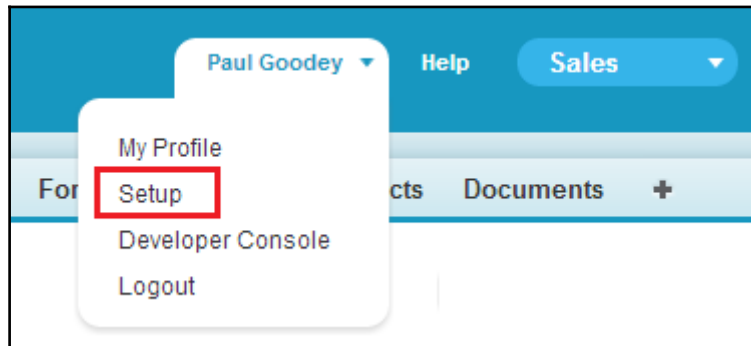
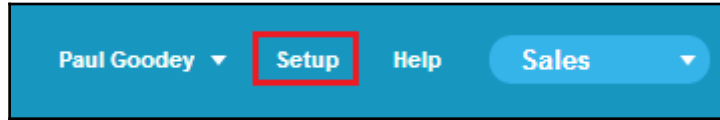
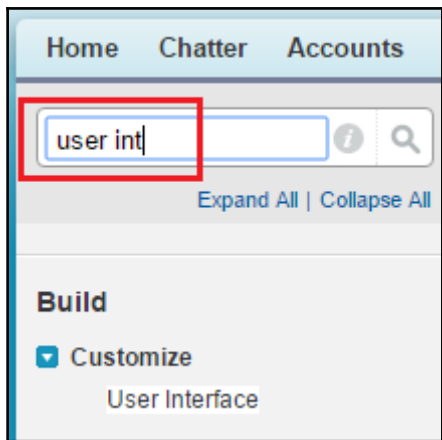
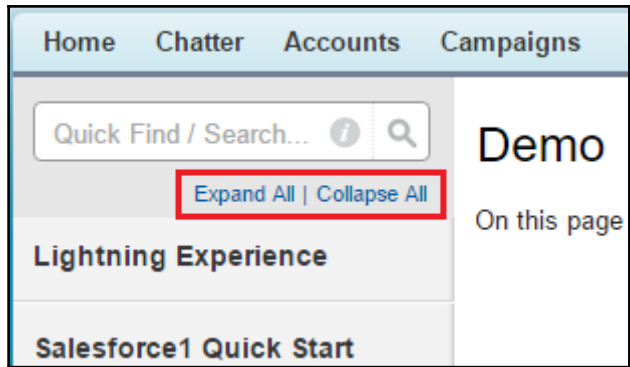


Chapter 1: Setting Up Salesforce CRM and the Company Profile



The screenshot shows the 'Users' page in Salesforce Demo mode. The page title is 'Demo' and it includes a search bar and navigation tabs. The main content area displays a table of users with columns for Action, Full Name, Alias, Username, Last Login, Role, Active, Profile, and Manager. There are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users' at the top and bottom of the table.

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
<input type="checkbox"/> Edit	Howard, Trevor	thow	trevor.howard@widgetsxyz.com	24/09/2014 20:34	AM_Region B01	<input type="checkbox"/>	Custom_Sales Profile	Goodey, Paul
<input type="checkbox"/> Edit	One_Platform	POne	p1@widgetsxyz.com		CEO	<input type="checkbox"/>	Standard Platform User	
<input type="checkbox"/> Edit	Two_Platform	PTwo	p2@widgetsxyz.com		CEO	<input type="checkbox"/>	Standard Platform User	



WidgetsXYZ

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	<input type="checkbox"/>	Currency Locale	English (United States)
Admin Newsletter	<input type="checkbox"/>	Used Data Space	842 KB (4%) [View]
Hide Notices About System Maintenance	<input type="checkbox"/>	Used File Space	302 KB (1%) [View]
Hide Notices About System Downtime	<input type="checkbox"/>	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	00DA00000000IIs1
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

Language & Time Zone Help for this Page ?

Settings ! = Required Information

Time Zone ▾

Locale ▾

Language ▾

Email Encoding ▾

My Settings

Personal

- Personal Information
- Change My Password
- Language & Time Zone
- Grant Account Login Access






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		Displayed Languages	
German		English	Top
Italian		Spanish	
Japanese		French	Up
Swedish			
Korean	Add		Down
Chinese (Traditional)			
Chinese (Simplified)			Bottom
Portuguese (Brazilian)	Remove		
Dutch			
Danish			
Thai			
Finnish			
Russian			

Languages that appear in gray are currently used by your company, users, or both. They cannot be deactivated.

Home Chatter Leads Accounts Contacts Reports Campaigns Dashboards Opportunities + ▾

Quick Find

Language & Time Zone Help for this Page ?

Settings ! = Required Information

Time Zone ▾

Locale ▾

Language ▾

Email Encoding ▾ ▾

Profile Help for this Page ?

Custom: Sales Profile

|

[Profile Overview](#) > **Login Hours** ▾

Login Hours

All times are in (GMT-04:00) Eastern Daylight Time (America/New_York)

Day	Start Time	End Time	
Monday	--None-- ▾	--None-- ▾	Clear times
Tuesday	--None-- ▾	--None-- ▾	Clear times
Wednesday	--None-- ▾	--None-- ▾	Clear times
Thursday	--None-- ▾	--None-- ▾	Clear times
Friday	--None-- ▾	--None-- ▾	Clear times
Saturday	8:00 AM ▾	8:00 AM ▾	Clear times
Sunday	8:00 AM ▾	8:00 AM ▾	Clear times

[Clear all times](#)

Login IP Ranges



Enter the range of valid IP addresses from which users with this profile can log in.

IP Start Address	IP End Address	Description
<input type="text" value="88.110.54.113"/>	<input type="text" value="88.110.54.113"/>	<input type="text" value="Head Office"/>

Save this IP Range even though it does not cover my current IP address

Network Access

[Help for this Page](#) ?

Trusted IP Range Edit

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	<input type="text" value="88.110.54.100"/>	End IP Address	<input type="text" value="88.110.54.105"/>
Description	<input type="text" value="Head Office"/>		

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					
<input type="checkbox"/>	Username ↑	Login IP	Created Date	Is Authenticated	Challenge Sent
<input type="checkbox"/>	sales@widgetsxyz.com	81.178.189.173	28.01.2014 17:37	✓	28.01.2014 17:37
<input type="checkbox"/>	sales@widgetsxyz.com	82.12.148.221	28.05.2014 22:21	✓	
<input type="checkbox"/>	sales@widgetsxyz.com	31.100.158.80	11.06.2014 08:18	✓	11.06.2014 08:18
<input type="checkbox"/>	trevor.howard@widgetsxyz.com	80.47.223.92	01.01.2010 11:14	✓	
<input type="checkbox"/>	trevor.howard@widgetsxyz.com	80.47.236.99	18.02.2010 05:44	✓	18.02.2010 05:44
<input type="checkbox"/>	trevor.howard@widgetsxyz.com	88.110.54.113	01.01.2011 12:04	✓	01.01.2011 12:04
<input type="checkbox"/>	trevor.howard@widgetsxyz.com	81.178.188.171	31.01.2011 02:44	✓	31.01.2011 02:44
<input type="checkbox"/>	trevor.howard@widgetsxyz.com	81.178.177.167	23.07.2011 14:15	✓	23.07.2011 14:17
<input type="checkbox"/>	trevor.howard@widgetsxyz.com	81.178.189.7	21.04.2013 21:59	✓	21.04.2013 22:00
<input type="checkbox"/>	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					
<input type="checkbox"/>	Username ↑	User Agent String	Proxy Info	Created Date	Last Update
<input type="checkbox"/>	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
<input type="checkbox"/>	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
<input type="checkbox"/>	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

Register Your Mobile Phone

Make it easy to verify your identity when you log in to Salesforce. Any time we have to verify it's you, we can text a code to your registered phone.

Country

United States (+1) ▼

Mobile Phone Number

Register

[Remind Me Later](#)

[I Don't Want to Register My Phone](#)

Verify Your Identity

You're trying to **Log In to Salesforce**. To make sure your Salesforce account is secure, we have to verify your identity.



Enter the verification code we emailed to *****@*****.com.



Verification Code


Verify

Don't ask again

[Resend Code](#)

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](#) 07:45
Reply 

To

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.

Browser Support Warning for the Salesforce Classic 2010 User Interface Theme ✕



Just so you know...

Enabling the 2010 user interface theme affects the look and feel of Salesforce Classic for all users, but not all browsers can display this interface. **Unsupported browsers display the Salesforce Classic 2005 user interface theme, shown on the left below.**



2005 Theme



2010 Theme

For a consistent experience in your org, all users should upgrade to the latest version of a supported browser:

- [Firefox](#)
- [Safari](#)
- [Internet Explorer](#)
- [Chrome](#)

OK


User Interface

Help for this Page 

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

User Interface

- Enable Collapsible Sections
- Show Quick Create
- Enable Hover Details
- Enable Related List Hover Links
- Enable Separate Loading of Related Lists
 - Enable Separate Loading of Related Lists of External Objects [i](#)
- Enable Inline Editing
- Enable Enhanced Lists
- Enable the Salesforce Classic 2010 User Interface Theme

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

- Enable Tab Bar Organizer
- Enable Printable List Views
- Enable Customization of Chatter User Profile Pages [i](#)
- Enable Salesforce Notification Banner

Sidebar

- Enable Collapsible Sidebar
- Show Custom Sidebar Components on All Pages

Calendar

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

Name Settings

- Enable Middle Names for Person Names
- Enable Name Suffixes for Person Names

Setup

- Enable Enhanced Page Layout Editor
- Enable Streaming API
- Enable Dynamic Streaming Channel Creation
- Enable "Set Audit Fields upon Record Creation" and "Update Records with Inactive Owners" User Permissions [i](#)
- Enable "Delete from Field History" and "Delete from Field History Archive" User Permissions [i](#)
- Enable Custom Object Truncate

Advanced

- Enable Extended Mail Merge [i](#)
- Save All Extended Mail Merge documents to Salesforce Documents [i](#)
- Enable Improved Setup User Interface [i](#)
- Enable Advanced Setup Search (Beta) [i](#)


Save Cancel

Opportunity Detail		Edit	Delete	Clone
Opportunity Owner	Trevor Howard [Change]			
Private	<input type="checkbox"/>			
Opportunity Name	Opportunity Y			
Account Name	Company X			
Type				
<hr/>				
▼ Section One				
Hide Section - Section One		Pipeline		
Primary Campaign Source		Widget World Campaign		

Opportunity Detail		Edit	Delete	Clone
Opportunity Owner	Trevor Howard [Change]			
Private	<input type="checkbox"/>			
Opportunity Name	Opportunity Y			
Account Name	Company X			
Type				
<hr/>				
▶ Section One				
Show Section - Section One				
▼ Section Two				

Quick Create

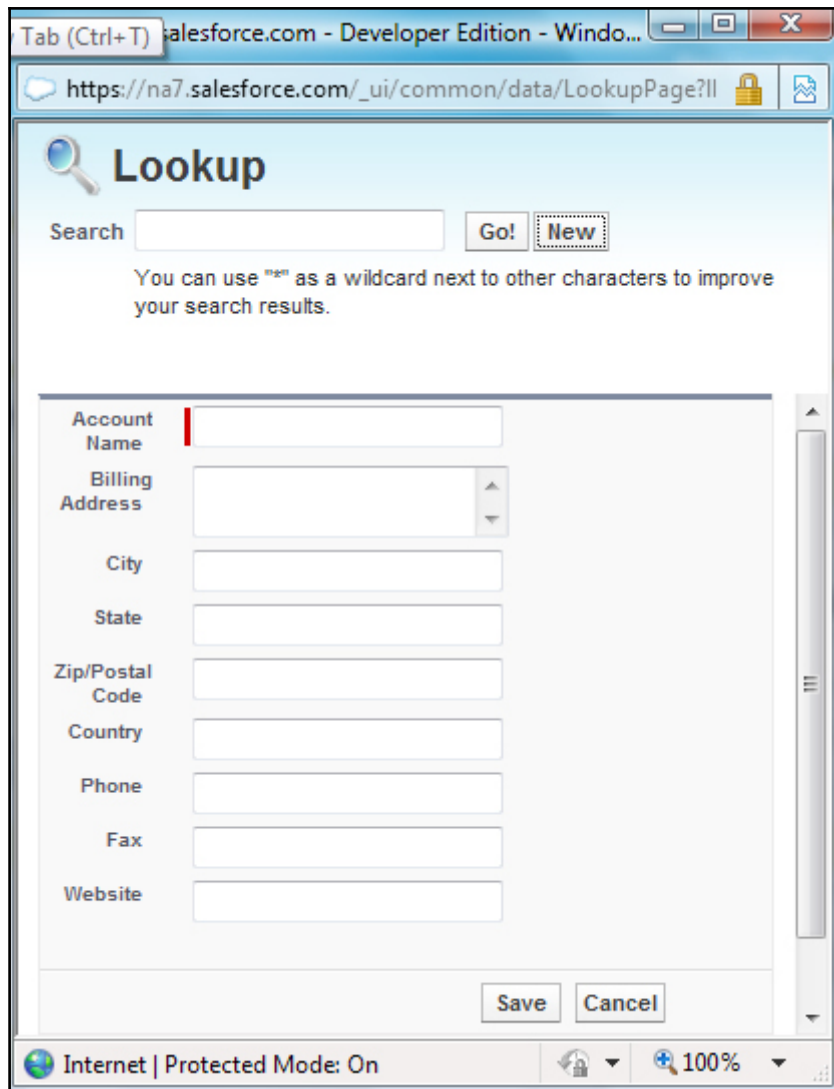
*Opportunity Name

Account
 

*Close Date
 [08/01/2011]

*Stage
 ▼

Amount



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

Opportunity Owner [Trevor Howard](#) [\[Change\]](#)

Private

Opportunity Name Opportunity Y

Account Name [Company X](#)

Type

▶ Section One

▼ Section Two

[Edit](#) [Delete](#) [Clone](#)

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

Account Owner [Paul Goodey](#) [\[Change\]](#)

Account Name [Edge Communications](#) [\[View Hierarchy\]](#)

[Edit](#) [Delete](#) [Include Offline](#)



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	<input type="text" value="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 25 records per page

1-4 of 4 0 Selected

Page 1 of 1

Edit Billing Street

Billing Street

Apply changes to

- The record clicked
- All 2 selected records

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

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



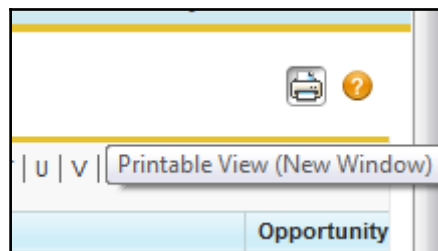
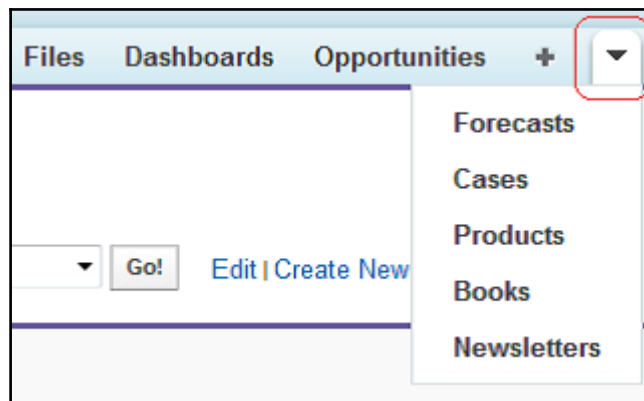
Your Records Per Page Setting: 200

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
- Keep my current setting and don't show me this message again

Save

Cancel



US Opportunities
Displaying records 1 - 4

Number of records ▼

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

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Chatter > People > Martin Brown ●

Start Chat



Feed Overview **Learning Zone**

Post File Link Poll

Share with Martin Brown and your company

Share

Sort By Post Date ▼

There are no updates.

Search Settings

[Help for this Page](#) ?

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

Search Settings

- 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	<input type="checkbox"/> Enhanced Lookups	<input type="checkbox"/> Lookup Auto-Completion
Accounts	<input type="checkbox"/>	<input type="checkbox"/>


Search Settings

[Help for this Page](#) ?

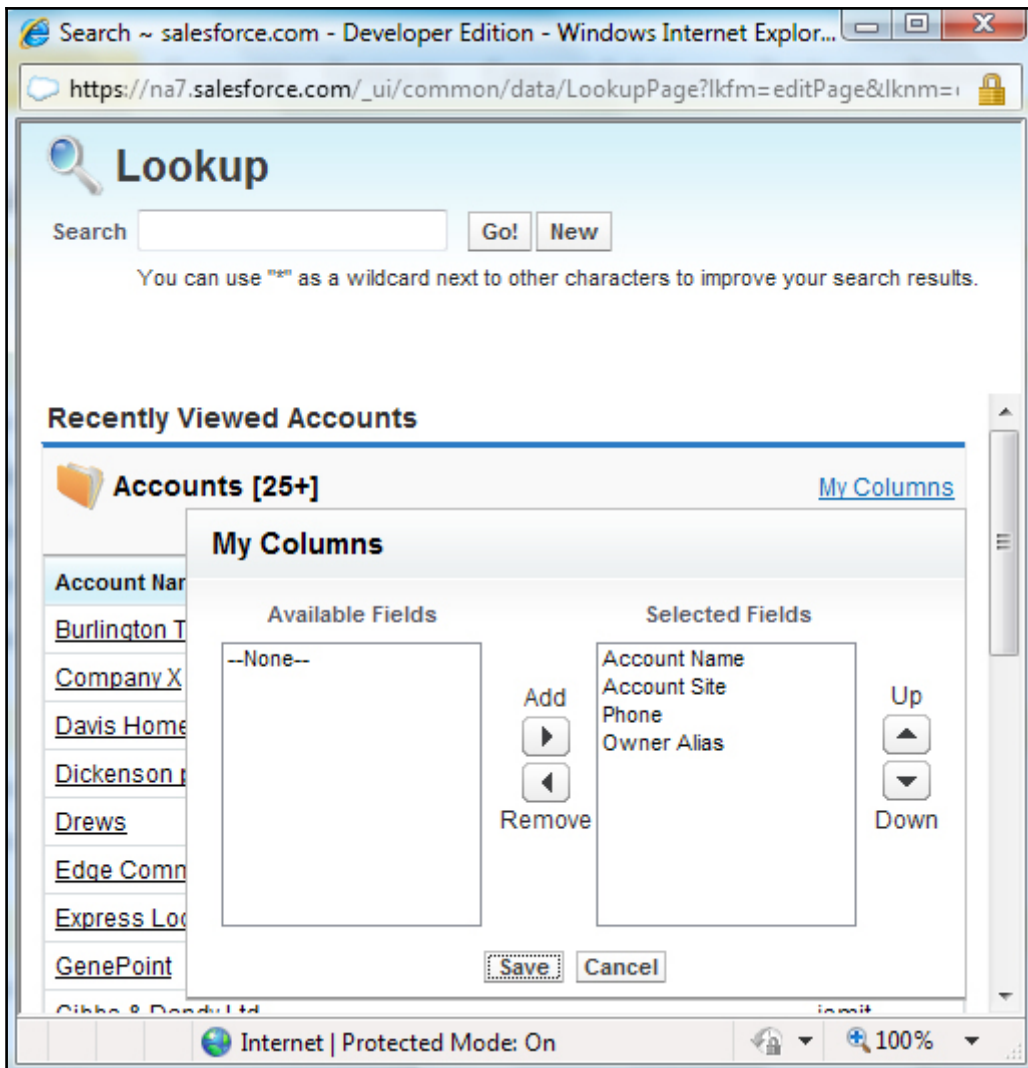
Modify your organization's search interface with the following settings:

Search Settings

- 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 English-Only Spell Correction for Knowledge Search

 You have enabled Global Search and the following search settings only apply to Sidebar and Advanced Search in Portals. To disable Global Search, you must disable Chatter on the [Chatter Settings](#) page.

- Enable Drop-Down List for Portal Sidebar Search
- Enable Portal Sidebar Search Auto-Complete
- Enable Single-Search-Result Shortcut for Portal Sidebar and Advanced Search



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](#)

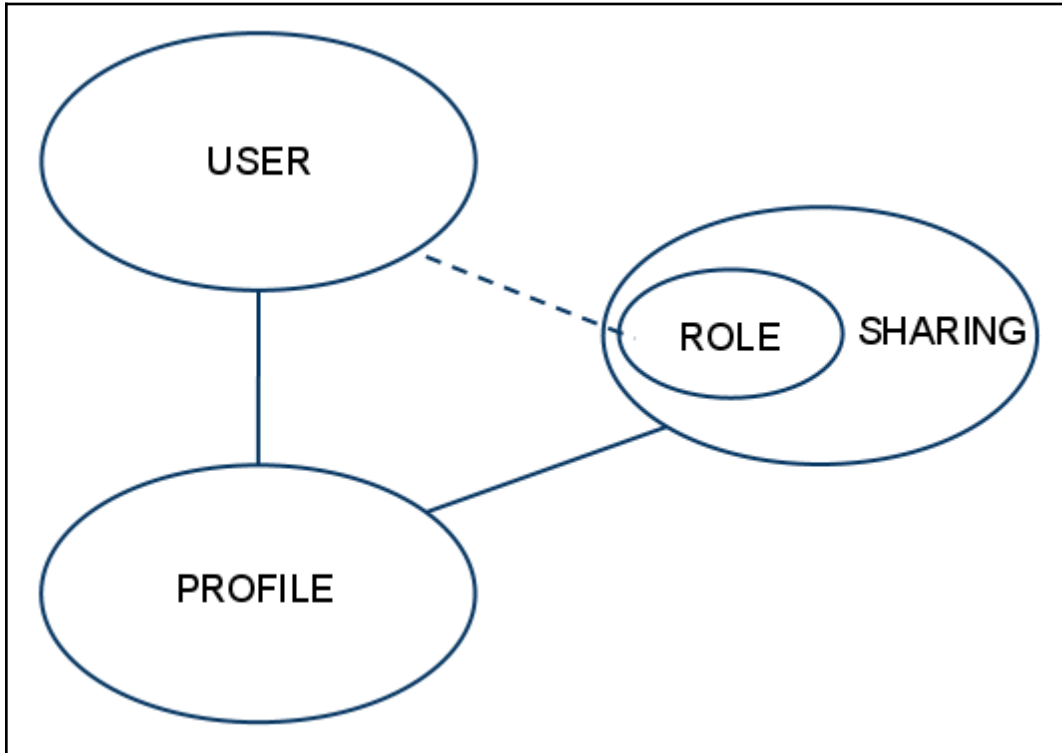
Account Search Layouts

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

The screenshot shows a 'Lookup' dialog box with a search field and 'Go!' and 'New' buttons. Below the search field is a section titled 'Recently Viewed Accounts' which contains a table of accounts. The table has columns for Account Name, Account Site, Owner Alias, Type, and Active. Two accounts are visible: GenePoint and United Oil & Gas UK.

Account Name	Account Site	Owner Alias	Type	Active
GenePoint		PGood	Customer - Channel	Yes
United Oil & Gas UK		PGood	Customer	Yes

Chapter 2: Managing Users and Controlling System Access



Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Set | Edit | Delete | Create New View

New [↕]

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	Permission Set Label ↑	Description	License
Del Clone	Export Reports		Salesforce
Del Clone	Moderator		Chatter Free
Del Clone	Moderator_Salesforce		Salesforce
Del Clone	SMS Activation		Salesforce

Permission Set
Create

Help for this Page ?

Save Cancel

Enter permission set information

! = Required Information

Label

API Name

Description

Session Activation Required

Select the type of users who will use this permission set

Who will use this permission set?

- Choose '--None--' if you plan to assign this permission set to multiple users with different user and permission set licenses.
- Choose a specific user license if you want users with only one license type to use this permission set.
- Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License

Save Cancel



SETUP

User Management Settings

User Self Deactivate

Allow external users to deactivate their own accounts.



Disabled

Scramble Specific Users' Data

Honor your users' requests when they no longer want their personal data recognized in Salesforce. After turning on this option, you can invoke the Apex method, `obfuscateUser`, which permanently scrambles those specific users' data. Keep in mind that when you invoke that Apex method, those users' data becomes anonymous, and you can never recover it.



Disabled

Enhanced Profile List Views

Create profile list views with the fields you choose. For example, create a list view of all profiles with the "Modify All Data" permission.



Enabled

Enhanced Profile User Interface

Browse, search, and modify settings and permissions in a profile through a streamlined user interface.



Enabled

Profiles

All Profiles



New Profile

[Create New View](#) | [Edit](#) | [Delete](#) | [Refresh](#)

A | B | C | D | E |

<input type="checkbox"/>	Action	Profile Name ↑	User License
<input type="checkbox"/>	Edit Clone	Authenticated Website	Platform Portal
<input type="checkbox"/>	Edit Clone	Chatter Free User	Chatter Free
<input type="checkbox"/>	Edit Clone	Chatter Moderator User	Chatter Free
<input type="checkbox"/>	Edit Clone	Contract Manager	Salesforce

Create New View

Step 1. Enter View Name

View Name

Step 2. Specify Filter Criteria

[Clear All Rows](#)

Setting	Operator	Value
<input type="text" value="Convert Leads"/>	<input type="text" value="equals"/>	<input type="text" value="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

Available Settings	Selected Settings
<ul style="list-style-type: none">Created ByCreated By AliasCreated DateCustomDescription	<ul style="list-style-type: none">Profile NameConvert LeadsLast Modified ByLast Modified DateUser License

Profiles

My Profile List for Lead Conversion ▾

New Profile

Create New View | [Edit](#) | [Delete](#) | [Refresh](#)

<input type="checkbox"/>	Action	Profile Name ↑	Convert Leads
<input type="checkbox"/>	Edit Clone	Contract Manager	✓
<input type="checkbox"/>	Edit Del Clone	Custom: Marketing Profile	✓
<input checked="" type="checkbox"/>	Edit Del Clone	Custom: Sales Profile	✓
<input checked="" type="checkbox"/>	Edit Del Clone	Custom: Support Profile	✓
<input type="checkbox"/>	Edit Clone	Marketing User	✓
<input type="checkbox"/>	Edit Clone	Partner User	✓
<input type="checkbox"/>	Edit Clone	Solution Manager	✓
<input type="checkbox"/>	Edit Clone	Standard User	✓
<input type="checkbox"/>	Edit Del Clone	System Admin Custom	✓
<input type="checkbox"/>	Edit Clone	System Administrator	✓

1-10 of 10 ▾

2 Selected ▾

Edit Convert Leads ✕

Change the following setting

Convert Leads

These settings will also be disabled

i When Convert Leads is disabled, if any of the following permissions are currently enabled, they will be disabled. [Don't show this message again](#)

General User Permissions	Administrative Permissions	Object Permissions
Download AppExchange Packages	Author Apex Modify All Data	No Impact

Apply changes to

The record clicked
 All 2 selected records

Profiles

My Profile List for Lead Conversion ▾

New Profile

Create New View | Edit | Delete | Refresh

<input type="checkbox"/>	Action	Profile Name ↑	Convert Leads
<input type="checkbox"/>	Edit Clone	Contract Manager	✓
<input type="checkbox"/>	Edit Del Clone	Custom: Marketing Profile	✓
<input type="checkbox"/>	Edit Clone	Marketing User	✓
<input type="checkbox"/>	Edit Clone	Partner User	✓
<input type="checkbox"/>	Edit Clone	Solution Manager	✓
<input type="checkbox"/>	Edit Clone	Standard User	✓
<input type="checkbox"/>	Edit Del Clone	System Admin Custom	✓
<input type="checkbox"/>	Edit Clone	System Administrator	✓

1-8 of 8 ▾

0 Selected ▾

Profile Help for this Page ?

System Admin Custom

Clone Delete Edit Properties

Profile Overview	Find Permissions and Settings	Edit Profile Properties
<p>Profile Overview</p> <p>Description</p> <p>User License</p> <p>Created</p>	<p>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.</p>	<p>Easily change a profile's name or description.</p> <p><input checked="" type="checkbox"/></p> <p>Paul Goodey, 27/09/2011 20:09</p>

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

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

Browse App Permissions and Settings ✕

App-related permissions and settings are grouped on individual pages. The profile overview page provides descriptions and links.

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"

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

Browse System Permissions and Settings ✕

System permissions and settings are grouped and linked the same way.

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](#)

<input type="checkbox"/>	Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager
<input type="checkbox"/>	Edit	Brown, Martin	mbrow	martin.brown@widgetsxyz.com		CEO	<input checked="" type="checkbox"/>	Custom Sales Profile	
<input type="checkbox"/>	Edit Login	Howard, Trevor	thow	trevor.howard@widgetsxyz.com	01/01/2011 12:05	AM, Region B01	<input checked="" type="checkbox"/>	Standard Platform User	Goodey, Paul
<input type="checkbox"/>	Edit	One, Platform	POne	p1@widgetsxyz.com		CEO	<input type="checkbox"/>	Standard Platform User	
<input type="checkbox"/>	Edit	Two, Platform	PTwo	p2@widgetsxyz.com		CEO	<input type="checkbox"/>	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:

View Unique Name: [i](#)

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.	<input type="text" value="Last Login"/>	<input type="text" value="less than"/>	<input type="text" value="LAST 28 DAYS"/>




New User




[Help for this Page](#) 

User Edit

General Information

 = Required Information

First Name	<input type="text"/>	Role	<input type="text" value="<None Specified>"/> 
Last Name	<input type="text"/>	User License	<input type="text" value="Salesforce Platform"/>
Alias	<input type="text"/>	Profile	<input type="text" value="Standard Platform User"/> 
Email	<input type="text"/>	Active	<input checked="" type="checkbox"/>
Username	<input type="text"/>	Marketing User	<input type="checkbox"/>
Nickname	<input type="text"/> 	Offline User	<input type="checkbox"/>
Title	<input type="text"/>	Knowledge User	<input type="checkbox"/>
Company	<input type="text"/>	Force.com Flow User	<input type="checkbox"/>
Department	<input type="text"/>	Service Cloud User	<input type="checkbox"/>
Division	<input type="text"/>	Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher	<input type="checkbox"/>

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

User [Edit Layout](#) | [Help](#)

Trevor Howard

[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	Role	AM_Region B01
Alias	thow	User License	Salesforce
Email	trevor.howard@widgetsxyz.com	Profile	Custom: Sales Profile
Username	trevor.howard@widgetsxyz.com	Active	<input checked="" type="checkbox"/>
Community Nickname	th1 i	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company	WidgetsXYZ	Knowledge User	<input type="checkbox"/>

Users

Add Multiple Users

Number of available Salesforce Platform user licenses: 3
 Number of available XOrg Proxy User user licenses: 2
 Number of available Chatter Free user licenses: 5000
 Number of available Chatter External user licenses: 500

Add Users [Save](#) [Cancel](#)

User License Salesforce Platform

New Users ! = Required Information

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>

New User #3

First Name

Last Name

Email (User Name)

Profile --None--

Role <None Specified>

Generate passwords and notify user via email

[Save](#) [Cancel](#)

[Collapse All](#) [Expand All](#)

- WidgetsXYZ
 - Add Role
 - CEO
 - Add Role
 - SVP, Sales & Marketing
 - Add Role
 - VP, Global Marketing
 - Add Role
 - Marketing Team
 - Add Role
 - VP, International Sales
 - Add Role
 - Sales Manager, Region B
 - Add Role
 - AM, Region B01
 - Add Role
 - VP, North American Sales
 - Add Role
 - Sales Manager, Region A
 - Add Role
 - AM, Region A01
 - Add Role

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 | <input checked="" type="checkbox"/> | 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

Developer Name User_Management

Created By [Paul Goodey](#), 30/01/2011 17:40

Modified By [Paul Goodey](#), 21/02/2011 07:52

Delegated Administrators

[i](#)

[Add](#)

[Delegated Administrators Help](#) ?

No delegated administrators specified.

User Administration

[i](#)

[Add](#)

[User Administration Help](#) ?

Action Roles and Subordinates

Modified By

[Remove](#) [AM_Region B01](#)

[Paul Goodey](#), 30/01/2011 17:54

Assignable Profiles

[i](#)

[Add](#)

[Assignable Profiles Help](#) ?

Action Profiles

Modified By

[Remove](#) [Custom_Sales_Profile](#)

[Paul Goodey](#), 30/01/2011 18:13

Assignable Permission Sets

[i](#)

[Edit](#)

[Assignable Permission Sets Help](#) ?

No permission sets specified.

Assignable Public Groups

[i](#)

[Edit](#)

[Assignable Public Groups Help](#) ?

No groups specified.

Custom Object Administration

[i](#)

[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

Help for this Page 

User Management

Delegated Group Edit

Save Cancel

Delegated Group Name

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

The image shows a screenshot of the Salesforce login interface. On the left is the main login form, and on the right is a help section for users having trouble logging in.

Left Panel (Login Form):

- salesforce® logo
- User Name input field
- Password input field
- Log in to Salesforce button
- Remember User Name
- [Forgot your password?](#) | [Sign up for free.](#)
- [Log in to a custom domain.](#)

Right Panel (Having trouble logging in?):

- salesforce® logo
- Having trouble logging in?**
- Verify you're entering the correct user name in the form of an email address (username)
- 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 to [https://test.sale](https://test.salesforce.com)
- 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 ! = Required Information

User passwords expire in

Enforce password history

Minimum password length i

Password complexity requirement

Password question requirement

Maximum invalid login attempts

Lockout effective period

Obscure secret answer for password resets

Require a minimum 1 day password lifetime

Allow use of setPassword() API for self-resets

Forgot Password / Locked Account Assistance

Message

Help link

Forgot password preview If you still can't log in, try the following: test

Locked account preview To re-enable your account, try the following: test

API Only User Settings

Alternative Home Page i

Session Settings

[Help for this Page](#) 

Set the session security and session expiration timeout for your organization.

Session Timeout



Timeout Value

- Disable session timeout warning popup
- Force logout on session timeout

Session Settings

- Lock sessions to the IP address from which they originated
- Lock sessions to the domain in which they were first used

Require secure connections (HTTPS)

- Require secure connections (HTTPS) 
- Require secure connections (HTTPS) for all third-party domains
- Force relogin after Login-As-User
- Require HttpOnly attribute
- Use POST requests for cross-domain sessions
- Enforce login IP ranges on every request 

Extended use of IE11 with Lightning Experience

****SUPPLEMENTAL ORDER FORM TERMS - EXTENDED USE OF IE11 WITH LIGHTNING EXPERIENCE****

BY CLICKING THE "I AGREE" BOX BELOW, YOU AGREE TO THESE TERMS ON BEHALF OF A COMPANY OR OTHER LEGAL ENTITY AND REPRESENT THAT YOU HAVE THE AUTHORITY TO BIND SUCH COMPANY OR OTHER LEGAL ENTITY AND ITS AFFILIATES TO THESE TERMS, IN WHICH CASE THE TERM "YOU" SHALL REFER TO SUCH COMPANY OR OTHER LEGAL ENTITY AND ITS AFFILIATES. IF YOU DO NOT HAVE SUCH AUTHORITY, OR IF YOU DO NOT AGREE TO THESE TERMS, YOU MUST NOT ACCEPT THESE SUPPLEMENTAL ORDER FORM TERMS AND MAY NOT USE LIGHTNING EXPERIENCE WITH MICROSOFT INTERNET EXPLORER 11 (IE11) DURING THE EXTENDED PERIOD OF TIME AFTER THE ORIGINALLY PLANNED END OF LIFE DATE FOR ACCESS TO AND SUPPORT OF LIGHTNING EXPERIENCE WITH IE11, WHICH IS THE PERIOD BEGINNING DECEMBER 16, 2017 AND ENDING DECEMBER 31, 2020 ("EXTENDED PERIOD"). NOTE THAT DURING THE EXTENDED PERIOD SALESFORCE WILL NOT PROVIDE TECHNICAL SUPPORT FOR ISSUES RELATED TO PERFORMANCE.


DESPITE THE SALESFORCE RECOMMENDATION AGAINST IT, YOU HAVE DETERMINED IN YOUR SOLE DISCRETION TO CONTINUE USING LIGHTNING EXPERIENCE WITH IE11 DURING THE EXTENDED PERIOD. THEREFORE, YOU AGREE THAT SALESFORCE AND ITS AFFILIATES SHALL HAVE NO LIABILITY WHATSOEVER, WHETHER AN ACTION IS IN CONTRACT OR TORT AND REGARDLESS OF THE THEORY OF LIABILITY, IN CONNECTION WITH DAMAGES ARISING OUT OF YOUR CONTINUED USE OF LIGHTNING EXPERIENCE WITH IE11 DURING THE EXTENDED PERIOD. UPON EXPIRATION OF THE EXTENDED PERIOD, YOU WILL NO LONGER HAVE ACCESS TO, AND SALESFORCE WILL NO LONGER PROVIDE SUPPORT FOR, LIGHTNING EXPERIENCE WITH IE11. THESE SUPPLEMENTAL ORDER FORM TERMS FORM A LEGALLY BINDING PART OF THE ORDER FORM UNDER WHICH YOU ORDERED THE APPLICABLE SERVICES.



- I AGREE, Use IE11 with Lightning Experience during the Extended Period

Caching

- Enable caching and autocomplete on login page
- Enable secure and persistent browser caching to improve performance
- Enable user switching
- Remember me until logout

Identity Verification

 These settings are also located in [Identity Verification](#). You can change these settings in either location.

- Enable the SMS method of identity verification 
- Require security tokens for API logins from callouts (API version 31.0 and earlier)
- Let users use a security key (U2F) 
- Require identity verification during two-factor authentication registration
- Require identity verification for change of email address
- Allow location-based automated verifications with Salesforce Authenticator
 - Allow only from trusted IP addresses

Lightning Login

Allow Lightning Login
 Allow only for users with the Lightning Login User permission

Clickjack Protection

Enable clickjack protection for Setup pages [i](#)
 Enable clickjack protection for non-Setup Salesforce pages [i](#)
 Enable clickjack protection for customer Visualforce pages with standard headers
 Enable clickjack protection for customer Visualforce pages with headers disabled [i](#)

Cross-Site Request Forgery (CSRF) Protection

Enable CSRF protection on GET requests on non-setup pages [i](#)
 Enable CSRF protection on POST requests on non-setup pages [i](#)

Content Security Policy protection

Override Restriction on Accessing Email Templates in Salesforce Classic Using Internet Explorer [i](#)

XSS protection

Enable XSS protection

Content Sniffing protection

Enable Content Sniffing protection

Referrer URL protection

Hide this site's URL from other web sites (including Visualforce pages)

HSTS for Sites and Communities

Enable HSTS for all Sites and Communities with the default force.com subdomain that require a secure connection (HTTPS)

Redirections

Warn users before they are redirected outside of Salesforce

Session Security Levels

| Standard | | High Assurance |
|--|---|---|
| <ul style="list-style-type: none"> Username Password Delegated Authentication Activation Lightning Login Passwordless Login | Add
<input type="button" value="▶"/>
<input type="button" value="◀"/>
Remove | <ul style="list-style-type: none"> Two Factor Authentication |

Logout Page Settings

Logout URL [i](#)

New User Email

Link expires in [i](#)

Session Security Levels

Standard

- Username Password
- Delegated Authentication
- Activation
- Lightning Login

Add

▶

◀

Remove

High Assurance

- Two Factor Authentication

| <input type="checkbox"/> Action | Full Name ↑ |
|---|--------------------------------|
| <input type="checkbox"/> Edit | Brown, Martin |
| <input type="checkbox"/> Edit | Goodey, Paul |
| <input type="checkbox"/> Edit Login | Howard, Trevor |
| <input type="checkbox"/> Edit | One, Platform |
| <input type="checkbox"/> Edit | Two, Platform |

User Edit Layout | User Profile | Help for this Page ?

Trevor Howard

[Permission Set Assignments \[0\]](#) |
 [Permission Set Assignments: Activation Required \[0\]](#) |
 [Permission Set License Assignments \[0\]](#) |
 [Personal Groups \[0\]](#) |
 [Public Group Membership \[0\]](#) |
 [Queue Membership \[1\]](#) |
 [Team \[1\]](#) |
 [Managers in the Role Hierarchy \[3\]](#) |
 [OAuth Connected Apps \[0\]](#) |
 [Third-Party Account Links \[0\]](#) |
 [Installed Mobile Apps \[0\]](#) |
 [Authentication Settings for External Systems \[0\]](#) |
 [Login History \[1+\]](#) |
 [User Provisioning Accounts \[0\]](#)

User Detail
[Edit](#) |
 [Sharing](#) |
 [Reset Password](#) |

[Login](#)
 |
 [Freeze](#)

| | | | |
|-------|---------------|--------------|---------------|
| Name | Trevor Howard | Role | AM_Region B01 |
| Alias | thow | User License | Salesforce |

Logged in as Trevor Howard (trevor.howard@widgetsxyz.com)

Trevor Howard ▾ Setup Help Sales ▾

The screenshot shows the Salesforce user interface for the 'Grant Login Access' page. The page title is 'Grant Login Access'. The main content area contains a form with the following elements:

- My Username:** Your username shown here
- Grant Access To:** A table with two rows:

| Grant Access To | Access Duration |
|------------------------------|----------------------------|
| Your Company's Administrator | 1 Week (exp. 20/01/2014) ▾ |
| Salesforce.com Support | --No Access-- ▾ |
- Buttons:** 'Save' and 'Cancel' buttons are located at the bottom of the form.

The left sidebar contains navigation options under '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

The top navigation bar includes 'Home', 'Chatter', 'Leads', 'Accounts', 'Contacts', 'Reports', 'Files', 'Opportunities', and 'Forecasts'. A search bar and a 'Sales' dropdown menu are also present.

Numbered Steps:


- Step 1:** Click "Your Name" (points to the user name dropdown in the top right).
- Step 2:** Click "Setup" (points to the 'Setup' link in the top navigation bar).
- Step 3:** Click "My Personal Information" (points to the 'My Personal Information' link in the left sidebar).
- Step 4:** Click "Grant Login Access" (points to the 'Grant Login Access' link in the left sidebar).
- 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 (points to the 'Your Company's Administrator' row and the '1 Week' dropdown).
- Step 6:** Click "Save" (points to the 'Save' button).

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-- ▼ |

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

| 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-Select) |



Health Check

How well does your org meet Salesforce security standards? Reduce your security risk and limit data loss by optimizing the areas below.

[Video](#), [Learn More about Health Check](#) | [Help for this Page](#)

Salesforce Baseline Standard

Refresh

67%

of the standard met

[How did we calculate this score?](#)

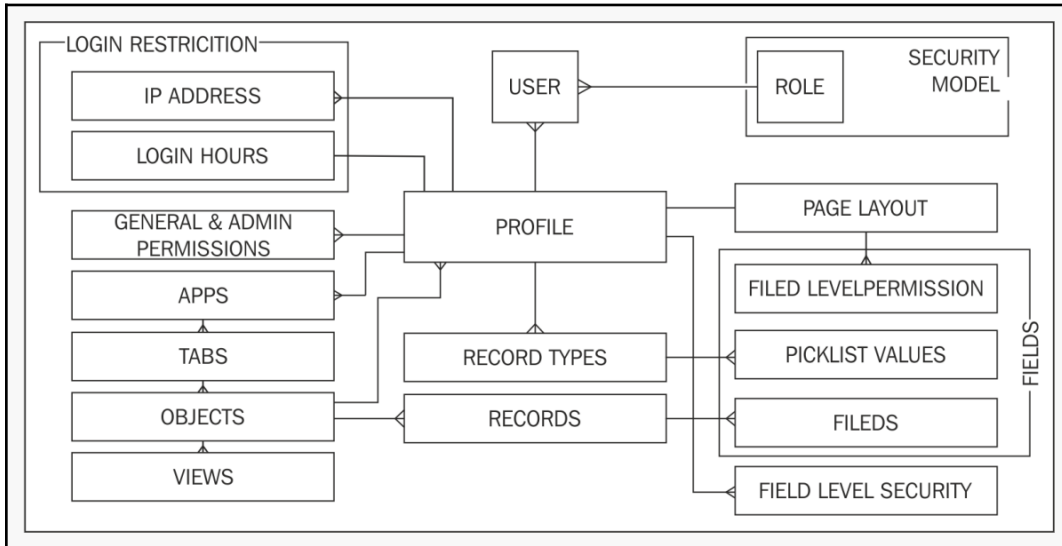


High-Risk Security Settings (4)

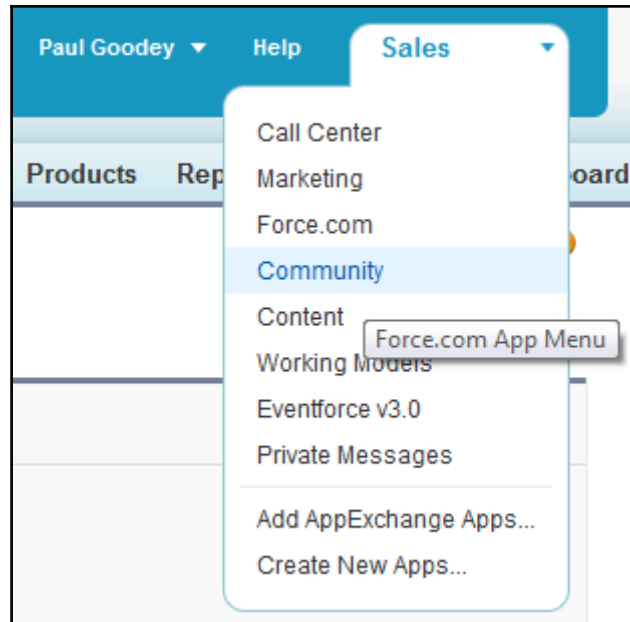
Your values in these settings are considered high-risk security vulnerabilities.

| STATUS | SETTING | GROUP | YOUR VALUE | STANDARD VALUE | ACTIONS |
|-----------|--|----------------------------------|------------|----------------|----------------------|
| High Risk | Lock sessions to the domain in which they were first used | Session Settings | Disabled | Enabled | Edit |
| High Risk | Force relogin after Login-As-User | Session Settings | Disabled | Enabled | Edit |
| High Risk | Enable clickjack protection for customer Visualforce pages with standard headers | Session Settings | Disabled | Enabled | Edit |
| High | Enable clickjack protection for customer Visualforce | Session | | | |

Chapter 3: Configuring Objects and Apps



| Opportunity Detail | | Edit | Delete | Clone ▾ |
|--|--|------------------|--------------|---------|
| Opportunity Owner | Trevor Howard [Change] | Amount | \$110,000.00 | |
| Private | <input type="checkbox"/> | Expected Revenue | \$11,000.00 | |
| Opportunity Name | Test | Close Date | 06/12/2012 | |
| Account Name | Westwood | Next Step | | |
| Type | | Stage | Prospecting | |
| <div style="border: 1px solid yellow; padding: 2px;"> This is a custom Help Text on a Standard field called Stage </div> | | Probability (%) | 10% | |



Customize My Tabs

[Help for this Page](#) ?

Choose the tabs that will display in each of your apps.

Custom App:

Sales

Available Tabs

Action Plan Templates
Activity Tracker
App Launcher
Books
Console
Content
Contracts
Contribute
Customer Search
Customizable Forecasts
Data.com

Add



Remove

Selected Tabs

Home (default)
Chatter
Accounts
Campaigns
Leads
Contacts
Opportunities
Reports
Dashboards
Cases

Up



Down

Save

Cancel

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

Profile Help for this Page ?

Custom: Sales Profile

Find Settings... | Clone Delete Edit Properties

Profile Overview Assigned Users

Description

User License **Salesforce** Custom Profile

Created By [Paul Goodey](#), 19/12/2009 13:01 Last Modified By [Paul Goodey](#), 22/07/2016 18:30

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

Assigned Connected Apps
Settings that specify which connected 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

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Profile Help for this Page ?

Custom: Sales Profile

Find Settings... | Clone Delete Edit Properties

Profile Overview > **Object Settings** ▼

All Object Settings

| Object Name | Object Permissions | Total Fields | Tab Settings | Page Layouts |
|------------------------------------|----------------------------|--------------|--------------|--------------------------|
| About Action Plans | -- | -- | Tab Hidden | -- |
| Acc Childs | No Access | 5 | -- | Acc Child Layout |
| Account Last Views | No Access | 5 | -- | Account Last View Layout |
| Accounts | Read, Create, Edit, Delete | 45 | Default On | Account (Sales) Layout |
| Action Plans | No Access | 22 | -- | Action Plan Layout |

Profile Help for this Page ?

Custom: Sales Profile

Find Settings... | Clone Delete Edit Properties

Profile Overview > Object Settings ▾ Accounts ▾

Accounts Edit

Tab Settings
Default On

Account: Record Types and Page Layout Assignments

| Record Types | Page Layout Assignment | Assigned Record Types | Default Record Type |
|--------------|------------------------|-----------------------|---------------------|
| --Master-- | Account (Sales) Layout | ☑ | ☑ |

Object Permissions

| Permission Name | Enabled |
|-----------------|---------|
| Read | ☑ |
| Create | ☑ |

Profile

Custom: Sales Profile

Find Settings... | Clone Delete Edit Properties

Profile Overview > Object Settings ▾ Accounts ▾

Accounts Save Cancel

Tab Settings

Default On ▾

Tab Hidden

Default Off

Default On

Account: Record Types and Page Layout Assignments

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 ▼

Standard Tabs

[Standard Tabs Help](#) ?

| Action | Tab Name | Display Label | Renamed | Last Modified |
|----------------------|------------|---------------|--------------------------|---------------|
| Edit | Accounts | Accounts | <input type="checkbox"/> | |
| Edit | Activities | Activities | <input type="checkbox"/> | |
| Edit | Articles | Articles | <input type="checkbox"/> | |
| Edit | Assets | Assets | <input type="checkbox"/> | |
| Edit | Campaigns | Campaigns | <input type="checkbox"/> | |
| Edit | Cases | Cases | <input type="checkbox"/> | |

Step 1. Enter the new tab names

Step 1 of 2

Tab Accounts

Language English

Singular Example: Account

Plural 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 | <input type="text" value="Client Division"/> | | <input type="checkbox"/> |
| Account Name | <input type="text" value="Client Name"/> | <input type="text" value="Client Names"/> | <input type="checkbox"/> |
| Account Number | <input type="text" value="Client Number"/> | | <input type="checkbox"/> |
| Account Owner | <input type="text" value="Client Owner"/> | <input type="text" value="Client Owners"/> | <input type="checkbox"/> |
| Account Site | <input type="text" value="Client Site"/> | <input type="text" value="Client Sites"/> | <input type="checkbox"/> |
| Address | <input type="text" value="Address"/> | | <input checked="" type="checkbox"/> |
| Annual Revenue | <input type="text" value="Annual Revenue"/> | | <input checked="" type="checkbox"/> |
| Billing Address | <input type="text" value="Billing Address"/> | | <input type="checkbox"/> |
| Billing City | <input type="text" value="Billing City"/> | | <input type="checkbox"/> |
| Billing Country | <input type="text" value="Billing Country"/> | | <input type="checkbox"/> |


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 

Standard Tabs

[Standard Tabs Help](#) 

| Action | Tab Name | Display Label | Renamed | Last Modified |
|--|------------|---------------|-------------------------------------|--|
| Edit Reset | Accounts | Clients | <input checked="" type="checkbox"/> | Paul Goodey , 20/02/2011 04:04 |
| Edit | Activities | Activities | <input type="checkbox"/> | |
| Edit | Articles | Articles | <input type="checkbox"/> | |
| Edit | Assets | Assets | <input type="checkbox"/> | |
| Edit | Campaigns | Campaigns | <input type="checkbox"/> | |
| Edit | Cases | Cases | <input type="checkbox"/> | |

Custom Object Information I = 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

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

Optional Features

Allow Reports
 Allow Activities
 Available for Customer Portal
 Track Field History
 Allow in Chatter Groups

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status [What is this?](#)

In Development
 Deployed

Search Status

Enables SOSL and Salesforce global searches for this external object. If selected, make sure that you also enable search on the external data source.. [Learn more.](#)

Allow Search

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

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% | |

New Custom Field

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** [i](#) 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 [i](#)

Default Value Checked
 Unchecked

Field Name [i](#)

Description

Help Text [i](#)

New Relationship

Step 2. Choose the related object

Step 2

[Previous](#) [Next](#) [Cancel](#)

Select the other object to which this object is related.

Related To

Step 2. Enter the details

Step 2 of 4

[Previous](#) [Next](#) [Cancel](#)

Field Label [i](#)

Default Value Checked Unchecked

Field Name [i](#)

Description

Help Text [i](#)

Step 3. Establish field-level security
Step 3 of 4

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 | <input type="checkbox"/> Visible | <input type="checkbox"/> Read-Only |
|----------------------------------|----------------------------------|------------------------------------|
| Authenticated Website | <input type="checkbox"/> | <input type="checkbox"/> |
| Contract Manager | <input type="checkbox"/> | <input type="checkbox"/> |
| Custom: Marketing Profile | <input type="checkbox"/> | <input type="checkbox"/> |
| Custom: Sales Profile | <input type="checkbox"/> | <input type="checkbox"/> |
| Custom: Support Profile | <input type="checkbox"/> | <input type="checkbox"/> |
| Customer Portal Manager | <input type="checkbox"/> | <input type="checkbox"/> |

Step 4. Add to page layouts
Step 4 of 4

Field Label Air Conditioned

Data Type Checkbox

Field Name Air_Conditioned


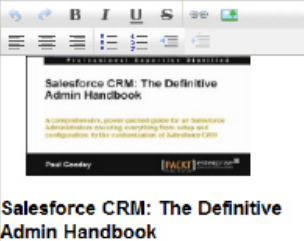
Description

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.

| <input checked="" type="checkbox"/> Add Field | Page Layout Name |
|---|------------------|
| <input checked="" type="checkbox"/> | 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 | <input checked="" type="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@widgetxyz.com | Text Area | WorldHello WorldHello WorldHello
1 remaining
WorldHello WorldHello WorldHello
WorldHello WorldHello WorldHello |
| Text Area (Long) | WorldHello WorldHello WorldHello
WorldHello WorldHello WorldHello
WorldHello WorldHello WorldHello
WorldHello WorldHello WorldHello | Text | WorldHello WorldHello |
| Text Area (Rich) |  | URL | www.widgetxyz.com |

Edit Field Dependency

[Help for this Page](#) 

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:

Showing Columns: 6 - 10 (of 10) < Previous | Next > [View All](#) > [Go to](#)

| Stage: | <u>Perception Analysis</u> | <u>Proposal/Price Quote</u> | <u>Negotiation/Review</u> | <u>Closed Won</u> | <u>Closed Lost</u> |
|--------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|
| Reason Lost: | <i>No Budget</i> | <i>No Budget</i> | <i>No Budget</i> | <i>No Budget</i> | No Budget |
| | <i>Missing Product Features</i> | <i>Missing Product Features</i> | <i>Missing Product Features</i> | <i>Missing Product Features</i> | Missing Product Features |
| | <i>Better Price</i> | <i>Better Price</i> | <i>Better Price</i> | <i>Better Price</i> | Better Price |
| | <i>Cost / Value</i> | <i>Cost / Value</i> | <i>Cost / Value</i> | <i>Cost / Value</i> | Cost / Value |

Showing Columns: 6 - 10 (of 10) < Previous | Next > [View All](#)

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

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 | <input type="checkbox"/> | Account Number | <input type="checkbox"/> |
| Account Owner | <input type="checkbox"/> | Account Site | <input type="checkbox"/> |
| Account Source | <input type="checkbox"/> | Active | <input type="checkbox"/> |
| Annual Revenue | <input type="checkbox"/> | Billing Address | <input type="checkbox"/> |
| Customer | <input type="checkbox"/> | Data.com Key | <input type="checkbox"/> |

Save Quick Save Preview As... Cancel Undo Redo Layout Prop

Fields

Buttons
Custom Links
Visualforce Pages
Custom S-Controls
Related Lists

Quick Find Field Name

| | | |
|----------------|----------------|-------------------|
| Blank Space | Account Owner | Billing Address |
| Section | Account Site | Created By |
| Account Name | Active | Customer Priority |
| Account Number | Annual Revenue | Description |

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

Account Site Read-Only **Required**

OK Cancel

Account Edit

Account Information

| | | | |
|-------------------|---|--|--|
| Account Owner | Paul Goodey | | |
| Account Name | <input style="width: 100%;" type="text" value="Edge Communications"/> | | |
| Parent Account | <input style="width: 100%;" type="text"/> | | |
| Account Number | <input style="width: 100%;" type="text" value="CD451796"/> | | |
| Account Site | <input style="width: 100%;" type="text"/> | | |
| Industry | <input style="width: 100%;" type="text" value="Electronics"/> ▼ | | |
| SIC Code | <input style="width: 100%;" type="text" value="6576"/> | | |
| Annual Revenue | <input style="width: 100%;" type="text" value="139.000.000"/> | | |
| Employees | <input style="width: 100%;" type="text" value="1.000"/> | | |
| Lat | <input style="width: 100%;" type="text" value="33,112669"/> | | |
| Lon | <input style="width: 100%;" type="text" value="-96,852588"/> | | |
| Geocode Status | <input style="width: 100%;" type="text" value="G_GEO_SUCCESS"/> | | |
| Region | <input style="width: 100%;" type="text" value="A01"/> ▼ | | |
| SF Account Number | <input style="width: 100%;" type="text" value="SFA-000017"/> | | |

Account Edit

Edge Communications

[Help for this Page](#)

Account Edit

Account Information ! = Required Information

| | | | | |
|----------------|---|--|--------------------|---|
| Account Owner | Paul Goodey | | Active | <input style="width: 100%;" type="text" value="Yes"/> ▼ |
| Account Name | <input style="width: 100%;" type="text" value="Edge Communications"/> | | Upsell Opportunity | <input style="width: 100%;" type="text" value="Maybe"/> ▼ |
| Parent Account | <input style="width: 100%;" type="text"/> | | | |
| Account Number | <input style="width: 100%;" type="text" value="CD451796"/> | | Type | <input style="width: 100%;" type="text" value="Customer"/> ▼ |
| Account Site | <input style="width: 100%; border: 2px solid red;" type="text"/> | | Rating | <input style="width: 100%;" type="text" value="Hot"/> ▼ |
| Industry | <input style="width: 100%;" type="text" value="Electronics"/> ▼ | | Phone | <input style="width: 100%;" type="text" value="(512) 757-6000"/> |
| SIC Code | <input style="width: 100%;" type="text" value="6576"/> | | Fax | <input style="width: 100%;" type="text" value="(512) 757-9000"/> |
| | | | Website | <input style="width: 100%;" type="text" value="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 | | |

 Account
United Oil & Gas Corp.

[Feed](#) [Details](#)

[Post](#) [File](#) [Link](#) [Poll](#)

Click here to expand the Post action.

[Show All Updates](#)

 **Paul Goodey** changed Type from Customer to Customer - Direct, Phone from (212) 842-5500 to (212) 555-5500, and Employees from 100,000 to 100,001. [Comment](#) · [Like](#) · Today at 22:44

 **Paul Goodey** changed Description. [Comment](#) · [Like](#) · Today at 22:38

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.

| Object | Tracked | Fields in accounts | |
|------------------------|------------------|---|--|
| AP Task | | <input type="button" value="Save"/> <input type="button" value="Cancel"/> <input checked="" type="checkbox"/> Enable Feed Tracking Restore Defaults | |
| APT Task | | Your changes have been saved. | |
| Acc Child | | Account Name <input checked="" type="checkbox"/> | Account Number <input checked="" type="checkbox"/> |
| Account | 10 Fields | Account Owner <input checked="" type="checkbox"/> | Account Site <input type="checkbox"/> |
| Account Last View | | Account Source <input type="checkbox"/> | Active <input checked="" type="checkbox"/> |
| Action Plan | | Annual Revenue <input type="checkbox"/> | Billing Address <input type="checkbox"/> |
| Action Plan Template | | Customer Priority <input type="checkbox"/> | Data.com Key <input type="checkbox"/> |
| Activity Tracker | | Description <input checked="" type="checkbox"/> | Employees <input checked="" type="checkbox"/> |
| Activity Tracker Setup | | Fax <input type="checkbox"/> | Geocode Status <input type="checkbox"/> |
| Asset | | Industry <input checked="" type="checkbox"/> | Lat <input type="checkbox"/> |
| Book | | | |
| Campaign | | | |
| Case | 3 Fields | | |

Create New Page Layout

[Help for this Page](#) ?

i As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections whose names are translated for your international users.

Existing Page Layout

Page Layout Name

Feed-Based Layout **i**

Account (Sales) Feed-Based Layout ▾ [Feed View](#) [Custom Console Components](#) [Mini Page Layout](#) [Mini Console View](#) | [Video Tutorial](#) [Help for this Page](#) ?

Save ▾ Quick Save Preview As... ▾ Cancel | Undo Redo | Layout Properties

Fields

Quick Find: *

| | | | | | | | |
|--------------|----------------|-----------------|----------------------|----------------|------------------|---------------------|----|
| Section | Account Number | Active | Customer Portal A... | Employees | Last Modified By | Must have | Ph |
| Blank Space | Account Owner | Annual Revenue | Customer Priority | Fax | Lat | Number of Locations | Ph |
| Acc Child | Account Site | Billing Address | Data.com Key | Geocode Status | Lon | Ownership | Ra |
| Account Name | Account Source | Created By | Description | Industry | Market | Parent Account | Re |

Account Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher

Post File Link Poll

Salesforce1 and Lightning Experience Actions

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Salesforce1 and Lightning Experience pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Account Detail

Standard Buttons:

Custom Buttons:

Account (Sales) Feed-Based Layout ▾ [Feed View](#) [Custom Console Components](#) [Mini Page Layout](#)

Save ▾ Quick Save Preview As... ▾ Cancel | Undo Redo | Layout Properties

Account (Sales) Feed-Based Layout

[Help for this Page](#)

Save Cancel

Feed View Options

- Enable Full-Width Feed View in the Console
- Enable Compact Feed View in the Console
- Highlight Externally Visible Feed Items

Publisher Options

- Automatically Collapse Publisher

Other Tools and Components

Custom Components

| Action | Name | Height (Pixels) |
|--------------------------|------|-----------------|
| + Add a Visualforce page | | |

Choose Placement

| Left Column | Hidden | Right Column |
|--------------------|----------|--|
| --None-- | --None-- | Following Icon
Followers List
Custom Links
Custom Buttons |
| Up
Down
Move | | Up
Down
Move |

Hide Sidebar

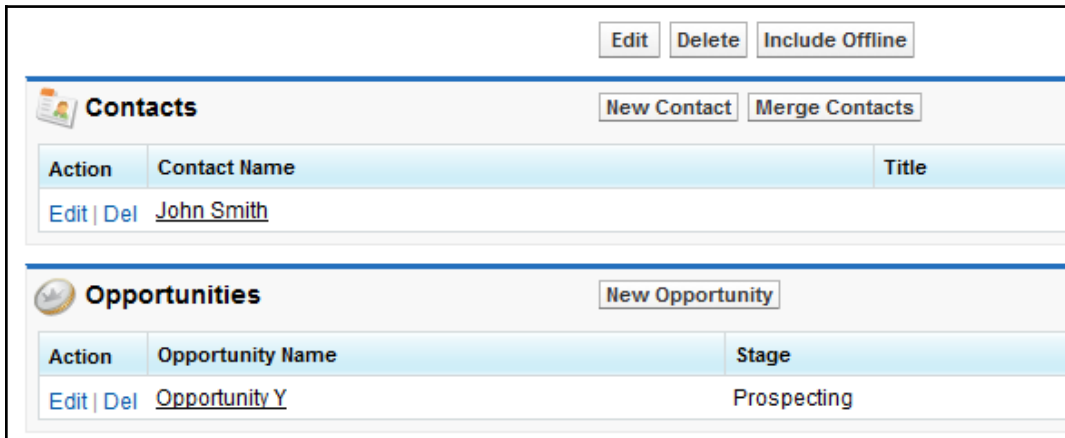
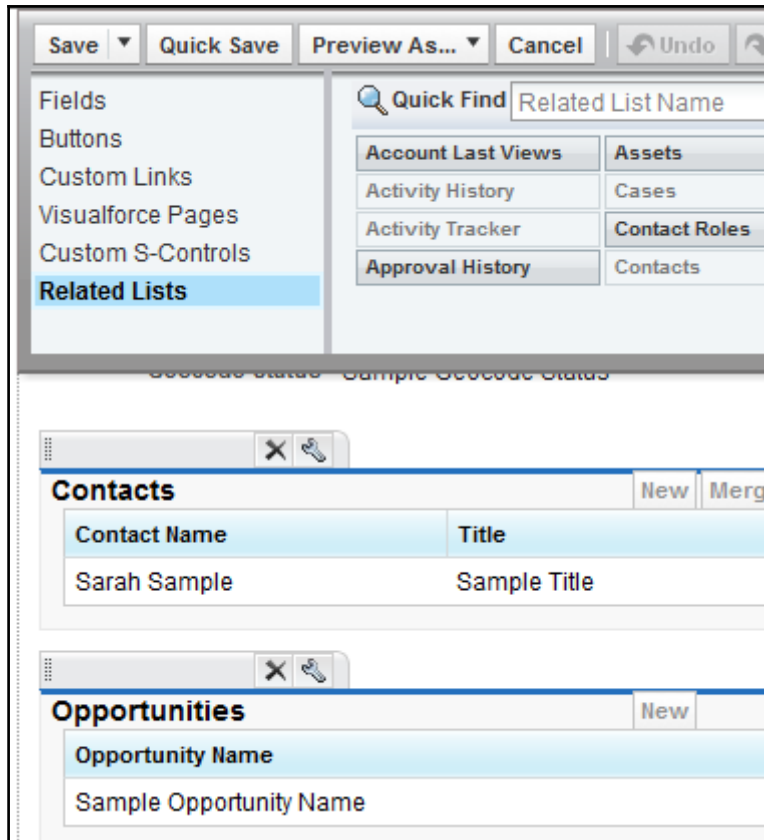
Feed Filter Options

- Filters Appear
- As a fixed list in the left column
 - As a floating list in the left column
 - As a drop-down list in the center column
 - As in-line links in Compact Feed View in the console


Select Filters


| Available | | Selected |
|-----------|---------------|---------------------------|
| Call Logs | Add
Remove | All Updates
Text Posts |
| | | Up
Down |


Save Cancel




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

| <input type="checkbox"/> | Action | Account Name | Account Site | Billing State/Provin... |
|--------------------------|--|--------------|--------------|-------------------------|
| <input type="checkbox"/> | 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

Rece
Accou
Comp
sales



Create New View

Save

Cancel

Step 1. Enter View Name

View Name:

View Unique Name: [i](#)

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



Billing Street
Billing City


Selected Fields

Account Name
Account Site













Leads **Accounts** Contacts Opportunities Forecasts Contracts Cases

 **All Accounts** ▼ [Edit](#) | [Delete](#) | [Create New View](#)  

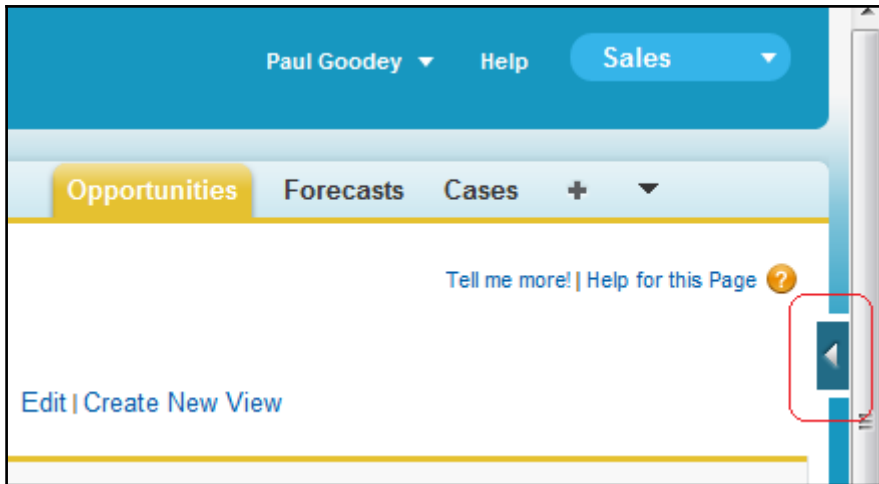
 List  Chatter

[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**

| <input type="checkbox"/> | Action | Account Name ↑ | Account Site | Billing State/Province | Phone |
|--------------------------|--|--|--------------|------------------------|-----------|
| <input type="checkbox"/> | Edit Del  | Burlington Textiles Co | | NC | (336) 222 |
| <input type="checkbox"/> | Edit Del  | Dickenson plc | | KS | (785) 241 |
| <input type="checkbox"/> | Edit Del  | Edge Communication | | TX | (512) 757 |
| <input type="checkbox"/> | Edit Del  | Express Logistics anc | | OR | (503) 421 |
| <input type="checkbox"/> | Edit Del  | GenePoint | | CA | (650) 867 |
| <input type="checkbox"/> | Edit Del  | Grand Hotels & Resor | | IL | (312) 596 |
| <input type="checkbox"/> | Edit Del  | Pyramid Construction | | | (014) 427 |
| <input type="checkbox"/> | Edit Del  | sForce | | CA | (415) 901 |
| <input type="checkbox"/> | Edit Del  | United Oil & Gas Corp | | NY | (212) 842 |
| <input type="checkbox"/> | Edit Del  | United Oil & Gas, Sinc | | Singapore | (650) 450 |
| <input type="checkbox"/> | Edit Del  | United Oil & Gas, UK | | UK | +44 191 4 |
| <input type="checkbox"/> | 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 ?

force.com ?

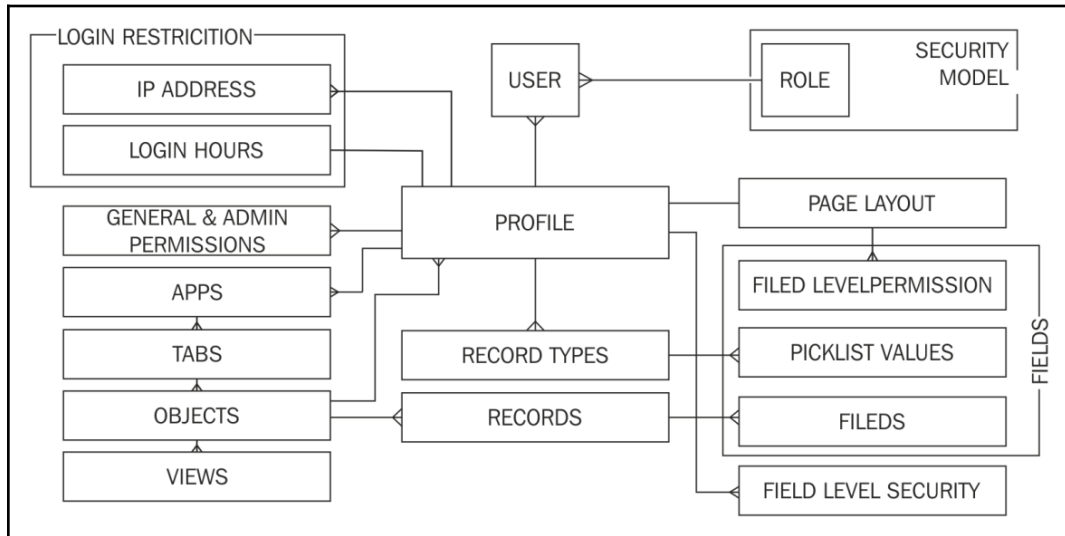
Edit | Create New View

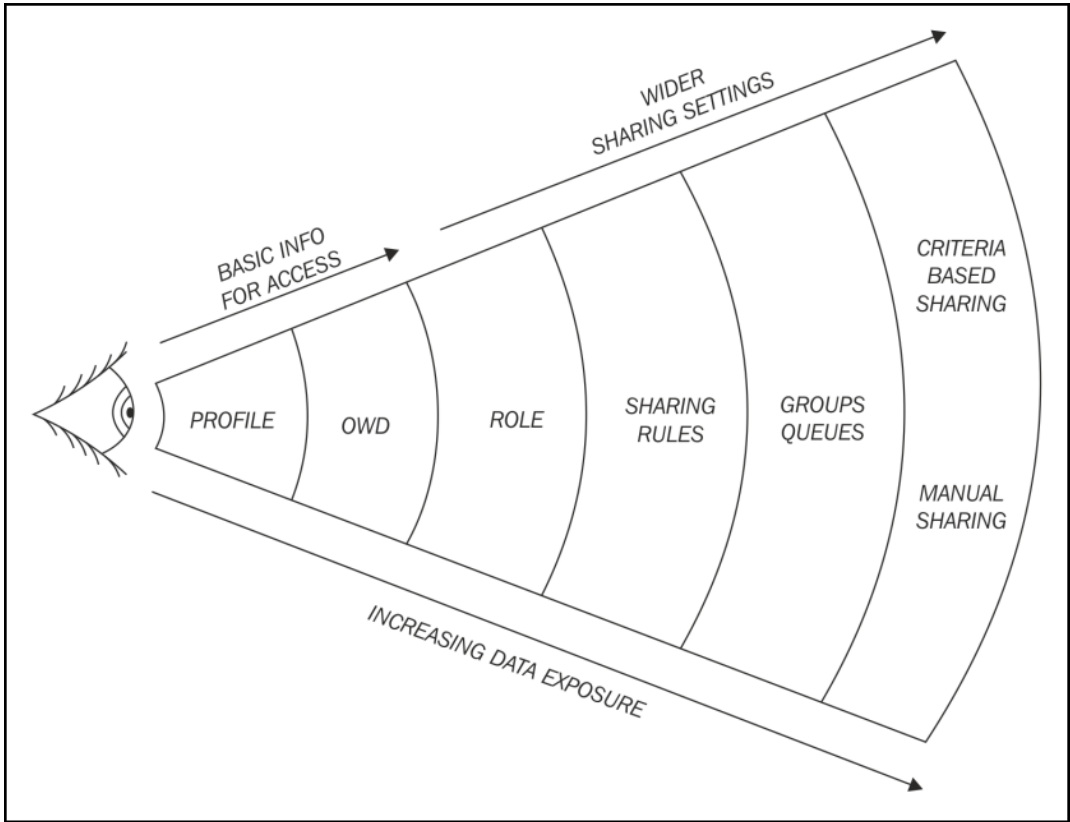
| Account Name |
|-------------------------------|
| <u>Westwood</u> |
| <u>Company X</u> |
| <u>Company X</u> |
| <u>GenePoint</u> |
| <u>Contacts First Account</u> |
| <u>Contacts First Account</u> |

- View Fields
- View Object
- View Record Types
- View Validation Rules
- View Approvals
-
- Edit App
- Edit Columns

Turn off menu

Chapter 4: Securing Access to Data and Data Validation





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.

| Object | Default Internal Access | Default External Access | Grant Access Using Hierarchies |
|------------------------------------|-----------------------------|-----------------------------|-------------------------------------|
| Lead | Private | Private | <input checked="" type="checkbox"/> |
| Account, Contract, Order and Asset | Private | Private | <input checked="" type="checkbox"/> |
| Contact | Controlled by Parent | Controlled by Parent | <input checked="" type="checkbox"/> |
| Opportunity | Private | Private | <input checked="" type="checkbox"/> |
| Case | Private | Private | <input checked="" type="checkbox"/> |
| Campaign | Private | Private | <input checked="" type="checkbox"/> |
| User | Public Read Only | Private | <input checked="" type="checkbox"/> |
| Activity | Private | Private | <input checked="" type="checkbox"/> |
| Calendar | Hide Details and Add Events | Hide Details and Add Events | <input checked="" type="checkbox"/> |
| Price Book | Use | Use | <input checked="" type="checkbox"/> |

| Object | Default Access | Grant Access Using Hierarchies |
|-----------------------------|-----------------------------|-------------------------------------|
| Lead | Public Read/Write/Transfer | <input checked="" type="checkbox"/> |
| Account, Contract and Asset | Public Read/Write | <input checked="" type="checkbox"/> |
| Contact | Controlled by Parent | <input checked="" type="checkbox"/> |
| Opportunity | Public Read/Write | <input checked="" type="checkbox"/> |
| Case | Public Read/Write/Transfer | <input checked="" type="checkbox"/> |
| Campaign | Public Full Access | <input checked="" type="checkbox"/> |
| Activity | Private | <input checked="" type="checkbox"/> |
| Calendar | Hide Details and Add Events | <input checked="" type="checkbox"/> |
| Price Book | Use | <input checked="" type="checkbox"/> |
| Activity Tracker Setup | Public Read/Write | <input checked="" type="checkbox"/> |
| Country | Public Read Only | <input checked="" type="checkbox"/> |
| Currency | Public Read Only | <input checked="" type="checkbox"/> |

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 | 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:

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:

Default Sharing Settings

Organization-Wide Defaults

[Organization-Wide Defaults Help](#) 


| Object | Default Access | Grant Access Using Hierarchies |
|--------|----------------------------|-------------------------------------|
| Lead | Public Read/Write/Transfer | <input checked="" type="checkbox"/> |

Permission Set

Create

[Help for this Page](#) 


Enter permission set information

 = Required Information

Label

API Name 

Description

Session Activation Required 

Select the type of users who will use this permission set

Who will use this permission set?

- Choose '--None--' if you plan to assign this permission set to multiple users with different user and permission set licenses.
- Choose a specific user license if you want users with only one license type to use this permission set.
- Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License

Permission Set
Widget Access

Video Tutorial | Help for this Page ?

Find Settings... | Clone Delete Edit Properties Manage Assignments

Permission Set Overview

| | | | |
|-----------------------------|--|------------------|-------------------------------|
| Description | This is full read write access to the custom Widget object | API Name | Widget_Access |
| License | | Namespace Prefix | |
| Session Activation Required | <input type="checkbox"/> | | |
| Created By | Paul Goodey, 13/10/2018 15:34 | Last Modified By | Paul Goodey, 16/10/2018 21:06 |

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

Assigned Apps

Settings that specify which apps are visible in the app menu

Assigned Connected Apps

Settings that specify which connected apps are visible in the app menu

Object Settings

Permissions to access objects and fields, and settings such as tab availability

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

External Data Source Access

Permissions to authenticate against external data sources

Named Credential Access

Permissions to authenticate against named credentials

Custom Permissions

Permissions to access custom processes and apps


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"

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 | <input checked="" type="checkbox"/> |
| Create | <input checked="" type="checkbox"/> |
| Edit | <input checked="" type="checkbox"/> |
| Delete | <input checked="" type="checkbox"/> |
| View All | <input checked="" type="checkbox"/> |
| Modify All | <input checked="" type="checkbox"/> |

Field Permissions

| Field Name | Read | Edit |
|------------------|-------------------------------------|-------------------------------------|
| Account | <input type="checkbox"/> | <input type="checkbox"/> |
| Name | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Created By | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Last Modified By | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Owner | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

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 ▾

[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](#)

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

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.

View: [All](#)  [Edit](#) | [Create New View](#)

[Show in sorted list view](#) 

[Show in tree view](#)

[Show in sorted list view](#)

[Show in list view](#)

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

[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](#)

| Action | Role | Reports To | |
|---|--|-------------------------|--|
| Edit Del Assign | CEO | | Show in list view |
| 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

[Help for this Page](#) 

VP, International Sales

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 | <input type="checkbox"/> | | |



Users in VP, International Sales Role

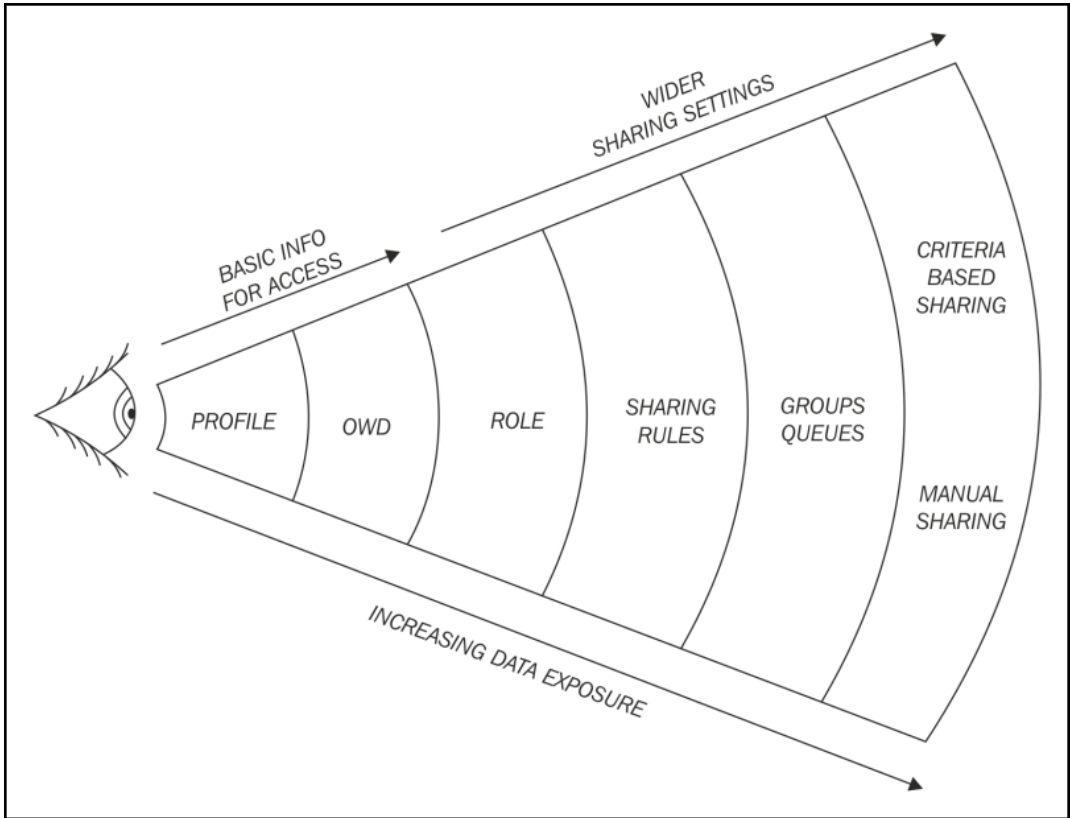
[Assign Users to Role](#)

[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 | <input checked="" type="checkbox"/> |



Sharing Rules

Lead Sharing Rules [Lead Sharing Rules Help ?](#)

No sharing rules specified.

Account Sharing Rules [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 |

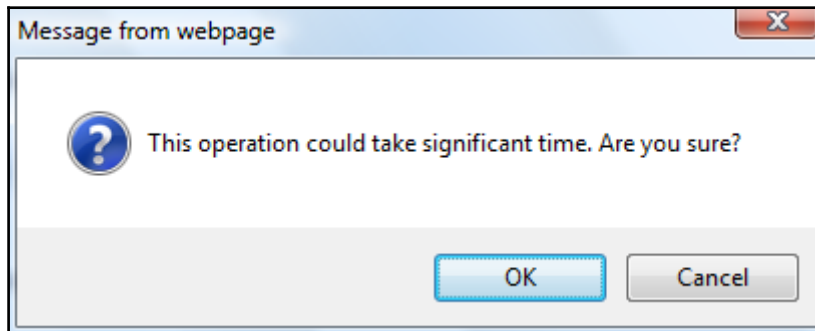
Contact Sharing Rules [Contact Sharing Rules Help ?](#)

No sharing rules specified.

Opportunity Sharing Rules [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 [Case Sharing Rules Help ?](#)



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 ?](#)

Account Sharing Rule

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 | <input type="text" value="US Market"/> | | |
| Rule Name | <input type="text" value="US_Market"/> <small>i</small> | | |
| Criteria | Field | Operator | Value |
| | <input type="text" value="Market"/> | <input type="text" value="equals"/> | <input type="text" value="US"/> <small>🔍</small> |
| | <input type="text" value="--None--"/> | <input type="text" value="--None--"/> | <input type="text"/> |
| | <input type="text" value="--None--"/> | <input type="text" value="--None--"/> | <input type="text"/> |
| | <input type="text" value="--None--"/> | <input type="text" value="--None--"/> | <input type="text"/> |
| | | | AND |
| | | | AND |
| | | | AND |
| | | | AND |
| | | | AND |
| | Add Filter Logic... | | |
| Share with | Role: VP, North American Sales | | |
| Default Account, Contract and Asset Access | <input type="text" value="Read Only"/> | | |
| Opportunity Access | <input type="text" value="Read Only"/> | | |
| Case Access | <input type="text" value="Read Only"/> | | |
| Created By | Paul Goodey, 06/03/2011 22:48 | | |
| | | Modified By | Paul Goodey, 28/03/2011 04:41 |
| <input type="button" value="Save"/> <input type="button" value="Cancel"/> | | | |


Newsletter Sharing Rule

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 | <input type="text" value="International in Name"/> | | |
| Rule Name | <input type="text" value="International_in_Name"/>  | | |
| Criteria | Field | Operator | Value |
| | <input type="text" value="Newsletter Name"/> ▼ | <input type="text" value="contains"/> ▼ | <input type="text" value="International,international"/> AND |
| | <input type="text" value="--None--"/> ▼ | <input type="text" value="--None--"/> ▼ | <input type="text" value=""/> AND |
| | <input type="text" value="--None--"/> ▼ | <input type="text" value="--None--"/> ▼ | <input type="text" value=""/> AND |
| | <input type="text" value="--None--"/> ▼ | <input type="text" value="--None--"/> ▼ | <input type="text" value=""/> AND |
| | <input type="text" value="--None--"/> ▼ | <input type="text" value="--None--"/> ▼ | <input type="text" value=""/> |
| | Add Filter Logic... | | |
| Share with | Role, Internal and Portal Subordinates: VP, International Sales | | |
| Access Level | <input type="text" value="Read Only"/> ▼ | | |
| Created By | <u>Paul Goodey</u> , 28/03/2011 05:23 | Modified By | <u>Paul Goodey</u> , 28/03/2011 05:23 |
| <input type="button" value="Save"/> <input type="button" value="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 \[View Hierarchy\]](#)

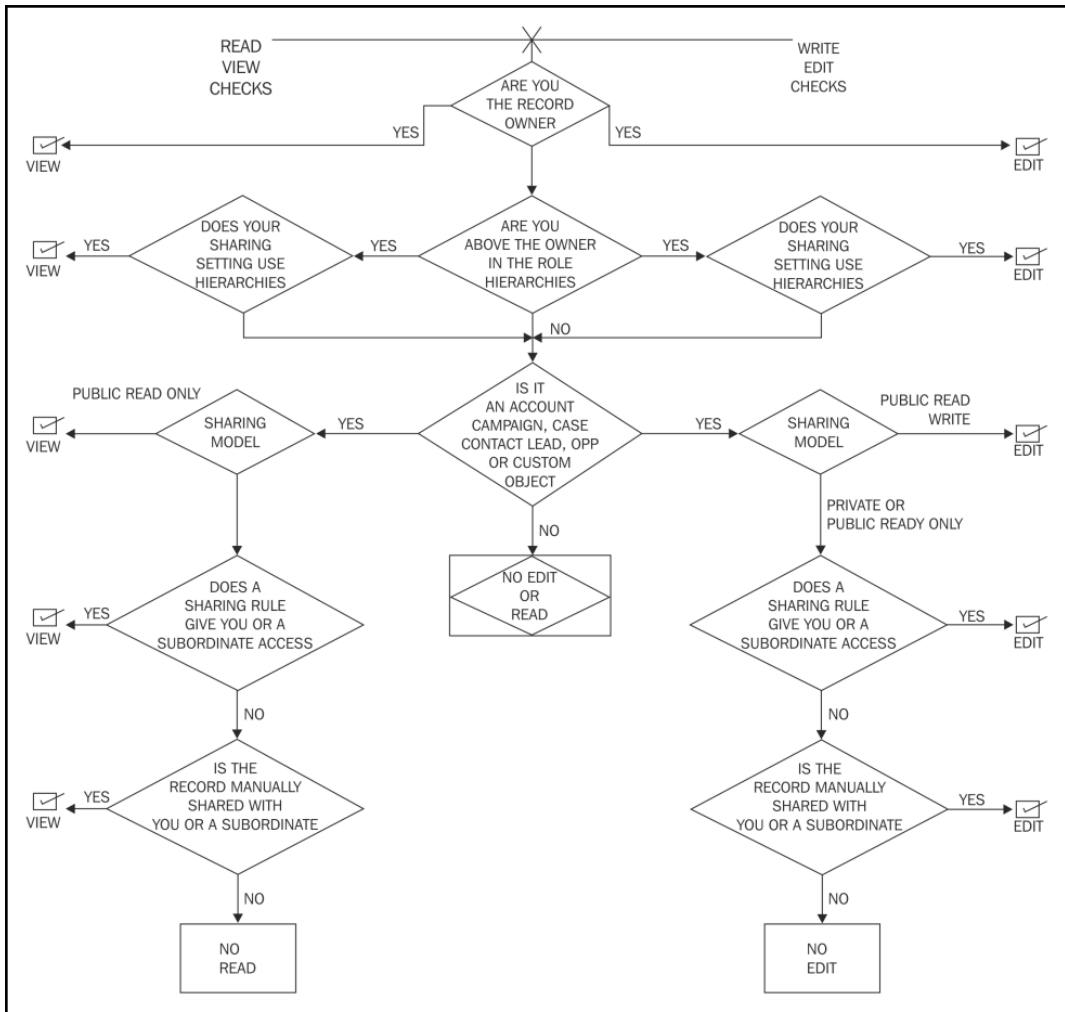
User Visibility Settings

Portal User Visibility [i](#)

Standard Report Visibility [i](#)


Manual User Record Sharing [i](#)

Save Cancel



Chapter 5: Managing Data in Salesforce CRM




 **Recycle Bin** [Help for this Page ?](#)

View: My recycle bin ▾

My recycle bin
All recycle bin

| <input type="checkbox"/> | Action | Name | Type | Deleted By | Deletion Date ↓ |
|--------------------------|--------|------|----------------------------|--------------|------------------|
| <input type="checkbox"/> | | Name | Contact Employment History | Goodey, Paul | 01/08/2011 21:36 |

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



[Validation Rules Help](#) 

No validation rules defined.

Opportunity Validation Rule

Help for this Page 

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

Rule Name

Active

Description

Quick Tips

- [Operators & Functions](#)

Error Condition Formula

Example: [More Examples...](#)
Display an error if Discount is more than 30%
If this formula expression is **true**, display the text defined in the Error Message area

Functions

-- All Function Categories --

- ABS
- AND
- BEGINS
- BLANKVALUE
- BR
- CASE

ABS(number)
Returns the absolute value of a number, a number without its sign

[Help on this function](#)

Error Message

Example:
This message will appear when Error Condition formula is **true**

Error Message

This error message can either appear at the top of the page or below a specific field on the page

Error Location Top of Page Field

Opportunity Detail Save Cancel

Error: Invalid Data.
Review all error messages below to correct your data.

| | | | |
|-------------------|--------------------------|------------------|--------------|
| Opportunity Owner | Trevor Howard [Change] | Amount | \$200,000.00 |
| Private | <input type="checkbox"/> | Expected Revenue | \$150,000.00 |
| Opportunity Name | Opportunity Y | Close Date | 14/07/2016 |
| Account Name | <u>Company X</u> | Next Step | |

Error: Close Date Must Be a Future Date

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 Custom Buttons and Links \[0\]](#) | [Record Types \[0\]](#) | [Apex Sharing](#)

Custom Object Definition Detail

Edit

Delete

Singular Label Speaker

Plural Label Speakers

Object Name Speaker

API Name Speaker__c

Created By [Paul Goodey](#), 27/11/2010 18:44

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

| Action | Field Label | API Name | Data |
|--------|-------------|----------|------|
|--------|-------------|----------|------|

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.

| | |
|---|---|
| <input type="button" value="Continue"/> <input type="button" value="Cancel"/> | |
| Controlling Field | <input type="text" value="Speaker Event Status"/> ▼ |
| Dependent Field | <input type="text" value="Speaker Status"/> ▼ |
| <input type="button" value="Continue"/> <input type="button" value="Cancel"/> | |

Edit Field Dependency

[Help for this Page](#) ?

Controlling Field **Speaker Event Status**

Dependent Field **Speaker Status**

► **Instructions**

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

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

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

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

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

Edit Field Dependency

[Help for this Page](#) ?

Controlling Field Speaker Event Status

Dependent Field Speaker Status

► Instructions

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

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

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

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

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

All Matching Rules

[Help for this Page](#) ?

What Are Matching Rules?

[\[Expand \]](#)

View: [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 | Rule Name ↑ | Object | Status | Description | Last Modified Date | Last Modified By |
|--------------------------|--|---------|----------|--|--------------------|-----------------------|
| Activate | Standard Account Matching Rule | Account | Inactive | Matching rule for account records. More info | 14/02/2015 | PGood |
| Activate | Standard Contact Matching Rule | Contact | Inactive | Matching rule for contact records. More info | 14/02/2015 | PGood |
| Activate | Standard Lead Matching Rule | Lead | Inactive | Matching rule for lead records. More info | 14/02/2015 | PGood |

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 Matching Rule

Step 1: Select object

Step 1 of 2

Next

Cancel

Select the object to which this matching rule applies.

Object

Account ▼

Next

Cancel

Step 2: Configure Matching Rule

Step 2 of 2

[Previous](#) [Save](#) [Cancel](#)

Rule Details

= Required Information

Object Account

Rule Name

Unique Name

Description

Matching Criteria

Tell the rule which fields to compare and how.

| Field | Matching Method | Match Blank Fields | |
|---|------------------------------------|--------------------------|-----|
| <input type="text" value="Account Name"/> | <input type="text" value="Exact"/> | <input type="checkbox"/> | AND |
| <input type="text" value="--None--"/> | <input type="text" value="Exact"/> | <input type="checkbox"/> | AND |
| <input type="text" value="--None--"/> | <input type="text" value="Exact"/> | <input type="checkbox"/> | AND |
| <input type="text" value="--None--"/> | <input type="text" value="Exact"/> | <input type="checkbox"/> | AND |
| <input type="text" value="--None--"/> | <input type="text" value="Exact"/> | <input type="checkbox"/> | AND |

[Add Filter Logic...](#)

[Previous](#) [Save](#) [Cancel](#)

[Back to List: Accounts](#)

Matching Rule Detail

[Edit](#) [Delete](#) [Clone](#) [Activate](#)

| | |
|-------------------|---|
| Object | Account |
| Rule Name | Company Name Exact |
| Unique Name | Company_Name_Exact |
| Description | Matches for exact account name |
| Matching Criteria | Account : Name EXACT MatchBlank = FALSE |
| Status | Inactive |
| Created By | Paul Goodey, 30/10/2018 16:44 |
| Modified By | Paul Goodey, 30/10/2018 16:44 |

Matching Rule Activation



We're activating your matching rule. We'll send an email to you@email@email.com when the activation process is complete.

OK

All Duplicate Rules

[Help for this Page](#)

What Are Duplicate Rules?

[\[Expand \]](#)

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**

| Rule Name ↑ | Description | Object | Matching Rule | Active | Last Modified By | Last Modified Date |
|---|---|---------|--|--------------------------|------------------|--------------------|
| Standard Rule for Contacts with Duplicate Leads | Identify contacts with duplicate leads. | Contact | Standard Lead Matching Rule | <input type="checkbox"/> | autoproc | 10/06/2017 |
| Standard Rule for Leads with Duplicate Contacts | Identify leads with duplicate contacts. | Lead | Standard Contact Matching Rule | <input type="checkbox"/> | autoproc | 10/06/2017 |

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**

Account

Duplicate Rule Edit

Save Save & New Cancel

Rule Details

! = Required Information

Rule Name

Description

Object Account

Record-Level Security Enforce sharing rules Bypass sharing rules i

Actions

Specify what happens when a user tries to save a duplicate record.

Action On Create

Action On Edit Alert Report

Alert Text i

Matching Rules

Define how duplicate records are identified.

Compare Accounts With

Matching Rule

Matching Criteria Account : Name EXACT MatchBlank = FALSE

Field Mapping Mapping Selected

Add Rule Remove Rule

Conditions

Optionally, specify the conditions a record must meet for the rule to run.

| Field | Operator | Value | |
|--|---|---|-----|
| <input type="text" value="Current User: Profile"/> | <input type="text" value="not equal to"/> | <input type="text" value="System Administrator"/> | AND |
| <input type="text" value="--None--"/> | <input type="text" value="--None--"/> | <input type="text" value=""/> | AND |
| <input type="text" value="--None--"/> | <input type="text" value="--None--"/> | <input type="text" value=""/> | AND |
| <input type="text" value="--None--"/> | <input type="text" value="--None--"/> | <input type="text" value=""/> | AND |
| <input type="text" value="--None--"/> | <input type="text" value="--None--"/> | <input type="text" value=""/> | |

Add Filter Logic...

Save Save & New Cancel

Account Name Exact

[Back to List: Duplicate Rules](#)

Duplicate Rule Detail

[Edit](#) [Delete](#) [Clone](#) [Activate](#)

| | | | |
|-----------------------|---|----------------------|--|
| Rule Name | Account Name Exact | Order | 1 of 1 [Reorder] i |
| Description | Matches for exact account name | | |
| Object | Account | | |
| Record-Level Security | Enforce sharing rules | | |
| Action On Create | Block | Operations On Create | <input type="checkbox"/> Alert <input type="checkbox"/> Report |
| Action On Edit | Allow | Operations On Edit | <input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report |
| Alert Text | Use one of these records? | | |
| Active | <input type="checkbox"/> | | |
| Matching Rule | <input checked="" type="checkbox"/> Company Name Exact <input checked="" type="checkbox"/> Mapped | Matching Criteria | Account: Name EXACT MatchBlank = FALSE |
| Conditions | Current User: Profile EQUALS System Administrator | | |
| Created By | Paul Goodey , 31/10/2018 09:19 | Modified By | Paul Goodey , 31/10/2018 09:19 |

[Edit](#) [Delete](#) [Clone](#) [Activate](#)

New! Duplicate Detection X

Here's a list of records that may be duplicates for the one you're trying to create or edit.

[Learn More!](#)

[Save](#) [Save & New](#) [Cancel](#)

1 Possible Duplicate Record Found
Use one of these records?

Accounts

| Account Name | Account Owner | Last Modified Date |
|----------------------|-----------------------------|--------------------|
| Acme | Paul Goodey | 27/04/2012 14:31 |

Account Information

I = Required Information

| | | | |
|----------------|-----------------------------------|--------------------|---|
| Account Owner | Paul Goodey | Active | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |
| Account Name | <input type="text" value="Acme"/> | Upsell Opportunity | <input type="text" value="--None--"/> |
| Parent Account | <input type="text"/> | Type | <input type="text" value="--None--"/> |

Leads Contacts Opportunities **Accounts** Reports Dashboards Cases Duplicate Record Sets Venues Books + ▾

Help for this Page ?

New! Duplicate Detection X

Here's a list of records that may be duplicates for the one you're trying to create or edit.

[Learn More!](#)

4 Possible Duplicate Records Found
Use one of these records?

| Account Name | Account Owner | Last Modified Date |
|-----------------------|-----------------------------|--------------------|
| test2 | Paul Goodey | 31/10/2018 09:46 |
| test2 | Paul Goodey | 31/10/2018 09:40 |
| test2 | Paul Goodey | 03/09/2011 01:10 |
| test2 | Paul Goodey | 03/09/2011 00:56 |


Account Information ! = Required Information

| | | | |
|----------------|---|--------------------|------------|
| Account Owner | Paul Goodey | Active | Yes ▾ |
| Account Name | <input style="border: 1px solid red;" type="text" value="test2"/> | Upsell Opportunity | --None-- ▾ |
| Parent Account | <input type="text"/> | Type | --None-- ▾ |

Recent Import Jobs

| Status | Object | Records Created | Records Updated | Records Failed | Start Date | Processing Time (ms) |
|--------|--------|-----------------|-----------------|----------------|------------|----------------------|
|--------|--------|-----------------|-----------------|----------------|------------|----------------------|

Bulk Api Monitoring



Before you import your data . . .

[Collapse](#)

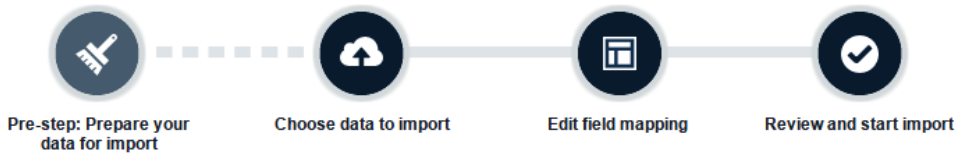
Clean up your data import file
You'll have fewer errors to resolve if your data file is clean and free of duplicates. [Watch video](#)

Make sure your field names match Salesforce field names
You'll be required to map your data fields to Salesforce data fields. Data in unmapped fields is not imported. [View a list of Salesforce data fields](#).

Don't import too many records at once
Using the Data Import Wizard, import up to 50,000 records at a time. Importing too many records can slow down your org for all users, especially during periods of peak usage.

Import your data in 3 easy steps!

Launch the Data Import Wizard to import your data.

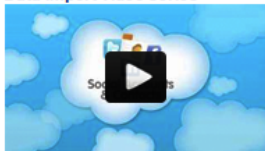


Launch Wizard!

FAQ

- How do I prepare my data for import?
- How many records can I import?
- What kind of objects can I import?
- Can I do simultaneous imports?
- How long does it take to complete an import?

Data Import video series



Additional Resources

- [Find import templates and other helpful tools](#)
- [Learn how to use the Data Import Wizard](#)

Let's do this

Choose data Edit mapping Start import

Import your Data into Salesforce

You can import up to 50,000 records at a time. [Help for this page](#)

What kind of data are you importing? What do you want to do? Where is your data located?

| Standard objects | Custom objects |
|-------------------------|----------------|
| Accounts and Contacts > | |
| Leads > | |
| Solutions > | |
| > | |

Cancel Previous **Next**

Good job

Choose data Edit mapping Start import

Import your Data into Salesforce

You can import up to 50,000 records at a time. [Help for this page](#)

What kind of data are you importing? What do you want to do? Where is your data located?

| Standard objects | Custom objects |
|-------------------------|----------------|
| Accounts and Contacts > | |
| Leads ✓ | |
| Solutions > | |
| Campaign Members > | |

| |
|---------------------------------------|
| Add new records > |
| Update existing records > |
| Add new and update existing records > |

Cancel Previous **Next**

Almost done

Choose data **Edit mapping** Start import

Edit Field Mapping: Leads

[Help for this page](#) ?

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

| Edit | Mapped Salesforce Object | CSV Header | Example |
|--------|--------------------------|------------|-------------------------|
| Change | Name | Name | John Bloggs |
| Change | Email | Email | j.bloggs@widgetsxyz.com |
| Change | Company | Company | 001F000000gQ2uF |

Cancel Previous **Next**

Great job

Choose data Edit mapping **Start import**

Review & Start Import

[Help for this page](#) ?

Review your import information and click Start Import.

Your selections:

- Leads ✓
- Add new records ✓
- New Leads Test.csv ✓

Your import **will include**:

Mapped fields

3

Your import **will not include**:

Unmapped fields

0

Cancel Previous **Start Import**

Congratulations, your import has started!
 Click OK to view your import status on the Bulk Data Load Job page.

OK

Bulk Data Load Job
7500G00000Eqyssc

View the details of a bulk data load job.

[← Back to List: Bulk Data Load Jobs](#)

Bulk Data Load Job Detail Reload

| | | | |
|-------------------------------|-----------------------------|---------------------|---------|
| Job ID | 7500G00000Eqyssc | Job Type | Bulk V1 |
| Submitted By | Paul Goodey | Operation | Upsert |
| Start Time | 05/11/2018 21:22 GMT | Queued Batches | 0 |
| End Time | 05/11/2018 21:22 GMT | In Progress Batches | 0 |
| Time to Complete ([hh:mm:ss]) | 00:01 | Completed Batches | 1 |
| Object | Lead | Failed Batches | 0 |
| External ID Field | Email | Progress | 100% |
| Content Type | CSV | Records Processed | 1 |
| Concurrency Mode | Parallel | Records Failed | 0 |
| API Version | 44.0 | Retries | 0 |

Reload

Batches

| View Request | View Result | Batch ID | Start Time | End Time | Total Processing Time (ms) | API Active Processing Time (ms) | Apex Processing Time (ms) | Records Processed | Records Failed |
|------------------------------|-----------------------------|-----------------|------------------|------------------|----------------------------|---------------------------------|---------------------------|-------------------|----------------|
| View Request | View Result | 7510G00000InyIM | 05/11/2018 21:22 | 05/11/2018 21:22 | 456 | 269 | 26 | 1 | 0 |

Search mail

1 of 8,149

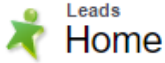
Salesforce import of "New Leads Test.csv" has finished. 1 rows were processed. Inbox x

noreply@salesforce.com <noreply@salesforce.com> 9:23 PM (26 minutes ago) ☆ ↶ ⋮
to me ▾

Your Leads import is complete. Here are your results:

- Leads Created: 1
- Leads Updated: 0
- Leads Ignored: 0 (We ignored updates that we couldn't match to an existing record.)
- Leads Failed: 0 (We couldn't import these due to errors.)
- Leads Rejected: 0 (We rejected duplicate rows.)

Processed job information for imported Leads: <https://na43.salesforce.com/7500G00000EqyscQAB?fromEmail=1>



View: [Edit | Create New View](#)

Recent Leads

| Name | Company |
|----------------------------------|--|
| Chubbe, Mos | Ideal Homes |
| Brownell, Shelly | Western Telecommunications Corp. |
| Glimpse, Jeff | Jackson Controls |

Reports

[Lead Lifetime](#)

[Leads By Source](#)

[Bounced Leads](#)

[Go to Reports »](#)

Summary

Interval: From: [

To: [

View:

Tools

[Import Leads](#)

[Mass Delete Leads](#)

Let's do this

Choose data Edit mapping Start import

Import your Data into Salesforce

You can import up to 50,000 records at a time. [Help for this page](#)

What kind of data are you importing? [?](#) What do you want to do? [?](#) Where is your data located? [?](#)

Standard objects Custom objects

Leads >

What do you want to do? [?](#)

Where is your data located? [?](#)

Cancel Previous Next

Data Loader

[Help for this page](#)

Data Loader is a client app for the bulk import and export of data.

With data in a comma-separated values (CSV) file, Data Loader can create, edit, or delete Salesforce records for any standard or custom object.

Data Loader exports Salesforce records into CSV files. You can then edit those CSV files or use them as templates for importing data into Salesforce.


[Download Data Loader for Windows](#)

[Download Data Loader for Mac](#)

Monthly Export Service

[Help for this Page](#) 

Data Export lets you prepare a copy of all your data in salesforce.com. From this page you can start the export process manually or schedule it to run automatically. When an export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are also available on this page for 48 hours, after which time they are deleted.

 **Next scheduled export:**
None

[Export Now](#)

[Schedule Export](#)

Monthly Export Service

[Help for this Page](#) 

Export File Encoding **ISO-8859-1 (General US & Western European, ISO-LATIN-1)** ▼

Include images, documents, and attachments

Include Salesforce Files and Salesforce CRM Content document versions

Replace carriage returns with spaces

[Start Export](#)

[Cancel](#)

Exported Data

Select what type of information you would like to include in the export. The data types listed below use the Apex API names. If you are not familiar with these names, select Include all data for your export.

Include all data

Contract

Approval

ContractContactRole

RecordType

BusinessProcess

EntityHistory

Schedule Data Export

[Help for this Page](#) ?

Schedule Data Export

Export File Encoding **ISO-8859-1 (General US & Western European, ISO-LATIN-1)** ▼

Include images, documents, and attachments i

Include Salesforce Files and Salesforce CRM Content document versions i

Replace carriage returns with spaces

Schedule Data Export

Frequency

On day **1** ▼ of every month

On **the 1st** ▼ **Sunday** ▼ of every month

Start []

End []

Preferred Start Time ▼

Exact start time will depend on job queue activity.

Exported Data

Select what type of information you would like to include in the export. The data types listed below use the Apex API names. If you are not familiar with these names, select Include all data for your export.

- Include all data
- Contract Approval ContractContactRole
- RecordType BusinessProcess EntityHistory

Data Protection and Privacy

[Help for this Page](#) ?

Give access to data protection and privacy details in lead, contact and person account records.

The Individual object stores details about data protection and privacy preferences. That way, you can respect your customers' wishes for how you handle their personal data.

- Make data protection details available in records

Reminder: Add the Individual field to Lead, Contact, or Person Account page layouts.

Leads Contacts Opportunities Accounts Reports Dashboards Cases + ▾

Contact Layout ▾ Custom Console Components Mini Page Layout Mini Console View | Video Tutorial Help for this Page

Save ▾ Quick Save Preview As... ▾ Cancel Undo Redo Layout Properties

Quick Find individual ✕

- Fields
- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists

- Section
- Blank Space
- Individual


Contact Sample

Highlights Panel

Customize the highlights panel for this page layout...


Quick Actions in the Salesforce Classic Publisher ⓘ


Leads **Contacts** Opportunities Accounts Reports



Contact
 **John Smith**

[Cases](#) [0] | [Open Activities](#) [0] | [Activity History](#) [0] | [Opportunities](#) [0] | [Links to Objects](#) [0] | [Opportunities](#) [0] | [Contact Employment](#) [0] |

Contact Detail Save Cancel

Contact Owner  **Paul Goodey** [\[Change\]](#)

Name **John Smith** 

Individual  

Account Name

Search ~ Salesforce - Developer Edition - Google Chrome

https://na43.salesforce.com/_ui/common/data/LookupPage?lknm=Individual&lktp=0PK&lksrch=J...

Lookup

You can use "*" as a wildcard next to other characters to improve your search results.

[< Clear Search Results](#)

Search Results

| Name | Alias | Created By Alias | Last Modified By Alias | Last Modified Date |
|---|-------|------------------|------------------------|--------------------|
| No records found due to one of the following: | | | | |
| <ul style="list-style-type: none">There are no records of this typeYou don't have permission to see any of the records | | | | |

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Search ~ Salesforce - Developer Edition - Google Chrome

https://na43.salesforce.com/_ui/common/data/LookupPage?lknm=Indi...

Lookup

You can use "*" as a wildcard next to other characters to improve your search results.

| | |
|------------|------------------------------------|
| First Name | <input type="text" value="John"/> |
| Last Name | <input type="text" value="Smith"/> |

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Individual
John Smith

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#) 

[Individual History](#) [1] | [Contacts](#) [1] | [Leads](#) [0]

Individual Detail

[Edit](#) [Delete](#) [Clone](#) [Sharing](#)

▼ **Information**

| | | | |
|--------------------------------|--------------------------|----------------------------|--|
| Name | John Smith | Owner |  Paul Goodey [Change] |
| Birth Date | | Block Geolocation Tracking | <input type="checkbox"/> |
| Don't Process | <input type="checkbox"/> | Don't Profile | <input type="checkbox"/> |
| Don't Market | <input type="checkbox"/> | Don't Track | <input type="checkbox"/> |
| Export Individual's Data | <input type="checkbox"/> | Forget this Individual | <input type="checkbox"/> |
| OK to Store PII Data Elsewhere | <input type="checkbox"/> | Individual's Age | |


▼ **System Information**

| | | | |
|--------------|--|--------------------|--|
| Created By | Paul Goodey , 01/11/2018 23:55 | Last Modified By | Paul Goodey , 01/11/2018 23:55 |
| Created Date | 01/11/2018 23:55 | Last Modified Date | 01/11/2018 23:55 |

[Edit](#) [Delete](#) [Clone](#) [Sharing](#)


Individual History

| Date | User | Action |
|------------------|-----------------------------|----------|
| 01/11/2018 23:56 | Paul Goodey | Created. |

 **Contacts**

[New Contact](#) [Merge Contacts](#)

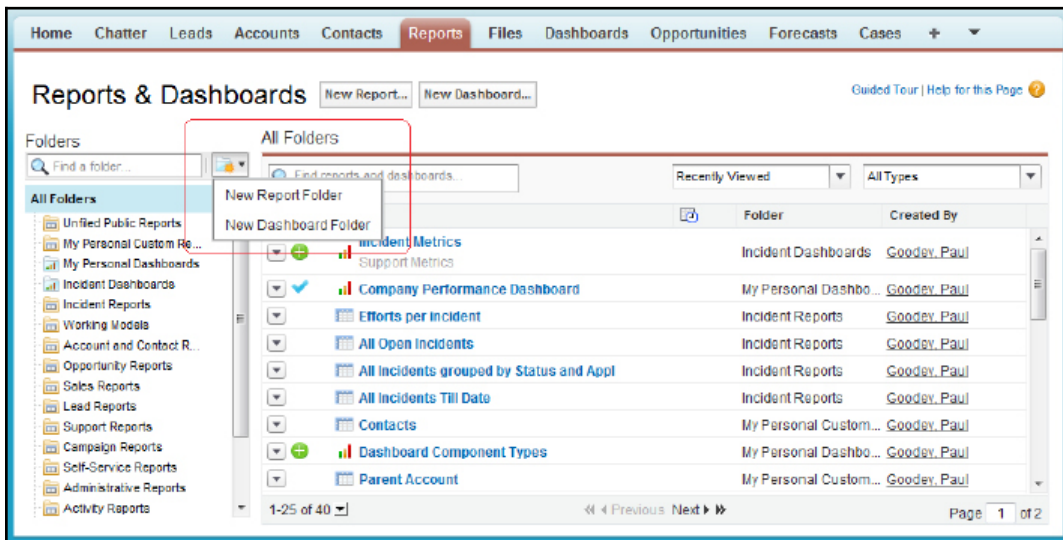
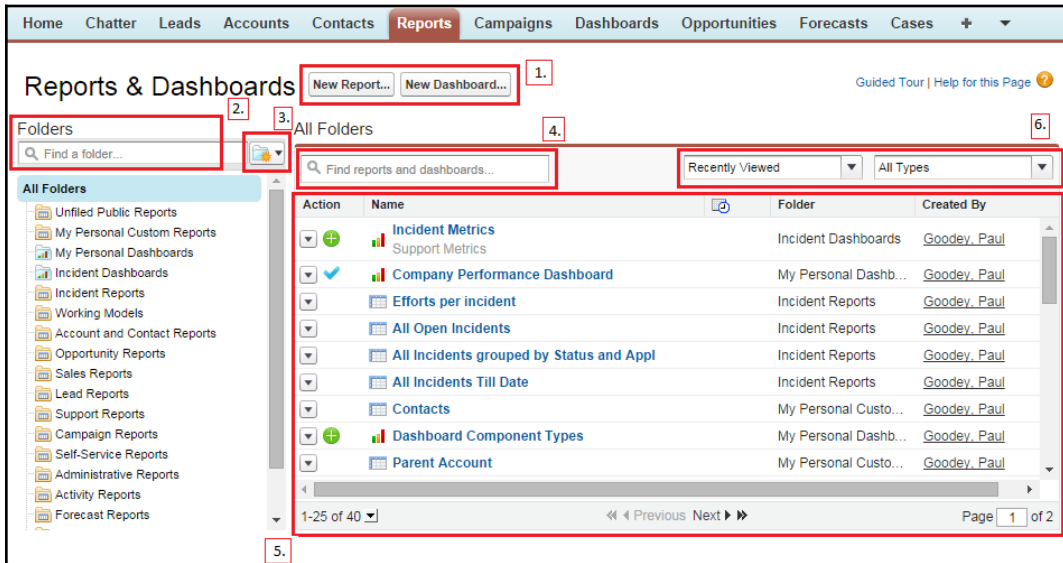
| Action | Contact Name | Title | Email | Phone |
|--|----------------------------|-------|--|-------|
| Edit Del | John Smith | | john.smith@stuffxyz.com | |

 **Leads**

[New Lead](#)

No records to display

Chapter 6: Generating Data Analytics with Reports and Dashboards



Home Chatter Leads Accounts Contacts **Reports** Campaigns Dashboards Opportunities Forecasts Cases +

Reports & Dashboards

New Report... New Dashboard... [Guided Tour](#) | [Help for this Page](#)

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

Find reports and dashboards... Recently Viewed All Types

| Action | Name | Folder | Created By |
|--------------------------|---|----------------------|--------------|
| <input type="checkbox"/> | Company Performance Dashboard | My Personal Dashb... | Goodev, P... |
| <input type="checkbox"/> | Incident Metrics
Support Metrics | Incident Dashboards | Goodev, P... |
| <input type="checkbox"/> | All Incidents Till Date | Incident Reports | Goodev, P... |
| <input type="checkbox"/> | Efforts per incident | Incident Reports | Goodev, P... |
| <input type="checkbox"/> | All Open Incidents | Incident Reports | Goodev, P... |
| <input type="checkbox"/> | All Incidents grouped by Status and Appl | Incident Reports | Goodev, P... |
| <input type="checkbox"/> | Contacts | My Personal Cust... | Goodev, P... |
| <input type="checkbox"/> | Dashboard Component Types | My Personal Dashb... | Goodev, P... |

1-25 of 40 << Previous Next >> Page 1 of 2

Pin to top Edit Delete



New Report Folder

Folder Edit

Save

Cancel

Report Folder Label

Folder Unique Name



Public Folder Access

Read Only

Unfiled Public Reports

--None--

Add



Remove

Reports in this Folder

--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

--None--

Add




Remove

Shared To

--None--

Save

Cancel



New Report Folder

Folder Edit Save Cancel

Report Folder Label

Folder Unique Name i

Save Cancel

Report and Dashboard Folder Sharing [Help for this Page](#) ?

This setting lets users selectively share reports and dashboards with other users, roles, public user groups, or portal users.

Folder Sharing

Enable access levels for sharing report and dashboard folders

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

Working Models

Find reports and dashboards...

| Action | Name ↑ |
|--------|------------------------|
| ▼ | Accounts with Activity |
| ▼ | Activity Tracker |
| ▼ | Test |
| ▼ | Test 2 |

Pin to top

Share

Edit

Delete

Share: Working Models

Help for this Page ? x

Share with: [Users](#), [Roles](#), [Roles, Internal and Portal Subordinates](#), and [2 more](#) ▼

| All (2) | Access |
|---------------------------|---|
| All Internal Users | Viewer ▼ |
| All Customer Portal Users | <input checked="" type="checkbox"/> Viewer
Editor
Manager |

Close



Create New Report

[Help for this Page](#)

Select Report Types to Hide [i](#)

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
- Leads

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 [i](#)

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

Identification

Report Type Label

Report Type Name

Description
Note: Description will be visible to users who create reports.

Store in Category

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 Add #

Quick Find

Drag and drop to add fields to the report.

- Opportunities
 - Account Name: Account Nar
 - Amount

Filters Add

Show

- My opportunities
- My opportunities
- My team's opportunities
- All opportunities

Date Field

New Custom Report Type Help for this Page ?

Events with or without Sessions

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)

Previous Save Cancel

Custom Report Type Help for this Page ?

Events with or without Sessions

[< Back to List: Custom Object Definitions](#)

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 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 Fields Available for Reports Help ?

| Source | Selected Fields |
|----------|-----------------|
| Events | 30 |
| Sessions | 30 |
| Speakers | 28 |

Events with or without Sessions

Set how fields display on the Select Columns page in the report wizard via this report type by selecting fields individually or Shift+click to select a group of fields. 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

| Events | | | |
|------------------|------------------|------------------|------------------|
| 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 ... | | |

Legend

- Not in Page Layout
- Used in Page Layout
- Selected
- Checked by Default
- Added via Lookup

View: Events Fields

Events Fields (Page 1/2)

| Events Fields (Page 1/2) | |
|--------------------------|------------------|
| 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 | | | |
|------------------|---------|------------------|------------|
| # of Survey R... | AV Form | All Speakers ... | Attendance |

Field Layout Properties

Save Cancel Preview Layout

Layout: 88

Field Information - Windows Internet Explorer

https://na10.salesforce.com/setup/layout/crtfieldedit.jsp

| Item Name | Display As | Checked by Default |
|------------|------------|-------------------------------------|
| Event Name | Event Name | <input checked="" type="checkbox"/> |

OK Cancel

Internet | Protected Mode: On

| |
|------------------|
| Event End Date |
| ✓ Event Name |
| Final Attenda... |
| Last Modified... |
| Owner |
| Vendor |

Home Chatter Leads Accounts Contacts **Reports** Files Dashboards Opportunities Forecasts Cases + ▾

Reports & Dashboards

New Report... New Dashboard... [Guided Tour](#) | [Help for this Page](#) ?

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

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/Province |
|----------------|--------------|------------------------|
| 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

 **Contacts**

Export Report

| | |
|----------------------|---|
| Export File Encoding | ISO-8859-1 (General US & Western European, ISO-LATIN-1) ▾ |
| Export File Format | 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) |



Opportunities

Closed This Month

Report Generation Status: Complete

Paul Goodey

Report Options:

Summarize information by:

--None--

Time Frame

Date Field

Close Date

Range

This Month

From

01/11/2018

To

30/11/2018

Show

All opportunities

Opportunity Status

Closed Won

Probability

All

Run Report

Hide Details

Customize

Save

Save As

Delete

Printable View

Export Details

Subscribe

Run Report Now

[Schedule Future Runs...](#)

| | Type | Amount | Close Date | Stage | Fiscal Period | Opportunity Owner |
|---|-----------------------------|---------------------|------------|------------|---------------|-----------------------------|
| Edge SLA | Existing Customer - Upgrade | \$60,000.00 | 12/11/2018 | Closed Won | Q4-2018 | Paul Goodey |
| Grand Hotels SLA | Existing Customer - Upgrade | \$90,000.00 | 27/11/2018 | Closed Won | Q4-2018 | Paul Goodey |
| Express Logistics Standby Generator | New Customer | \$220,000.00 | 30/11/2018 | Closed Won | Q4-2018 | Paul Goodey |
| Grand Totals (3 records) | | \$370,000.00 | | | | |



Schedule Report

Save Report Schedule

Cancel

Running User

Email Report To me To me and/or others...

Schedule Report

Frequency

- Daily
- Weekly
- Monthly

- Every weekday
- Every day

Start [11/11/2018]

End [11/11/2018]

Preferred Start Time [Find available options...](#)

Exact start time will depend on job queue activity.

Save Changes Save report modifications with this schedule
 Discard report modifications

Save Report Schedule

Cancel



Closed This Month

Report Generation Status: Complete

Paul Goodey

Report Options:

Summarize information by:

--None--

Time Frame

Date Field: Range:

From: To:

Show

All opportunities

Opportunity Status

Closed Won

Probability

All

Run Report

Hide Details

Customize

Save

Save As

Delete

Printable View

Export Details

Subscribe

| Opportunity Name | Type | Amount | Close Date | Stage | Fiscal Period | Opportunity Owner | Account Name |
|---|-----------------------------|---------------------|------------|------------|---------------|-----------------------------|---|
| Edge SLA | Existing Customer - Upgrade | \$60,000.00 | 12/11/2018 | Closed Won | Q4-2018 | Paul Goodey | Edge Communications |
| Grand Hotels SLA | Existing Customer - Upgrade | \$90,000.00 | 27/11/2018 | Closed Won | Q4-2018 | Paul Goodey | Grand Hotels & Resorts Ltd |
| Express Logistics Standby Generator | New Customer | \$220,000.00 | 30/11/2018 | Closed Won | Q4-2018 | Paul Goodey | Express Logistics and Transport |
| Grand Totals (3 records) | | \$370,000.00 | | | | | |



Subscribe to

Opportunities: Closed This Month

[Help for this Page](#)

Report Subscription

When you subscribe to a report, you can define the set of conditions to meet before sending a notification, and choose how and when to be notified. Make sure to save any changes to your report before subscribing.

Type **Notify me:** Every time conditions are met
 Only the first time conditions are met

Conditions **Aggregate** **Operator** **Value**
Record Count Equals

Schedule **Frequency** Every Weekday
 Daily
 Weekly
Time

Actions Send Mobile Notification
 Post to Chatter Feed
 Send Email Notification
 Execute a Custom Action

Preview

Alert: The conditions in 'Opportunities: Closed This Month' have been met. <https://na43.salesforce.com/00000G0000007UTAB>
'Active Concurrent Users' is equal to 500.
'Average Session Minutes' is 23 and is greater than 20.

Active

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-- | | |

| <input checked="" type="checkbox"/> | Report Name | Description | Folder | Name |
|-------------------------------------|---|-------------|----------------|------------------------------|
| <input checked="" type="checkbox"/> | Accounts with Activity Tracker Report | | Working Models | Goodey, Paul |
| <input checked="" type="checkbox"/> | Activity Tracker | | Working Models | Goodey, Paul |

salesforce

Paul Goodey ▾ Help [Sales](#) ▾

Report Type: Opportunities
[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 ▾

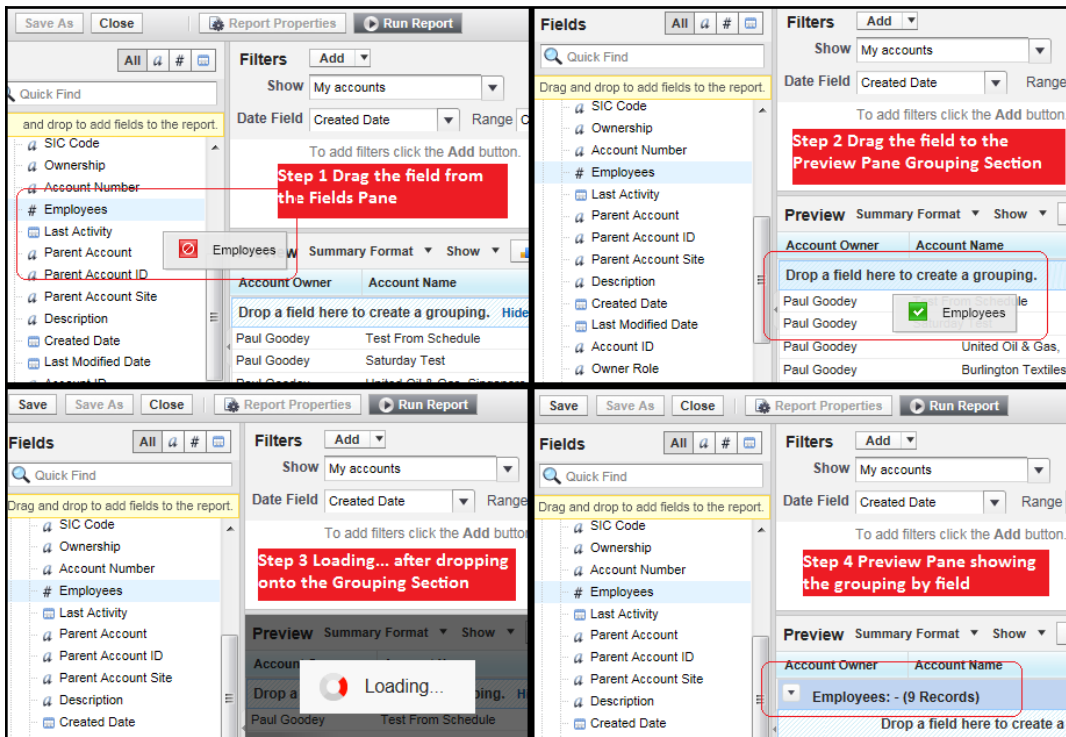
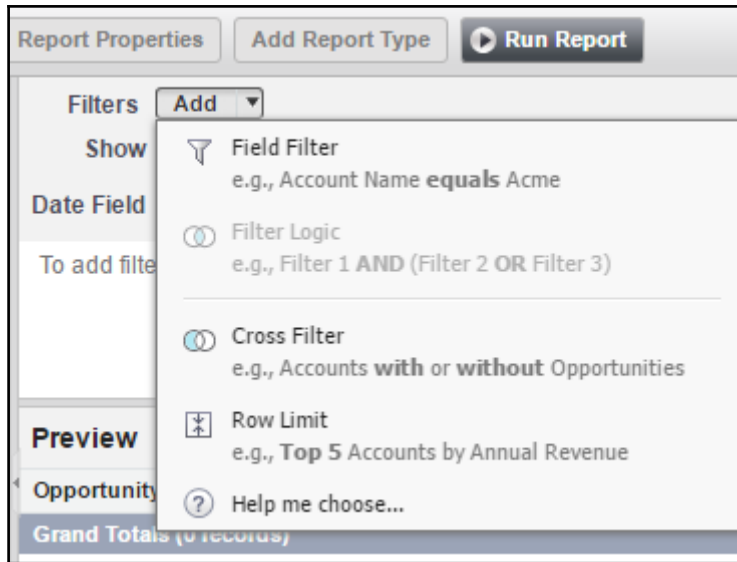
Show All opportunities ▾ Opportunity Status Any ▾ Probability All ▾

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. | | | | | | |




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

| Annual Revenue ↓ | Rating | Last Activity |
|-------------------|--------|---------------|
| avg \$5,600,000,0 | | |
| \$5,600,000,0 | | |
| avg | | |
| avg \$475,000,000 | | |
| \$950,000,000 | Cold | - |

-  Sort Ascending
-  Sort Descending

-  Group by this Field
-  Summarize this Field

-  Remove Column

Summarize ✕

| Field | Sum | Average | Max | Min |
|----------------|--------------------------|-------------------------------------|--------------------------|--------------------------|
| Annual Revenue | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

| Account Owner | Account Name | Type | Rating | Annual Revenue |
|---|---|--------------------|--------|-----------------|
| <input type="checkbox"/> Employees: 100,000 (1 record) avg \$5,600,000,000 | | | | |
| Paul Goodey | United Oil & Gas Corp. | Customer | Hot | \$5,600,000,000 |
| <input type="checkbox"/> Employees: 39,000 (1 record) avg \$0 | | | | |
| Paul Goodey | University of Arizona | Customer | Warm | - |
| <input type="checkbox"/> 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 | - | - |
| <input type="checkbox"/> 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 |
| <input type="checkbox"/> Employees: 3,000 (1 record) avg \$0 | | | | |
| Paul Goodey | United Oil & Gas, Singapore | Customer | - | - |
| <input type="checkbox"/> 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 | - | - | - |

| Opportunity Name | Opportunity Owner |
|--|--------------------------|
| Stage: Needs Analysis (3 Records) <div style="border: 1px solid gray; padding: 5px; margin-top: 5px;"> Show <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Details <input checked="" type="checkbox"/> Drop Zones <input type="checkbox"/> Conditional Highlighting... </div> | |
| Drop a field here to create a grouping. Hide | |
| United Oil Plant Standby Generators | \$135,000.00 Paul Goodey |

Conditional Highlighting ✕

| | | | | | |
|----------------------|--|-------------|--|-------------|--|
| Avg Expected Revenue | | 60,000.0000 | | 95,000.0000 | |
| --Select Field-- | | | | | |
| --Select Field-- | | | | | |

Filtered By: [Edit](#)
 Stage equals Needs Analysis, Perception Analysis, Proposal/Price Quote [Clear](#)

| | Opportunity Name | Expected Revenue | Opportunity Owner | Account Name + | Avg Expected Revenue |
|---------------------------------|---|------------------|-----------------------------|---|----------------------|
| <input type="checkbox"/> | 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 | |
| <input type="checkbox"/> | Stage: Perception Analysis (1 record) | | | | \$84,000.00 |
| | Express Logistics SLA | \$84,000.00 | Paul Goodey | Express Logistics and Transport | |
| <input type="checkbox"/> | 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) | | | | |
| Drop a field here to create a grouping. Hide | | | | |
| United Oil Plant Standby Generators | \$135,000.00 | Paul Goodey | United Oil & Gas Corp. | \$52,066.67 |
| Starr Toolset | \$1,200.00 | Paul Goodey | Starr Hardware Wholesalers | |
| Toolset Q1 | \$20,000.00 | Paul Goodey | Drews | |
| Stage: Perception Analysis (1 Record) | | | | |
| Express Logistics SLA | \$84,000.00 | Paul Goodey | Express Logistics and Transport | \$84,000.00 |
| Stage: Proposal/Price Quote (3 Records) | | | | |
| University of AZ Installations | \$75,000.00 | Paul Goodey | University of Arizona | \$95,500.00 |
| United Oil Refinery Generators | \$202,500.00 | Paul Goodey | United Oil & Gas Corp. | |
| Stearne | \$9,000.00 | Paul Goodey | Stearne & Co | |
| Grand Totals (7 records) | | | | \$75,242.88 |

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 ? x

Column Name: Avg Expected Revenue

Description:

Format: Currency

Decimal Places: 2

Where will this formula be



Number

Percent

Currency

- All summary levels
- Grand summary only
- Grouping 1: Stage

ation will be displayed in the report at the level you select.

Formula

Functions

Tips

Summary Fields Operators Check Syntax

All

ABS

EXP_AMOUNT:AVG

ABS(number)

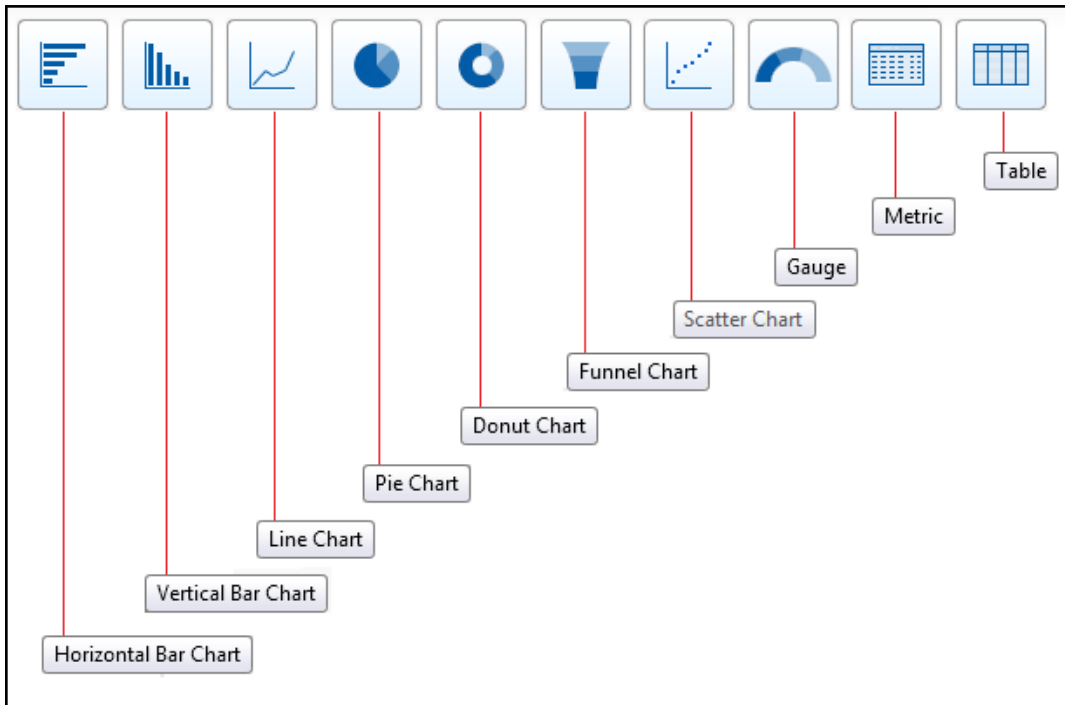
Returns the absolute value of a number, a number without its sign

< Insert

[Help on this function](#)

OK

Cancel



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 | Goodev, Paul |
| ✓ | Company Performance Dashboard | My Personal Dashbo... | Goodev, Paul |
| ▾ | Efforts per incident | Incident Reports | Goodev, Paul |
| ▾ | All Open Incidents | Incident Reports | Goodev, Paul |
| ▾ | All Incidents grouped by Status and Appl | Incident Reports | Goodev, Paul |
| ▾ | All Incidents Till Date | Incident Reports | Goodev, Paul |
| ▾ | Contacts | My Personal Custom... | Goodev, Paul |
| + | Dashboard Component Types | My Personal Dashbo... | Goodev, Paul |
| ▾ | Parent Account | My Personal Custom... | Goodev, Paul |

1-25 of 40 ▾ ◀ Previous Next ▶▶ Page 1 of 2

Dashboard Properties Help for this Page ? x

General Component Settings

Title

Dashboard Unique Name i

Folder
To avoid exposing sensitive data to the wrong people, choose a folder visible only to the right users.

Save to ▼

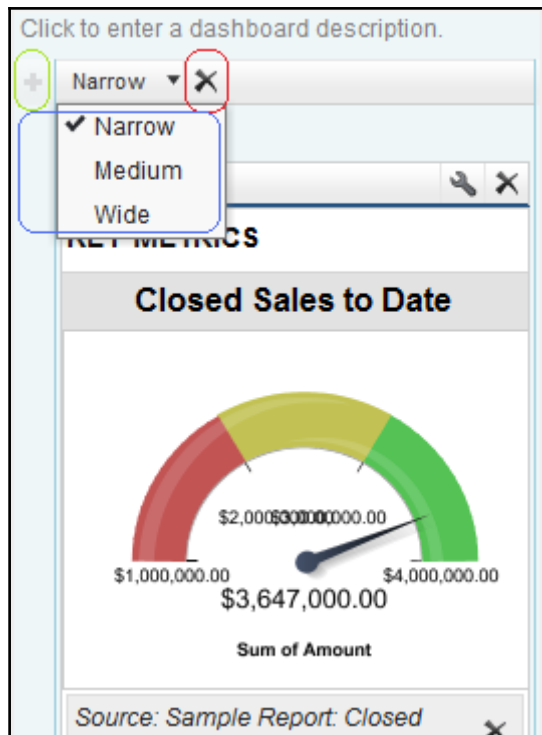
Help for this Page ?

View dashboard as: ▼

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 i

The report returned no results.



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 Expect
 - Sample Report: Closed Sale
 - Sample Report: Closed Sale

Click to enter a dashboard description.

Narrow

Wide

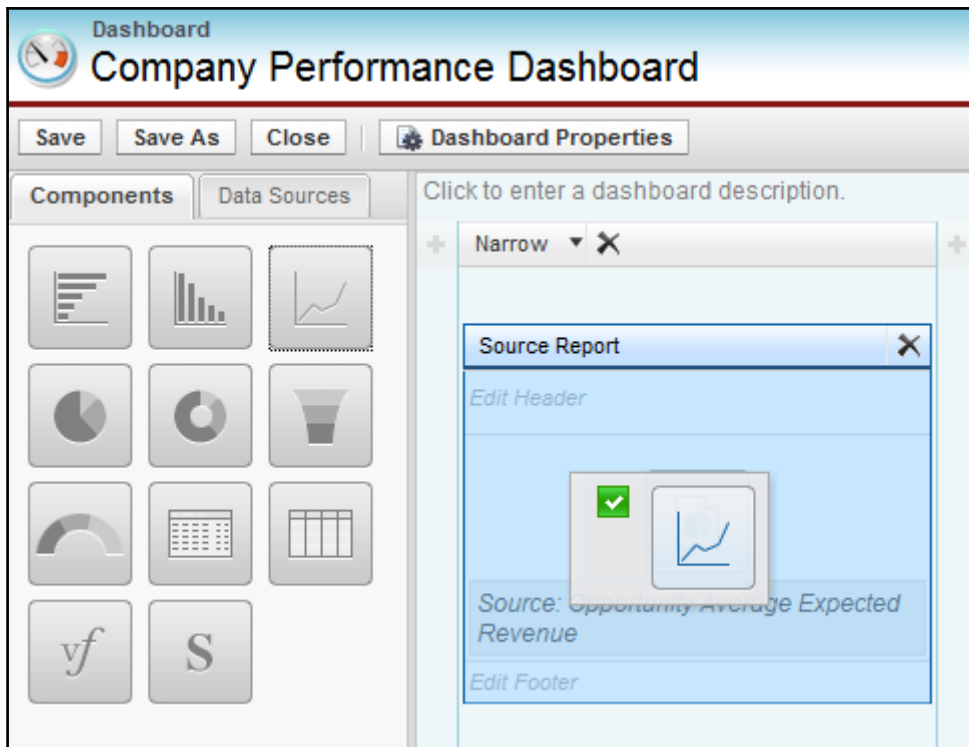
Gauge Opportunity Average Expected Revenue

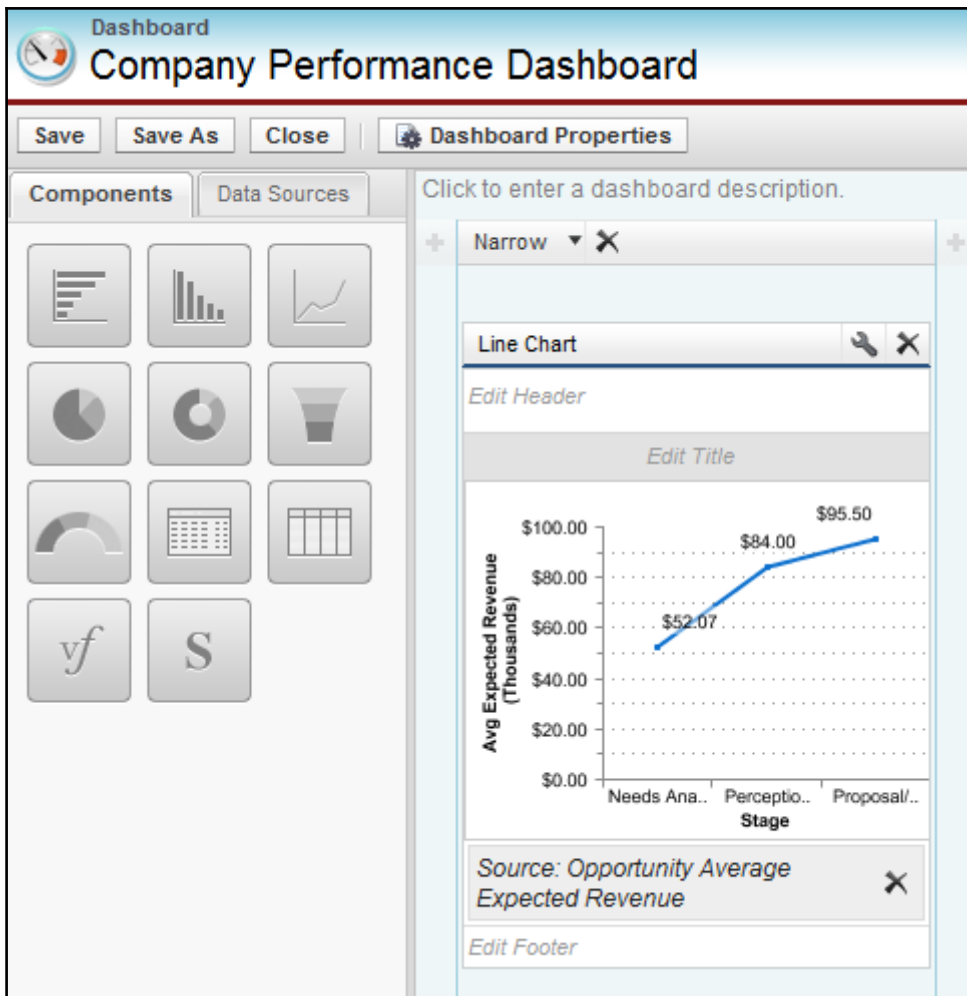
KEY METRICS

Closed Sales to Date

Source

Edit Hea





Chapter 7: Implementing Business Processes in Salesforce CRM

Email Alert Edit Save Save & New Cancel

Edit Email Alert

Description

Unique Name [i](#)

Object Opportunity

Email Template [🔍](#)

Protected Component

Recipient Type Search: for: Find

Recipients

- Account Owner
- Case Team
- Creator
- Email Field
- Owner
- Public Groups
- Related Contact
- Related Lead or Contact Owner
- Related User
- Role
- Role and Subordinates
- User**

You can enter up to five (5) email addresses to be notified.

Additional Emails

From Email Address

Make this address the default From email address for this object's email alerts. [i](#)

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.

Organization-Wide Email Address

| = Required Information

Display Name **|**

Email Address **|**

- 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

Verify your Salesforce Organization-Wide Address



support@salesforce.com



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

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

Click this link to confirm this Organization-Wide Email Address: https://ap8.salesforce.com/setup/emailverif?oid=00D0c0000018XmZ&k=eyJlbmMiOiJBMjU2R0NNIiwiaXVkJoiMDBEMG8wMDAwMDE4WG1aIiwia2lkjoi mav1cW0mXDOtNDQipdi470Yyy_MtSd4pG6WXfThz7PXRRSaZQf75sBrBIOO91R2GZixr_IMWwitXE48FUT-Au

This link expires 72 hours after the receipt of this message. To confirm your email address, you must click the

If you have any questions, please contact your administrator. Or, after you have logged in, click the Help &

Thank you,
salesforce.com

From Email Address

Default Workflow User's email address

Current User's email address

Default Workflow User's email address

"Cust_Srv WidgetsXYZ"

Save Save & New Cancel

ess for this object's email alerts. i

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

I = Required Information

| | | | |
|---------------------|---|----------|---------------------------|
| Object | Opportunity | Status | I Not Started ▾ |
| Assigned To | I <input type="text"/>  | Priority | I Normal ▾ |
| Subject | I <input type="text"/> | | |
| Unique Name | I <input type="text"/>  | | |
| Due Date | I --None-- ▾ | plus ▾ | <input type="text"/> days |
| Notify Assignee | <input type="checkbox"/> | | |
| Protected Component | <input type="checkbox"/> | | |

Description Information

Comments

Field Update Edit

Save

Save & New

Cancel

Identification

| = Required Information

Name **|**

Unique Name **|** [i](#)

Description

Object **|**

Field to Update **|**

Field Data Type Date

Specify New Field Value

Date Options

Use a formula to set the new value

[Show Formula Editor](#)

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

| Rules | | Actions | | Users |
|------------------------------|---|-------------------|----------------|---------------|
| Object | Criteria | E-mail alerts | Immediate | People |
| | | | Time-dependent | |
| | | Tasks | Immediate | |
| | | | Time-dependent | |
| | | Field updates | Immediate | System |
| | | | Time-dependent | |
| | | Outbound messages | Immediate | |
| | | | Time-dependent | |
| Example workflow rule | | | | |
| Opportunity | Whenever an opportunity record is updated | E-mail Alert | Immediate | Account Owner |

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](#)

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 rule [How do I choose?](#)

- When a record is created, or when a record is edited and did not previously meet the rule criteria
- Only when a record is created
- Every time a record is created or edited

Rule Criteria

Run this rule if the following :

| Field | Operator | Value | |
|----------|----------|----------------------|-----|
| --None-- | --None-- | <input type="text"/> | AND |
| --None-- | --None-- | <input type="text"/> | AND |
| --None-- | --None-- | <input type="text"/> | AND |
| --None-- | --None-- | <input type="text"/> | AND |
| --None-- | --None-- | <input type="text"/> | |

[Add Filter Logic...](#)

Previous Save & Next Cancel

Rule Criteria

Run this rule if the following :

| Field | Operator | Value | |
|-------------------------|--------------|----------------------|-----|
| Opportunity: Close Date | equals | NEXT 7 DAYS | AND |
| Opportunity: Closed | not equal to | True | AND |
| --None-- | --None-- | <input type="text"/> | AND |
| --None-- | --None-- | <input type="text"/> | AND |
| --None-- | --None-- | <input type="text"/> | |

[Add Filter Logic...](#)

Save Cancel

Rule Criteria

Run this rule if the :

| 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: [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

| Field | Operator | Value |
|----------------|--------------|--------------|
| 1. Amount | greater than | 1000000 |
| 2. Closed Date | equals | NEXT 45 DAYS |
| 3. Owner Role | starts with | VP |
| 4. --None-- | equa | |

Advanced Filter Conditions:

ALL OPPORTUNITIES

Amount > \$1M

Close Date = next 45 days

Deals owned by a VP

1 and 2 3

RESULT

Rule Criteria

Run this rule if the following :

Example: evaluates to true when the person who last modified the record is not the record owner. [More Examples...](#)

```

AND
(
  ISCHANGED(StageName),
  ISPICKVAL(PRIORVALUE(StageName), "Negotiation/Review"),
  ISPICKVAL(StageName, "Closed Lost"),
  Amount > 50000
)

```

No errors found

Functions

-- All Function Categories --

- ABS
- AND
- BEGINS
- BLANKVALUE
- BR
- CASE

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

[Help for this Page](#) 

Opportunity

Workflow Time Trigger Edit

Workflow Rule Close Date Within 7 Days

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 | <input type="checkbox"/> |
| Edit Del Activate | Lost Negotiation 50k | | Opportunity | <input type="checkbox"/> |
| Edit Del Deactivate | Test | | MD One | <input checked="" type="checkbox"/> |
| Edit Deactivate | Timer | | MD One | <input checked="" type="checkbox"/> |

Identification

Name

Unique Name [i](#)

Description

Object Chapter

Field to Update

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 ▼

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

| <input type="checkbox"/> | Record Name | Object | Workflow Rule Name | Scheduled Date | Created By | Created Date |
|--------------------------|---------------------------|---------|------------------------------------|------------------|------------------------------|------------------|
| <input type="checkbox"/> | Frog | MD One | Timer | 02/05/2011 23:34 | Goodey, Paul | 02/05/2011 22:34 |
| <input type="checkbox"/> | 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 :

| Field | Operator | Value | |
|---|---|---|-----|
| <input type="text" value="Opportunity: Amount"/> | <input type="text" value="greater than"/> | <input type="text" value="100000"/> | AND |
| <input type="text" value="Opportunity: Stage"/> | <input type="text" value="equals"/> | <input type="text" value="Proposal/Price Quote"/> | AND |
| <input type="text" value="Opportunity: Closed"/> | <input type="text" value="equals"/> | <input type="text" value="False"/> | AND |
| <input type="text" value="Current User: Department"/> | <input type="text" value="equals"/> | <input type="text" value="Sales"/> | AND |
| <input type="text" value="--None--"/> | <input type="text" value="--None--"/> | <input type="text"/> | |

[Add Filter Logic...](#)

Step 3. Specify Approver Field and Record Editability Properties Step 3 of 6

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

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

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

Process Automation Settings

Help for this Page

Save Cancel

Specify a default workflow user. Salesforce recommends choosing a user with system administrator privileges.

Default Workflow User

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 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.

Let users pause flows when they need to wait for more information. Once you enable this setting, the Pause button appears on every screen that has "Show Pause button" selected.

Let Users Pause Flows

Flows launched from a URL or from Setup use the Lightning runtime experience instead of the classic runtime experience. Only Lightning runtime supports two-column flow screens.

Enable Lightning Runtime for Flows (Beta)

Allows Apex code to set and remove approval process locks.

Enable record locking and unlocking in Apex

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. [i](#)



Opportunity: 500k

[« Back to Opportunity: 500k](#)

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

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: for: [Find](#)

Available Submitters

--None--

Allowed Submitters

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

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

Step 2. Specify Step Criteria
Step 2 of 3

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 , else :

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. [i](#)

Approval Processes

Opportunity: Deals > 100k Review

[« Back to Approval Process List](#)

Process Definition Detail

[Edit](#)

[Clone](#)

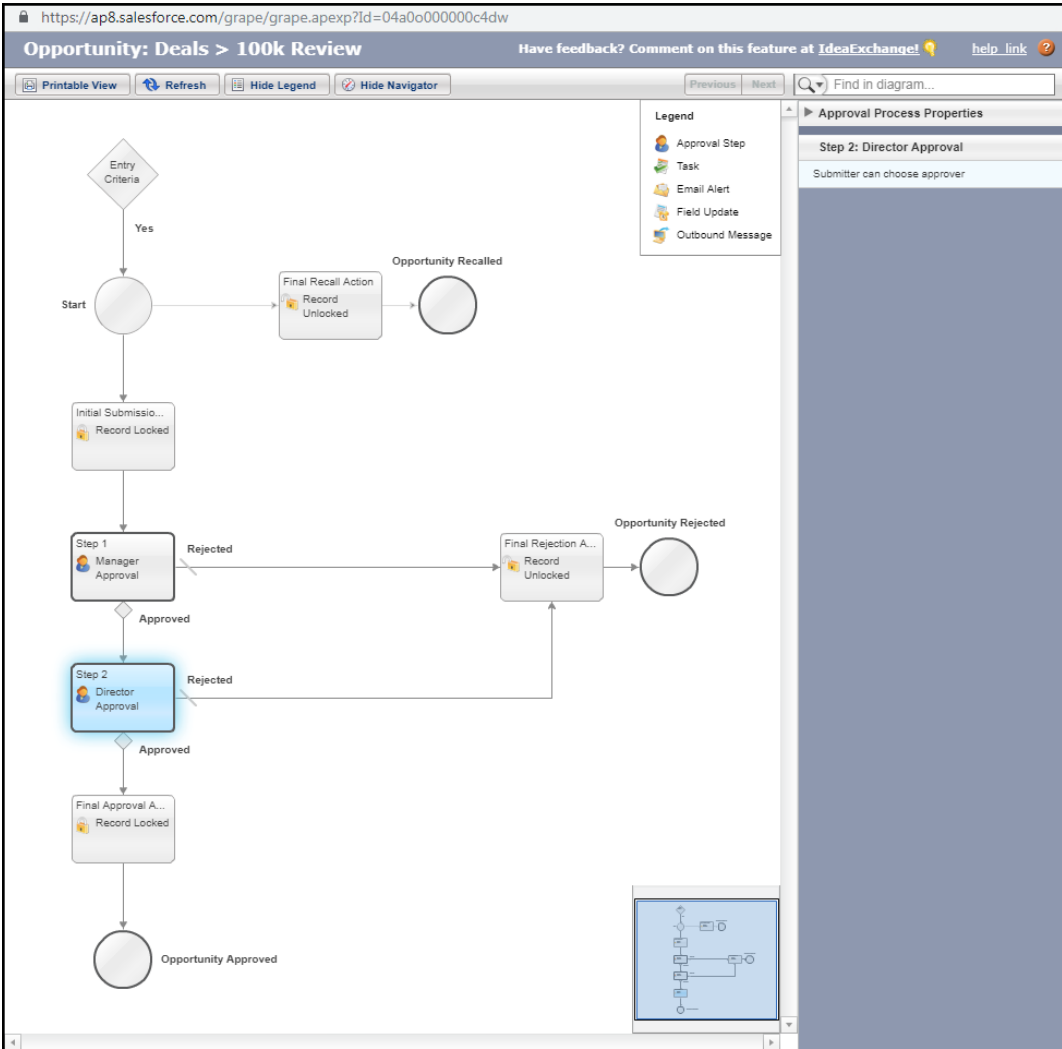
[Deactivate](#)

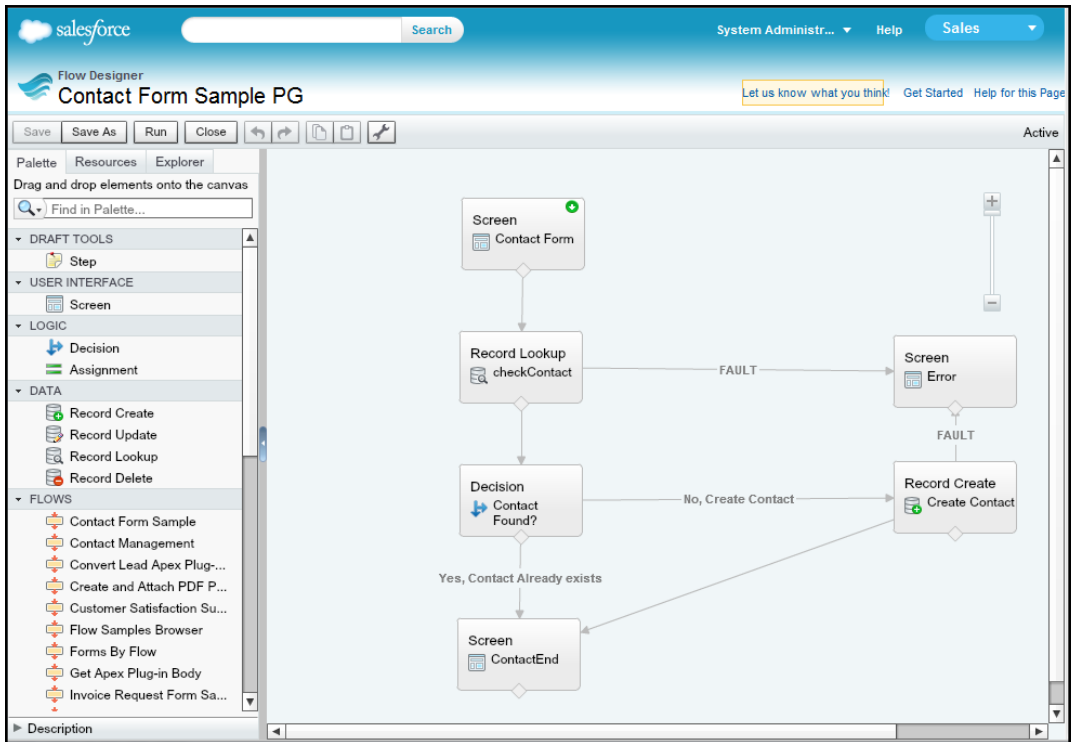
[View Diagram](#)

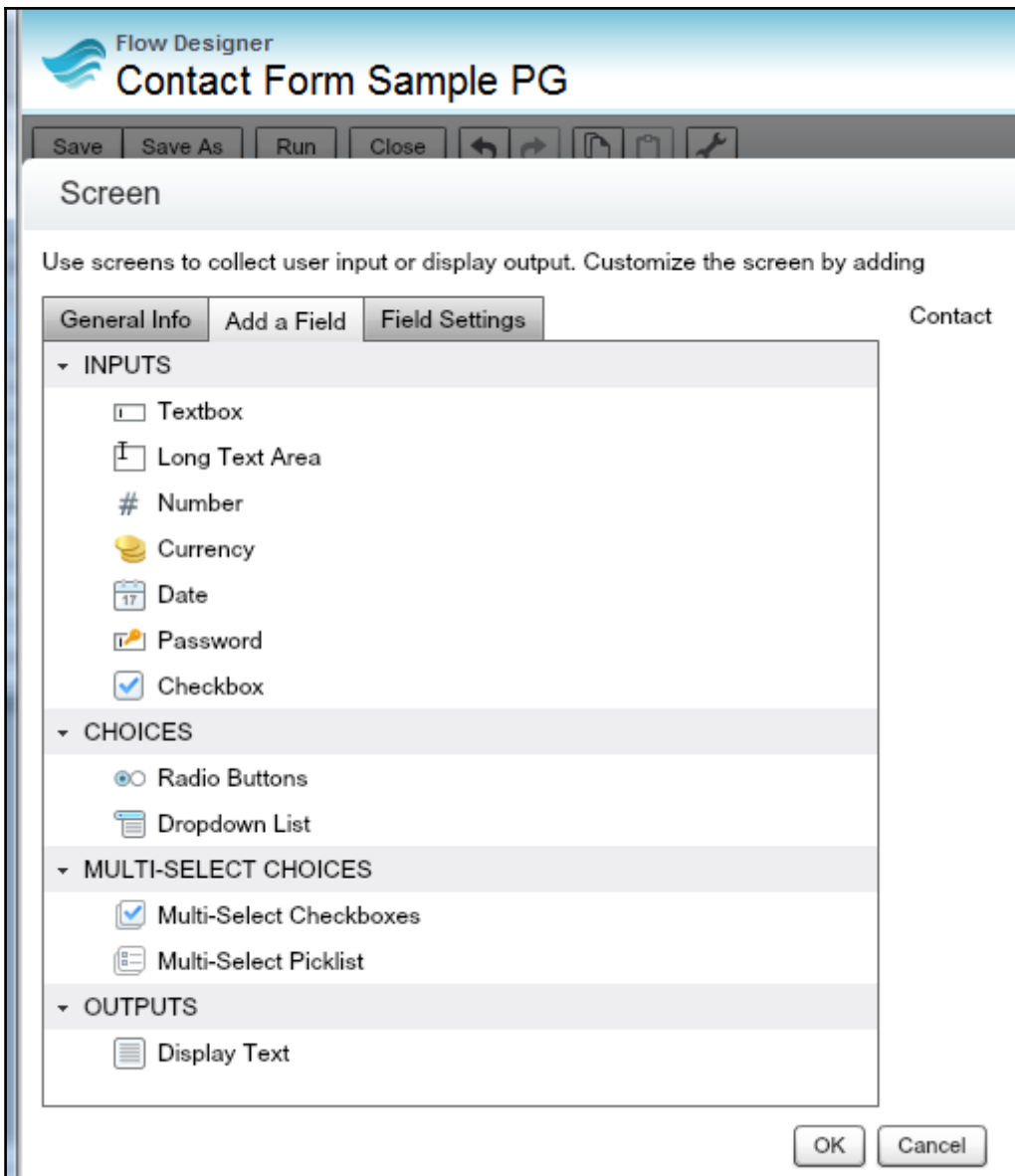
Process Name Deals > 100k Review

Active









Decision x

Configure how users move through the flow by setting up conditions for each decision outcome.

General Settings

Name *

Unique Name * i

[Add Description](#)

Outcomes

Drag to reorder outcome execution

EDITABLE OUTCOMES

Yes, Contact Already exists

[Add Outcome](#)

DEFAULT OUTCOME

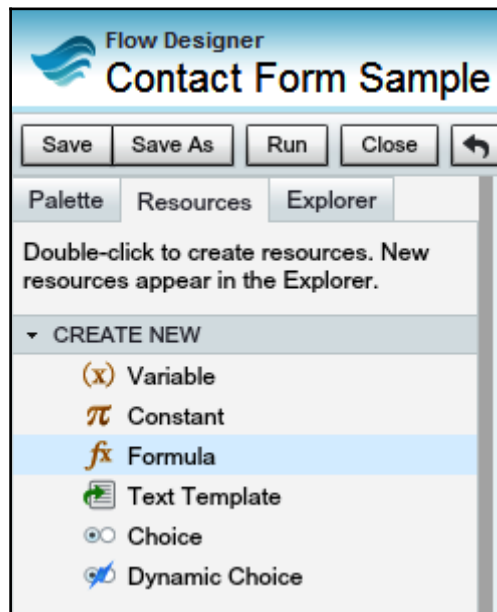
No, Create Contact

Create an outcome. You can then select it when you draw a connector out from this decision.

Name *

Unique Name * i

| Resource | Operator | Value |
|---|--|--|
| <input type="text" value="{!checkContact}"/> v | <input type="text" value="equals"/> v | <input type="text" value="{!\$GlobalConstant.True}"/> v |
| Add Condition <input type="text" value="All conditions must be true (AND)"/> v | | |



Flow Properties ✕

Save As New Version ▾

Name * New Version le PG

Unique Name * Contact_Form_Sample_PG i

Description

OK
Cancel

Process Builder ← Back To Setup ? Help

My Processes New
1 items

| PROCESS ▲ | DESCRIPTION | LAST MODIFIED | STATUS |
|---------------------------------------|-------------|---------------|--------|
| > Set Service User on Risk Assessment | | 23/10/2018 | Active |

New Process

Process Name *

API Name * 

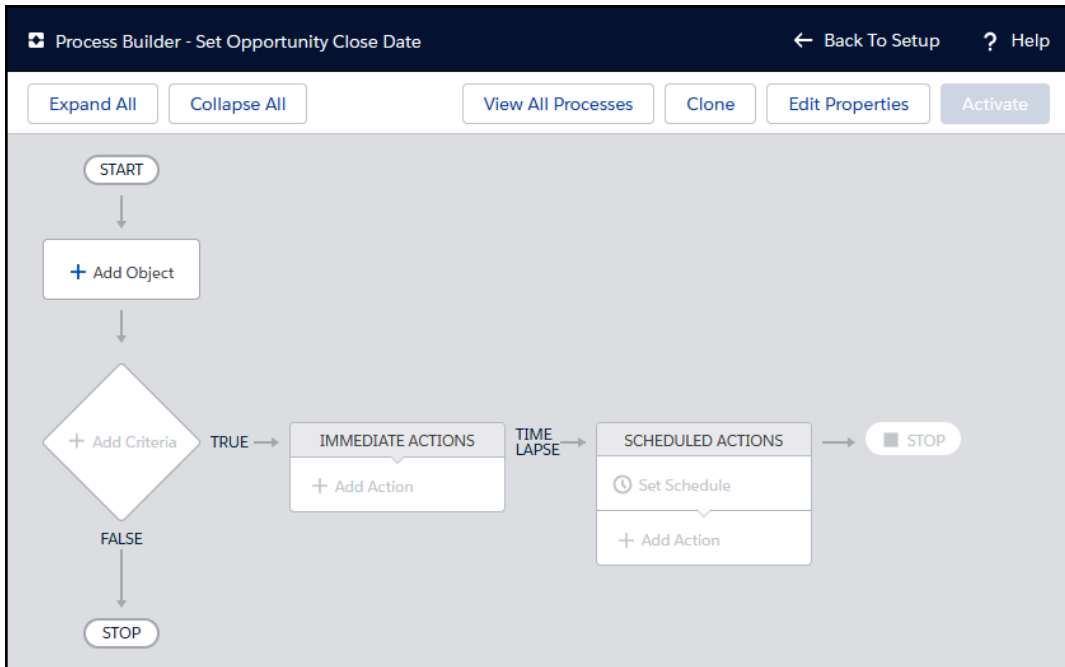
Description

The process starts when *

Select One 

Cancel

Save



Process Builder - Set Opportunity Close Date

← Back To Setup ? Help

Expand All Collapse All View All Processes Clone Edit Properties Activate

Choose Object and Specify When to Start the Process

Object * 1

Find an object... ▼

Start the process *

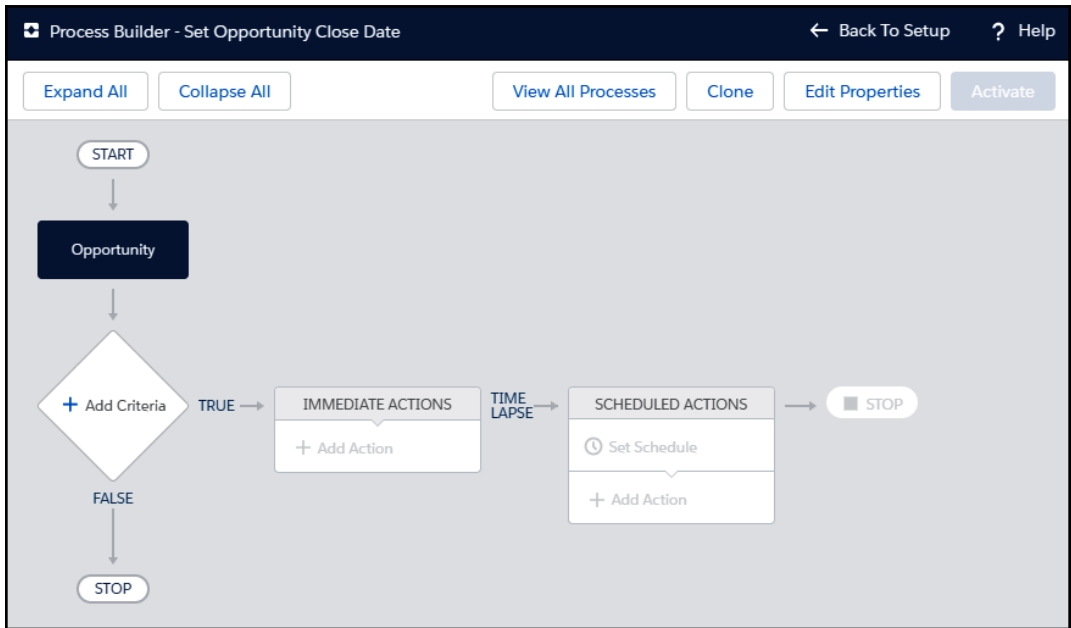
- only when a record is created
- when a record is created or edited

Advanced

Recursion - Allow process to evaluate a record multiple times in a single transaction? 1

Yes

Save Cancel



Process Builder - Set Opportunity Close Date ← Back To Setup ? Help

Expand All Collapse All View All Processes Clone Edit Properties Activate

Define Criteria for this Action Group ?

Criteria Name * i

Criteria for Executing Actions *

Conditions are met

Formula evaluates to true

No criteria—just execute the actions!

Set Conditions

| | Field * | Operator * | Type * | Value * |
|---|---|---------------------------------------|---------------------------------------|----------------------|
| 1 | <input type="text" value="Find a field..."/> <input type="button" value="Q"/> | <input type="text" value="Equals"/> ▼ | <input type="text" value="String"/> ▼ | <input type="text"/> |

[+ Add Row](#)

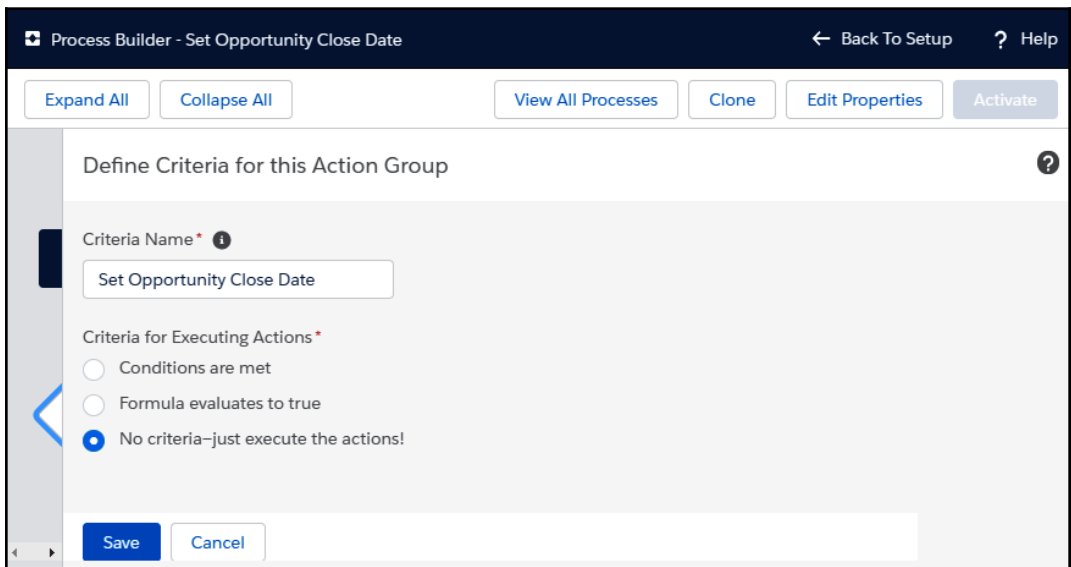
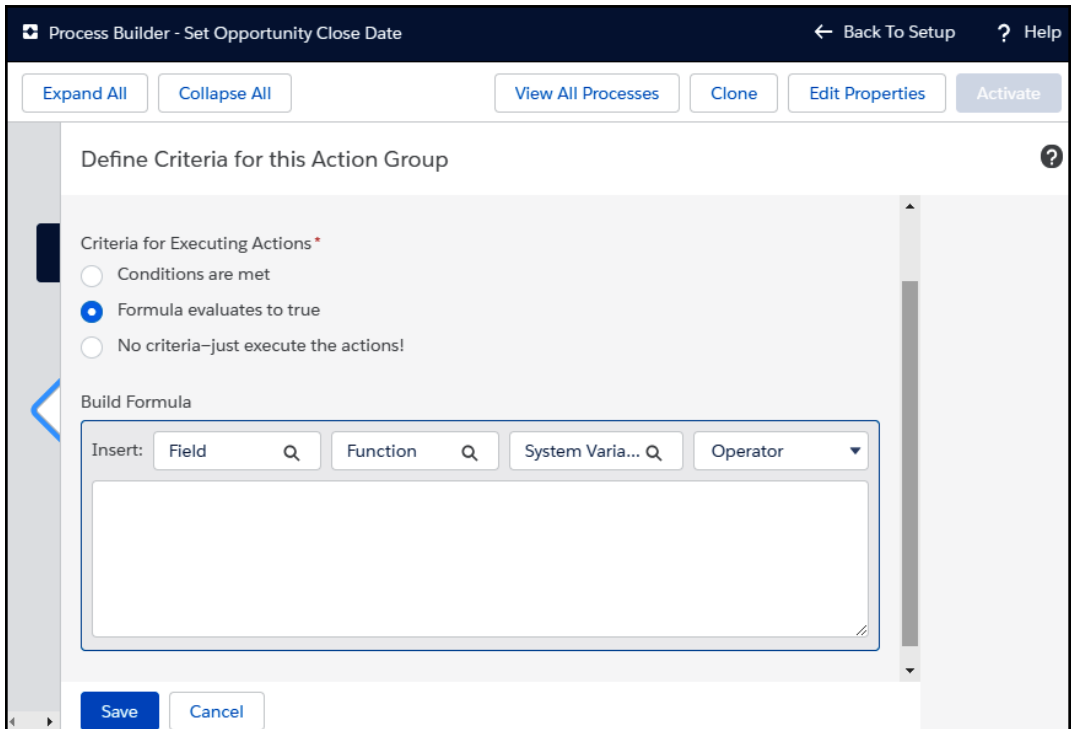
Conditions *

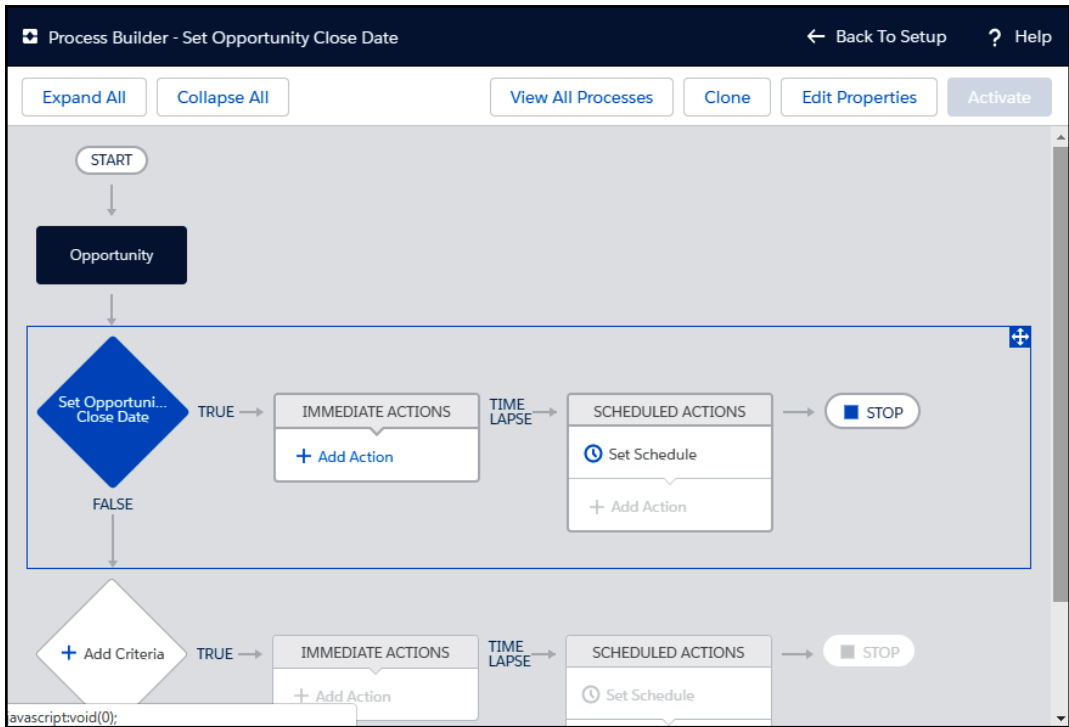
All of the conditions are met (AND)

Any of the conditions are met (OR)

Customize the logic

Save Cancel





Process Builder - Set Opportunity Close Date

← Back To Setup ? Help

Expand All Collapse All View All Processes Clone Edit Properties Activate

START

Opportunity

Set Opportuni...
Close Date

FALSE

+ Add Criteria

Select and Define Action

Action Type *

- Select One
- Select One
- Apex
- Create a Record
- Email Alerts
- Flows
- Post to Chatter
- Processes
- Quick Actions
- Submit for Approval
- Update Records

Save Cancel

The screenshot displays the Salesforce Process Builder interface for a process named "Set Opportunity Close Date". On the left, a vertical flow diagram shows the process steps: a "START" node, an "Opportunity" object node, a decision diamond labeled "Set Opportuni... Close Date", and a "FALSE" path leading to an "Add Criteria" node. On the right, the "Select and Define Action" panel is open, showing a dropdown menu for "Action Type" with "Select One" selected. The dropdown list includes options: "Select One", "Apex", "Create a Record", "Email Alerts", "Flows", "Post to Chatter", "Processes", "Quick Actions", "Submit for Approval", and "Update Records". At the bottom of the panel are "Save" and "Cancel" buttons.

Process Builder - Set Opportunity Close Date

← Back To Setup ? Help

Expand All Collapse All View All Processes Clone Edit Properties Activate

START

Opportunity

Set Opportuni...
Close Date

FALSE

+ Add Criteria

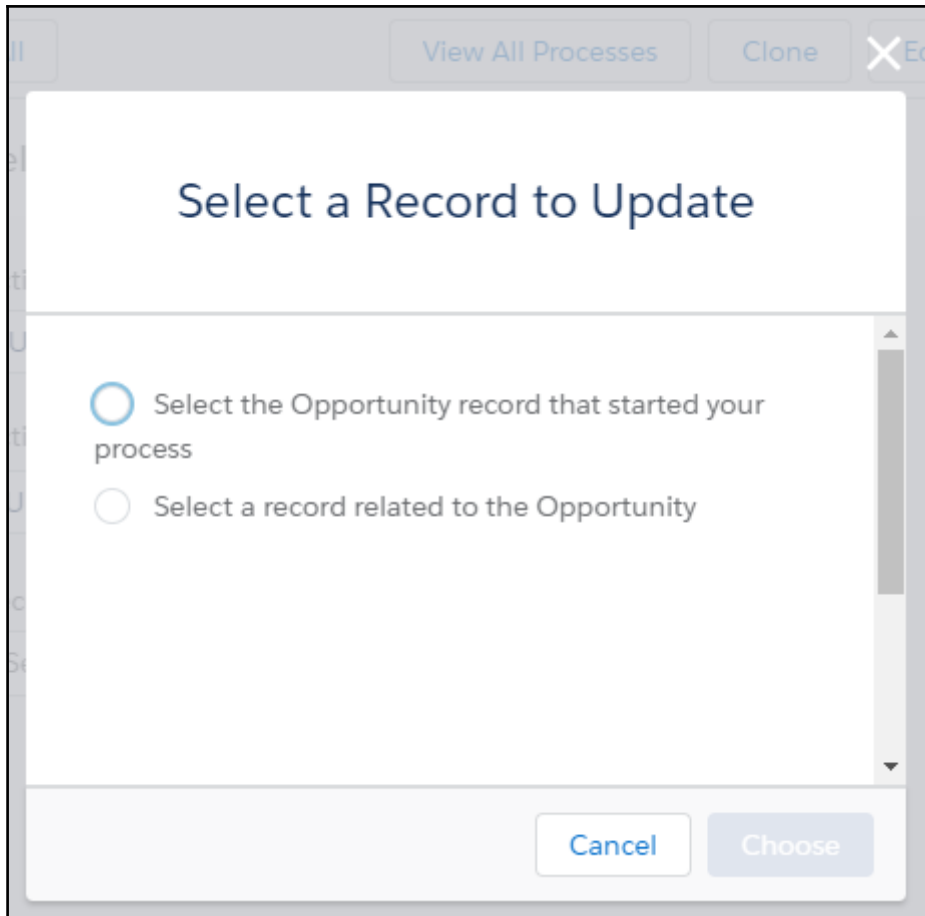
Select and Define Action

Action Type *
Update Records

Action Name * ⓘ
Update Opportunity

Record Type *
Select a record to update... 🔍

Save Cancel



Process Builder - Set Opportunity Close Date

← Back To Setup ? Help

Expand All Collapse All View All Processes Clone Edit Properties Activate

START

Opportunity

Set Opportuni...
Close Date

FALSE

+ Add Criteria

Select and Define Action

Action Type*
Update Records

Action Name* ⓘ
Update Opportunity

Record Type*
[Opportunity]

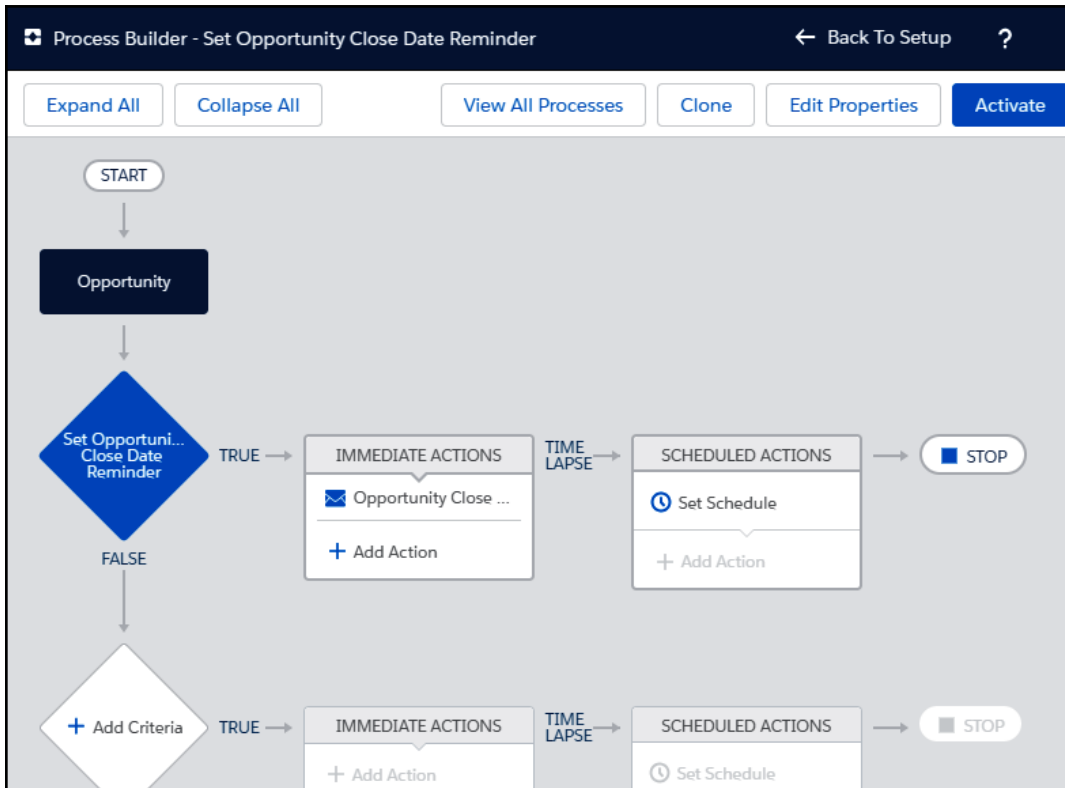
Criteria for Updating Records*
 Updated records meet all conditions
 No criteria—just update the records!

Set new field values for the records you update

| Field* | Type* | Value* |
|------------|-------|--------------|
| Close Date | Date | TODAY() + 30 |

+ Add Row

Save Cancel



Process Builder - Set Opportunity Close Date Reminder

← Back To Setup ? Help

Expand All Collapse All View All Processes Clone Edit Properties Activate

The screenshot shows the 'Set Time for Actions to Execute' configuration panel. The flowchart on the left includes a 'START' node, an 'Opportunity' object, a decision diamond 'Set Opportuni... Close Date Reminder', and an 'Add Criteria' node. The configuration panel has two radio buttons: the first is selected and set to '15 Days Before' of the 'CloseDate' field; the second is unselected and set to 'from now'.

Set Time for Actions to Execute

15 Days Before CloseDate

Days from now.

Save Cancel Delete

Process Builder - Set Opportunity Close Date Reminder

← Back To Setup ? Help

Expand All Collapse All View All Processes Clone Edit Properties Activate

The screenshot shows a detailed flowchart. The 'Set Opportuni... Close Date Reminder' decision diamond has a 'TRUE' path leading to an 'IMMEDIATE ACTIONS' box containing 'Opportunity Close ...' and 'Add Action'. This path then goes through a 'TIME LAPSE' to a 'SCHEDULED ACTIONS' box containing '15 Days Before Clos...' and 'Add Action'. This leads to another 'SCHEDULED ACTIONS' box containing 'Set Schedule' and 'Add Action', which finally leads to a 'STOP' node. The 'FALSE' path from the decision diamond leads to an 'Add Criteria' node, which then leads to an 'IMMEDIATE ACTIONS' box with 'Add Action', followed by a 'TIME LAPSE' to a 'SCHEDULED ACTIONS' box with 'Set Schedule', and finally to a 'STOP' node.

START

Opportunity

Set Opportuni... Close Date Reminder

TRUE

FALSE

IMMEDIATE ACTIONS

Opportunity Close ...

TIME LAPSE

SCHEDULED ACTIONS

15 Days Before Clos...

SCHEDULED ACTIONS

Set Schedule

STOP

IMMEDIATE ACTIONS

Add Action

TIME LAPSE

SCHEDULED ACTIONS

Set Schedule

STOP

Process Builder - Set Opportunity Close Date Reminder

← Back To Setup ? Help

Expand All Collapse All View All Processes Clone Edit Properties Activate

Select and Define Action

Action Type *
Email Alerts

Action Name *
Opportunity Close Date Reminder

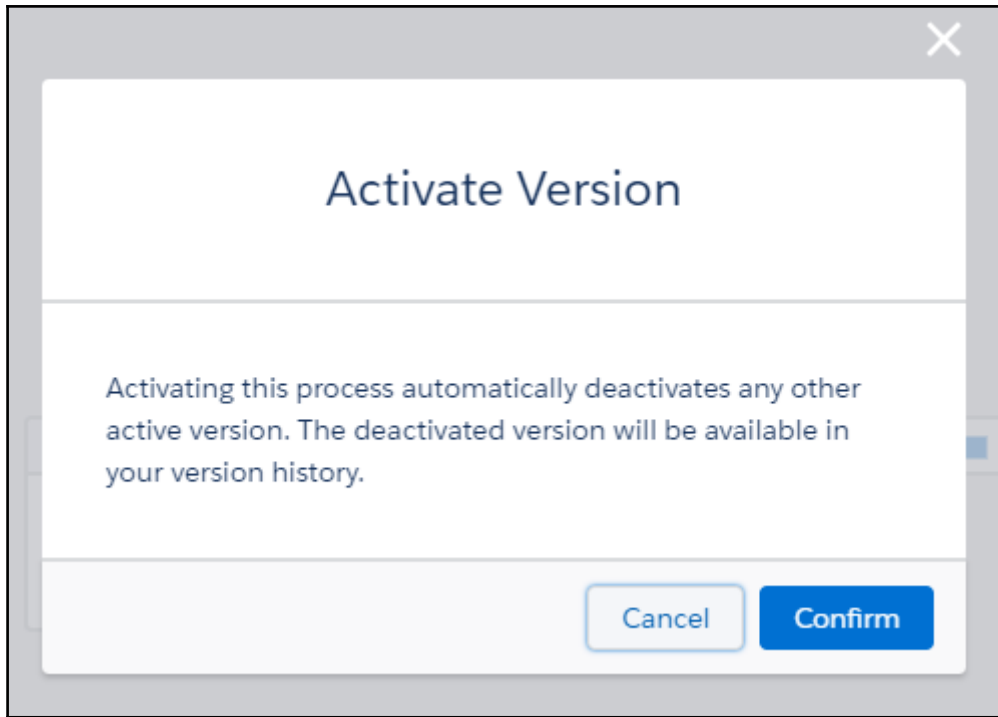
Email Alert *
Notify_Close_Date

Select an existing email alert for the object that this process is associated with. If none exist, create one.

Save Cancel

← Back To Setup ? Help

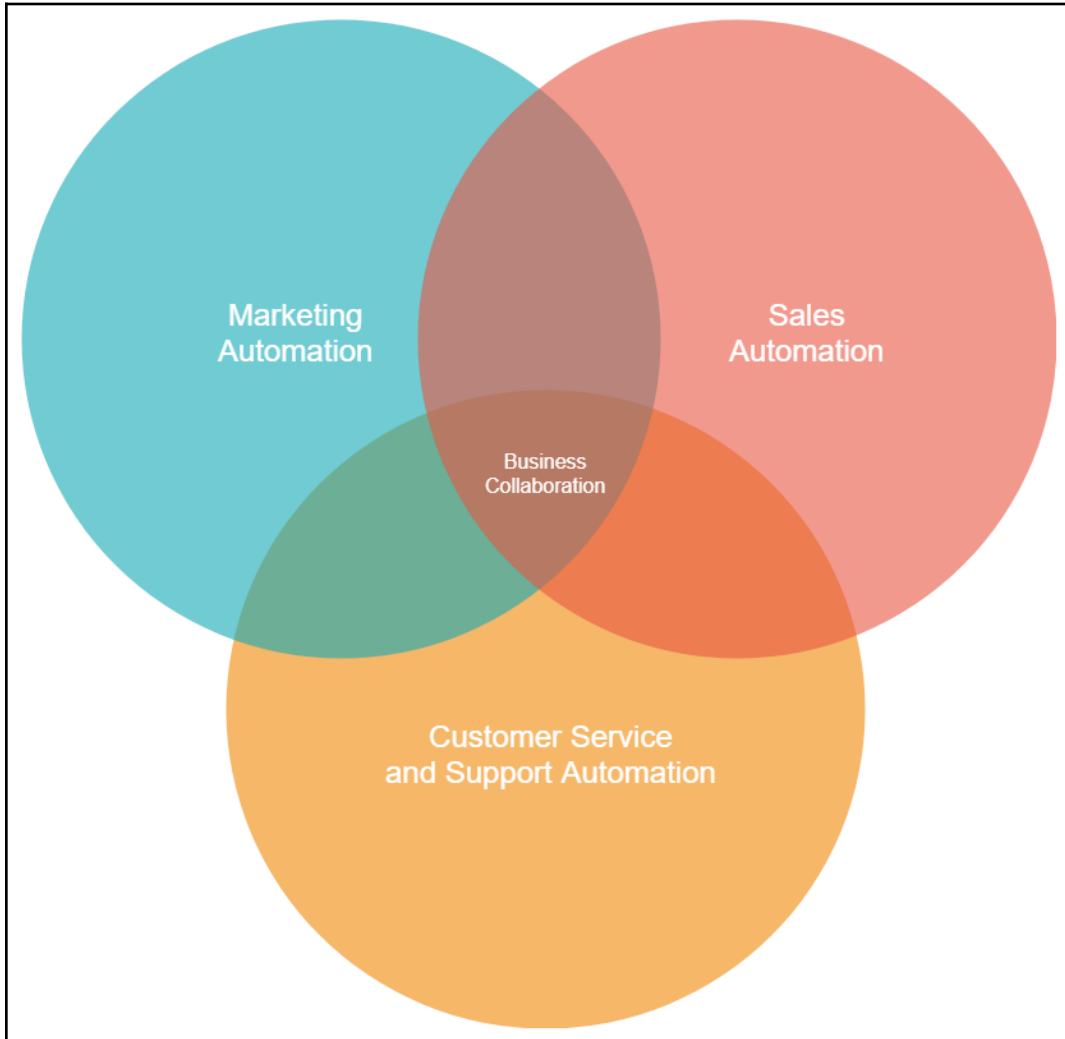
View All Processes Clone Edit Properties Activate

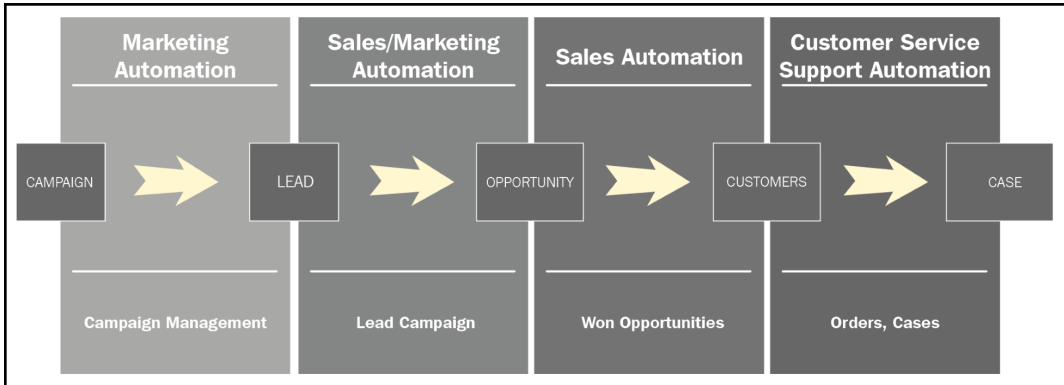


| | Workflow | Flow | Process Builder |
|--|---|--|--|
| Single or multiple steps | Single step and a single set of results | Multiple steps and different sets of results | Multiple steps and different sets of results |
| Able to design the logic using a visual interface? | No | Yes | Yes |
| | | | |
| Can be triggered when a record is changed | Yes | No | Yes |
| Can be triggered when a user clicks a custom tab, button, or link | No | Yes | No |
| Can be triggered by another process | No | No | Yes |
| Can be triggered when Apex is called | No | Yes | No |
| Supports time-based actions | Yes | Yes | Yes |
| Supports user interaction | No | Yes | No |

| | Workflow | Flow | Process Builder |
|---------------------------------|--|-------------|--------------------------------------|
| Able to create records | Tasks only | Yes | Yes |
| Able to delete records | No | Yes | No |
| Able to update fields | The initiating record or its parent only | Any record | The initiating or any related record |
| Able to send email | Yes | Yes | Yes |
| Able to post to Chatter | No | Yes | Yes |
| Able to launch a Flow | No | Yes | Yes |
| Able to invoke a process | No | No | Yes |
| Can call Apex code | No | Yes | Yes |

Chapter 8: Core Business Functionality in Salesforce CRM





User Edit
Paul Goodey

User Edit Save Save & New Cancel

General Information

| | | | |
|--------------------|---|-----------------------|---|
| First Name | <input type="text" value="Paul"/> | Role | <input type="text" value="CEO"/> |
| Last Name | <input type="text" value="Goodey"/> | User License | <input type="text" value="Salesforce"/> |
| Alias | <input type="text" value="pgood"/> | Profile | <input type="text" value="System Admin Custom"/> <small>i</small> |
| Email | <input type="text" value="paul.goodey@widgetsxyz"/> | Active | <input checked="" type="checkbox"/> |
| Username | <input type="text" value="paul.goodey@widgetsxyz"/> | Marketing User | <input checked="" type="checkbox"/> |
| Community Nickname | <input type="text" value="admin"/> <small>i</small> | Offline User | <input checked="" type="checkbox"/> |
| Title | <input type="text"/> | Knowledge User | <input checked="" type="checkbox"/> |
| Company | <input type="text"/> | Force.com Flow User | <input checked="" type="checkbox"/> |
| Department | <input type="text"/> | Service Cloud User | <input checked="" type="checkbox"/> |
| Division | <input type="text"/> | Mobile User | <input checked="" type="checkbox"/> |

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 | | | Basic Access | | | | Data Administration | |
|------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|---------------------------|-----------------------------|---------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|---------------------------|-----------------------------|
| | Read | Create | Edit | Delete | View All <small>i</small> | Modify All <small>i</small> | | Read | Create | Edit | Delete | View All <small>i</small> | Modify All <small>i</small> |
| Accounts | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Ideas | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Assets | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Leads | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Campaigns | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Opportunities | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Cases | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Price Books | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Contacts | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Products | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Contracts | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Quotes | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Documents | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Solutions | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

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 [Help for this Page](#) ?

Webinar Widget FY12Q1

Current Campaign: Webinar Widget FY12Q1 Status: Planned

Type: Webinar Active:

Member Status Values [Edit](#) [Replace](#)

| Status | Responded | Default |
|-----------|-------------------------------------|-------------------------------------|
| Sent | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Responded | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

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 | <input type="checkbox"/> |
| 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 | - | - | - |



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](#)

| <input type="checkbox"/> | Action | Name ↑ | Company |
|--------------------------|--|-------------------------------|----------------------------------|
| <input type="checkbox"/> | Edit Del | Chubbe, Mos | Ideal Homes |
| <input type="checkbox"/> | 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 | <input type="checkbox"/> | 05/06/2011 16:26 |

Company [Jackson Controls](#)

Title SVP, Procurement Email jeffq@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 | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |



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](#) ▼

| | | | |
|------------------|--|--------------------------------------|----------|
| Campaign Owner | Paul Goodey [Change] | Total Leads | 1 |
| Campaign Name | Webinar Widget FY11Q2 [View Hierarchy] | Converted Leads | 1 |
| Active | <input checked="" type="checkbox"/> | Total Contacts | 39 |
| Type | Webinar | Total Responses | 31 |
| Status | Completed | Num Total Opportunities | 3 |
| Start Date | 01/06/2011 | Num Won Opportunities | 2 |
| End Date | 01/06/2011 | Total Value Opportunities | \$30,000 |
| Expected Revenue | \$25,000 | Total Value Won Opportunities | \$30,000 |
| Budgeted Cost | \$3,000 | | |

Home **Reports** Dashboards Campaigns Leads Contacts

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
- Account and Contact R...
- Opportunity Reports
- Sales Reports
- Lead Reports
- Support Reports
- Campaign Reports**
- Self-Service Reports
- Administrative Reports
- Activity Reports
- Product and Asset Rep...
- Call Center Reports

Campaign Reports

Find reports and dashboards...

Reports

All Items

| Name |
|---|
| Campaign member Analysis Report
Who has responded to my campaign |
| Campaign Member Report
Show me the members of my camp... |
| Campaign ROI Analysis Report
How are each of my campaigns perf... |
| Campaign Revenue Report
Show me revenue generated from... |

1-8 of 8 << Previous Next >> Page 1 of 1

Campaign ROI Analysis Report

Report Generation Status: Complete

Report Options:

Summarize information by: Show Select campaign: Webinar Widget FY11Q2

Run Report Hide Details Customize Save As Printable View Export Details

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

Lead Process Edit

New Lead Process

Enter a name and description for the Lead Process. Select an the new process. Selecting "master" copies all available picklist

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

--None--

Selected Values

Open - Not Contacted
 Working - Contacted
 Closed - Converted (Converted)
 Closed - Not Converted

Add

Remove

Default Open - Not Contacted ▼

Home
Leads
Accounts
Contacts
Reports
Campaigns

Create New...

- Event
- Task
- Lead
- Account
- Contact
- Report
- Campaign

Leads

Home

View: Recently Viewed Leads ▼

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 

Save

Cancel

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 

Use Lead Auto-Response Rules to select different email response
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 | | Selected Fields | |
|------------------|-------------|-----------------|-----------|
| Salutation | Add
▶ | First Name | Up
▲ |
| Title | | Last Name | |
| Website | Remove
◀ | Email | Down
▼ |
| Phone | | Company | |
| Mobile | | City | |
| Fax | | State/Province | |
| Address | | | |
| Zip | | | |
| Country | | | |

After users submit the Web-to-Lead form, they will be taken to the specified website, such as a "thank you" page.

Return
URL

Generate

Cancel



Before you import
your data . . .

[Collapse](#)


Clean up your data import file
You'll have fewer errors to resolve if your data file is clean and free of duplicates. [Watch video](#)

Make sure your field names match Salesforce field names
You'll be required to map your data fields to Salesforce data fields. Data in unmapped fields is not imported. [View a list of Salesforce data fields.](#)


Don't import too many records at once
Using the Data Import Wizard, import up to 50,000 records at a time. Importing too many records can slow down your org for all users, especially during periods of peak usage.

Import your data in 3 easy steps!


Launch the Data Import Wizard to import your data.




Pre-step: Prepare your data for import



Choose data to import




Edit field mapping



Review and start import

Launch Wizard!



Choose data

Edit mapping

Start import

Import your Data into Salesforce [Help for this page](#)

You can import up to 50,000 records at a time.

What kind of data are you importing? ?

| Standard objects | Custom objects |
|-------------------------|----------------|
| Accounts and Contacts > | |
| Leads > ✓ | |
| Solutions > | |

What do you want to do? ?

Add new records >

Update existing records >

Add new and update existing records >

Where is your data located? ?

Cancel Previous Next

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 |
|-------------------------------------|------------|-------------|----------------|-------|----------------------|--------------|-------------|
| <input type="checkbox"/> Edit Del | Chubbe_Mos | Ideal Homes | | | Open - Not Contacted | 05/06/2011 | US Leads |

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.

| Action | Rule Name | Active | Created By | Created On |
|--|-----------------|-------------------------------------|-------------|------------|
| Rename Del | <u>Standard</u> | <input checked="" type="checkbox"/> | Paul Goodey | 19/12/2009 |
| Rename Del | <u>test</u> | <input type="checkbox"/> | Paul Goodey | 03/02/2010 |

Lead Assignment Rule Help for this Page ?

Standard


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

| | | | |
|------------|---------------------------------------|-------------|---------------------------------------|
| Rule Name | Standard | Active | <input checked="" type="checkbox"/> |
| Created By | <u>Paul Goodey</u> , 19/12/2009 13:01 | Modified By | <u>Paul Goodey</u> , 15/06/2011 20:45 |

Rule Entries


| Action | Order | Criteria | Assign To | Email |
|--|--------------------------------|--|----------------------|--------------------------|
| Edit Del | <input type="text" value="1"/> | Lead: Country EQUALS US,USA,United States,United States of America | <u>Paul Goodey</u> | <input type="checkbox"/> |
| Edit Del | <input type="text" value="2"/> | Lead: Country NOT EQUAL TO US,USA,United States,United States of America | <u>Trevor Howard</u> | <input type="checkbox"/> |

Lead
 **Mr Jeff Glimpse**

« [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

| = Required Information

Record Owner **|**

Send Email to the Owner

Account Name **|** [View](#)

Opportunity Name **|**
 Do not create a new opportunity upon conversion.

Converted Status **|**

Task Information

Subject **|** Status **|**

Due Date [15/06/2011]

Priority **|**

Location

Zip/Postal Code

Status

Description Information

Comments

Send Notification Email

Reminder

Reminder

Convert Lead

Record Owner: Paul Goodey

Send Email to the Owner:

Account Name: --None-- [View](#)

Opportunity Name: --None--
~~Create New Account: Jackson Controls~~
Attach to Existing: Jackson Controls version.

Converted Status: Closed - Converted

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 be used when you convert leads.


Lead Custom Field Mapping

| Take this lead custom field... | ...and map it to this field |
|--------------------------------|-----------------------------|
| Current Generator(s) | --None-- |
| Number of Locations | --None-- |
| Offer | None Available |
| Primary | --None-- |
| Product Interest | --None-- |
| SIC Code | --None-- |

Save

Cancel

Select New Owner

| | |
|--------------------------|--|
| Transfer this account | Company X |
| Owner | <input type="text"/>  |
| <input type="checkbox"/> | Transfer open opportunities not owned by the existing account owner |
| <input type="checkbox"/> | Transfer closed opportunities |
| <input type="checkbox"/> | Transfer open cases owned by the existing account owner |
| <input type="checkbox"/> | Transfer closed cases |
| <input type="checkbox"/> | Send Notification Email |

Save

Cancel

Escalation Action Edit

[Help for this Page](#) 

Escalation Action Edit


 = Required Information

Step 1: Specify the time criteria for this escalation rule


Age Over (Business 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  Notification Template 

Step 3: Select the user to notify

Notify This User  Notification Template 


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

Support Settings


The default owner of a case when assignment rules fail to locate an owner.

User 


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 


Use this template to notify contacts that a case has been created or updated for them.

Case Creation Template 

Use this template to notify your users a case has been assigned to them.

Case Assigned Template 

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 portal can comment on cases.

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 i

Role i

User License

Profile i

Active

Marketing User

Offline User

The screenshot shows the Salesforce Chatter interface. At the top, there is a search bar and navigation links for Paul Goodey, Setup, Help, and Salesforce Chatter. Below the navigation bar, there is a menu with options: Home, Chatter, Profile, People, Groups, and Files. The 'Chatter' option is highlighted with a red box. Below the menu, there is a 'Create New...' dropdown and a 'Shortcut' button. The main content area displays the user profile for Paul Goodey, including a profile picture, name, and the date 'Sunday 17 August'. There is a 'Show Feed' button and a red bar on the right side of the profile.

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 1

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
widgesxyz.co.uk
widgesxyz.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.

| Object | Tracked |
|---------------------------------|-----------------|
| Account | 2 Fields |
| Ad Group | |
| Additional Review Point | |
| Aftercare | |
| Alertable Temperament Condition | |
| Assessment | |
| Asset | |
| Breed | |
| Breed Colour | |
| Business Unit | |
| Campaign | |
| Case | 3 Fields |
| Chatter Group | 7 Fields |
| Code Debt | |
| Contact | 5 Fields |
| Contact Address | |
| Contact Dog Match | |
| Contact Equipment | |
| Contact Movement | |
| Contact Role | |
| Contact Role Allowance | |
| Contact | 0 Fields |

Fields in organisations

Save Cancel Enable Feed Tracking [Restore Defaults](#)

You can select up to 20 fields.

| | |
|---|--|
| Account Name <input checked="" type="checkbox"/> | Account Number <input type="checkbox"/> |
| Account Owner <input checked="" type="checkbox"/> | Account Site <input type="checkbox"/> |
| Account Source <input type="checkbox"/> | Annual Revenue <input type="checkbox"/> |
| Billing Address <input type="checkbox"/> | Data.com Key <input type="checkbox"/> |
| Description <input type="checkbox"/> | Employees <input type="checkbox"/> |
| Fax <input type="checkbox"/> | Industry <input type="checkbox"/> |
| Location Type <input type="checkbox"/> | Ownership <input type="checkbox"/> |
| Parent Account <input type="checkbox"/> | Phone <input type="checkbox"/> |
| Rating <input type="checkbox"/> | SIC Code <input type="checkbox"/> |
| SIC Description <input type="checkbox"/> | Shipping Address <input type="checkbox"/> |
| Status <input type="checkbox"/> | Ticker Symbol <input type="checkbox"/> |
| Type <input type="checkbox"/> | Website <input type="checkbox"/> |
| _SYSTEM: AccountType <input type="checkbox"/> | _SYSTEM: IsIndividual <input type="checkbox"/> |
| _SYSTEM: One2OneContact <input type="checkbox"/> | |

Save Cancel Enable Feed Tracking [Restore Defaults](#)

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 | <input type="text" value="0"/> |
| Comments
Received | <input type="text" value="0"/> |
| Likes
Received | <input type="text" value="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 [i](#)

Allow Email Replies

Allow Posts via Email

Sender

From Name

Email Address

Branding

Logo

150 x 50 pixels or less on a transparent background is best.

Footer Text

We strongly recommend including your company's physical address to comply with applicable anti-spam laws.

Save

The screenshot shows the top navigation bar of the Salesforce interface. On the left is the Salesforce logo. In the center is a search bar with the text "Search...". On the right, the user's name "Paul Goodey" is displayed with a dropdown arrow, followed by "Setup" and "Help" links, and a "Content" dropdown menu. Below the navigation bar is a secondary navigation bar with links for "Home", "Chatter", "Libraries", "Content", and "Subscriptions". The main content area shows a user profile for "Paul Goodey" with a "Create New..." dropdown, a "Shortcut" button, and a "Show Feed" button. A "Calendar" section is visible at the bottom with a "New Event" button and a "Calendar Help" link.

Home Chatter Libraries Content Subscriptions +

Content Search
 All Libraries [] Search

Libraries Overview Tell me more! Help for this Page

< Back

Contribute Create New... Manage Library: Select Library

Use the tabs below to view and manage shared libraries or your private library.

Shared Content My Private Files

My Libraries New

| Actions | Library Name |
|---------|---------------|
| Browse | Asset Library |

Top Content Category: Publication Date

| Title | Author | Publication Date |
|-----------------------------------|-------------|------------------|
| How to Guide – Grant Login Acc... | Paul Goodey | 2 days ago |

Show All

Popular Tags
 Sort Alphabetically | Sort By Popularity
 How to Guide Grant Login ...

Recent Activity
 No Recent Activity in Library

Most Active Contributors
 Paul Goodey

Recycle Bin

Save or Publish Content

Save or publish your content by completing the fields below. ! = Required Information

How to Guide...

Standard Information

Title ! How to Guide – Grant Login Access to Your Administrator

Description How to Guide to grant login access

Sharing Save in my private library Publish to a shared library
 Select a Library

Tags How to Guide Grant Login Access

My Recent Tags [Limits Cheatsheet](#) [Chapter 8 Salesforce CRM: T...](#) [How to Guide Grant Login Ac...](#)

Additional Information

Record Type ! General Presented as General

Publish Delete

Select the location where you would like to publish your content. If you select a shared library, you can select tags and provide additional information.

Content Tell me more! Help for this Page ?

How to Guide – Grant Login Access to Your Administrator

Created By: [Paul Goodey](#) 3 days ago

[Back](#)

Content Details Download Subscribe Edit

Grant Login Access to Your Administrator

Tags [How to Guide Grant Login Ac...](#)

add tags...

Author [Paul Goodey](#) 3 days ago

Version 1

Featured [Feature]

Size 63 KB

In My Libraries [Asset Library](#)

Preview Comments **Versions** Downloads Subscribers Content Packs

Number of Versions: 1 [Upload New Version](#)

Version: 1
Size: 63 KB

Uploaded by: [Paul Goodey](#) 3 days ago | Owned by: Paul Goodey | [download](#) | [preview](#)

Home Chatter **Libraries** Content Subscriptions + Tell me more! Help for this Page ?

Content Search

All Libraries

Recent Items

- [How to Guide – Grant Login Access to Your Administrator](#)
- [Trevor Howard](#)
- [Paul Goodey](#)
- [Test](#)
- [Acme](#)

Libraries Overview

[Back](#)

[Contribute](#) [Create New...](#) Manage Library: [Select Library](#)

Use the tabs below to view and manage shared libraries or your private library.

Shared Content **My Private Files**

→ [Delete selected](#) [Publish Selected](#)

| Actions | Title | File Size | Last Modified + |
|--|-------|-----------|-----------------|
| There is no content in your private library. | | | |

Save or Publish Content



Save or publish your content by completing the fields below.

I = Required Information

B12046_PG_08_07

Standard Information

Title **B12046_PG_08_07**

Description Chapter image

Sharing Save in my private library
 Publish to a shared library

! Select the location where you would like to publish your content. If you select a shared library, you can select tags and provide additional information.

Tags Chapter 8
Salesforce CRM: The Definitive Admin Handbook

My Recent Tags [How to Guide Grant Login Ac...](#)

Additional Information

Record Type **General**

Presented as General

Save

Delete

Home Chatter Libraries **Content** Subscriptions +

Filter Your Results

Use the filters below to restrict your search results.

[Clear Filters](#)

Show Only

Tags (1)

How to Guide Gran... (1)

File Formats (1)

Adobe PDF (1)

Authors (1)

Paul Goodey (1)

My Libraries (1)

Asset Library (1)



Content

Search for Content

[Tell me more!](#) [Help for this Page](#)

[Back](#)

Search in **All Libraries** for **How to Guide** [Go!](#) [Clear Search](#)

Search Results: Showing 1 result

Related Tag Searches: [How to Guide Grant Login Ac...](#)

[Download](#)

[Display Options](#)

| <input type="checkbox"/> | Title | Size | Author | Last Modified | Downloads |
|--------------------------|--|-------|-----------------------------|---------------|-----------|
| <input type="checkbox"/> | How to Guide – Grant Login Access to Your... | 63 KB | Paul Goodey | 5 minutes ago | |

Content **How to Guide – Grant Login Access to Your Administrator** Tell me more! Help for this Page ?

Created By: [Paul Goodey](#) 4 hours ago

[Back](#)

Content Details Download Subscribe Edit

Grant Login Access to Your Administrator

Tags [How to Guide Grant Login Ac...](#)
add tags...

Author [Paul Goodey](#) 4 hours ago

Version 1

Featured [\[Feature\]](#)

Size 63 KB

In My Libraries [Asset Library](#)

Preview Comments Versions Downloads Subscribers Content Packs

To see a full preview, go to the [File Detail page](#).

How to Guide – Grant Login Access to Your Administrator
Carry out the following steps:

- Step 1: Click "New Item"
- Step 2: Click "New"
- Step 3: Click "New Item" > "Information"
- Step 4: Click "New Item" > "Information"
- Step 5: Grant the Check Access to "Your Company's Administrator" and choose a period of access: 1 Day, 3 Days, 1 Week, 1 Month or 1 Year
- Step 6: Click "Save"

✔ You are now subscribed to this content. ?

Created By: [Paul Goodey](#) 4 hours ago

[Back](#)

Content Details Download **Subscribed** Edit

Grant Login Access to Your Administrator

Tags [How to Guide Grant Login Ac...](#)
add tags...

Author [Paul Goodey](#) 4 hours ago

Preview Comments Versions Downloads Subscribers

To see a full preview, go to the [File Detail page](#).

How to Guide – Grant Login Access to Your Administrator
Carry out the following steps:

- Step 1: Click "New Item"
- Step 2: Click "New"
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- Step 4: Click "New Item" > "Information"
- Step 5: Grant the Check Access to "Your Company's Administrator" and choose a period of access: 1 Day, 3 Days, 1 Week, 1 Month or 1 Year
- Step 6: Click "Save"

Content Tell me more! Help for this Page ?

How to Guide – Grant Login Access to Your Administrator

Created By: [Paul Goodey](#) 4 hours ago

[Back](#)

Content Details Download Subscribed Edit

Grant Login Access to Your Administrator

Preview Comments Versions Downloads Subscribers Content Packs

The following users are subscribed to this content:

- [Paul Goodey](#)
- [Trevor Howard](#)

Tags [How to Guide Grant Login Ac...](#)
add tags...

Author [Paul Goodey](#) 4 hours ago

Version 1

Featured [Feature]

Size 63 KB

In My Libraries [Asset Library](#)

Content Tell me more! Help for this Page ?

How to Guide – Grant Login Access to Your Administrator

Created By: [Paul Goodey](#) 4 hours ago

[Back](#)

Content Details Download Subscribed Edit

Grant Login Access to Your Administrator

Preview **Comments** Versions Downloads Subscribers Content Packs

Number of Comments: 1 Write Comment

this is great

By: [Trevor Howard](#) 1 minute ago | [Delete](#) | [Edit](#)

Tags [How to Guide Grant Login Ac...](#)
add tags...

Author [Paul Goodey](#) 4 hours ago

Version 1

Featured [Feature]

Size 63 KB

In My Libraries [Asset Library](#)

Content Tell me more! Help for this Page ?

How to Guide – Grant Login Access to Your Administrator

Created By: [Paul Goodey](#) 4 hours ago

[Back](#)

Content Details 0 0 Download Subscribe Edit

Grant Login Access to Your Administrator

Tags [How to Guide Grant Login Ac...](#)

Author [Paul Goodey](#) 4 hours ago

Version 1

Featured [Feature]

Size 63 KB

In My Libraries [Asset Library](#)

← Preview Comments Versions Downloads Subscribers →

The following people have downloaded this version:

- Trevor Howard < 1 minute ago
- Paul Goodey 4 minutes ago

Chapter 9: Extending and Enhancing Salesforce CRM

Quick Find / Search...

[Expand All](#) | [Collapse All](#)

Lightning Experience

Salesforce1 Quick Start

Force.com Home

Administer

- Manage Users
- Manage Apps
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Lightning for Outlook
- Lightning Sync
- Email Administration
- Google Apps
- Data.com Administration

Build

- Customize
- Create
- Develop
- Schema Builder
- Lightning App Builder
- Canvas App Previewer
- Installed Packages
- [AppExchange Marketplace](#)
- Critical Updates

Discover service apps every rep will love.

See them all >

[Paid Apps](#) | [Free Apps](#)

Your Suggestions < >

Geopointe: Maps, Mapping, Ter...
by Arrowpointe Corp...
★★★★★ (390)

Docu Sign Electronic Signature...
by DocuSign, Inc
★★★★★ (4504)

Document Generation & Reporti...
by Conga
★★★★★ (653)

TaskRay Project Management fo...
by Bracket Labs
★★★★★ (144)

MapAnything: Maps, Mapping an...
by MapAnything, Inc...
★★★★★ (316)

[View all suggestions >](#)

Most Popular < >

Docu Sign Electronic Signature...
by DocuSign, Inc
★★★★★ (4504)

Document Generation & Reporti...
by Conga
★★★★★ (653)

Gmail & Google Calendar perfe...
by Cirruspath, Inc
★★★★★ (1702)

Microsoft Outlook Integration...
by LinkPoint360
★★★★★ (460)

Nintex Drawloop Document Gene...
by Nintex Drawloop
★★★★★ (253)

[View all popular apps >](#)

New < >

Improved Help: Your users' l...
by Improved Apps Lt...
★★★★★ (10)

Impartner Locator for Salesfo...
by Impartner
☆☆☆☆☆ (No Rating)

Ultra Schema Builder
by Eternus Solution...
☆☆☆☆☆ (No Rating)

MarketingCentral for Salesfor...
by LoyaltyExpress
☆☆☆☆☆ (No Rating)

Personal Marketing Center
by PFL
☆☆☆☆☆ (No Rating)

[View all new apps >](#)

[232]

← → ↻ https://appexchange.salesforce.com


AppExchange Heroku Elements LINK Marketplace Salesforce

AppExchange the Salesforce store Search AppExchange Log In

Home Recommended for You Solutions by Type Product Collections Industry Collections Ohana


Forrester named us a Leader.
 AppExchange was just named a leader in the first-ever Forrester New Wave for SaaS Marketplaces report.

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PICKS FOR YOU
 Log in and we'll match you with solutions we think you'll love.

[Log In](#)

FEATURED SOLUTIONS

PandaDoc
Sales Documents That Close
★★★★★ PAID APP

TASKRAY
MORE THAN PROJECT MANAGEMENT
CUSTOMER ONBOARDING
★★★★★ PAID APP

Conqra Orchestrate
POWERFUL WORKFLOW AUTOMATION
★★★★★ PAID APP

sumo
ONLINE SCHEDULING NATIVES ON SALESFORCE
★★★★★ PAID APP

MapAnything
★★★★★ PAID APP

db sync
Replicate, Backup, Restore, Copy in Salesforce
Any Database | Big Data | AWS | Cloud
★★★★★ PAID APP

Conqra Composer
DOCUMENT GENERATION
★★★★★ PAID APP

HELLOSIGN
eSignatures for Salesforce
★★★★★ PAID APP

Accounting & Finance
★★★★★ PAID APP

Formstack
Native Form Builder
★★★★★ PAID APP

SMARTCOMM
Smart Communications for Salesforce
★★★★★ PAID APP

PROFESSIONAL SERVICES AUTOMATION (PSA)
krow
★★★★★ PAID APP

TOP CATEGORIES

- ★ Finance
- ★ Human Resources
- ★ Enterprise Resource Planning
- ★ Sales
- ★ Customer Service
- ★ IT & Admin
- ★ Marketing
- ★ Integration
- ★ Salesforce Labs
- ★ Analytics

https://appexchange.salesforce.com/appxListingDetail?listingId=a0N300000016YT5EAM

AppExchange Heroku Elements LINK Marketplace Salesforce

AppExchange the Salesforce store Search AppExchange

Home Recommended for You Solutions by Type Product Collections Industry Collections Ohana

ALL APPS > IT & ADMINISTRATION > ADMIN & DEVELOPER TOOLS By Salesforce Labs

Picture Uploader

Free [Get It Now](#)

RATING LISTED ON LATEST RELEASE
9/10/2007 10/7/2016

★★★★☆ (50)

CATEGORIES
Admin & Developer Tools

Install the Picture Uploader utility instantly within your salesforce.com account. The Picture Uploader utility makes it easy to upload a contact photo directly to the contact record.

AppExchange Heroku Elements LINK Marketplace Salesforce

AppExchange the Salesforce store Search AppExchange

Home Recommended for You Solutions by Type Product Collections Industry Collections Ohana

ALL APPS > IT & ADMINISTRATION > ADMIN & DEVELOPER TOOLS By Salesforce Labs

Picture Uploader

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RATING LISTED ON LATEST RELEASE
9/10/2007 10/7/2016

★★★★☆ (50)

CATEGORIES
Admin & Developer Tools

Install the Picture Uploader utility instantly within your salesforce.com account. The Picture Uploader utility makes it easy to upload a contact photo directly to the contact record.

Log In to AppExchange

To continue, log in with your Salesforce credentials.

[Log In](#)

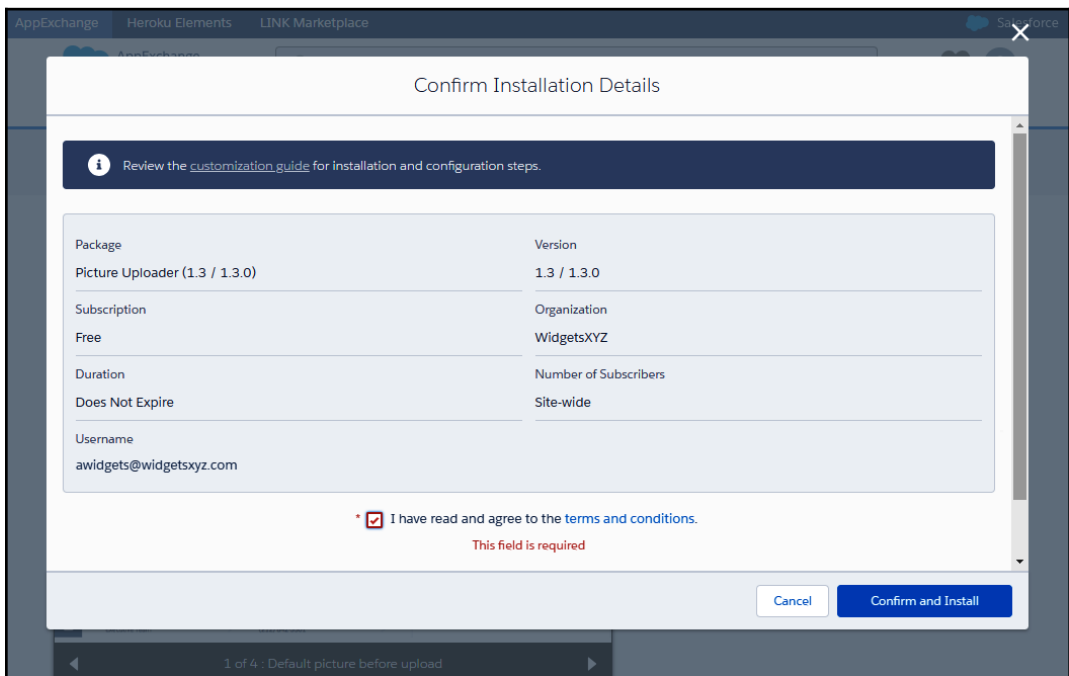
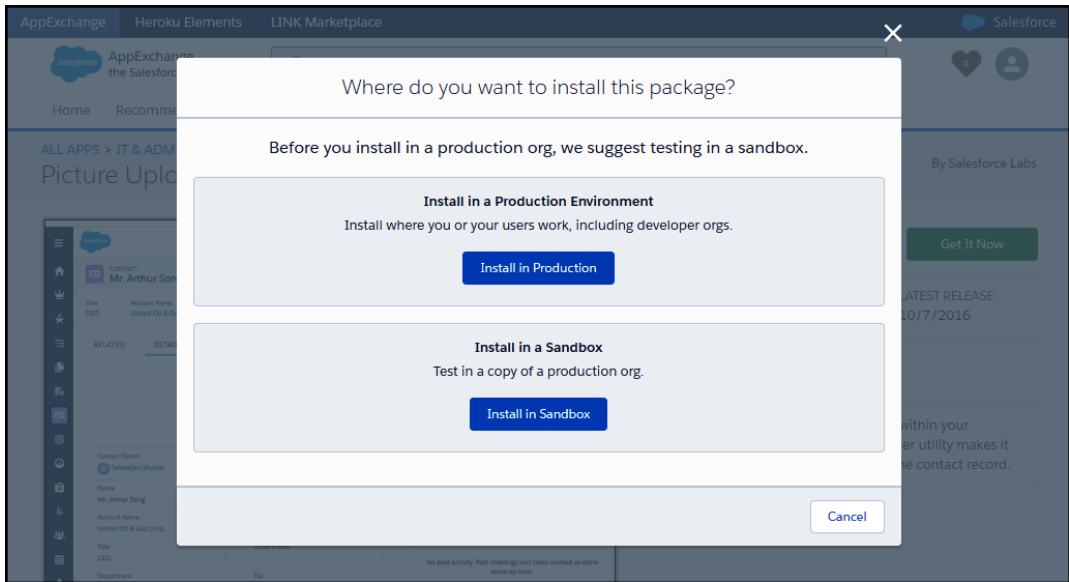
By submitting this request, you agree to share your information with Salesforce and the provider of this listing, Salesforce Labs.


Listing: Picture Uploader

Don't have a Salesforce account?

[Continue as Guest](#)


[Cancel](#)





STATE OF IT IN EUROPE
Get Insights from 1,000 IT Trailblazers

DOWNLOAD E-BOOK



Username 6 Saved Usernames


Password

Log In

Remember me


[Forgot Your Password?](#) [Use Custom Domain](#)

Not a customer? [Try for Free](#)




Install Picture Uploader

By FDCL - Picture Uploader


 **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**

Install Picture Uploader

By FDCL - Picture Uploader

Installation Complete!

| App Name | Publisher | Version Name | Version Number |
|------------------|-------------------------|--------------|----------------|
| Picture Uploader | FDCL - Picture Uploader | 1.3 | 1.3 |

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Quick Find

| | | | | |
|--------------------|----------------------|----------------------|----------------------------|--------------------|
| Change Owner | Create Action Plan | Enable Customer User | Sharing | View Customer User |
| Change Record Type | Delete | Enable Self-Service | Submit for Approval | View Self-Service |
| Check for New Data | Disable Customer ... | Log in to Communi... | Upload Picture | |
| Clone | Edit | Log in to Portal ... | View Contact Hie... | |

Quick Actions in the Salesforce Classic Publisher ?

Salesforce Mobile and Lightning Experience Actions ?

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience layout, then this section inherits that set of actions by default when you click to override.

Contact Detail

Standard Buttons

Custom Buttons

✓
Custom Button: Upload Picture

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

SEARCH PAGE(S) Quick Find Page Name *

- Section vfpEncrypt
- Blank Space
- fileupload
- showPicture

Contact Detail

Standard Buttons: Change Record Type Edit Delete View Contact Hierarchy Clone Change Owner Sharing View Self-Service Enable Self-Service

Custom Buttons: Upload Picture

Contact Information (Header visible on edit only)

Contact Owner [Sample Text](#) showPicture

Name Sarah Sample

Individual [Sample Text](#)

Account Name [Sample Text](#)

Title Sample Text

Leads **Contacts** Opportunities Accounts Reports Dashboards Cases +

Contact **John Smith**


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

« Back to List: Installed Package

[Cases \(0\)](#) | [Open Activities \(0\)](#) | [Activity History \(0\)](#) | [Opportunities \(0\)](#) | [Notes & Attachments \(0\)](#) | [HTML Email Status \(0\)](#) | [Activity Tracker \(0\)](#) | [Links to Objects \(0\)](#) | [Opportunities \(0\)](#) | [Contact Employment \(0\)](#) | [Support Plans \(0\)](#) | [Support Workers \(5+\)](#) | [Risk Assessments \(0\)](#)

Contact Detail Edit Delete Clone **Upload Picture**

Phone 01234567890



Installed Packages

Help for this Page ?

On 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**.



Installed Packages

| Action | Package Name | Publisher | Version Number | Namespace Prefix | Install Date | Limits | Apps | Tabs | Objects | AppExchange Ready |
|---------------------------|----------------------------------|-------------------------|----------------|------------------|------------------|--------|------|------|---------|-------------------|
| Uninstall | Picture Uploader | FDCL - Picture Uploader | 1.3 | | 19/01/2019 15:05 | ✓ | 0 | 0 | 0 | Not Applicable |

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

When you uninstall a package, by default, all its data as well as related notes and attachments are automatically saved as an export file. This file is available for 48 hours in case you need to recover the data. To reload the data, import the export file manually and recreate any relationships between objects. Some components can't be recreated and others require special treatment. You can also prevent the package data from being exported by selecting the appropriate radio button below. [Tell me more](#)

Package Components

| Action | Name | Parent Object | Type |
|-----------------------------------|-----------------------|---------------|------------------|
| Upload Picture | | Contact | Button or Link |
| Contactsextension | | | Apex Class |
| Upload Picture | | Contact | Action |
| showPicture | | | Visualforce Page |
| PictureUploader | | | Static Resource |
| ShowPicture | | | Apex Class |
| fileupload | | | Visualforce Page |
| TestUtilities | | | Apex Class |
| | Picture Upload Layout | Contact | Page Layout |

- Save a copy of this package's data for 48 hours after uninstall
- Do not save a copy of this package's data after uninstall
- Yes, I want to uninstall this package and permanently delete all associated components


Locations, hours, and admission | x +

← → ↻ https://www.moma.org/visit/ ☆ P ⋮

[Buy tickets](#) [Become a member](#)

MoMA

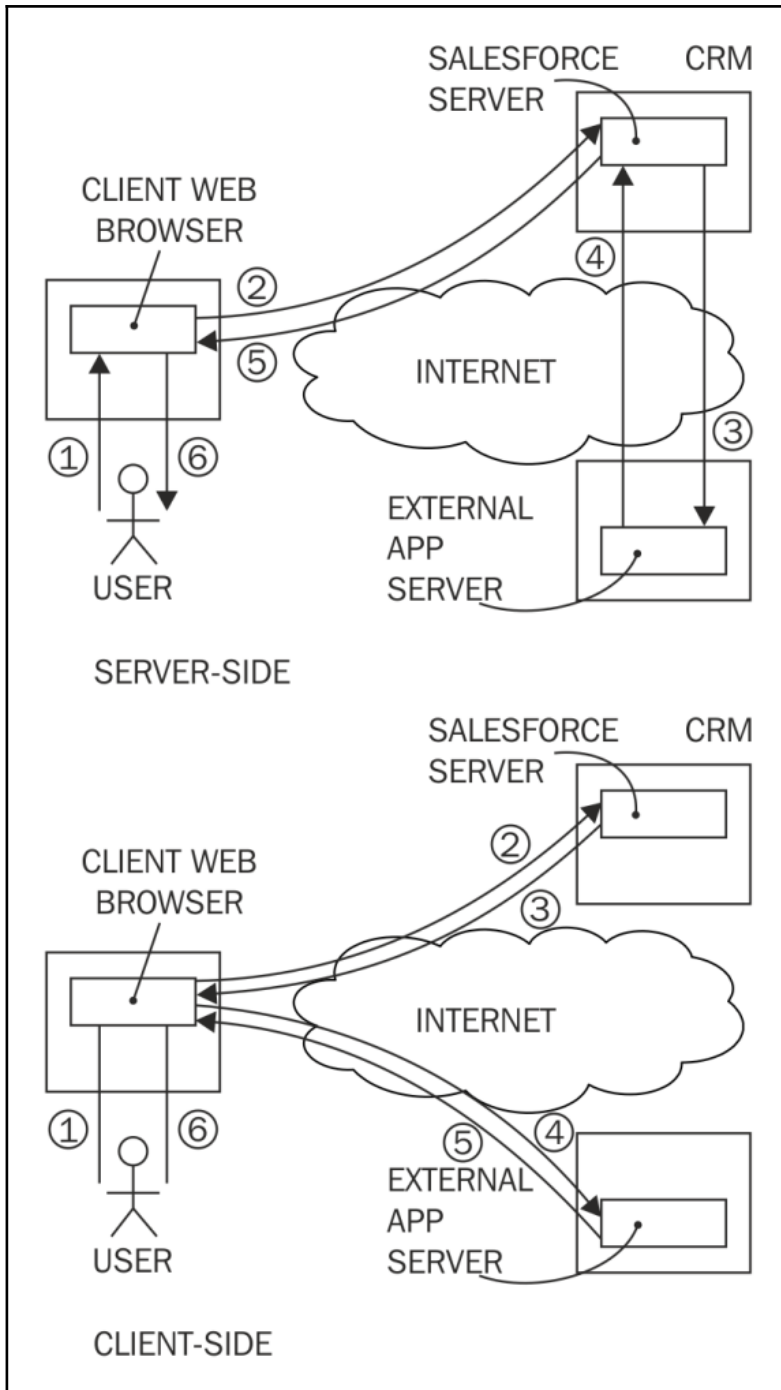
[Plan your visit](#)
[Exhibitions and events](#)
[Art and artists](#)
[Store](#)
Q



The map shows the area around MoMA and MoMA PS1. MoMA is located at 11 West 53 Street, and MoMA PS1 is located at 22-25 Jackson Avenue, Long Island City, NY 11101. The map includes labels for streets such as W 53rd St, E 57th St, and E 63rd St, as well as landmarks like Roosevelt Island and the Queens Midtown Tunnel.

The Museum of Modern Art
 11 West 53 Street, New York, NY 10019
 Please enter at 18 West 54 Street

MoMA PS1
 22-25 Jackson Avenue, Long Island City, NY 11101



Home Chatter Leads Accounts Contacts Reports Campaigns Dashboards Opportunities Forecasts Cases Products Documents +

Search All Setup... ?

Expand All | Collapse All

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: [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

| Label + | Name | Namespace Prefix | Api Version | Description | Created By Alias | Created Date | Last Modified By Alias | Last Modified Date |
|------------------------|------|------------------|-------------|-------------|------------------|--------------|------------------------|--------------------|
| No records to display. | | | | | | | | |

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

Development Mode

← → ↻ https://c.na93.visual.force.com/apex/TwitterEmbeddedTimeline ☆ P

salesforce  19 Search... Search Paul Goodey Setup Help Sales



Home Chatter Campaigns Leads Accounts Reports Dashboards Cases +


Quick Find / Search... ?

Expand All | Collapse All

Visualforce Error

Help for this Page ?

  **Page TwitterEmbeddedTimeline does not exist**

 [Create Page TwitterEmbeddedTimeline](#)

Home Chatter Campaigns Leads Contacts Opportunities Accounts Reports Dashboards Cases + ▾

Create New... ▾ Congratulations This is your new Page: TwitterEmbeddedTimeline

Shortcut

Unresolved Items

Recent Items

TwitterEmbeddedTimeline

Component Reference Where is this used?

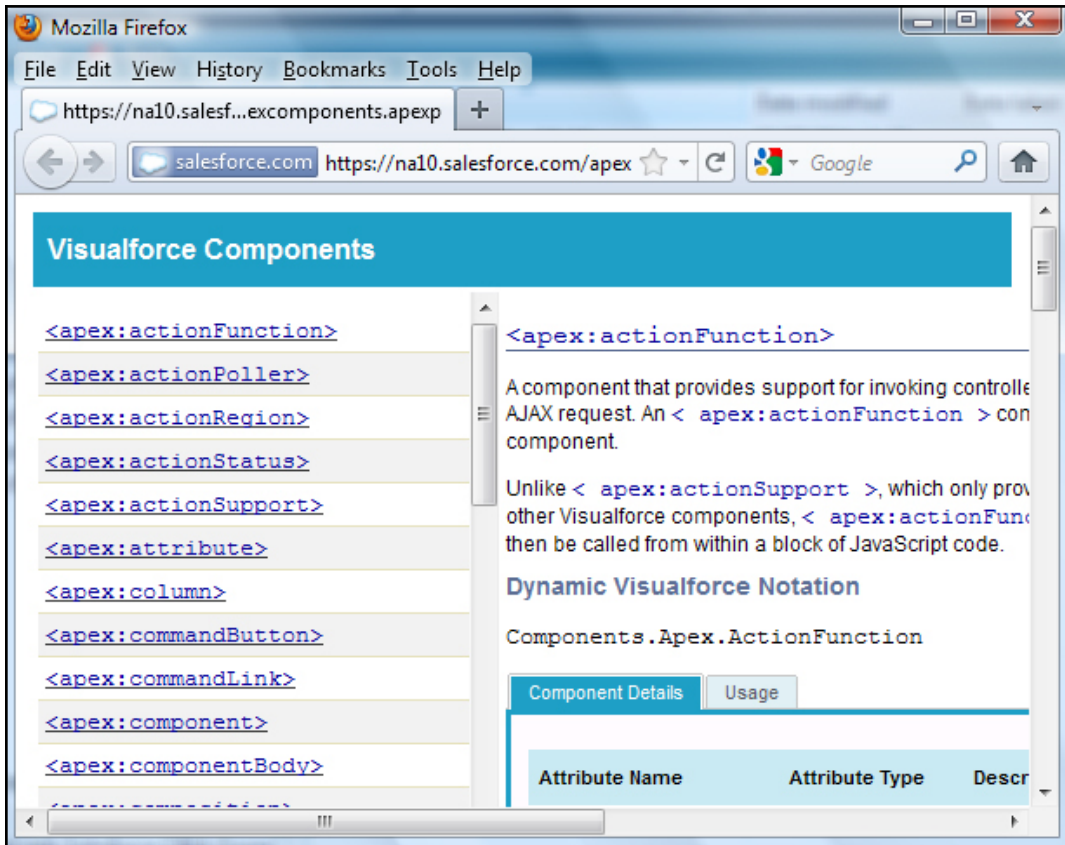
```
1 <apex:page >
2 <!-- Begin Default Content REMOVE THIS -->
3 <h1>Congratulations</h1>
4 This is your new Page: TwitterEmbeddedTimeline
5 <!-- End Default Content REMOVE THIS -->
6 </apex:page>
```

Position: Ln 6, Ch 13 Total: Ln 6, Ch 184

Position: Ln 6, Ch 13 Total: Ln 6, Ch 184



Component Reference



Home Chatter Campaigns Leads Contacts Opportunities Accounts Reports Dashboards Cases + ▾

Create New... ▾ Congratulations This is your new Page: TwitterEmbeddedTimeline

Shortcut

Unresolved Items

Recent Items

TwitterEmbeddedTimeline

Component Reference Where is this used?

```

1 <apex:page >
2 <!-- Begin Default Content REMOVE THIS -->
3 <h1>Congratulations</h1>
4 This is your new Page: TwitterEmbeddedTimeline
5 <!-- End Default Content REMOVE THIS -->
6 <
7 </ap:

```

Position: Ln 6, Ch 4 Total: Ln 7, Ch 187

Home Chatter Campaigns Leads Contacts Opportunities Accounts Reports Dashboards Cases + ▾

Create New... ▾ Congratulations This is your new Page: TwitterEmbeddedTimeline

Shortcut

Unresolved Items

Recent Items

TwitterEmbeddedTimeline

Component Reference Where is this used?

```

1 <apex:page >
2 <!-- Begin Default Content REMOVE THIS -->
3 <h1>Congratulations</h1>
4 This is your new Page: TwitterEmbeddedTimeline
5 <!-- End Default Content REMOVE THIS -->
6 </apex:page>

```

Position: Ln 2, Ch 1 Total: Ln 6, Ch 184

```

1 <apex:page standardController="account">
2
3 </apex:page>

```

Home Chatter Campaigns Leads Contacts Opportunities Accounts Reports Dashboards Cases +

Congratulations This is your new Page: TwitterEmbeddedTimeline

Create New... Shortcut Unresolved Items Recent Items

TwitterEmbeddedTimeline

Component Reference Where is this used?

```

1 <apex:page standardController="Account">
2 <div id="twitter" style="width:100%;height:300px">
3 <a class="twitter-timeline" href="https://twitter.com/{!Account.Name}?ref_src=twsrc%5Etfw">
4 Tweets by {!Account.Name}</a> <script async src="https://platform.twitter.com/widgets.js" charset="utf-8"></script>
5 </div>
6 </apex:page>

```

Position: Ln 4, Ch 1 Total: Ln 6, Ch 314

Home Chatter Campaigns Leads Contacts Opportunities Accounts Reports Dashboards Cases +

Tweets by

Create New... Shortcut Unresolved Items Recent Items

TwitterEmbeddedTimeline

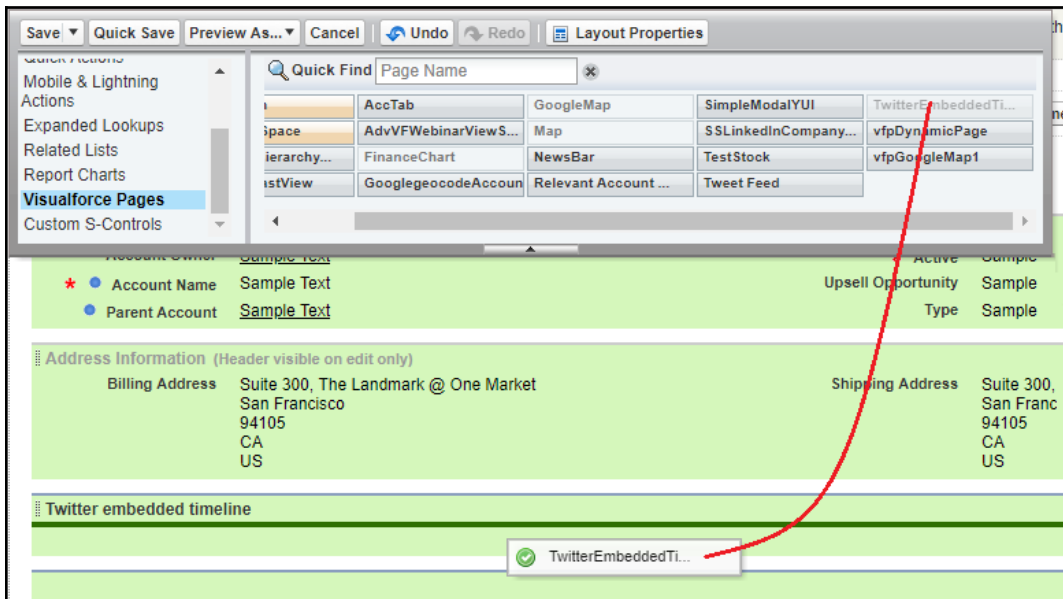
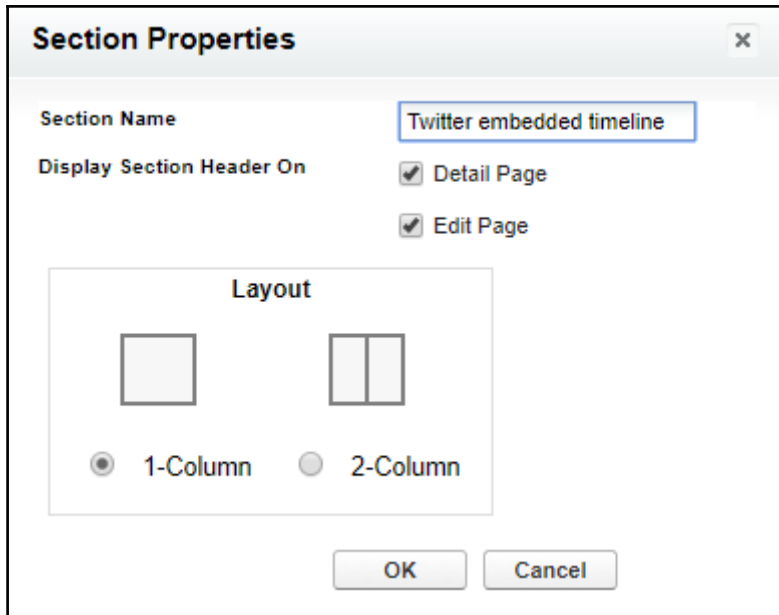
Component Reference Where is this used?

```

1 <apex:page standardController="Account">
2 <div id="twitter" style="width:100%;height:300px">
3 <a class="twitter-timeline" href="https://twitter.com/{!Account.Name}?ref_src=twsrc%5Etfw">
4 Tweets by {!Account.Name}</a> <script async="true" src="https://platform.twitter.com/widgets.js" charset="utf-8"></scr:
5 </div>
6 </apex:page>

```

Position: Ln 6, Ch 13 Total: Ln 6, Ch 321




Show Feed

« [Back to List: Installed Package](#)

[Action Plans \(0\)](#) | [Contacts \(0\)](#) | [Opportunities \(0\)](#) | [Cases \(0\)](#) | [Open Activities \(0\)](#) | [Activity History \(0\)](#) | [Notes & Attachments \(0\)](#)

Account Detail

[Edit](#) [Delete](#) [Sharing](#) [Include Offline](#)

| | | | |
|-----------------|--|--------------------|-----|
| Account Owner |  Paul Goodey [Change] | Active | Yes |
| Account Name | salesforce [View Hierarchy] | Upsell Opportunity | |
| Parent Account | | Type | |
| Billing Address | The Landmark @ One Market
Suite 300
San Francisco
94105
California
United States | Shipping Address | |

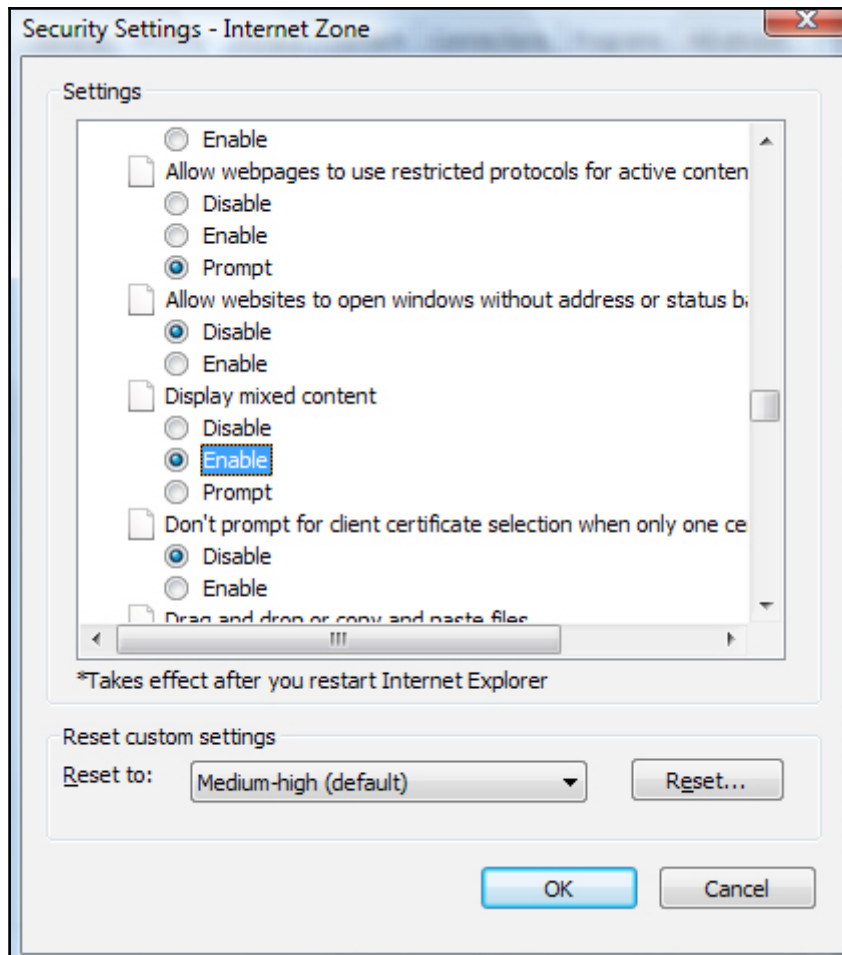
▼ **Twitter embedded timeline**

Tweets by [@salesforce](#)



Salesforce ✓
[@salesforce](#)

Music is a platform for change. Discover how
[@arcadefire](#), [@preshallband](#), and [@danny_clinch](#)



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 | Dev | Developer | Completed | CS2 | 0000000000000000 | 30/05/2012
14:16 | Developer sandbox |
| Edit Del Refresh Login Dev1 | Dev1 | Developer Pro | Completed | CS17 | 0000000000000000 | 05/08/2018
11:07 | Developer Pro sandbox |
| Edit Del Refresh Login Test | Test | Full | Completed | CS18 | 0000000000000000 | 12/02/2018
08:14 | Full Sandbox |

← → ↻ 🔒 https://appexchange.salesforce.com/listingDetail?listingId=a0N30000004gHhLEAU ☆ P ⋮


AppExchange Heroku Elements LINK Marketplace Salesforce

AppExchange the Salesforce store 🔍 Search AppExchange Log In

Home Recommended Solutions by Type Product Collections Industry Collections Ohana

ALL APPS > IT & ADMINISTRATION > ADMIN & DEVELOPER TOOLS By Salesforce Labs

Salesforce Adoption Dashboards



Get Visibility to User Login history and Key Feature Adoption
42 reports, 3 Dashboards: User Adoption Dashboards, Key Feature Adoption Dashboards, Sales & Marketing Adoption Dashboard

1 of 2 : Adoption Dashboards in Lightning

Free Get It Now

RATING ★★★★★ (148) LISTED ON 10/26/2011


LATEST RELEASE 8/18/2016

CATEGORIES
Admin & Developer Tools








Provides visibility to relevant user login history & key feature adoption!

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.

Chapter 10: Administrating the Mobile Features of Salesforce CRM

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. |



Salesforce Settings

Help for this Page 


App Access Settings

[Salesforce App Access Help](#) 

There are two ways to use Salesforce: through a mobile web browser and mobile apps that users install from the App Store or Google Play.

You can control your organization's access to Salesforce for Android, iOS, and mobile web.

Mobile Browser App Settings

Enable Salesforce mobile web 

Downloadable App Settings

Control who can access Salesforce for Android and iOS, and configure other security policies in the [Connected Apps](#) settings.

Device Access Settings

Allow Salesforce to import Contacts from mobile device Contact lists.

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

Salesforce Branding


Help for this Page 

Customize the appearance of the mobile app so it matches your company's branding. Salesforce branding is supported in the mobile web and version 5.2 or later of Salesforce for Android and iOS.

To change the branding of your login page, see the Authentication Configuration section on the [My Domain](#) page.

Salesforce Branding Settings

Edit

Brand Color  #1882ed

Loading Page Color  #7bb8f5

Loading Page Logo WidgetsXYZlogo.png

Edit



Mobile Navigation

[Help for this Page](#)

Add Salesforce productivity items, smart search items, Visualforce tabs, or Lightning Page tabs to the mobile app navigation menu.

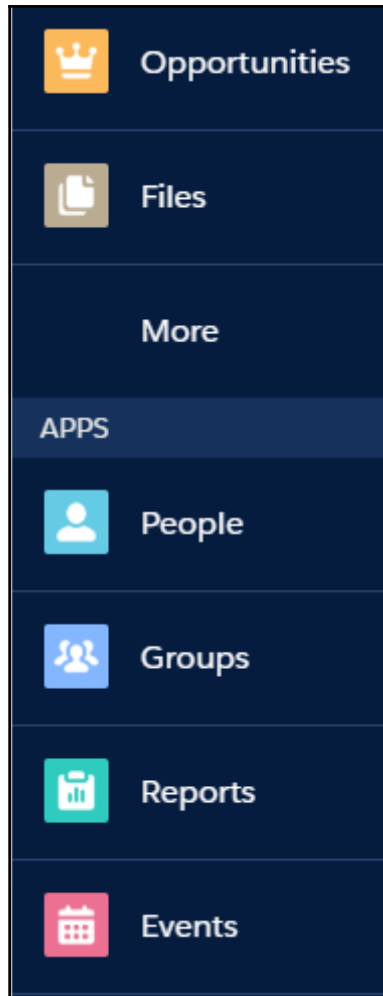
When organizing the menu items, put the items that users will want most at the top. The first item in the Selected list becomes the landing page for mobile users. The Smart Search Items element can expand into a set of eight or more menu items in the mobile app, and it may push other elements below the scroll point if you put it near the top of the menu. Anything you put below the Smart Search Items element will appear in the Apps section of the navigation menu.

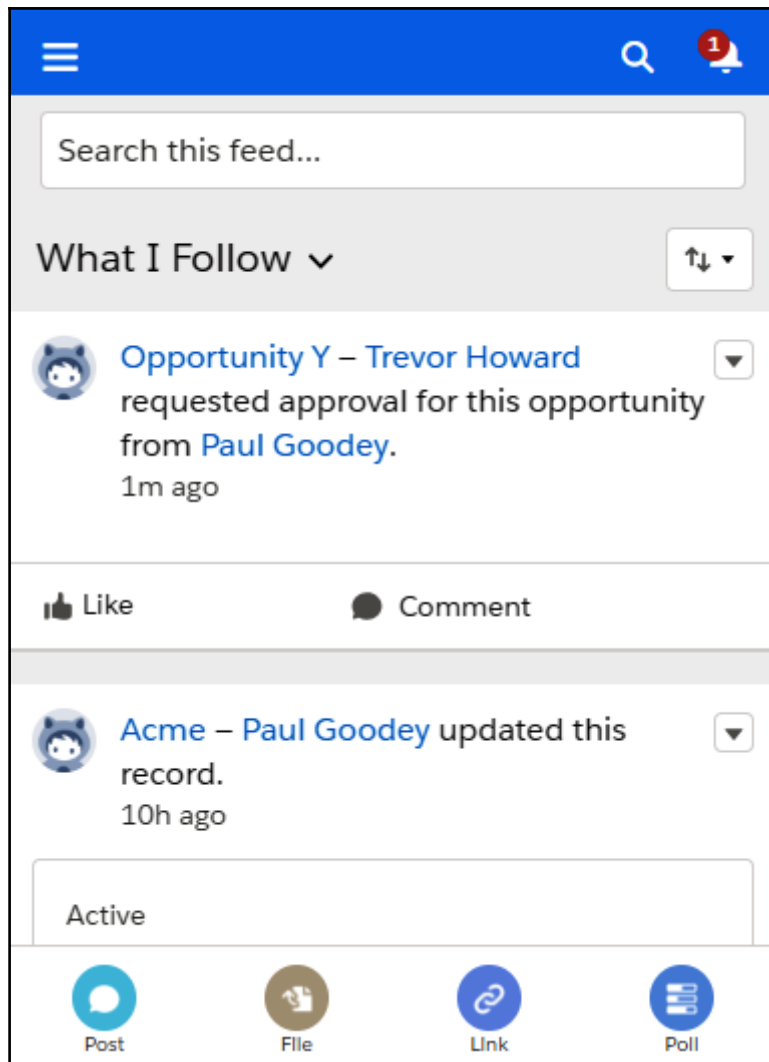
The Today menu item is only available for Salesforce for Android and iOS.

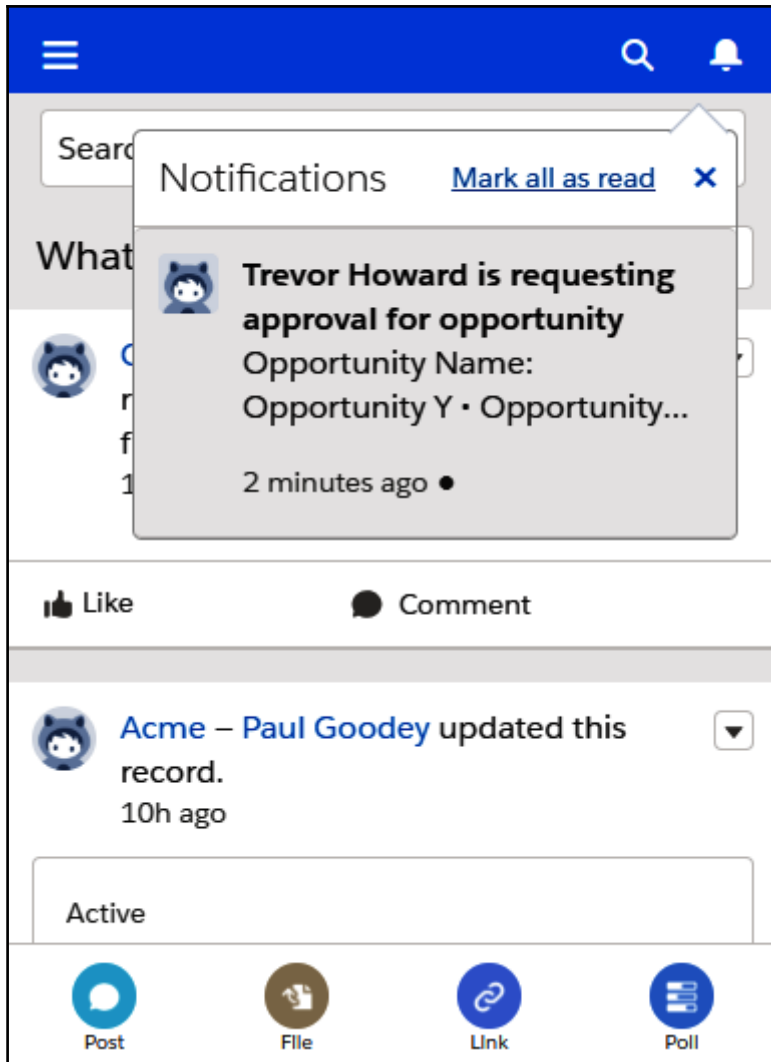
Navigation Menu Items

| Available | | Selected |
|--|----------------------------|--|
| <ul style="list-style-type: none">Kanban BoardBacklog ManagerCWB ToolWork Manager | <p>Add </p> <p>Remove </p> | <ul style="list-style-type: none">Einstein AssistantEinstein InsightsChatterTodayDashboardsTasksSmart Search ItemsPeopleGroupsReports <p>Up </p> <p>Down </p> |

Use SHIFT + click or click and drag to select a range of adjacent items. Use CTRL + click to select multiple items that are not adjacent.









Notifications Settings

Help for this Page 

Enable notifications in Lightning Experience and Salesforce mobile app

Notifications

Save

- Enable in-app notifications 
- Enable push notifications 

Offline Settings


Help for this Page 


Securely cache data from Salesforce for Android and iOS to mobile devices. This means faster viewing of previously-accessed records, access to cached data while offline, persistence of users' app settings, and better overall performance.

If caching is disabled, Salesforce for Android and iOS caches only the minimum data required to maintain the current session. Record details and feed items must be refreshed every time they're viewed, so performance can be impacted.

Save Cancel


Offline Settings

 = Required Information

- Enable caching in Salesforce for Android and iOS
- Enable offline create, edit, and delete in Salesforce for Android and iOS 

Save Cancel

Mobile Dashboard Settings

Help for this Page 

Salesforce.com's Mobile Dashboards iPad application is available from Apple's App Store. To use it, this option must be enabled.


- Enable the Mobile Dashboards iPad app for all users

Save Cancel

Home Chatter Campaigns Leads Contacts Opportunities Accounts Reports Dashboards Cases Duplicate Record Sets + ▾

Quick Find / Search... 🔍

Expand All | Collapse All


 Lightning Experience Migration Assistant
Switch to the modern, intelligent Salesforce.
[Get Started](#)

Salesforce Mobile Quick Start

Home

Administer

- ▾ Manage Users
- ▾ Manage Apps
- ▾ Company Profile
- ▾ Security Controls
- ▾ Domain Management
- ▾ Communication Templates
- ▾ Translation Workbench



Salesforce Mobile Setup

The mobile app allows you to bring Salesforce with you everywhere. Use the tools on this page to set up Salesforce 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](#)

Customizable Parts of the App
(Links open the Setup page)
[Navigation Menu](#)
[Branding](#)

Security and Access Settings
(Links open the Setup page)
[Mobile Browser Option](#)
[Notification Options](#)
[Offline Cache](#)
(Links open documentation in a new window)
[App Security Controls](#)

Work With Records While Mobile
(Links open documentation in a new window)



Welcome!

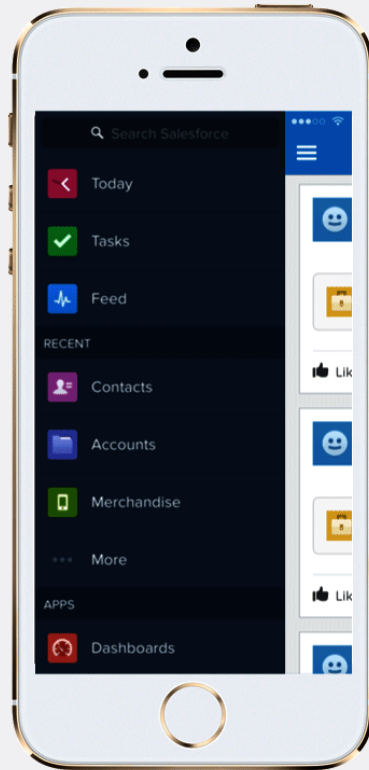
About the Quick Start Wizard

This wizard walks you through the basic setup of the Salesforce mobile app. Later, you can go to the Salesforce 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



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

- Kanban Board ≡
- Backlog Manager ≡
- CWB Tool ≡
- Work Manager ≡

Navigation Menu

- 🌸 Einstein Assistant ≡
- 🌸 Einstein Insights ≡
- 🗨️ Chatter ≡
- 🕒 Today ≡

⏪ ⏩

Back
Skip This Step
Save & Next

salesforce Setup Help & Training

● Navigation ● Actions ● Compact Layout ● Review ● Invite

Step 2: Arrange Global Actions

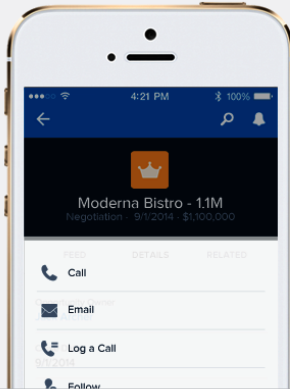
About Global Actions

Global actions give users quick access to Salesforce functions. Note that how actions appear may vary based on your version of the mobile app.

Arrange Global Actions

In this step you'll choose and arrange global actions.

Arrange Global Actions



Back
Next

salesforce Setup Help & Training

● Navigation
 ● Actions
 ● Compact Layout
 ○ Review
 ○ Invite

Step 3: Create a Custom Compact Layout for Contacts

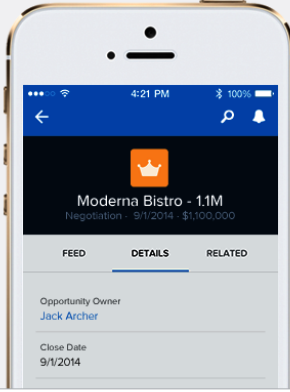
About Compact Layouts

Compact layouts show a record's key fields, such as a contact's name, email, and phone, in the highlights area at the top of the record detail.

Create a Compact Layout

In this step we'll create a custom compact layout for contacts. Later, after you've finished this wizard, you can create compact layouts for other objects as needed.

Create Compact Layout



Back
Next

salesforce Setup Help & Training

● Navigation
 ● Actions
 ● Compact Layout
 ● Review
 ○ Invite

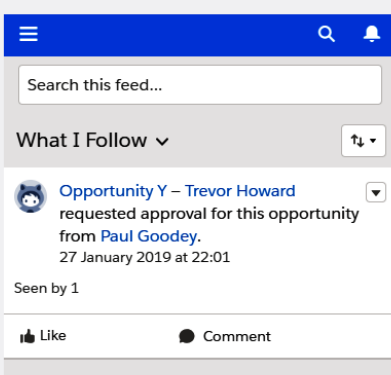
Step 4: Review

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



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. Want to get feedback on what you've done so far? Invite some of your users to give the app a try.

To: Send to all users

Subject:

Compose/Edit Message

https://na93.salesforce.com/home/home.jsp

Apps Search Paul Goodey

Home Chatter Campaigns Leads Contacts Opportunities Accounts Reports Dashboards Cases Dupli

Create New... Paul Goodey
 Sunday 27 January 2019

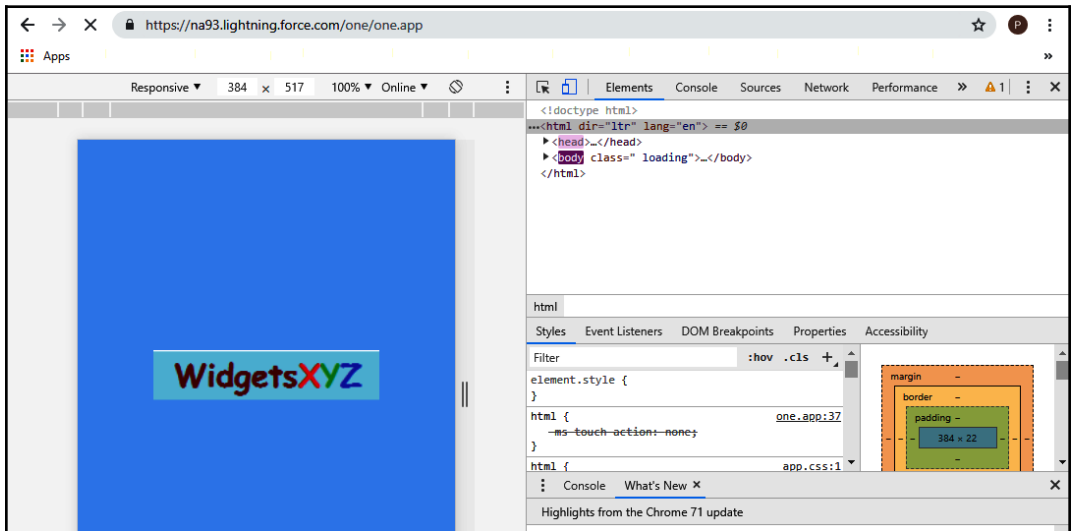
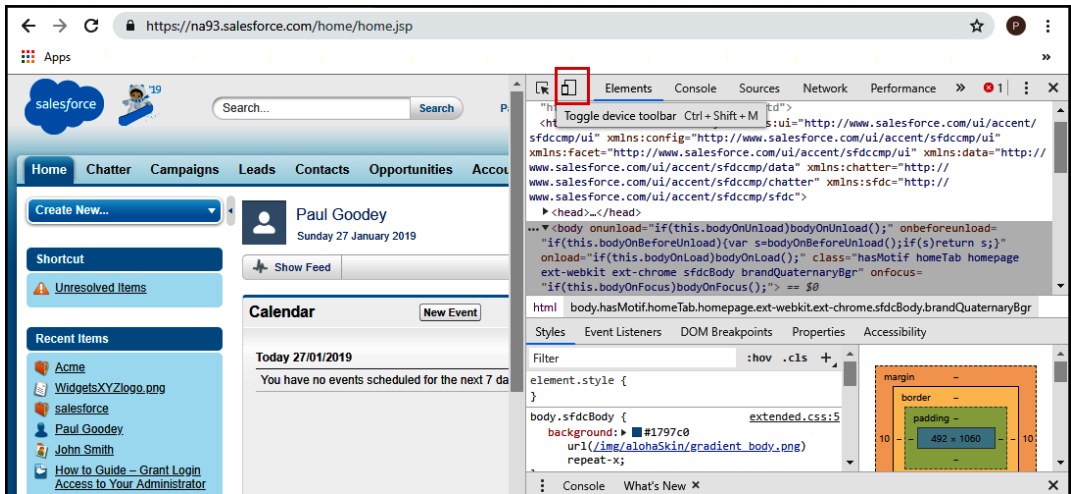
Shortcut
 Unresolved Items

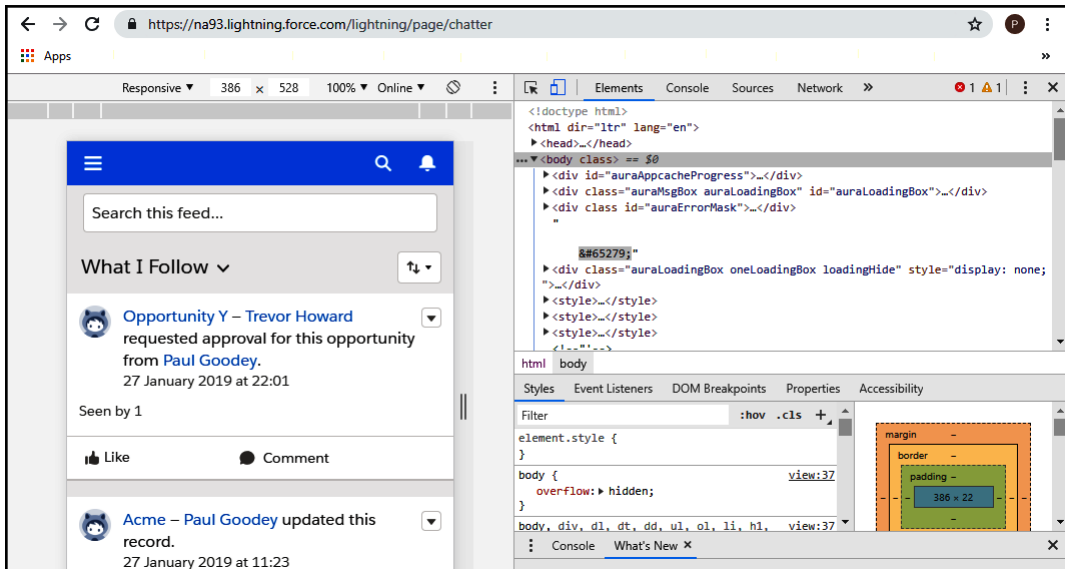
Recent Items
 Acme
 WidgetsXYZlogo.png
 salesforce
 Paul Goodey
 John Smith
 How to Guide – Grant Login

Calendar
 Today 27/01/2019
 You have no events scheduled for the next 7 days.

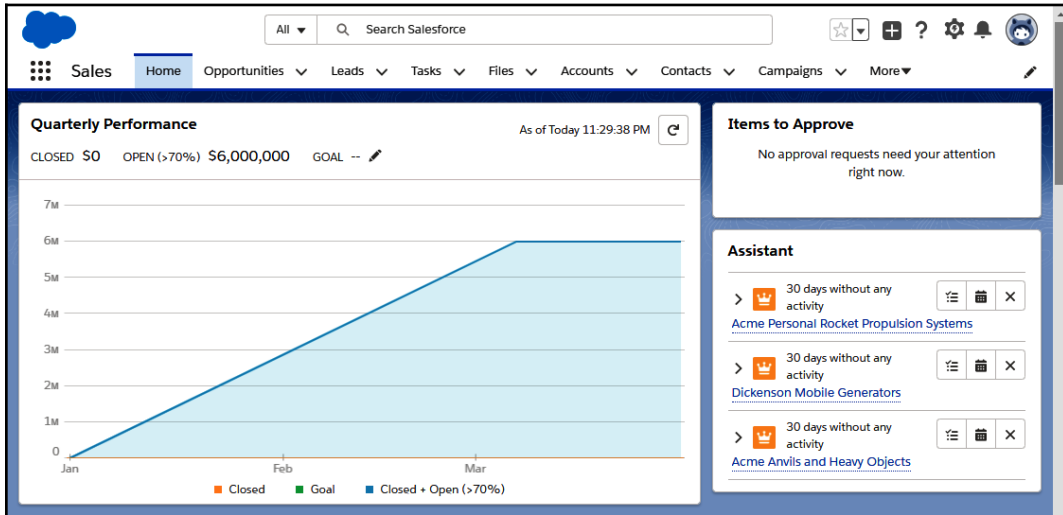
Save page as... Ctrl+S
 Create shortcut...
 Clear browsing data... Ctrl+Shift+Del
 Extensions
 Task manager Shift+Esc
 Developer tools Ctrl+Shift+I

New tab Ctrl+T
 New window Ctrl+N
 New incognito window Ctrl+Shift+N
 History
 Downloads Ctrl+J
 Bookmarks
 Zoom - 100% +
 Print... Ctrl+P
 Cast...
 Find... Ctrl+F
 More tools
 Edit Cut Copy Paste
 Settings
 Help
 Exit





Chapter 11: Lightning Experience



Quick Find / Search...

Expand All | Collapse All

Lightning Experience Migration Assistant
Switch to the modern, intelligent Salesforce.
[Get Started](#)

Salesforce Mobile Quick Start

Home

Administer

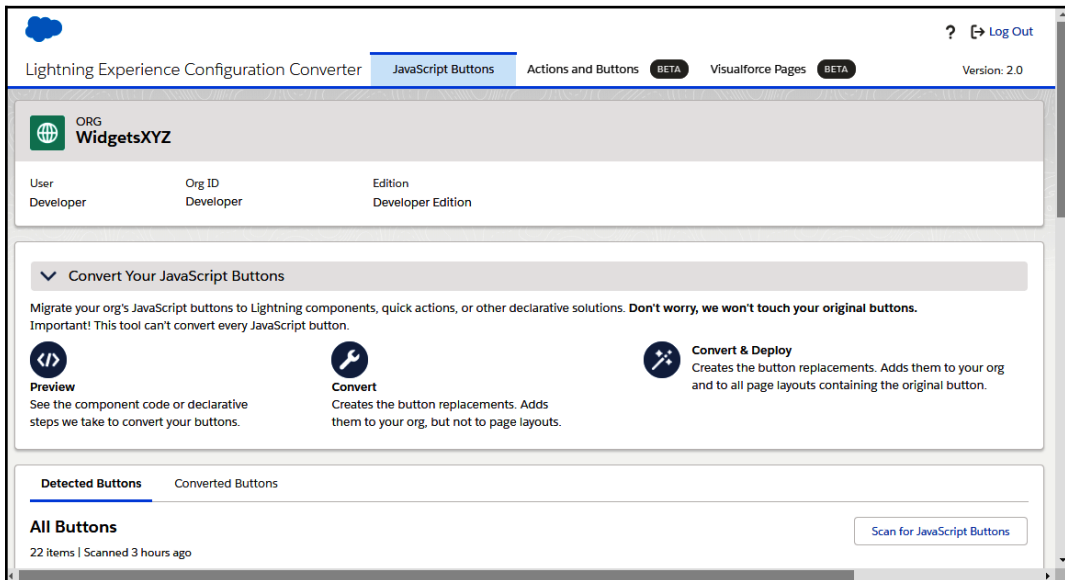
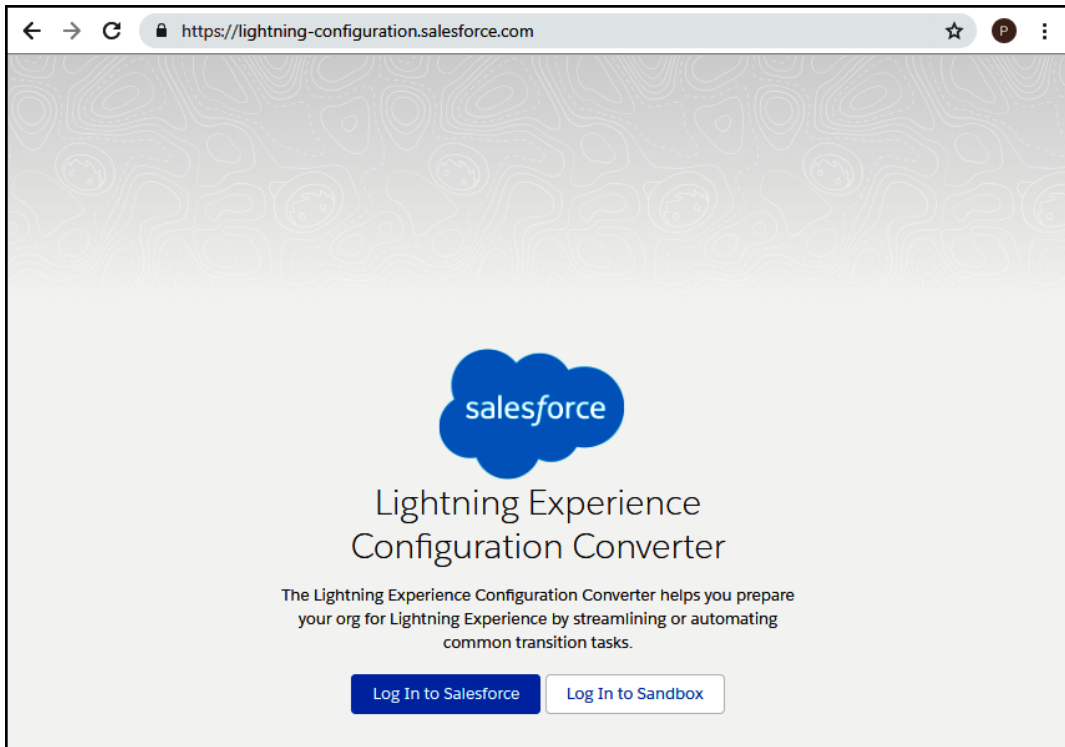
- ▾ Manage Users
- ▾ Manage Apps
- ▾ Company Profile
- ▾ Data Classification
- ▾ Security Controls
- ▾ Domain Management
- ▾ Communication Templates

Learn Check Readiness Preview Optimize with Features Set Up Users Turn It On

Lightning Experience Migration Assistant

[Learn About Lightning Experience](#)

Introducing Lightning Experience
See how Lightning Experience can revolutionize the way your team gets work done. [Watch Video](#)



Lightning Experience Migration Assistant

[Learn](#) [Check Readiness](#) [Preview](#) [Optimize with Features](#) **[Set Up Users](#)** [Turn It On](#)



Set Up Users for Lightning Experience

Fine-tune who can use Lightning Experience

Standard profile users are enabled to access Lightning Experience by default while custom profile users aren't. Adjust things to make sure the right users get access.

[Learn How](#)

Just beginning with Lightning Experience? Consider starting with a small pilot group, then add more users later.

Switch users to Lightning Experience

Select which users move to the new interface.

[Switch Users](#)

Make Lightning Experience your org's only experience

When you're ready for everyone in your org to go all in with Lightning Experience, turn off the option to switch to Salesforce Classic. [Tell Me More](#)



[Next Step](#)

Lightning Experience Migration Assistant

[Learn](#)

[Check Readiness](#)

[Preview](#)

[Optimize with Features](#)

[Set Up Users](#)

[Turn It On](#)

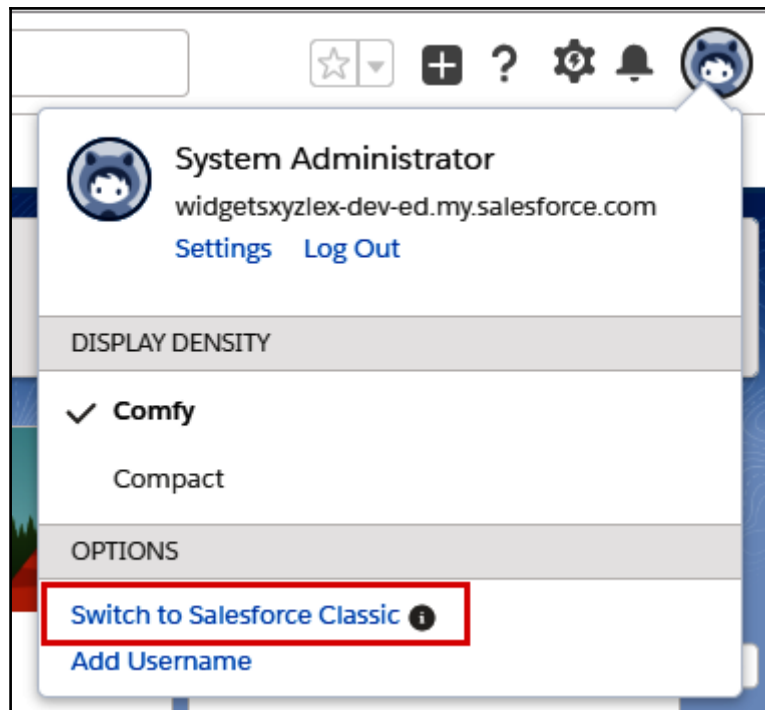


Turn On Lightning Experience

You didn't skip to the end, right? Great! You're ready to flip the switch.



On

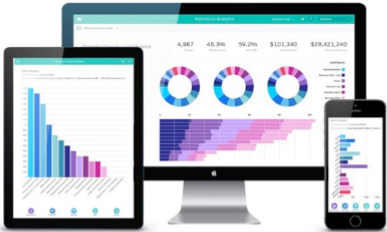


Chapter 12: Einstein Analytics

← → ↻ https://developer.salesforce.com/promotions/orgs/analytics-de ☆ P

salesforce developers

Learn Einstein Analytics with Trailhead



Want to learn how to use Salesforce Einstein Analytics? Sign up for a free Einstein Analytics-enabled Developer Edition packed with sample data that will let you start learning in no time at all!

Get a Free Einstein Analytics-enabled Developer Edition - to learn new skills with Trailhead today.

Name

First Last

Email

Your email address

Role

Developer

Company

Company Name

Country

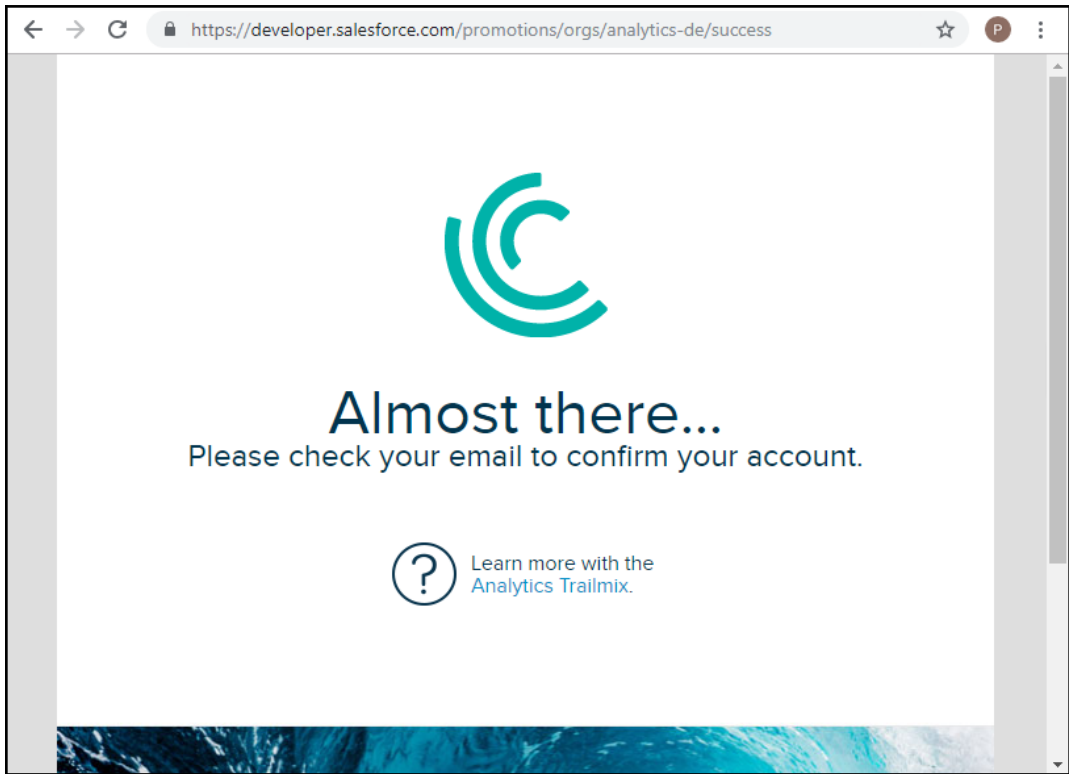
United States

Postal Code

Username

Ex: name@yourcompany.com

By registering, you confirm you have read and agree to the [Terms of Use](#) and the [Master Subscription Agreement](#) and agree that my data is subject to the [Privacy Statement](#), including use for marketing purposes.



Welcome to Salesforce: Verify your account

Inbox x

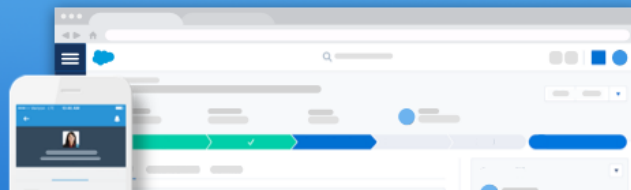


developer@salesforce.com <developer@salesforce.com>
to me ▾

Mon, Feb 11, 9:06 AM (3 days ago)



Thanks for signing up with Salesforce!



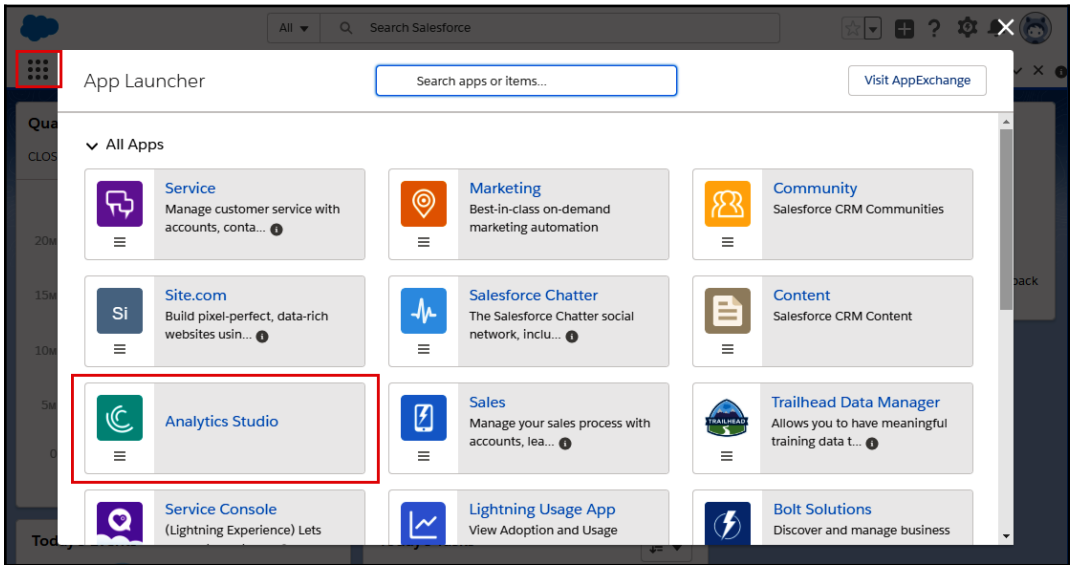
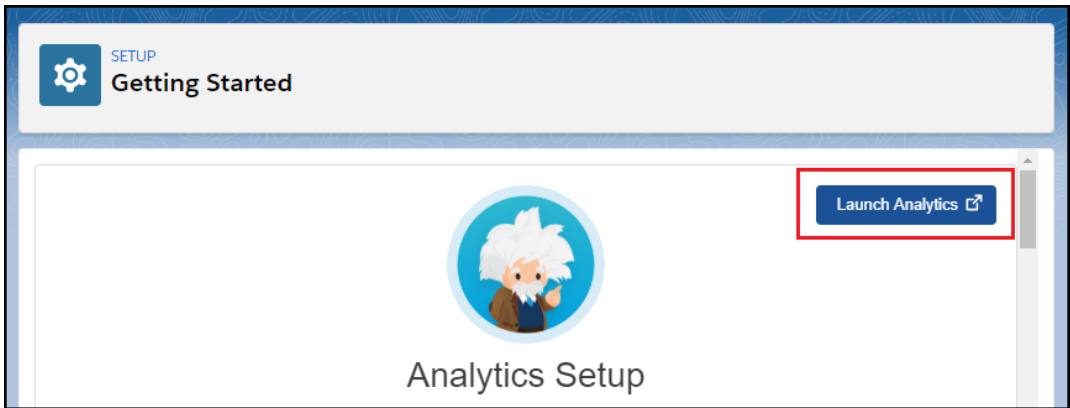
Click below to verify your account.

[Verify Account](#)

To easily log in later, save this URL:
<https://login.salesforce.com/>

Username:
ein@widgetsxyz.com

Again, welcome to Salesforce!



Analytics Studio

ANALYTICS Recent 16 items

Search Analytics... Create

ANALYTICS ALL APPS DASHBOARDS STORIES LENSES DATASETS

Recent

Created by Me

Shared with Me

Pinned Apps

Notifications

| TITLE | DESCRIPTION | CREATED BY | CREATED ON | |
|----------------|--|------------|-----------------|---------|
| My Private App | Use this default app to store private or ... | Paul ... | | Run App |
| ABC Seed | | Paul ... | 10 Feb 2019 ... | Run App |
| My DTC Sales | | Paul ... | 10 Feb 2019 ... | Run App |
| Shared App | | Integr... | 10 Feb 2019 ... | Run App |
| The Motivator | | Paul ... | 10 Feb 2019 ... | Run App |

DATA MANAGER

MODEL MANAGER

LEARN

COMMUNITY Dashboards View All

WHAT'S NEW

| TITLE | APP | CREATED BY | LAST MODIFIED BY | DATA REFRESHED |
|---------------------------------|----------|-------------|------------------|---------------------|
| Worldwide Fundraising - Starter | ABC Seed | Paul Goo... | Paul ... | 10 Feb 2019 at 2... |

App Launcher

Search apps or items... Visit AppExchange

Analytics Studio

Sales
Manage your sales process with accounts, leads...

Trailhead Data Manager
Allows you to have meaningful training data to...

Service Console
(Lightning Experience) Lets support agents wor...

Lightning Usage App
View Adoption and Usage Metrics for Lightning Experience

Bolt Solutions
Discover and manage business solutions designe...

▼ All Items

| | | | |
|------------|-----------------------|-----------------|-------------------|
| Accounts | Analytics | App Launcher | Approval Requests |
| Assets | Calendar | Campaigns | Cases |
| Chatter | Contact Requests | Contacts | Contracts |
| Dashboards | Duplicate Record Sets | Email Templates | Files |

Marketing Home Chatter Campaigns Leads Contacts Opportunities Reports Dashboards Analytics

ANALYTICS Recent 16 Items Search Analytics...

ANALYTICS ALL APPS DASHBOARDS LENSES

Recent

Created by Me

Shared with Me

Pinned Apps

Notifications

Apps

| TITLE | DESCRIPTION | CREATED BY | CREATED ON | |
|----------------|--|------------|----------------|--------|
| My Private App | Use this default app to store private o... | Paul ... | | Browse |
| ABC Seed | | Paul ... | 10 Feb 2019... | Browse |
| My DTC Sales | | Paul ... | 10 Feb 2019... | Browse |
| Shared App | | Integ... | 10 Feb 2019... | Browse |
| The Motivator | | Paul ... | 10 Feb 2019... | Browse |

Dashboards View All

| TITLE | APP | CREATED BY | LAST MODIFIED BY | DATA REFRESHED |
|-------|-----|------------|------------------|----------------|
|-------|-----|------------|------------------|----------------|

salesforce Analytics Studio ? ? ? ?

ANALYTICS Recent 5 Items Search Apps... Create

ANALYTICS ALL APPS DASHBOARDS STORIES LENSES DATASETS

Recent

Created by Me

Shared with Me

Pinned Apps

Notifications

DATA MANAGER

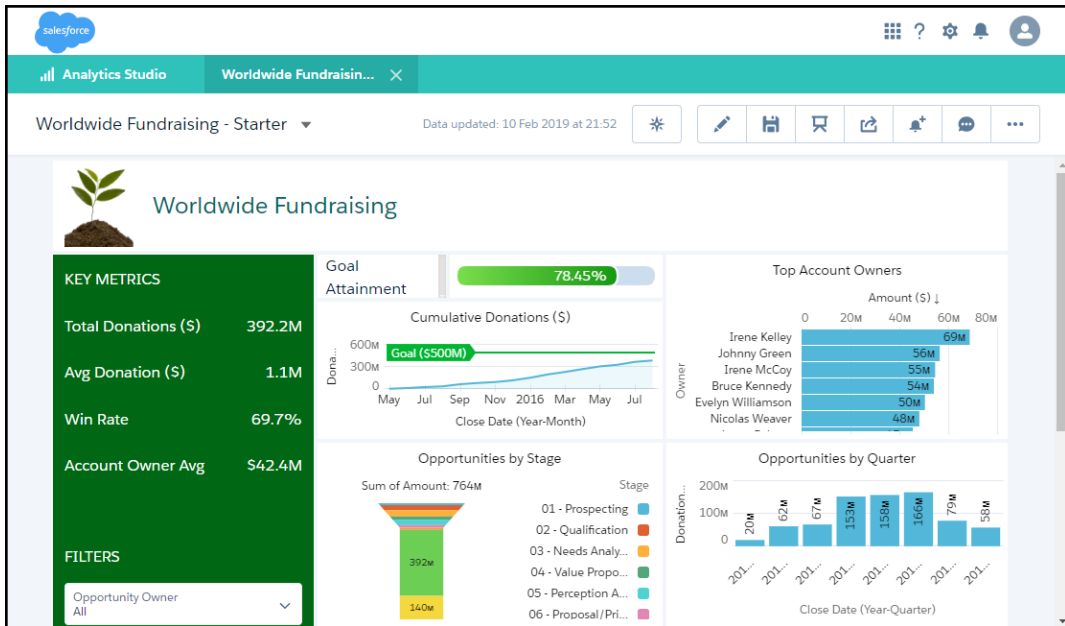
MODEL MANAGER

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COMMUNITY

WHAT'S NEW

| TITLE | DESCRIPTION | CREATED BY | CREATED ON | |
|----------------|--|------------|-----------------|---------|
| My Private App | Use this default app to store private or ... | Paul G... | | Run App |
| ABC Seed | | Paul G... | 10 Feb 2019 ... | Run App |
| My DTC Sales | | Paul G... | 10 Feb 2019 ... | Run App |
| Shared App | | Integr... | 10 Feb 2019 ... | Run App |
| The Motivator | | Paul G... | 10 Feb 2019 ... | Run App |

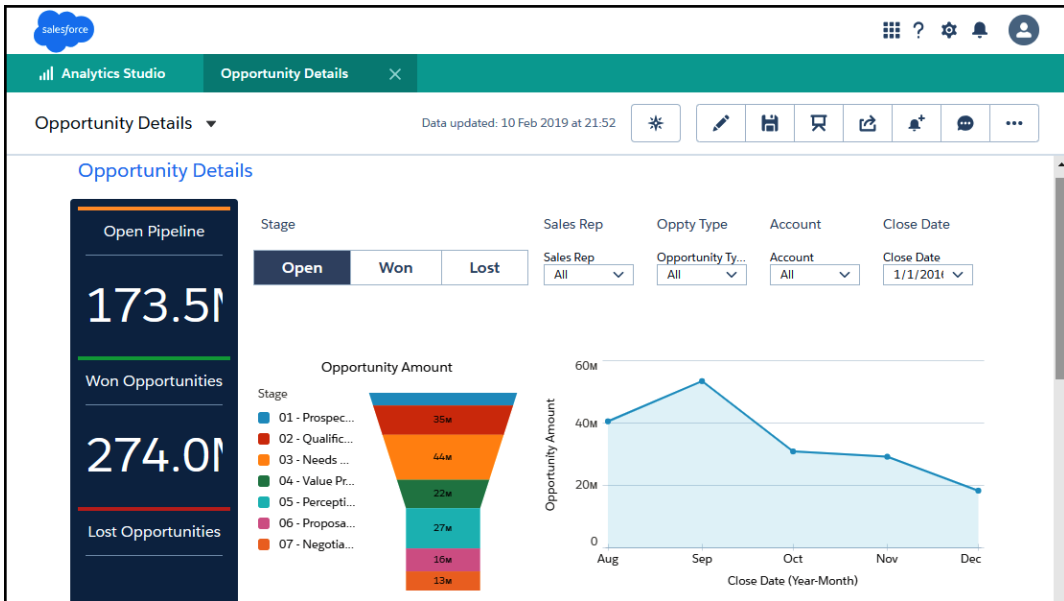


Analytics Studio

ANALYTICS Recent
7 items

Search Dashboards... Create

| ANALYTICS | ALL | APPS | DASHBOARDS | STORIES | LENSES | DATASETS |
|----------------|---------------------------------------|---------------|-------------|-----------------------|--------------------|----------|
| Recent | TITLE | APP | CREATED BY | LAST MODIFIED BY | DATA REFRESHED | |
| Created by Me | DTC Sales | My DTC Sales | Paul Goodey | Paul ... Yesterday... | Yesterday at 21:52 | |
| Shared with Me | Opportunity Details | My DTC Sales | Paul Goodey | Paul ... Yesterday... | Yesterday at 21:52 | |
| Pinned Apps | Regional Sales | My DTC Sales | Paul Goodey | Paul ... Yesterday... | Yesterday at 21:52 | |
| Notifications | Sales Performance with Selectable ... | My DTC Sales | Paul Goodey | Paul ... Yesterday... | Yesterday at 21:52 | |
| | The Motivator 1 | The Motivator | Paul Goodey | Paul ... Yesterday... | Yesterday at 21:52 | |
| DATA MANAGER | The Motivator 2 | The Motivator | Paul Goodey | Paul ... Yesterday... | Yesterday at 21:52 | |
| MODEL MANAGER | Worldwide Fundraising - Starter | ABC Seed | Paul Goodey | Paul ... Yesterday... | Yesterday at 21:52 | |
| LEARN | | | | | | |
| COMMUNITY | | | | | | |
| WHAT'S NEW | | | | | | |



Analytics Studio

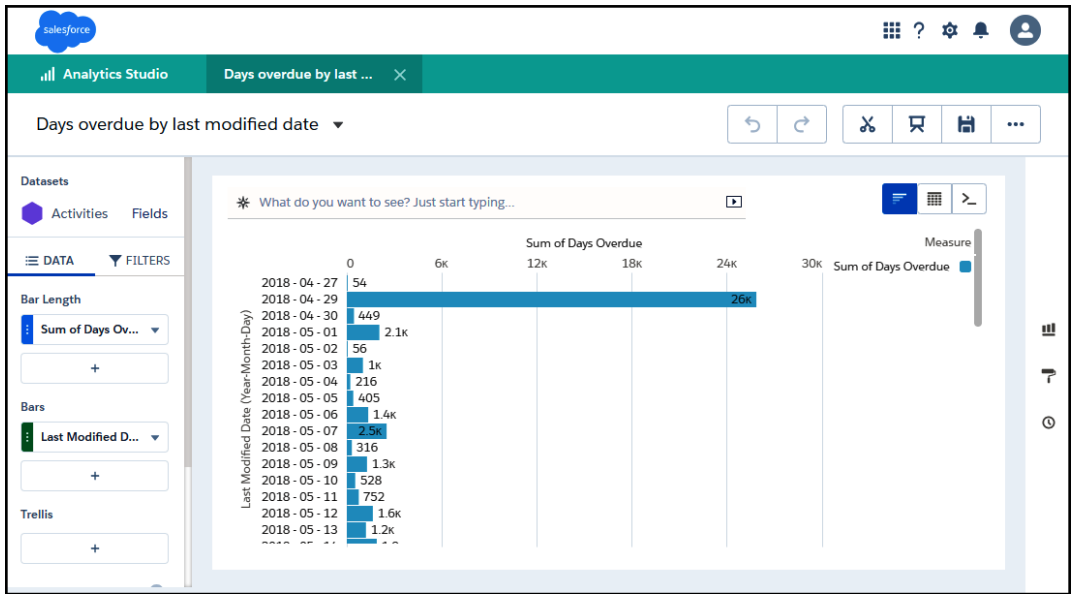
ANALYTICS **Recent** 1 item

Search Lenses... Create

ALL APPS DASHBOARDS STORIES **LENSES** DATASETS

| | TITLE | APP | CREATED BY | LAST MODIFIED BY | DATA REFRESHED |
|----------------|------------------------------------|---------------|--------------|----------------------|---------------------|
| Created by Me | Days overdue by last modified date | The Motivator | Paul Good... | Paul G... Today a... | 10 Feb 2019 at 2... |
| Shared with Me | | | | | |
| Pinned Apps | | | | | |
| Notifications | | | | | |

DATA MANAGER
MODEL MANAGER
LEARN
COMMUNITY
WHAT'S NEW



New dataset

Choose a source for your data.



CSV File

Upload data directly into a dataset.



Salesforce Data

Create a dataset from related Salesforce objects using the dataset builder and dataflow.



External Data

Connectors are not enabled. [Learn More](#)



Your Datasets

Prepare and combine data in datasets using a recipe and create a dataset with the results.

Chapter 13: Studying for the Certified Administrator Exam

No images