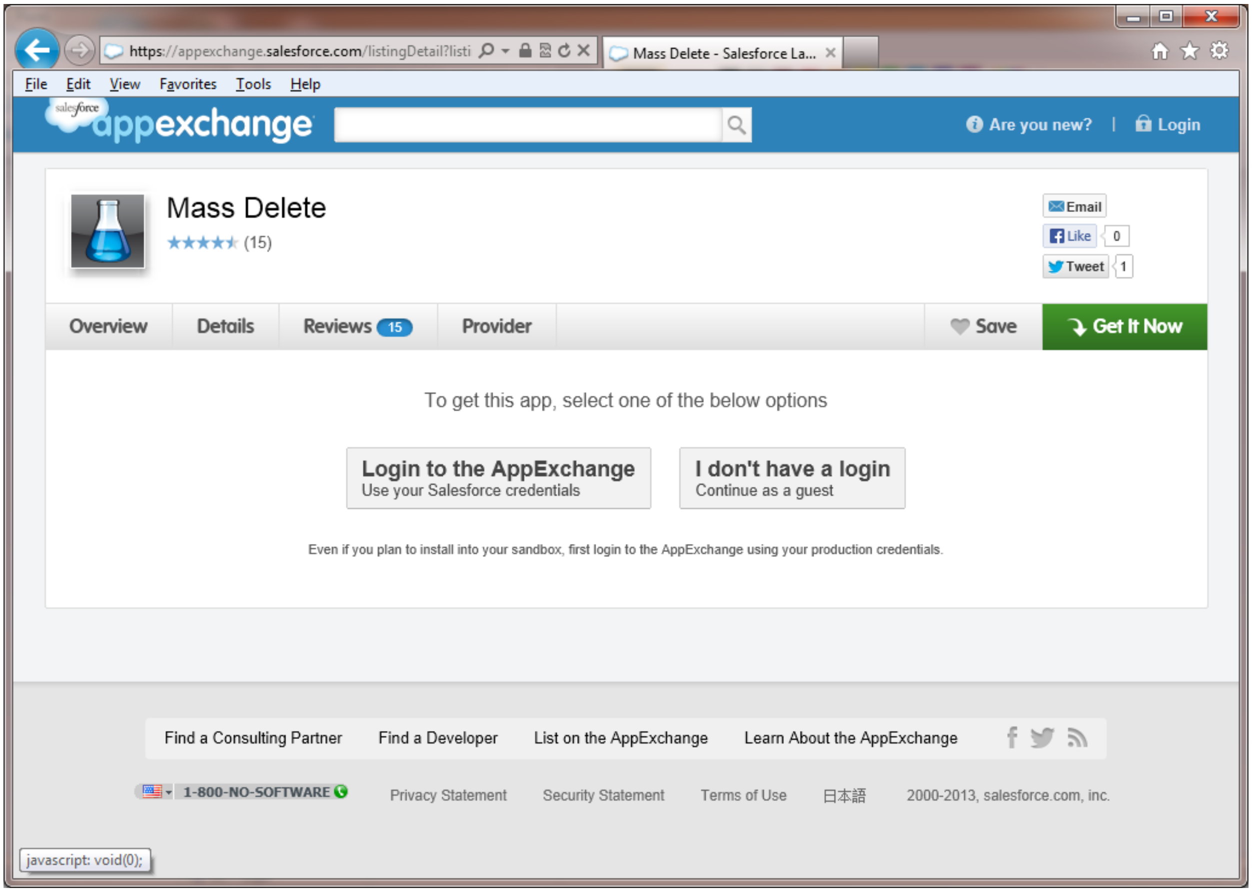
Chapter 9

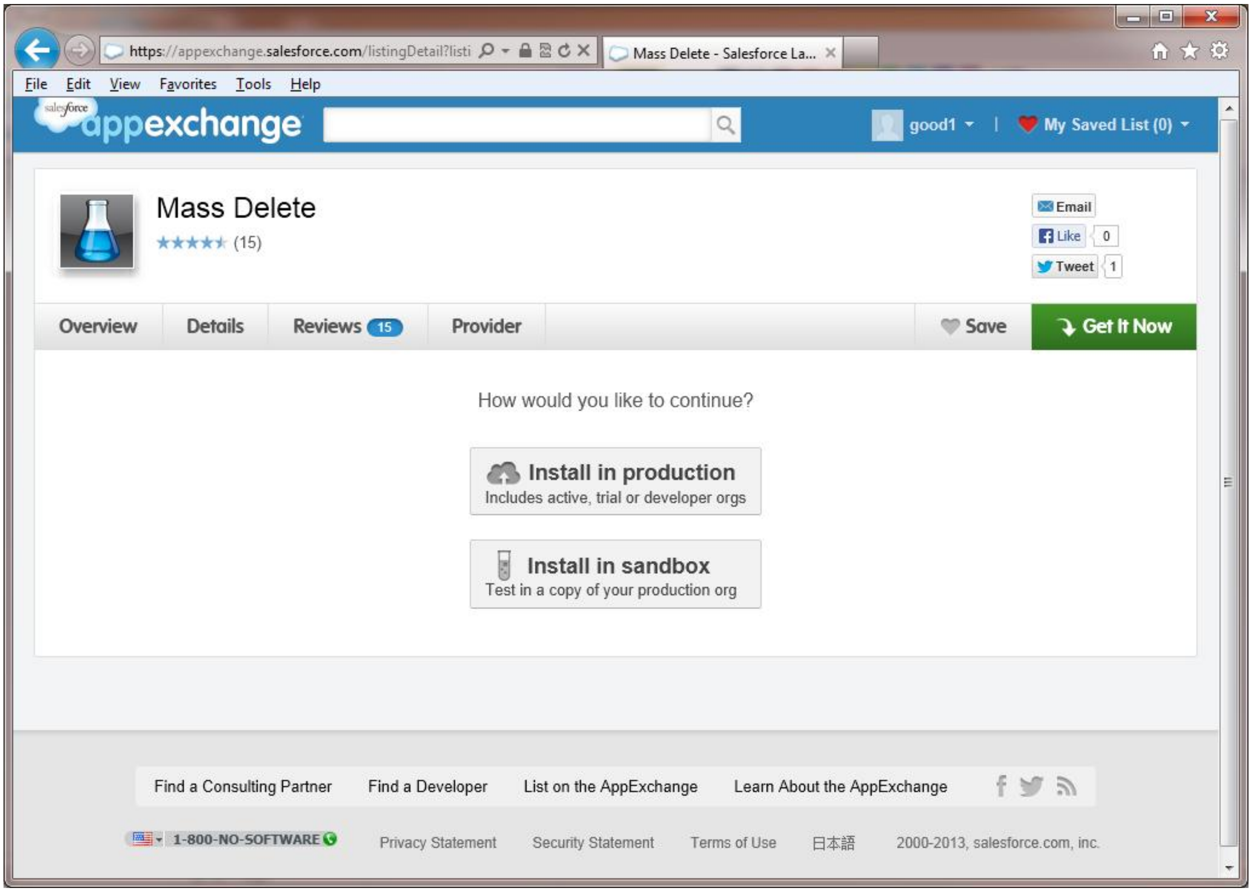


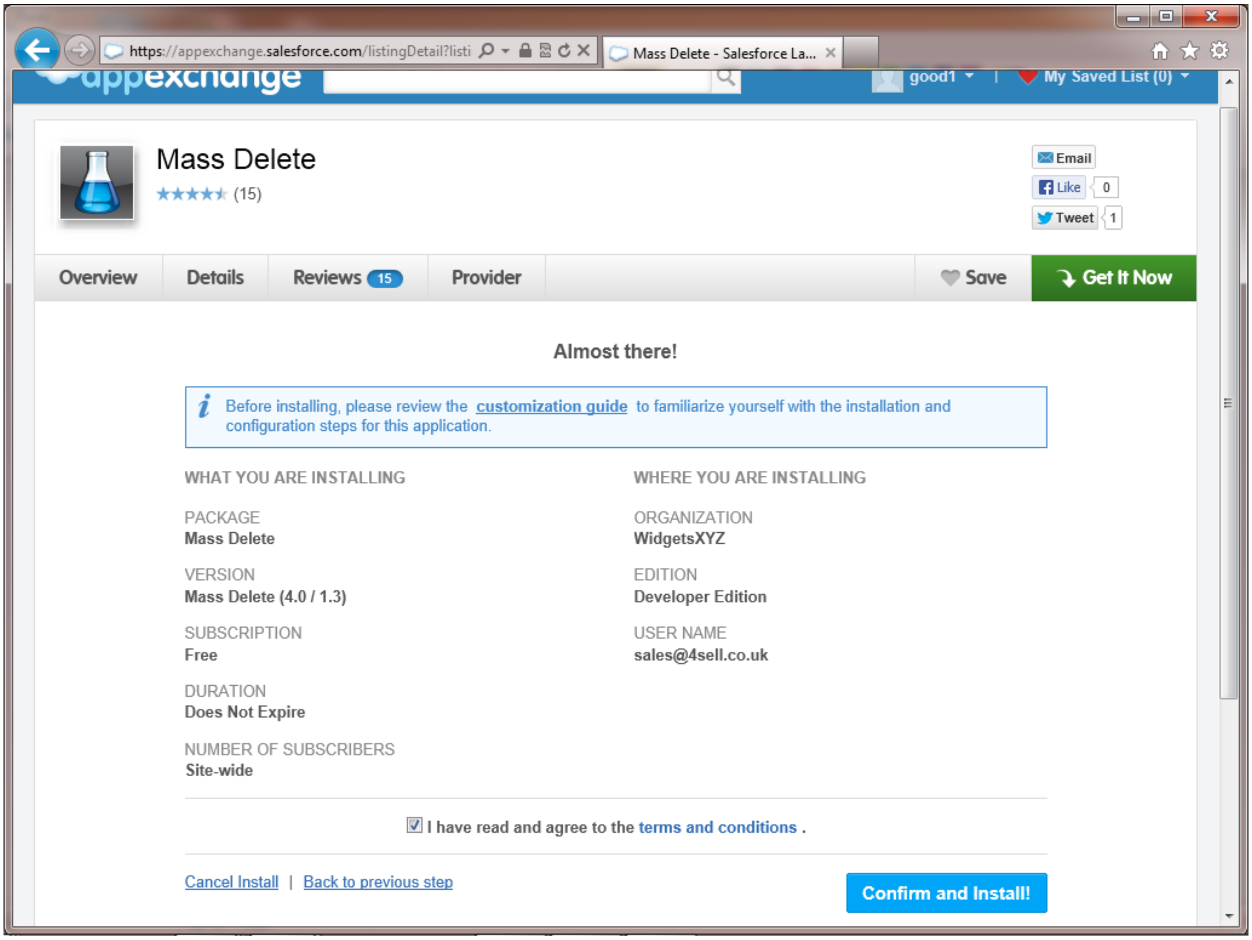
Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Dashboards
Opportunities
Forecasts
Cases
Products
Search All Setup...
Expand All | Collapse All
Force.com Home
Administer
Manage Users
Manage Apps
Company Profile
Security Controls
Domain Management
Communication Templates
Translation Workbench
Data Management
Mobile Administration
Desktop Administration
Email Administration
Google Apps
Build
Customize
Create
Develop
Schema Builder
Canvas App Previewer
Installed Packages
AppExchange Marketplace
Critical Updates
Deploy
Deployment Status
Monitor
System Overview
Imports
Outbound Messages
salesforce appexchange
Search AppExchange Apps...
Maximize Deals, Minimize Effort
Streamline Sales Quoting & Proposals on Any Device
CPQ
GET IT NOW
CallidusCloud
Paid Apps | Free Apps
Your Suggestions
Geopointe: Maps, Mapping, Rou...
byArrowpointe Corp...
(276)
Conga Composer - Generate Doc...
byConga
(434)
DocuSign Electronic Signature...
byDocuSign, Inc
(4349)
DupeBlocker 3 - REAL TIME De ...
byCRMfusion Inc.
(39)
LinkedIn Sales Navigator for ...
byLinkedIn
(131)
View all suggestions
Most Popular
Conga Composer - Generate Doc...
byConga
(434)
DocuSign Electronic Signature...
byDocuSign, Inc
(4349)
Gmail, Google Apps, Google Ca...
byCirruspath, Inc
(517)
LOOP Document Services - Docu...
byDrawloop Technol...
(181)
PowerDialer for Salesforce
byInsideSales.com
(115)
View all popular apps
New
X-Maps
byPexys, Inc.
(No Rating)
Firepond by FPX
byFPX, LLC
(No Rating)
SuperTRUMP for Salesforce
byIvory Consulting...
(No Rating)
Resident Central: Senior Livi...
byLansdale Group
(No Rating)
Natterbox Voice Services
byNatterbox
(2)
View all new apps

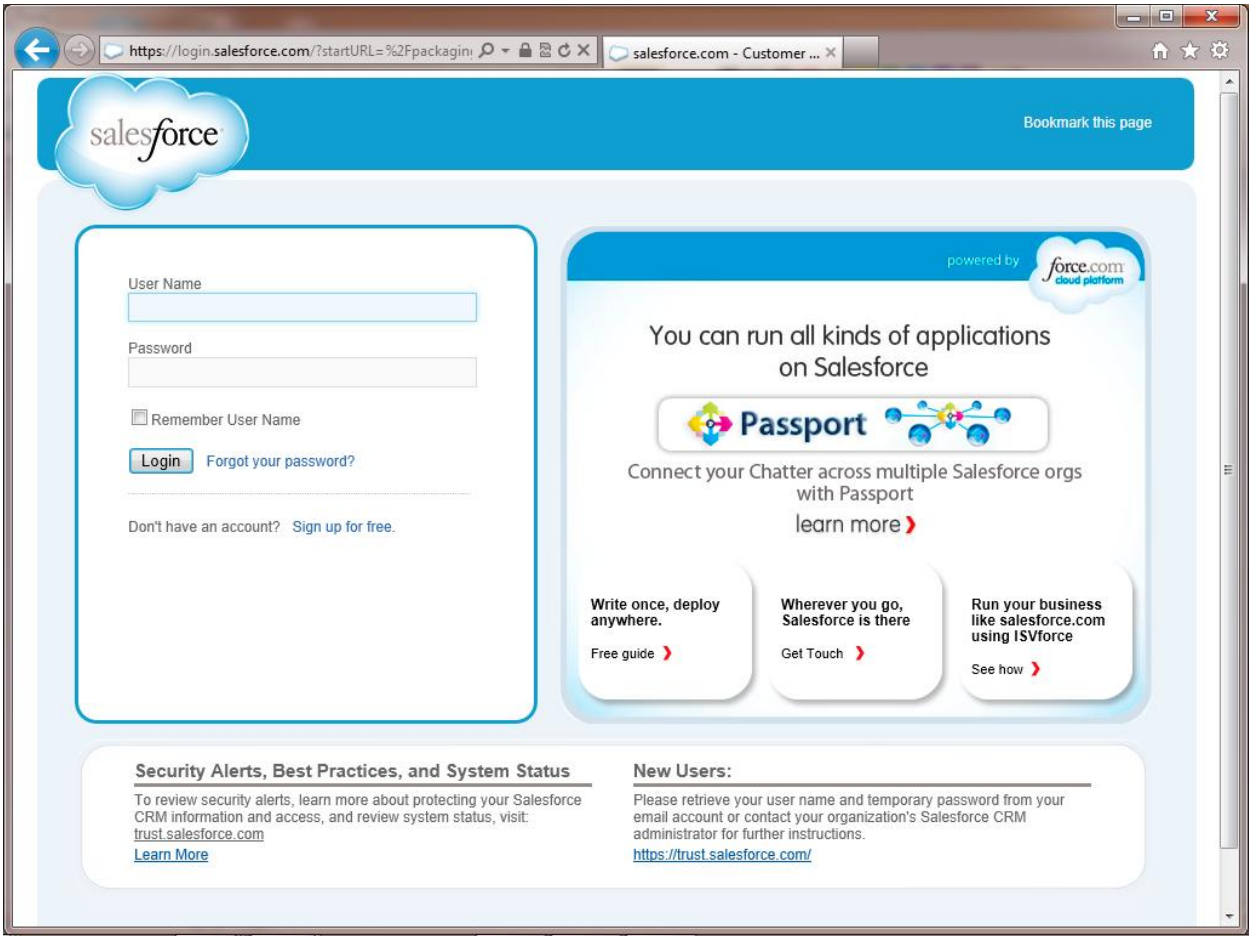

AppExchange - Home
https://appexchange.salesforce.com
salesforce appexchange
Are you new? | Log In
Create Quotes in Minutes. Not Days.
With Cameleon CPQ integrated with Salesforce.
GET IT NOW
Home
Popular
New
Free
Collections
Categories
Sales
Customer Service
Marketing
IT & Administration
Human Resources
Finance
Enterprise Resource Planning
Collaboration
Analytics
Industry Solutions
Free Apps Ready for the Salesforce1 Mobile App
See All Salesforce1 Mobile Ready Apps
gridbuddy free
Mass manage related objects on one page
(10) FREE
Approval Central
(7) FREE
Salesforce1
Connected Apps for Admins
(4) FREE
Editor's Choice: Great Apps for the Salesforce1 Mobile App
See more popular Salesforce1 Mobile Ready apps
MapAnything™
(149)
Build a killer UI
No code. No kidding.
skuid
(33)
Equipment
Location
Tracking
ONline
(16)
Featured Apps
View More
DocuSign
Send, Sign, & Manage Documents Anytime, Anywhere, Any Device
(4349)
xactly incent express
Incentive Compensation Automation for Growing Companies
EXPRESS EDITION
(53)
insidesales.com
Accelerate Sales
Dialing, Emailing and Motivating—Powered by Predictive Analytics and Machine Learning
PowerDialer™
(115)

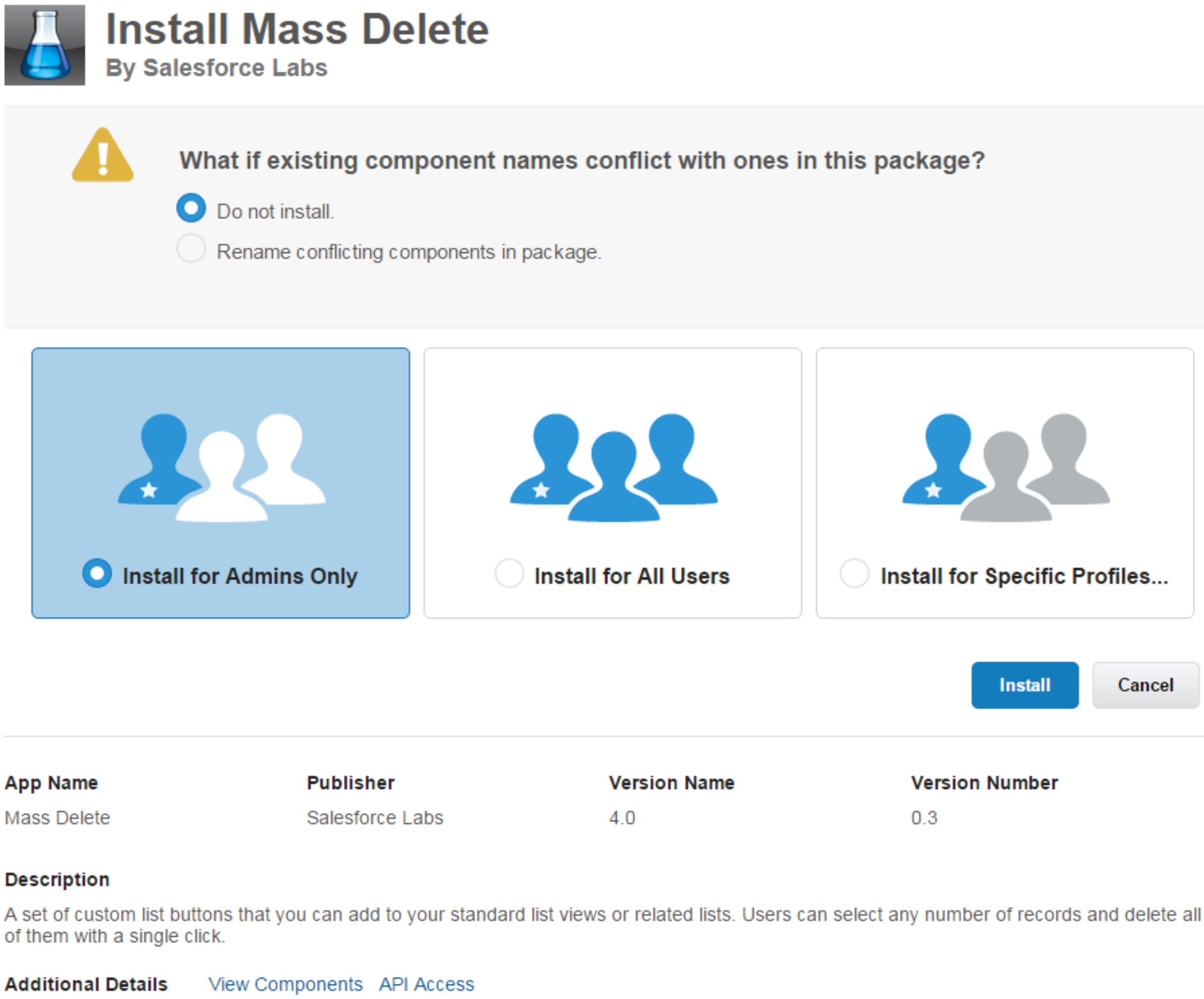

File Edit View Favorites Tools Help
Mass Delete - Salesforce La...
appexchange
Are you new?
Login
Mass Delete
(15)
Email
Like
Tweet
Overview
Details
Reviews 15
Provider
Save
Get It Now
App by Salesforce Labs
A set of custom list buttons that you can add to your standard list views or related lists. Users can select any number of records and delete all of them with a single click.
RELEASED
3/19/2007
PRICING
Free
CATEGORIES
Admin & Developer Tools
Take a Test Drive
Mass Delete Screenshot
Customers Also Installed

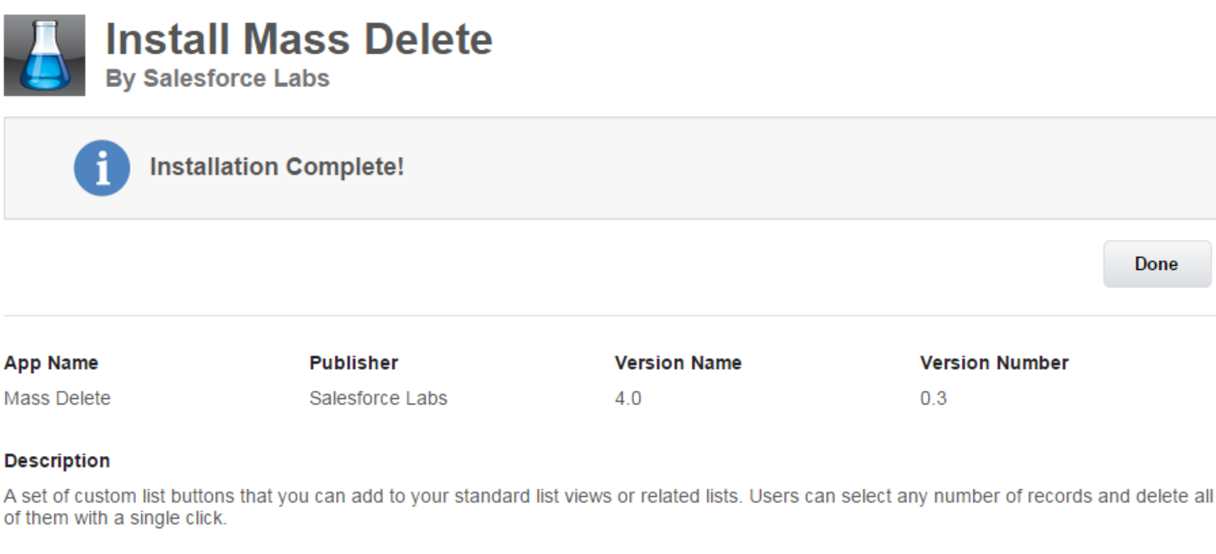

https://appexchange.salesforce.com/listingDetail?listi
Mass Delete - Salesforce La...
File Edit View Favorites Tools Help
appexchange
Are you new? | Login
Mass Delete
(15)
Email
Like 0
Tweet 1
Overview Details Reviews 15 Provider Save Get It Now
To get this app, select one of the below options
Login to the AppExchange
Use your Salesforce credentials
I don't have a login
Continue as a guest
Even if you plan to install into your sandbox, first login to the AppExchange using your production credentials.
Find a Consulting Partner Find a Developer List on the AppExchange Learn About the AppExchange
1-800-NO-SOFTWARE
Privacy Statement Security Statement Terms of Use 日本語 2000-2013, salesforce.com, inc.
javascript: void(0);

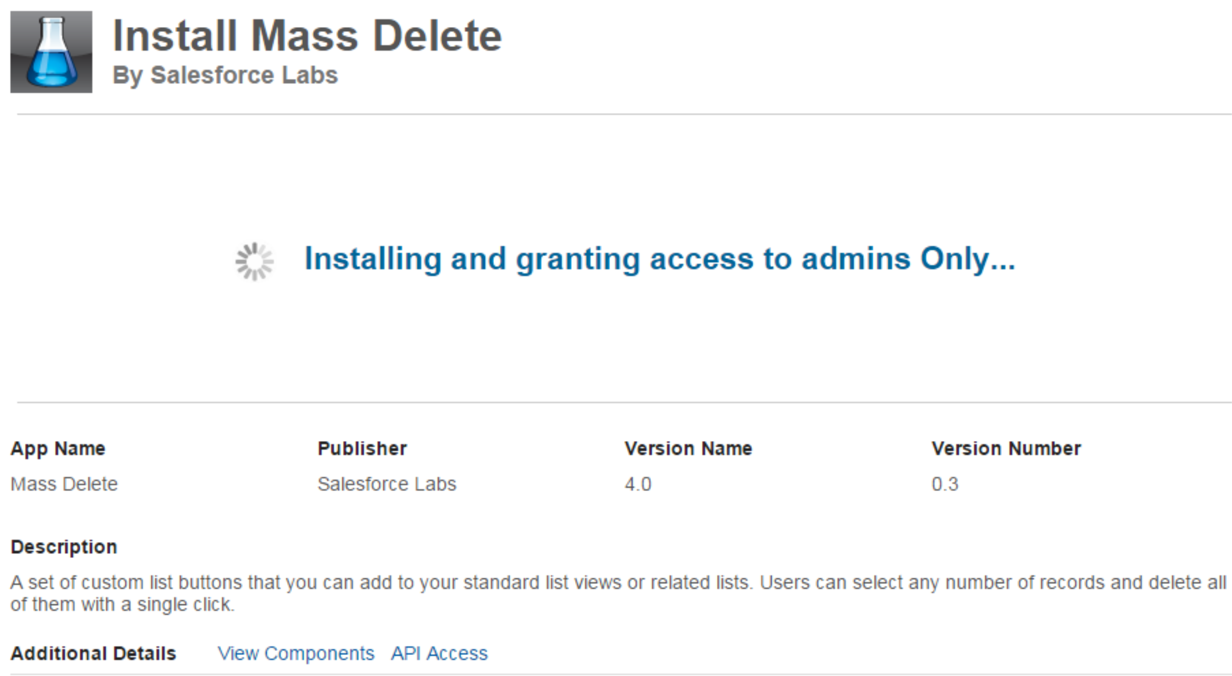

https://appexchange.salesforce.com/listingDetail?listi
Mass Delete - Salesforce La...
File Edit View Favorites Tools Help
salesforce appexchange
good1
My Saved List (0)
Mass Delete
(15)
Email
Like 0
Tweet 1
Overview
Details
Reviews 15
Provider
Save
Get It Now
How would you like to continue?
Install in production
Includes active, trial or developer orgs
Install in sandbox
Test in a copy of your production org
Find a Consulting Partner
Find a Developer
List on the AppExchange
Learn About the AppExchange
1-800-NO-SOFTWARE
Privacy Statement
Security Statement
Terms of Use
日本語
2000-2013, salesforce.com, inc.

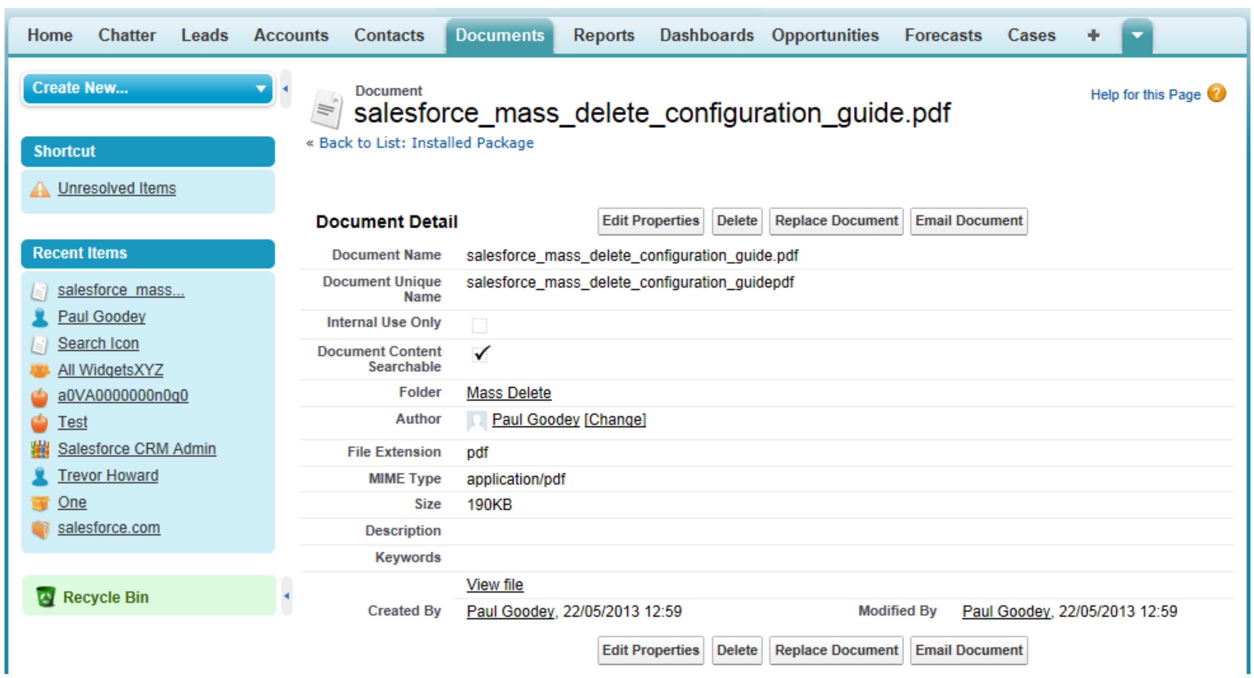

https://appexchange.salesforce.com/listingDetail?listi
Mass Delete - Salesforce La...
appexchange
good1
My Saved List (0)
Mass Delete
(15)
Email
Like
0
Tweet
1
Overview
Details
Reviews 15
Provider
Save
Get It Now
Almost there!
Before installing, please review the customization guide to familiarize yourself with the installation and configuration steps for this application.
WHAT YOU ARE INSTALLING
PACKAGE
Mass Delete
VERSION
Mass Delete (4.0 / 1.3)
SUBSCRIPTION
Free
DURATION
Does Not Expire
NUMBER OF SUBSCRIBERS
Site-wide
WHERE YOU ARE INSTALLING
ORGANIZATION
WidgetsXYZ
EDITION
Developer Edition
USER NAME
sales@4sell.co.uk
I have read and agree to the terms and conditions .
Cancel Install | Back to previous step
Confirm and Install!


https://login.salesforce.com/?startURL=%2Fpackagin
salesforce.com - Customer ...
salesforce
Bookmark this page
User Name
Password
Remember User Name
Login
Forgot your password?
Don't have an account? Sign up for free.
powered by
force.com cloud platform
You can run all kinds of applications on Salesforce
Passport
Connect your Chatter across multiple Salesforce orgs with Passport
learn more
Write once, deploy anywhere.
Free guide
Wherever you go, Salesforce is there
Get Touch
Run your business like salesforce.com using ISVforce
See how
Security Alerts, Best Practices, and System Status
To review security alerts, learn more about protecting your Salesforce CRM information and access, and review system status, visit: trust.salesforce.com
Learn More
New Users:
Please retrieve your user name and temporary password from your email account or contact your organization's Salesforce CRM administrator for further instructions.
https://trust.salesforce.com/


Install Mass Delete
By Salesforce Labs
What if existing component names conflict with ones in this package?
Do not install.
Rename conflicting components in package.
Install for Admins Only
Install for All Users
Install for Specific Profiles...
Install
Cancel
App Name
Mass Delete
Publisher
Salesforce Labs
Version Name
4.0
Version Number
0.3
Description
A set of custom list buttons that you can add to your standard list views or related lists. Users can select any number of records and delete all of them with a single click.
Additional Details
View Components
API Access


Install Mass Delete
By Salesforce Labs
Installation Complete!
Done
App Name
Mass Delete
Publisher
Salesforce Labs
Version Name
4.0
Version Number
0.3
Description
A set of custom list buttons that you can add to your standard list views or related lists. Users can select any number of records and delete all of them with a single click.


Install Mass Delete
By Salesforce Labs
Installing and granting access to admins Only...
App Name
Mass Delete
Publisher
Salesforce Labs
Version Name
4.0
Version Number
0.3
Description
A set of custom list buttons that you can add to your standard list views or related lists. Users can select any number of records and delete all of them with a single click.
Additional Details
View Components
API Access


Home
Chatter
Leads
Accounts
Contacts
Documents
Reports
Dashboards
Opportunities
Forecasts
Cases
Create New...
Shortcut
Unresolved Items
Recent Items
salesforce_mass...
Paul Goodey
Search Icon
All WidgetsXYZ
a0VA0000000n0g0
Test
Salesforce CRM Admin
Trevor Howard
One
salesforce.com
Recycle Bin
Document
salesforce_mass_delete_configuration_guide.pdf
« Back to List: Installed Package
Help for this Page
Document Detail
Edit Properties
Delete
Replace Document
Email Document
Document Name
salesforce_mass_delete_configuration_guide.pdf
Document Unique Name
salesforce_mass_delete_configuration_guidepdf
Internal Use Only
Document Content Searchable
Folder
Mass Delete
Author
Paul Goodey [Change]
File Extension
pdf
MIME Type
application/pdf
Size
190KB
Description
Keywords
View file
Created By
Paul Goodey, 22/05/2013 12:59
Modified By
Paul Goodey, 22/05/2013 12:59
Edit Properties
Delete
Replace Document
Email Document

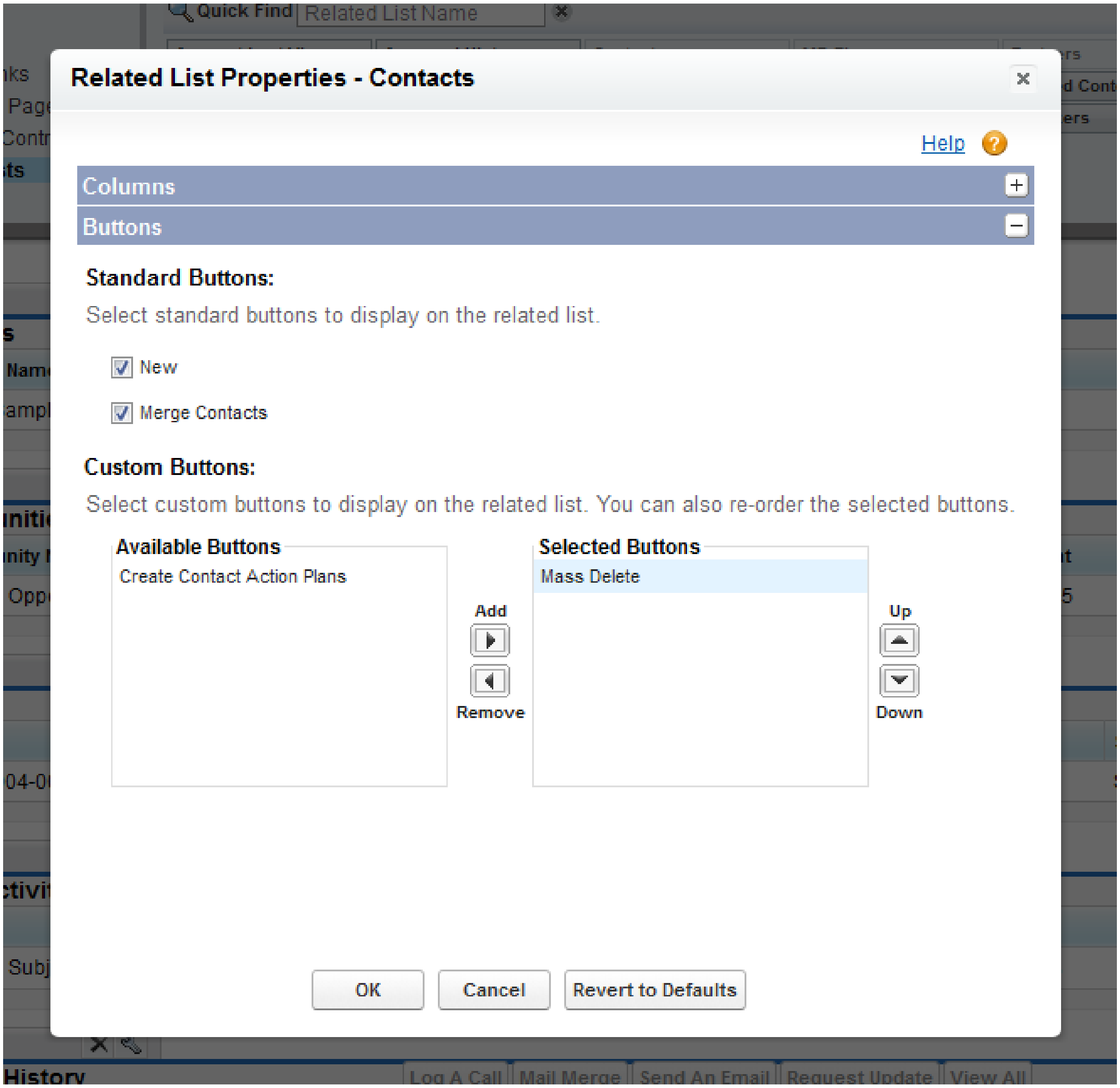
About Mass Delete Custom Buttons

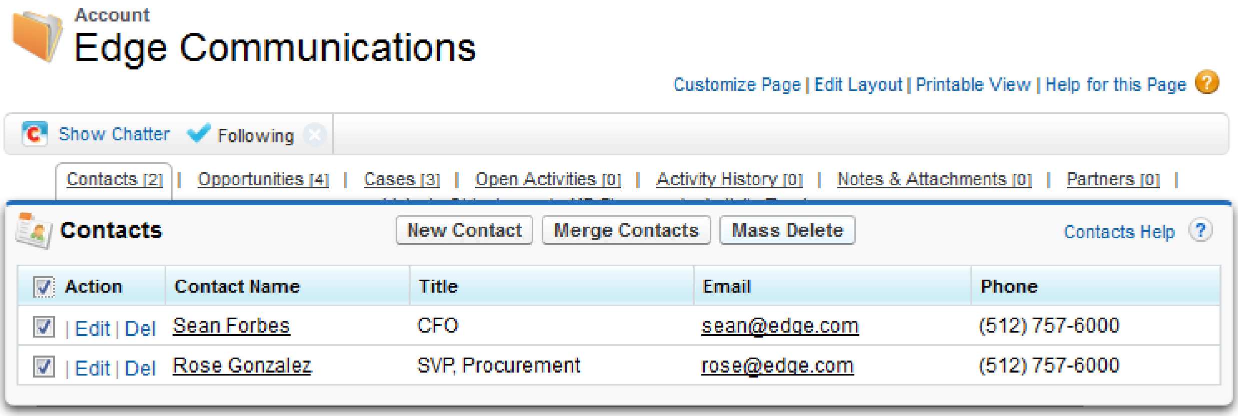
The Mass Delete buttons included in this package are custom list buttons designed to save you time when deleting multiple records in a list view or related list. Each custom button is specifically designed to delete multiple records in a list for a particular standard object such as contacts or cases. One unique button is included for events that is designed to delete all selected tasks and events from an activity list view or related list with the click of a single button.

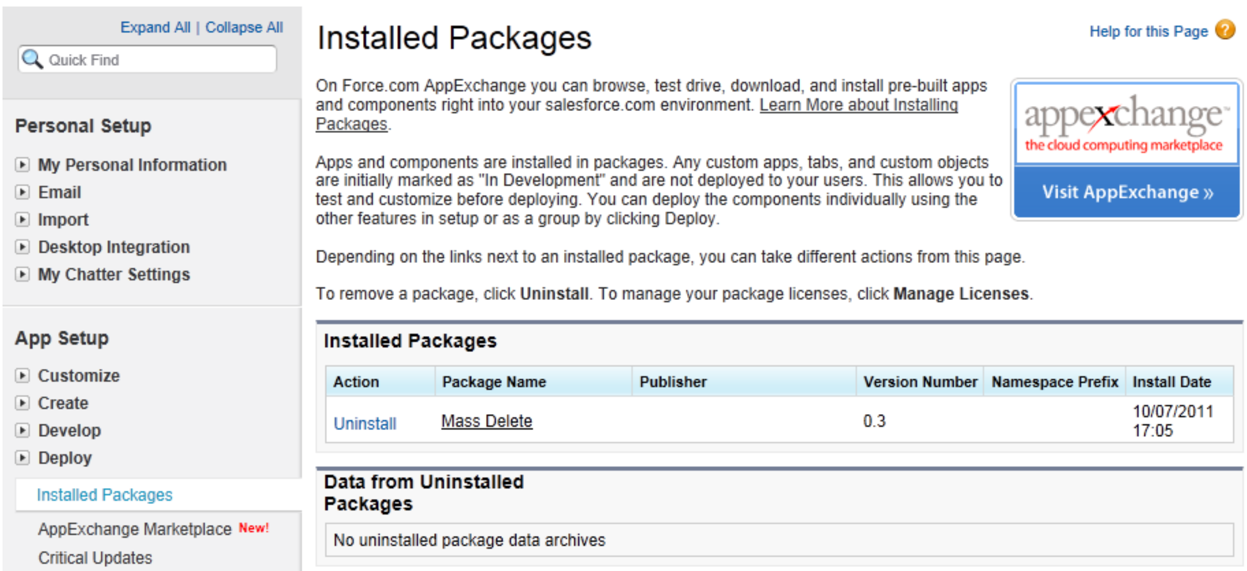
After installing, add the appropriate buttons to your list views and related lists. Each button was created as a list button, making it available on list views and related lists and designed to delete a single type of record. For example, to make the contact mass delete list button available to your users, add it to your contact list views and any page layout that displays the contacts related list.

Adding List Buttons to Related Lists

1. Click **Setup** ➤ **Customize** , select the appropriate object, and choose the Page Layouts link.
2. Click **Edit** next to the page layout that contains the related list where the custom button should display.
3. From the Related List Section, double-click a related list to edit it. Some related lists are not customizable because they link to data rather than store it. You can mouse-over any related list section to see if it is customizable.
4. Select "Mass Delete" in the Available Buttons list and click **Add** to add it to the list of buttons that display for the selected related list.
5. Sort custom buttons by selecting them and clicking **Up** or **Down**.
6. Click **OK**. Changes are not saved until you click **Save** on the page layout.
7. Select the `Overwrite users' personal related list customization` to apply the related lists in the page layout


Quick Find
Related List Name
Related List Properties - Contacts
Help
Columns
Buttons
Standard Buttons:
Select standard buttons to display on the related list.
New
Merge Contacts
Custom Buttons:
Select custom buttons to display on the related list. You can also re-order the selected buttons.
Available Buttons
Create Contact Action Plans
Selected Buttons
Mass Delete
Add
Remove
Up
Down
OK
Cancel
Revert to Defaults
History
Log A Call
Mail Merge
Send An Email
Request Update
View All


Account
Edge Communications
Customize Page | Edit Layout | Printable View | Help for this Page
Show Chatter
Following
Contacts [2] | Opportunities [4] | Cases [3] | Open Activities [0] | Activity History [0] | Notes & Attachments [0] | Partners [0] |
Contacts
New Contact
Merge Contacts
Mass Delete
Contacts Help
Action
Contact Name
Title
Email
Phone
| Edit | Del
Sean Forbes
CFO
sean@edge.com
(512) 757-6000
| Edit | Del
Rose Gonzalez
SVP, Procurement
rose@edge.com
(512) 757-6000


Expand All | Collapse All
Quick Find
Personal Setup
My Personal Information
Email
Import
Desktop Integration
My Chatter Settings
App Setup
Customize
Create
Develop
Deploy
Installed Packages
AppExchange Marketplace New!
Critical Updates
Installed Packages
Help for this Page
On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. Learn More about Installing Packages.
Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.
Depending on the links next to an installed package, you can take different actions from this page.
To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.
appexchange
the cloud computing marketplace
Visit AppExchange »
Installed Packages
Action
Package Name
Publisher
Version Number
Namespace Prefix
Install Date
Uninstall
Mass Delete
0.3
10/07/2011 17:05
Data from Uninstalled Packages
No uninstalled package data archives

Uninstalling a Package

Help for this Page

Uninstalling this package will:

- Permanently delete all components in this package (listed below)
- Permanently delete all customizations you have made to these components

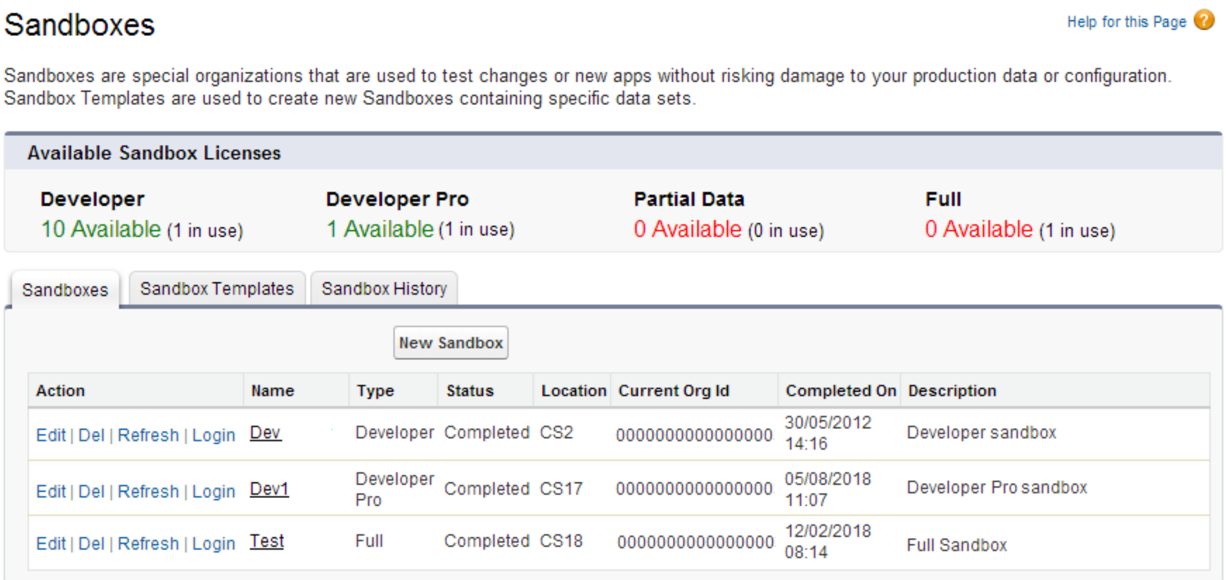
During an uninstall, salesforce.com automatically generates an export file containing the package data as well as related notes and attachments. This file is available for 48 hours if you need to retrieve the data. Note that re-importing your export data is not automatic. Reload your data manually and recreate any relationships between objects. Some components can not be recreated and others require special treatment. Tell me more

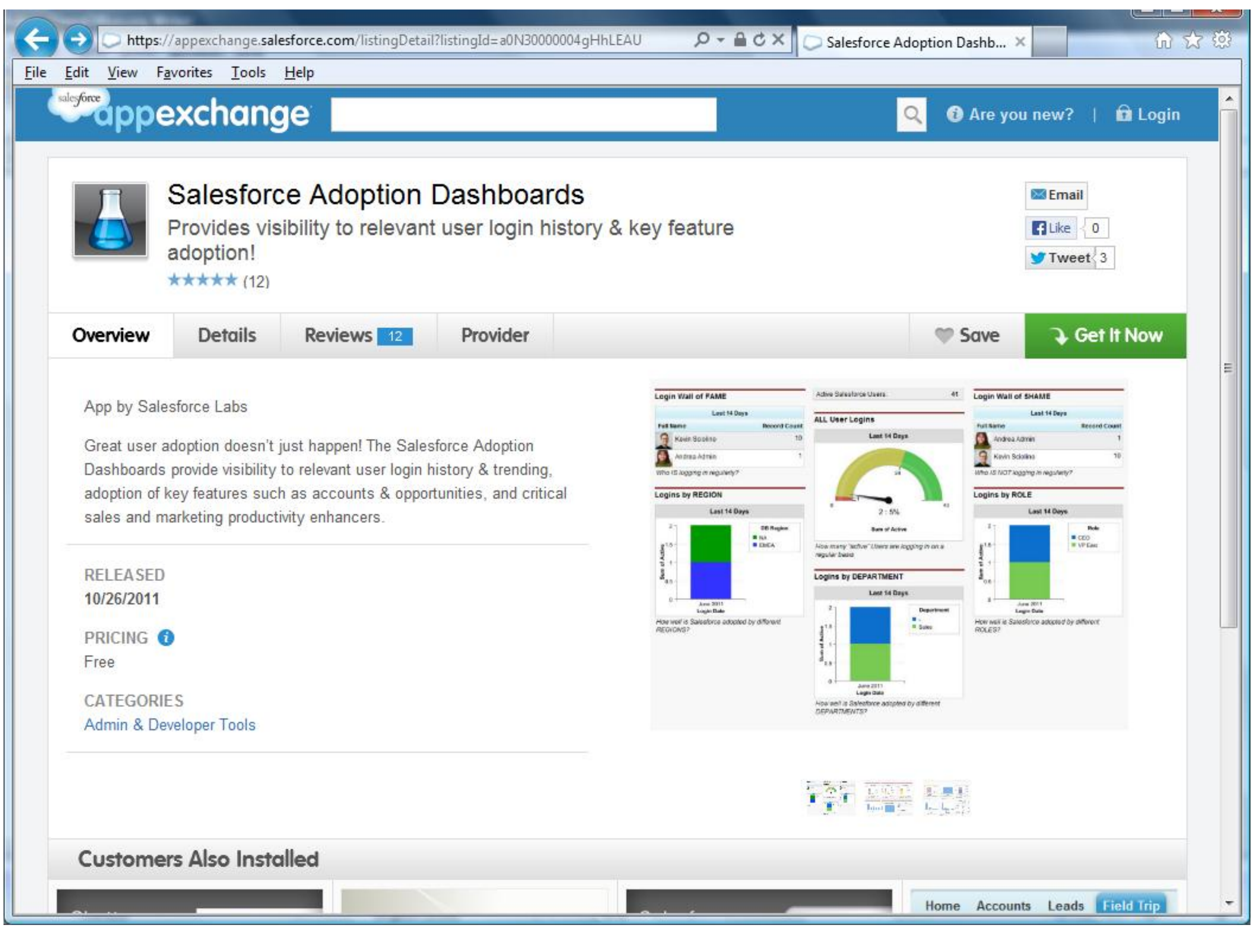
Package Components

Action	Name	Parent Object	Type
	Mass Delete		Document Folder
	Mass_Delete	Opportunity	Button or Link
	Mass_Delete	Opportunity Product	Button or Link
	Mass_Delete	Product	Button or Link
	Mass_Delete	Case	Button or Link
	Mass_Delete	Contact	Button or Link
	Mass_Delete	Event	Button or Link
	Mass_Delete	Solution	Button or Link
	Mass_Delete	Account	Button or Link
	Mass_Delete	Campaign	Button or Link
	Mass_Delete	Asset	Button or Link
	Mass_Delete	Lead	Button or Link
	Mass_Delete	Contract	Button or Link
	salesforce_mass_delete_configuration_guide.pdf		Document

☐ Yes, I want to uninstall this package and permanently delete all associated components

Uninstall


Sandboxes
Help for this Page
Sandboxes are special organizations that are used to test changes or new apps without risking damage to your production data or configuration.
Sandbox Templates are used to create new Sandboxes containing specific data sets.
Available Sandbox Licenses
Developer
10 Available (1 in use)
Developer Pro
1 Available (1 in use)
Partial Data
0 Available (0 in use)
Full
0 Available (1 in use)
Sandboxes
Sandbox Templates
Sandbox History
New Sandbox
Action
Name
Type
Status
Location
Current Org Id
Completed On
Description
Edit | Del | Refresh | Login
Dev
Developer
Completed
CS2
0000000000000000
30/05/2012 14:16
Developer sandbox
Edit | Del | Refresh | Login
Dev1
Developer Pro
Completed
CS17
0000000000000000
05/08/2018 11:07
Developer Pro sandbox
Edit | Del | Refresh | Login
Test
Full
Completed
CS18
0000000000000000
12/02/2018 08:14
Full Sandbox

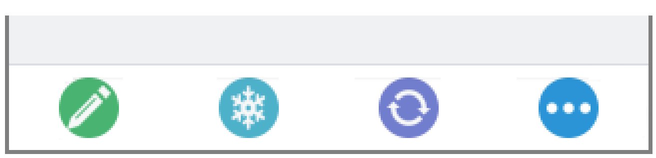

https://appexchange.salesforce.com/listingDetail?listingId=a0N30000004gHhLEAU
Salesforce Adoption Dashb...
File
Edit
View
Favorites
Tools
Help
appexchange
Are you new?
Login
Salesforce Adoption Dashboards
Provides visibility to relevant user login history & key feature adoption!
(12)
Email
Like
0
Tweet
3
Overview
Details
Reviews
12
Provider
Save
Get It Now
App by Salesforce Labs
Great user adoption doesn't just happen! The Salesforce Adoption Dashboards provide visibility to relevant user login history & trending, adoption of key features such as accounts & opportunities, and critical sales and marketing productivity enhancers.
RELEASED
10/26/2011
PRICING
Free
CATEGORIES
Admin & Developer Tools
Customers Also Installed
Home
Accounts
Leads
Field Trip

Chapter10

The available action icons depend on the user and organization. To open the action menu with all available actions for the current user, tap the More Actions icon.

The icons represent the following actions.

Action Icon	Action
	Edit the user record
	Freeze or unfreeze the user account
	Reset the user's password
	Deactivate or activate the user account
	Assign permission sets to the user
	Email the user
	Call the user or log a call made outside of the SalesforceA app.



Salesforce1 Settings

Help for this Page

There are two ways to use Salesforce1: a mobile browser app that users access by logging in to Salesforce from a supported mobile browser, and downloadable apps that users install from the App Store or Google Play.

You can control your organization's access to all of the Salesforce1 apps.

Save Cancel

Mobile Browser App Settings

= Required Information

- [x] Enable the Salesforce1 mobile browser app

Downloadable App Settings

Salesforce1 downloadable app settings are now located in Connected Apps

Save Cancel

Connected Apps

Help for this Page

Manage the apps that connect to your Salesforce organization.

App Access Settings Edit

- [ ] Allow users to install canvas personal apps

View: All Create New 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	Master Label ↑	Application Version	Permitted Users
Edit	Ant Migration Tool	4.0	All users may self-authorize
Edit	Chatter Desktop	7.0	All users may self-authorize
Edit	Chatter Mobile for BlackBerry	7.0	All users may self-authorize
Edit	Dataloader Bulk	6.0	All users may self-authorize
Edit	Dataloader Partner	6.0	All users may self-authorize
Edit	Force.com IDE	4.0	All users may self-authorize
Edit	Salesforce Files	5.0	All users may self-authorize
Edit	Salesforce for Outlook	6.0	All users may self-authorize
Edit	Salesforce Mobile Dashboards	6.0	All users may self-authorize
Edit	Salesforce Touch	7.0	All users may self-authorize
Edit	Salesforce1 for iOS	7.0	All users may self-authorize
Edit	Salesforce1/Chatter for Android	7.0	All users may self-authorize
Edit	SalesforceA	1.0	All users may self-authorize
Edit	Workbench	2.0	All users may self-authorize

Show me fewer ▲ records per list page

Notifications Settings

Help for this Page

Allow users to receive notifications in the Salesforce1 app.

Notifications Save

- [x] Enable in-app notifications
- [x] Enable push notifications
- [ ] Include full content in push notifications

Salesforce1 Branding

Help for this Page

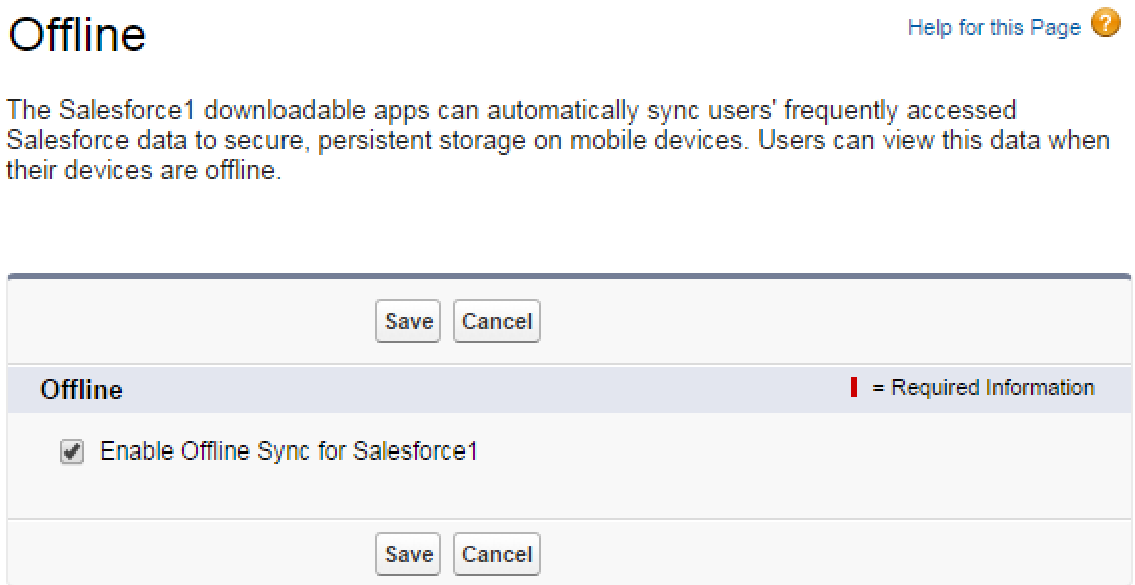
Customize the appearance of the Salesforce1 app so it matches your company's branding. Salesforce1 branding is supported in the mobile browser app and version 5.2 or later of the downloadable apps.

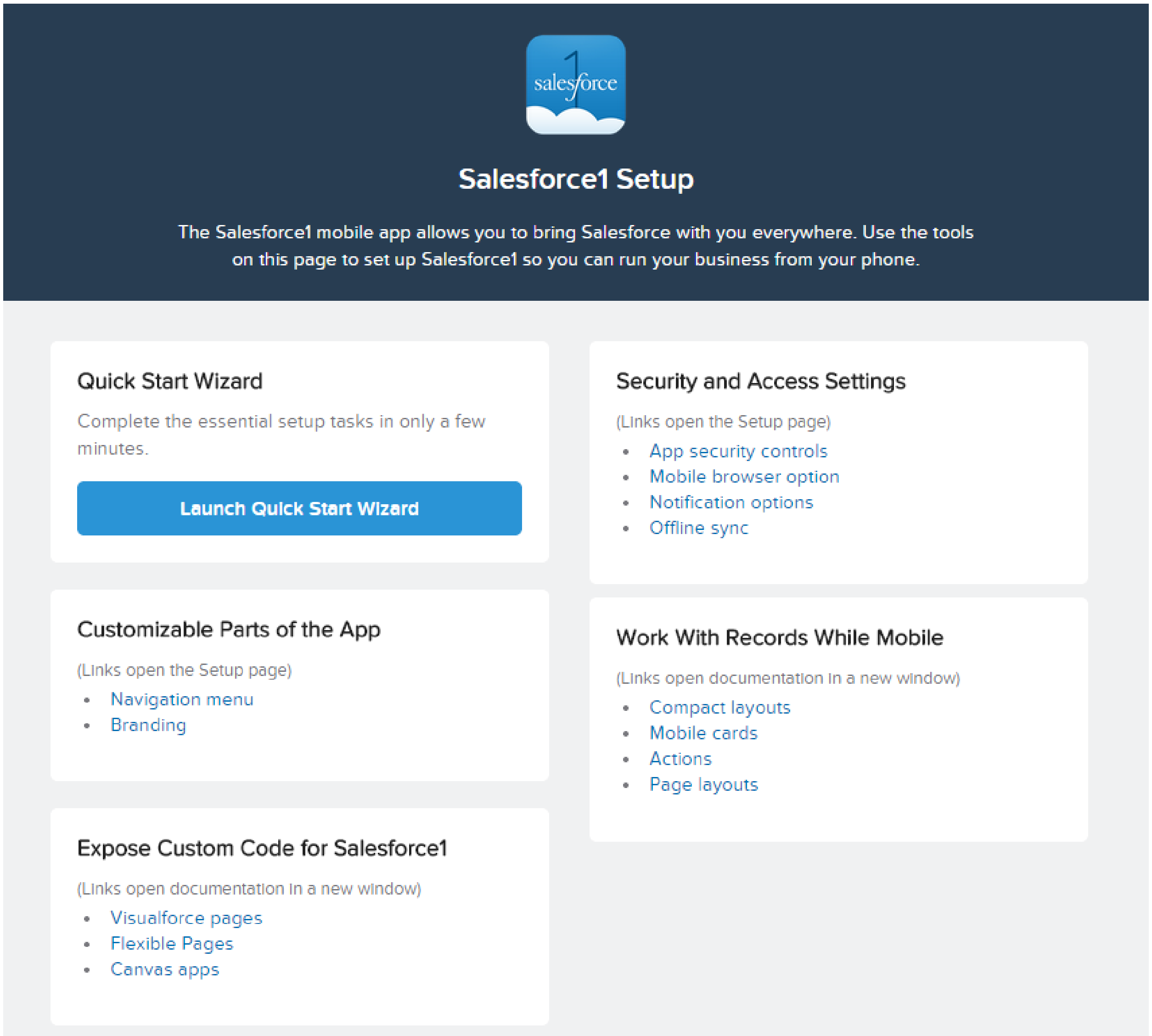
To change the branding of your login page, see the Login Page Settings section on the My Domain page.

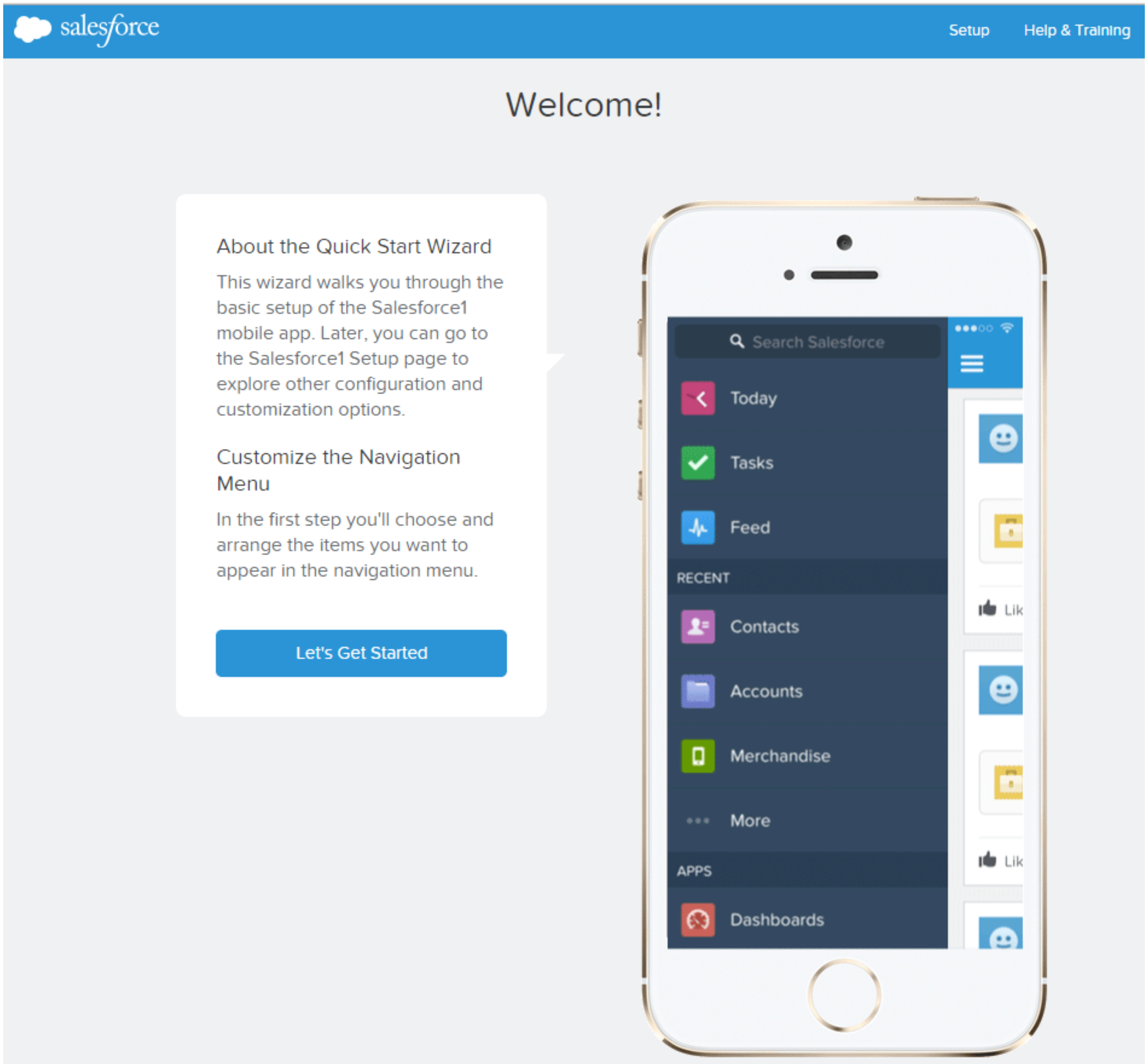
Salesforce1 Branding Settings Edit

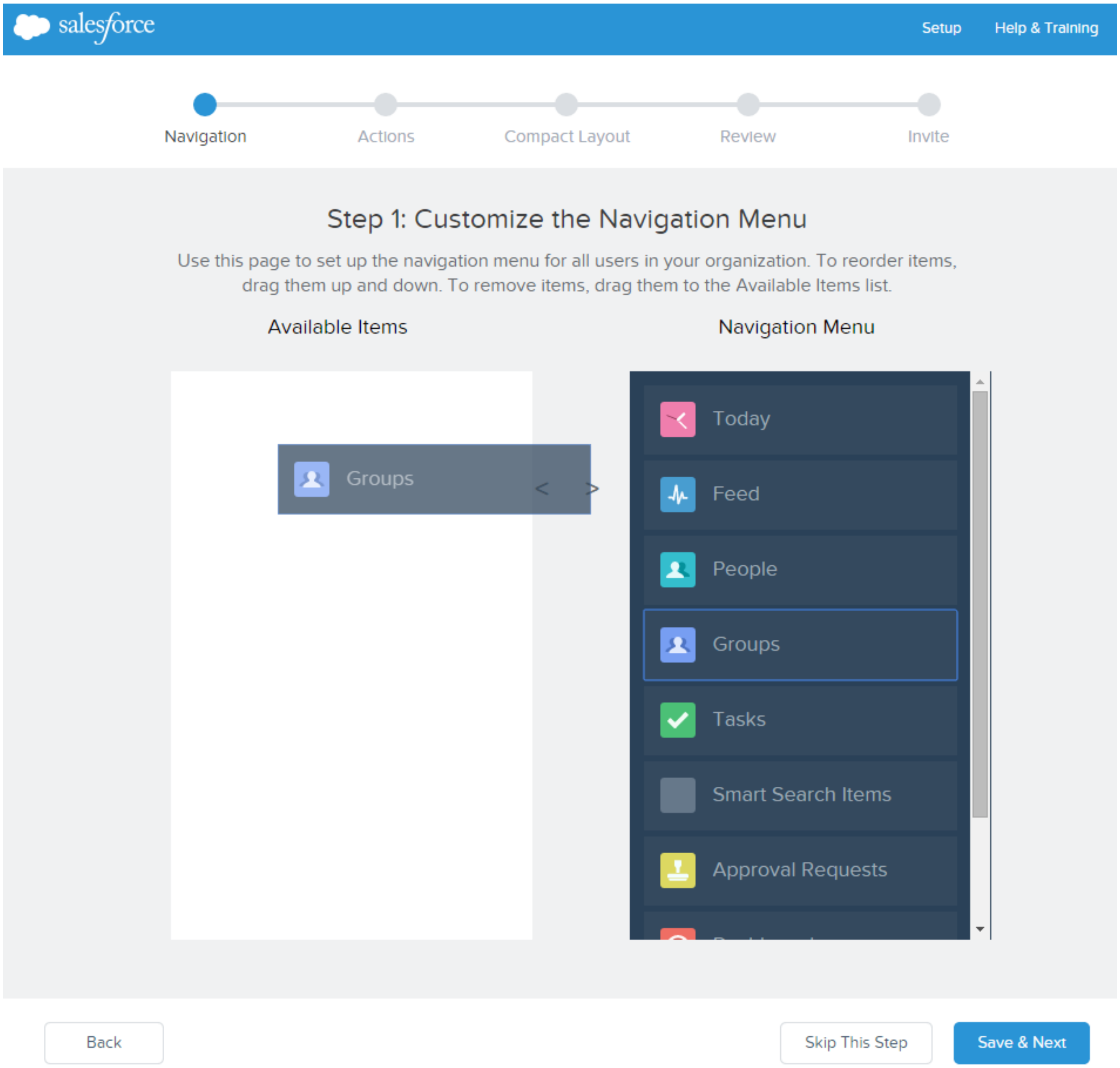
Brand Color	None selected
Loading Page Color	None selected
Loading Page Logo	None selected
Publisher Icon	None selected

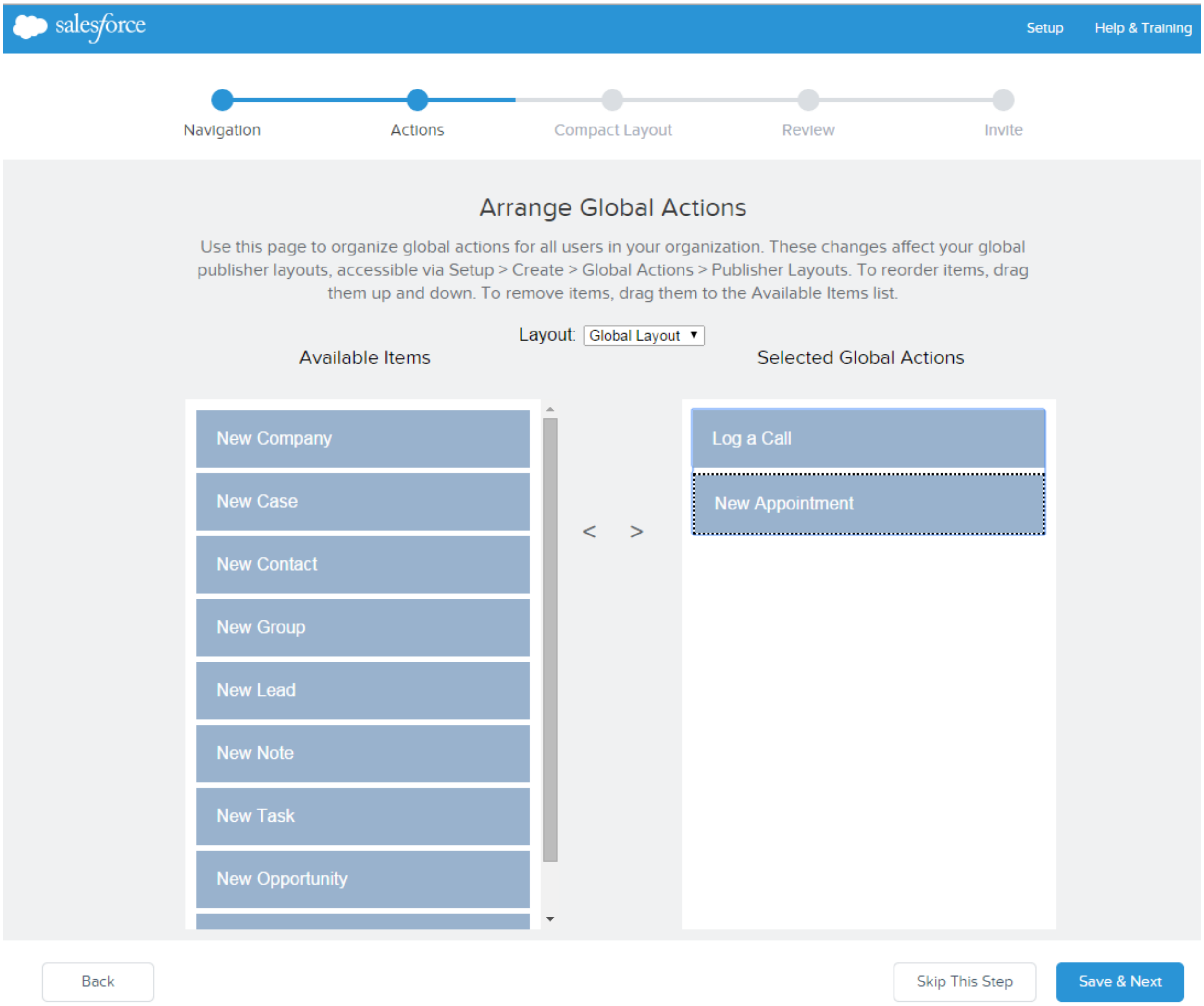
Edit

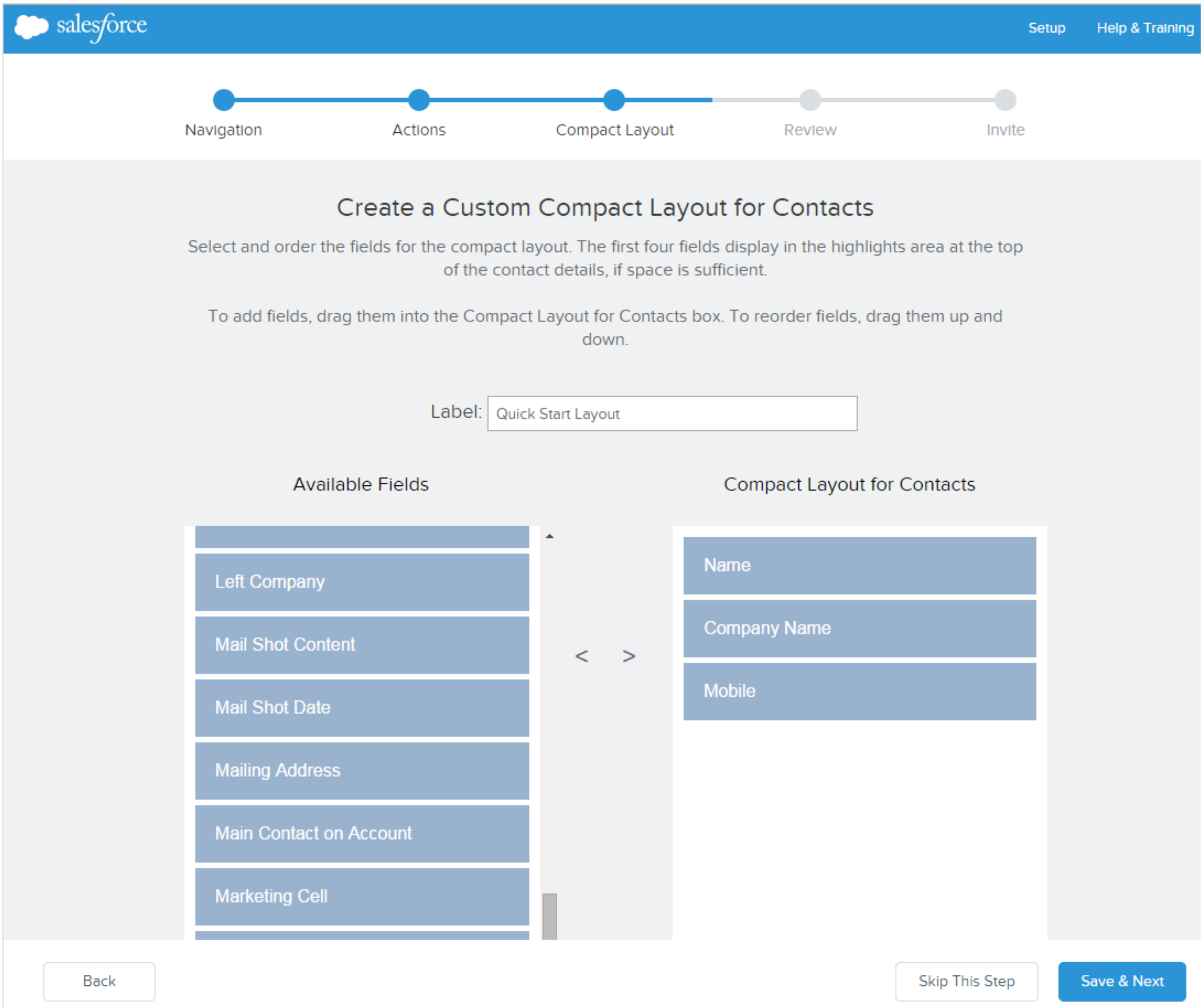

Offline
Help for this Page
The Salesforce1 downloadable apps can automatically sync users' frequently accessed Salesforce data to secure, persistent storage on mobile devices. Users can view this data when their devices are offline.
Save
Cancel
Offline
= Required Information
Enable Offline Sync for Salesforce1
Save
Cancel

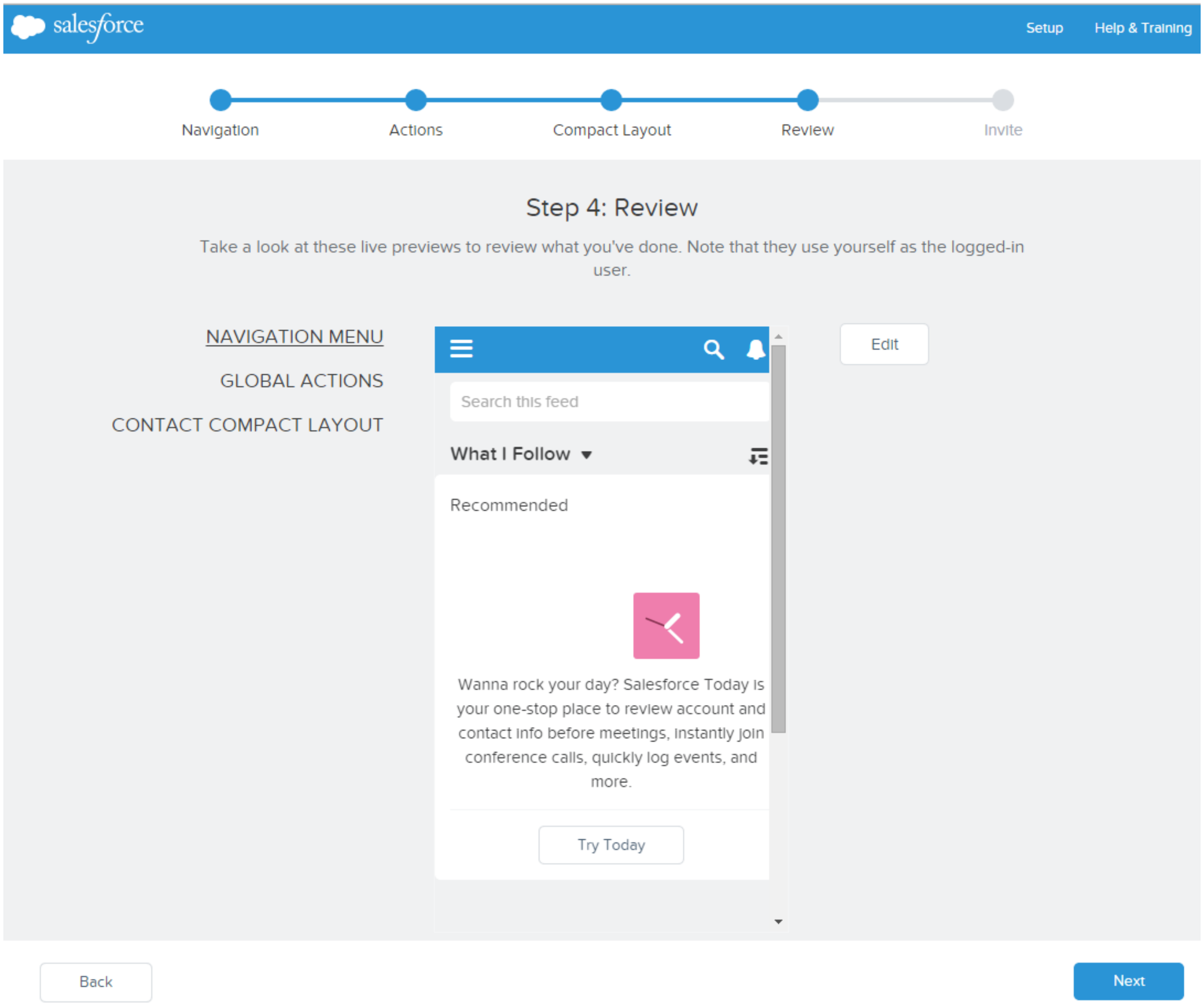

salesforce
Salesforce1 Setup
The Salesforce1 mobile app allows you to bring Salesforce with you everywhere. Use the tools on this page to set up Salesforce1 so you can run your business from your phone.
Quick Start Wizard
Complete the essential setup tasks in only a few minutes.
Launch Quick Start Wizard
Security and Access Settings
(Links open the Setup page)
App security controls
Mobile browser option
Notification options
Offline sync
Customizable Parts of the App
(Links open the Setup page)
Navigation menu
Branding
Work With Records While Mobile
(Links open documentation in a new window)
Compact layouts
Mobile cards
Actions
Page layouts
Expose Custom Code for Salesforce1
(Links open documentation in a new window)
Visualforce pages
Flexible Pages
Canvas apps

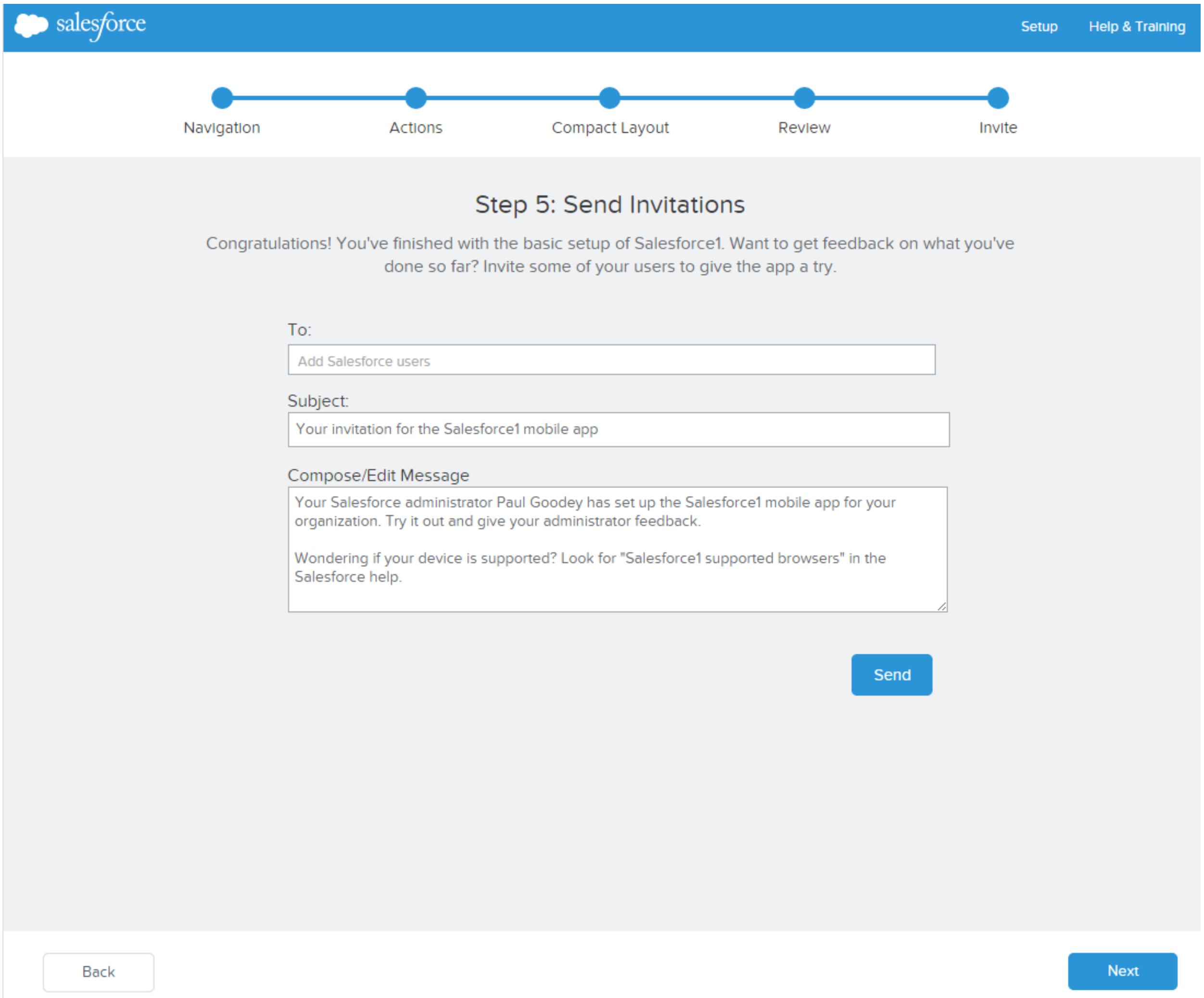

salesforce
Setup
Help & Training
Welcome!
About the Quick Start Wizard
This wizard walks you through the basic setup of the Salesforce1 mobile app. Later, you can go to the Salesforce1 Setup page to explore other configuration and customization options.
Customize the Navigation Menu
In the first step you'll choose and arrange the items you want to appear in the navigation menu.
Let's Get Started
Search Salesforce
Today
Tasks
Feed
RECENT
Contacts
Accounts
Merchandise
More
APPS
Dashboards


salesforce
Setup
Help & Training
Navigation
Actions
Compact Layout
Review
Invite
Step 1: Customize the Navigation Menu
Use this page to set up the navigation menu for all users in your organization. To reorder items, drag them up and down. To remove items, drag them to the Available Items list.
Available Items
Navigation Menu
Groups
Today
Feed
People
Groups
Tasks
Smart Search Items
Approval Requests
Back
Skip This Step
Save & Next


salesforce
Setup
Help & Training
Navigation
Actions
Compact Layout
Review
Invite
Arrange Global Actions
Use this page to organize global actions for all users in your organization. These changes affect your global publisher layouts, accessible via Setup > Create > Global Actions > Publisher Layouts. To reorder items, drag them up and down. To remove items, drag them to the Available Items list.
Layout: Global Layout
Available Items
Selected Global Actions
New Company
New Case
New Contact
New Group
New Lead
New Note
New Task
New Opportunity
Log a Call
New Appointment
Back
Skip This Step
Save & Next


salesforce
Setup
Help & Training
Navigation
Actions
Compact Layout
Review
Invite
Create a Custom Compact Layout for Contacts
Select and order the fields for the compact layout. The first four fields display in the highlights area at the top of the contact details, if space is sufficient.
To add fields, drag them into the Compact Layout for Contacts box. To reorder fields, drag them up and down.
Label:
Quick Start Layout
Available Fields
Compact Layout for Contacts
Left Company
Mail Shot Content
Mail Shot Date
Mailing Address
Main Contact on Account
Marketing Cell
Name
Company Name
Mobile
Back
Skip This Step
Save & Next


salesforce
Setup
Help & Training
Navigation
Actions
Compact Layout
Review
Invite
Step 4: Review
Take a look at these live previews to review what you've done. Note that they use yourself as the logged-in user.
NAVIGATION MENU
GLOBAL ACTIONS
CONTACT COMPACT LAYOUT
Search this feed
What I Follow
Recommended
Wanna rock your day? Salesforce Today is your one-stop place to review account and contact info before meetings, instantly join conference calls, quickly log events, and more.
Try Today
Edit
Back
Next


salesforce
Setup
Help & Training
Navigation
Actions
Compact Layout
Review
Invite
Step 5: Send Invitations
Congratulations! You've finished with the basic setup of Salesforce1. Want to get feedback on what you've done so far? Invite some of your users to give the app a try.
To:
Add Salesforce users
Subject:
Your invitation for the Salesforce1 mobile app
Compose/Edit Message
Your Salesforce administrator Paul Goodey has set up the Salesforce1 mobile app for your organization. Try it out and give your administrator feedback.
Wondering if your device is supported? Look for "Salesforce1 supported browsers" in the Salesforce help.
Send
Back
Next

Salesforce Classic User ☑

Salesforce Classic Settings

Help for this Page

Modify the Salesforce Classic settings for your organization.

Salesforce Classic Settings

Standard Salesforce Classic Settings

☐ **Enable Salesforce Classic Lite**

This option allows users who do not have a mobile or Unlimited Edition license to use a free, restricted version of Salesforce Classic.

Advanced Salesforce Classic Settings

☐ **Permanently Link User to Mobile Device**

Select this option only if you want to prevent your users from switching devices. Note that enabling this option requires administrative maintenance when users need to switch to a different device. Without administrative intervention, users who need to switch to a different device will be unable to use Salesforce Classic.

Edit

Introducing the Mobile Administration Console

Help for this Page

The Mobile Administration Console is used to set up and manage mobile configurations so that salesforce.com users can easily and productively access their salesforce.com data from their mobile device, whether or not a wireless connection is available. Salesforce Classic allows users to quickly look up a contact and -- with one click -- place a phone call or send an email, then log the call or email directly into salesforce.com. Users can make appointments, create and assign tasks, follow up on leads, work on cases and much more, all conveniently from their mobile device.

For more information about Salesforce Classic see Mobile Platform

All Customers

Administrators should read the Mobile Implementation Guide before using the Mobile Administration Console. Existing mobile customers can find information in the guide about migrating from earlier versions of the mobile console.

Set up Salesforce Classic with the Mobile Administration Console in 5 steps:

1. **Create a mobile configuration** and choose users and/or profiles that will be linked to the configuration (Note: licenses are required to activate users for Salesforce Classic).
2. **Define the data set** that will be pushed to the mobile device, then select the objects and record filters for those objects. Choose the objects in hierarchical order to create record filter dependencies.
3. **Set the mobile data set size** and test the data size against user accounts. It is important to test a mobile configuration with the accounts of users who will actually be assigned to the configuration, particularly users who own a large number of records.
4. **Optionally exclude some fields** from each object's mobile page layout because unnecessary fields consume memory and make it harder for users to scroll through pages on the mobile device.
5. **Send a mass email to mobile users** to notify them about the availability of the mobile client application.

See a short demo on setting up Salesforce Classic.

☐ Don't show me this page again

Continue