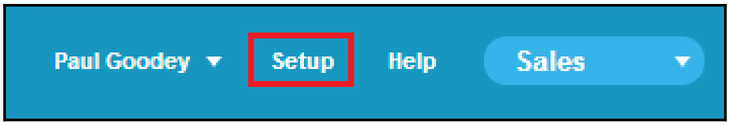
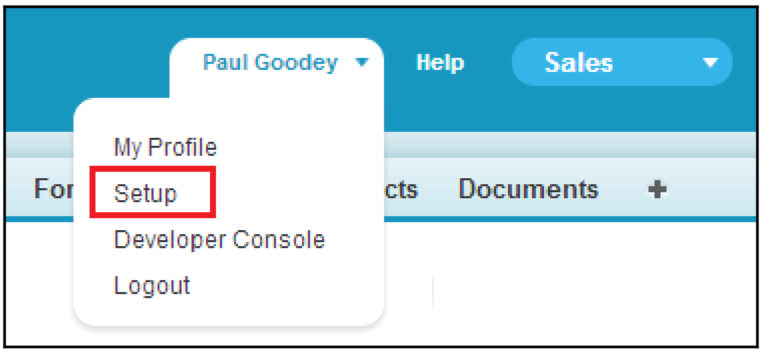
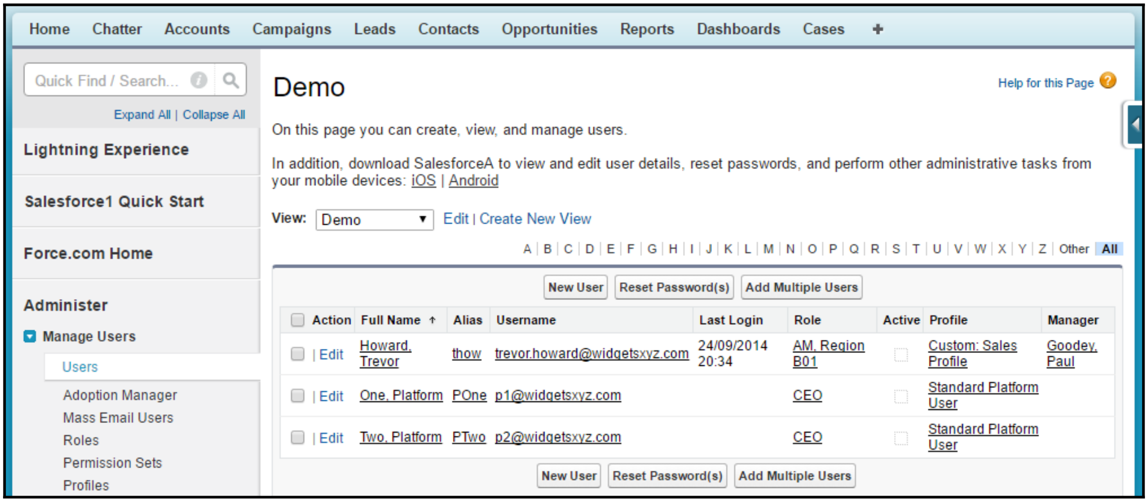
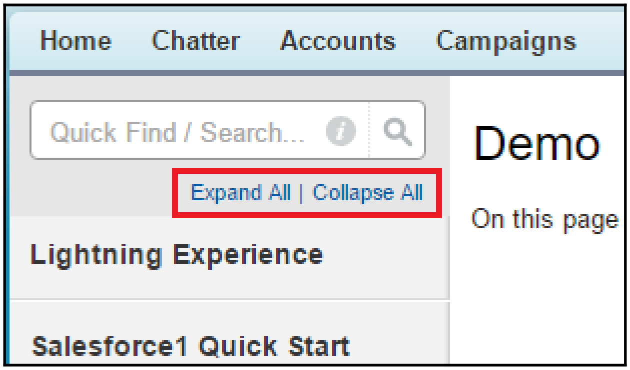
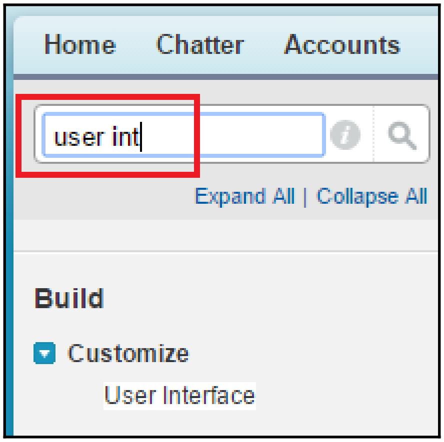
Chapter 1: Setting up Salesforce CRM and the Company Profile

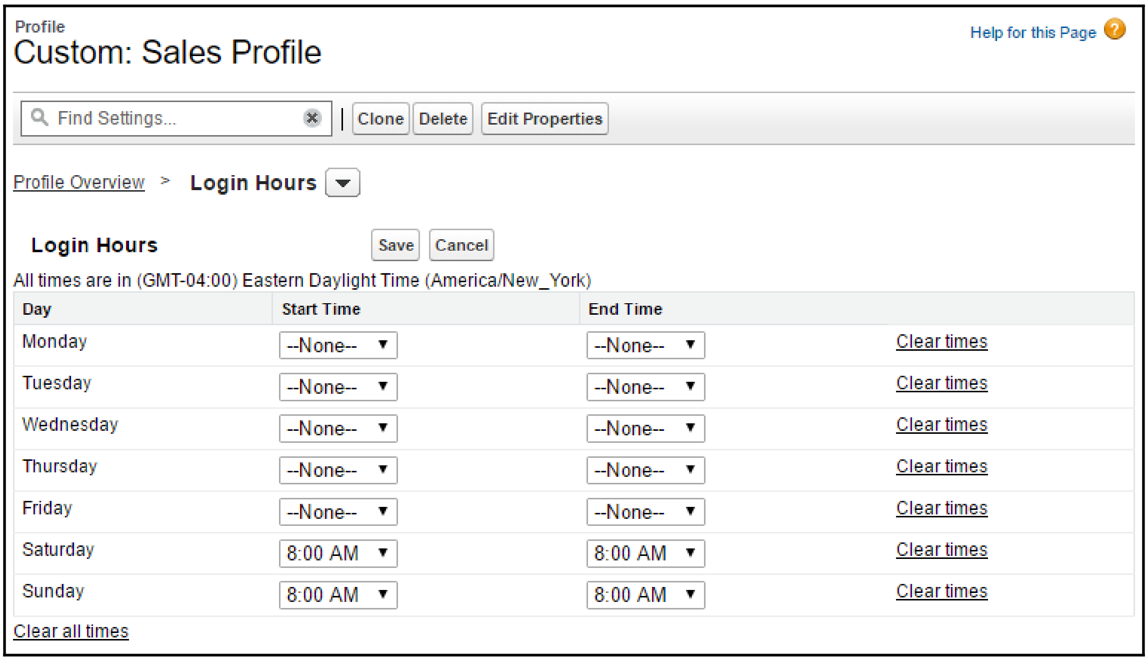


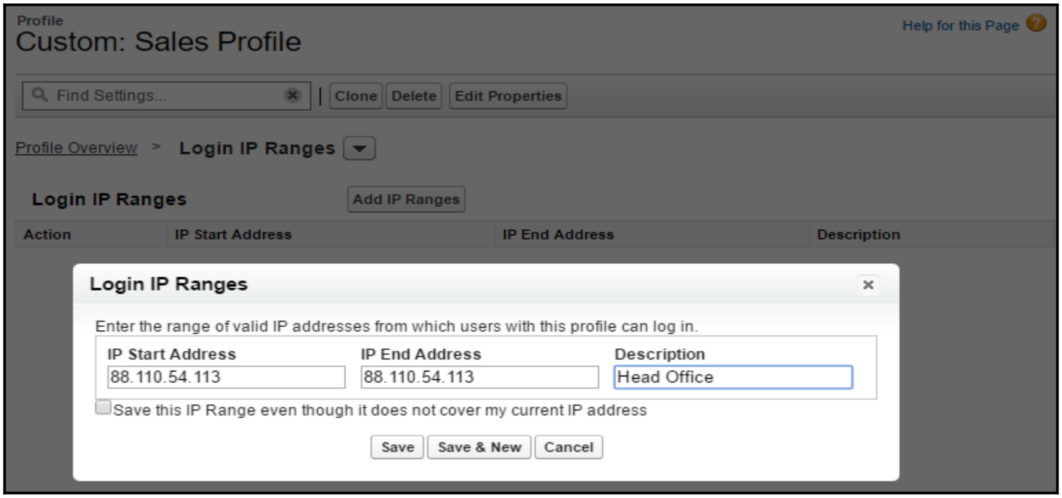


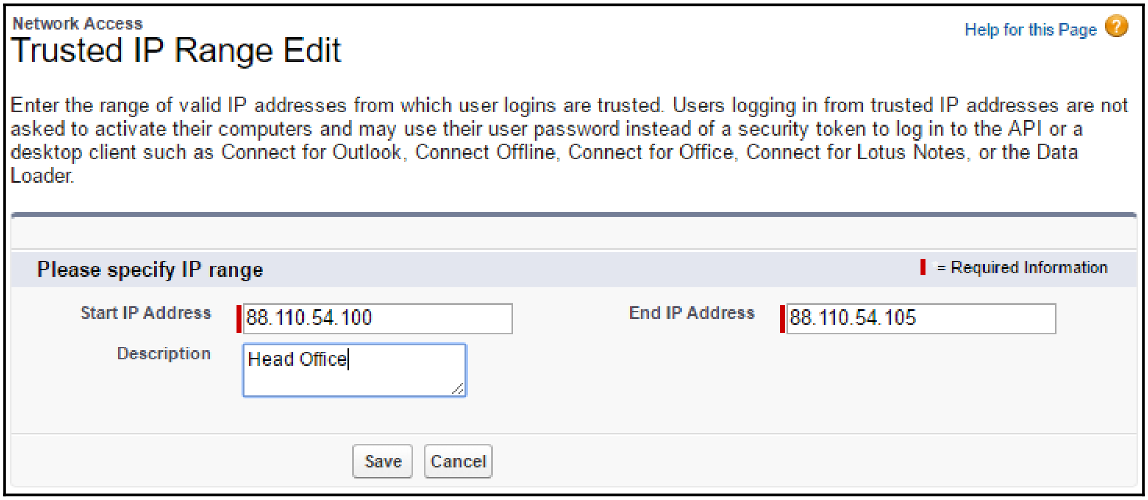

Home
Chatter
Accounts
Campaigns
Leads
Contacts
Opportunities
Reports
Dashboards
Cases
Quick Find / Search...
Expand All | Collapse All
Lightning Experience
Salesforce1 Quick Start
Force.com Home
Administer
Manage Users
Users
Adoption Manager
Mass Email Users
Roles
Permission Sets
Profiles
Demo
Help for this Page
On this page you can create, view, and manage users.
In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android
View: Demo
Edit | Create New View
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
New User
Reset Password(s)
Add Multiple Users
Action
Full Name
Alias
Username
Last Login
Role
Active
Profile
Manager
| Edit
Howard, Trevor
thow
trevor.howard@widgetsxyz.com
24/09/2014 20:34
AM, Region B01
Custom: Sales Profile
Goodey, Paul
| Edit
One, Platform
POne
p1@widgetsxyz.com
CEO
Standard Platform User
| Edit
Two, Platform
PTwo
p2@widgetsxyz.com
CEO
Standard Platform User
New User
Reset Password(s)
Add Multiple Users


Home
Chatter
Accounts
Campaigns
Quick Find / Search...
Expand All | Collapse All
Demo
On this page
Lightning Experience
Salesforce1 Quick Start


Home Chatter Accounts
user int
Expand All | Collapse All
Build
Customize
User Interface


Profile
Custom: Sales Profile
Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Profile Overview > Login Hours
Login Hours
Save
Cancel
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


Profile
Custom: Sales Profile
Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Profile Overview > Login IP Ranges
Login IP Ranges
Add IP Ranges
Action
IP Start Address
IP End Address
Description
Login IP Ranges
Enter the range of valid IP addresses from which users with this profile can log in.
IP Start Address
88.110.54.113
IP End Address
88.110.54.113
Description
Head Office
Save this IP Range even though it does not cover my current IP address
Save
Save & New
Cancel


Network Access
Trusted IP Range Edit
Help for this Page
Enter the range of valid IP addresses from which user logins are trusted. Users logging in from trusted IP addresses are not asked to activate their computers and may use their user password instead of a security token to log in to the API or a desktop client such as Connect for Outlook, Connect Offline, Connect for Office, Connect for Lotus Notes, or the Data Loader.
Please specify IP range
= Required Information
Start IP Address
88.110.54.100
End IP Address
88.110.54.105
Description
Head Office
Save
Cancel

Activated Login IP

Help for this Page

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

View: All ▾ Create New View

<Previous Page | Next Page>

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

Remove

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

Activated Client Browsers

Help for this Page

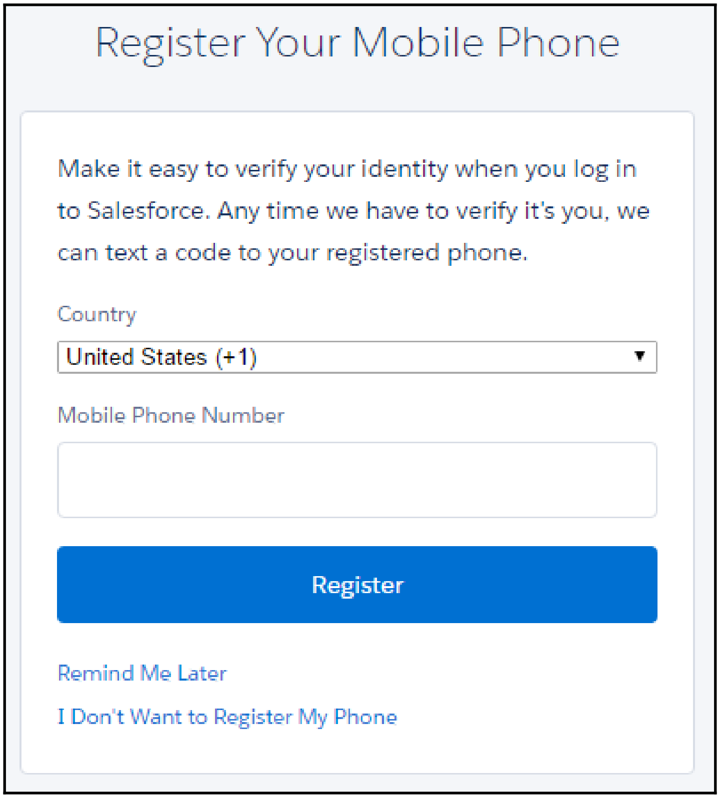
The list below shows Activated Client Browser information, with the browser agent information stored when a user accesses an organization from an activated device IP address.

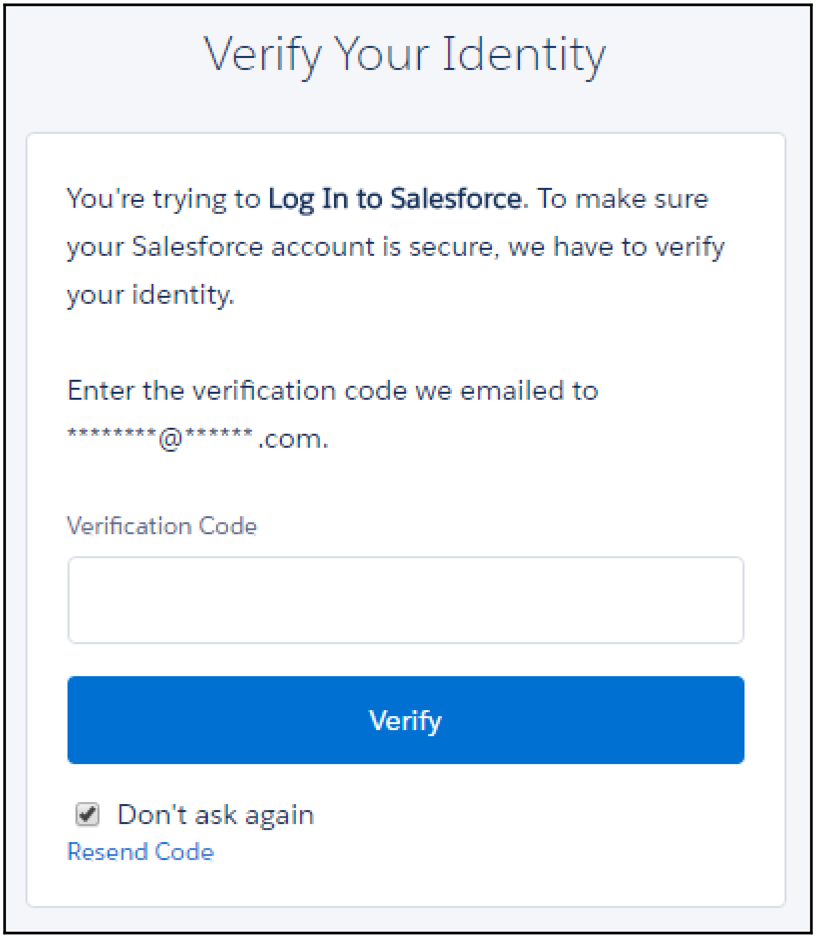
View: All ▾ Create New View

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

Remove

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


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

To

07:45

Reply ▾

Dear

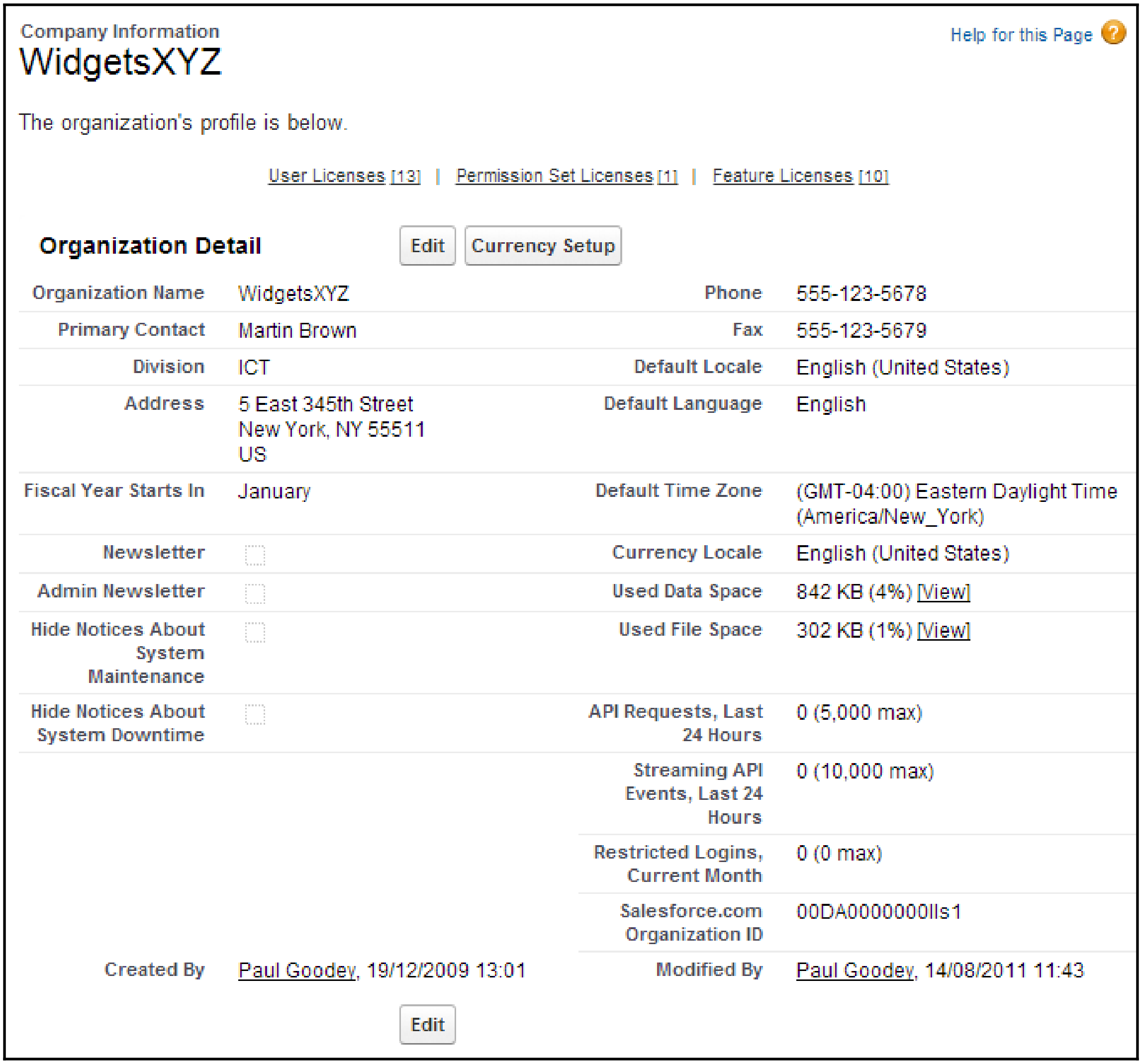
You have requested access to salesforce.com from an unknown device. Use the verification code below within 24 hours to activate this device.

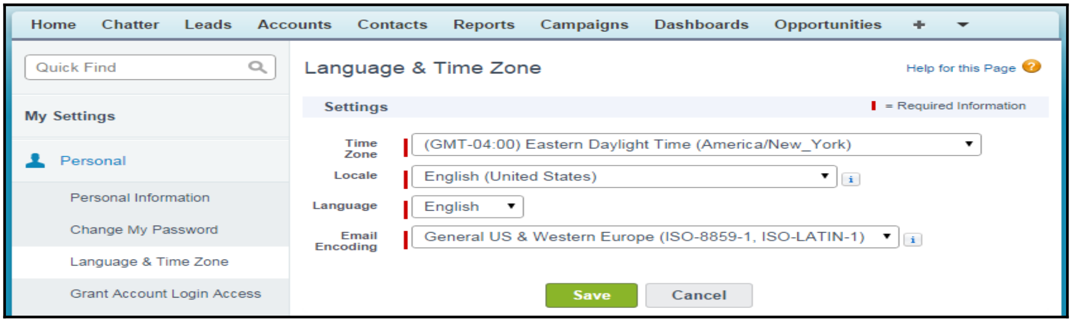
Verification Code: 83295

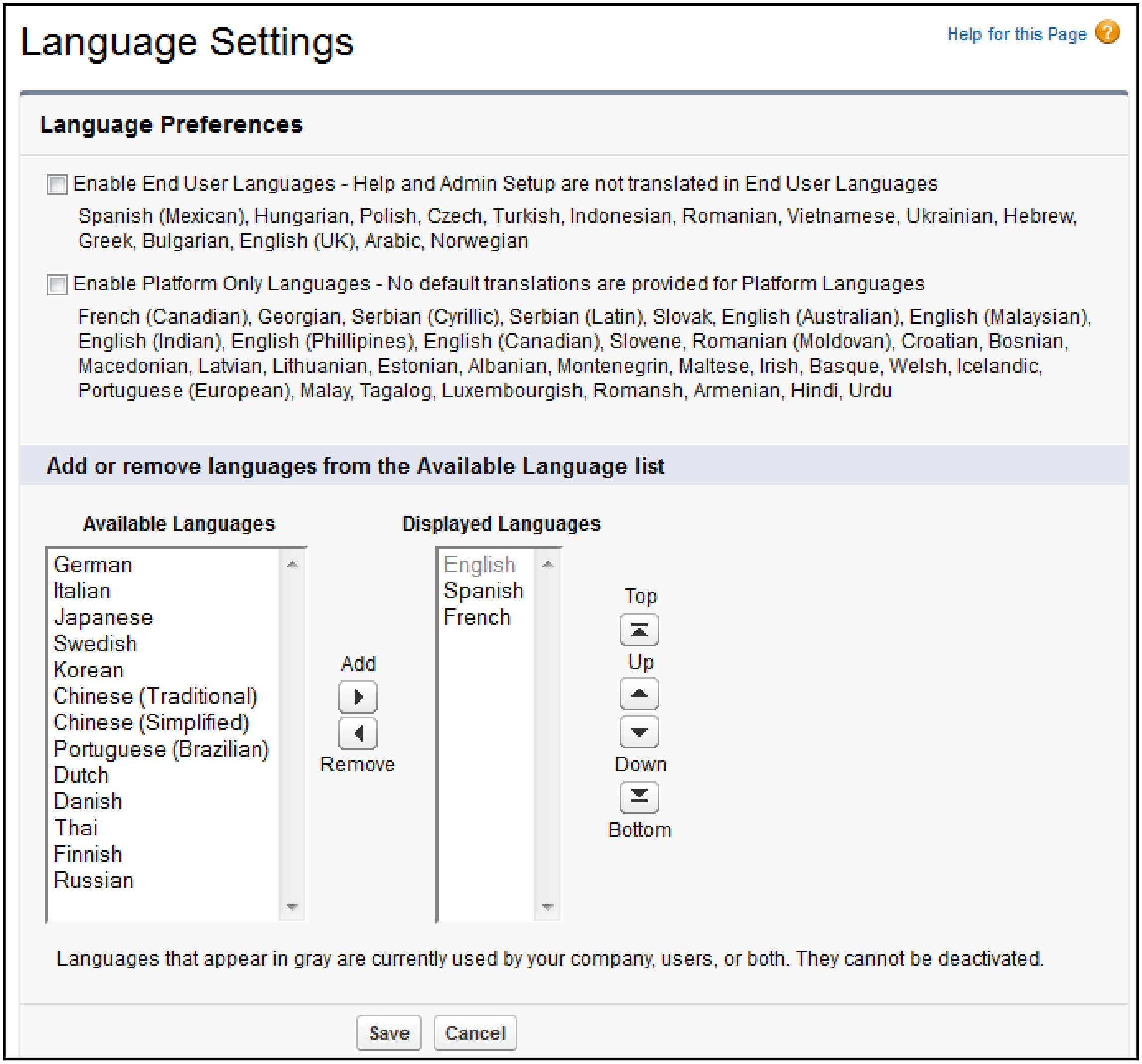
IMPORTANT: If you have not requested to activate a device, or believe you have received this message in error, please contact salesforce.com support (support@salesforce.com) immediately.

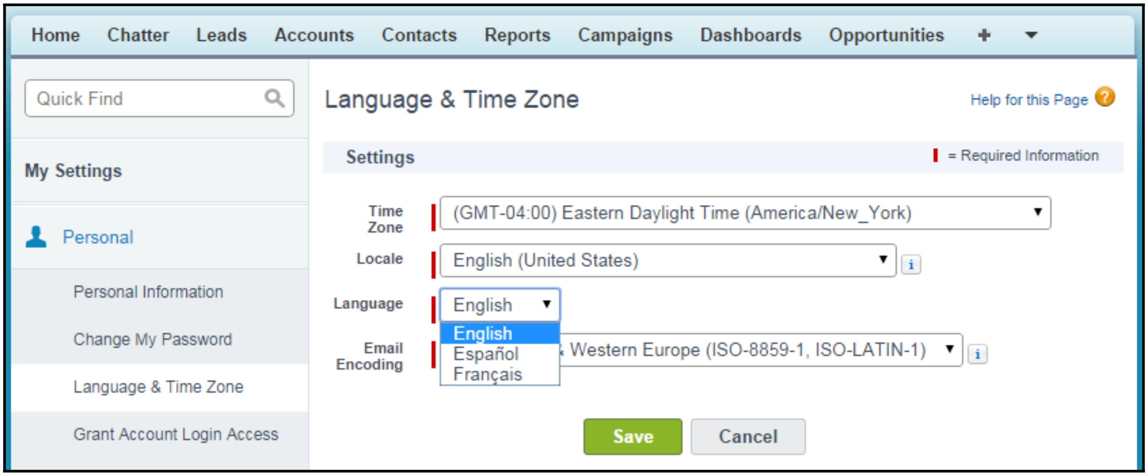
What does "activation" mean? Should I activate this computer?

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


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


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

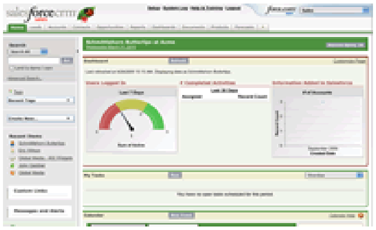

Language Settings
Help for this Page
Language Preferences
Enable End User Languages - Help and Admin Setup are not translated in End User Languages
Spanish (Mexican), Hungarian, Polish, Czech, Turkish, Indonesian, Romanian, Vietnamese, Ukrainian, Hebrew, Greek, Bulgarian, English (UK), Arabic, Norwegian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


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

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 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

- [x] Enable Collapsible Sections
- [x] Show Quick Create
- [x] Enable Hover Details
- [x] Enable Related List Hover Links
- [x] Enable Separate Loading of Related Lists
  - [x] Enable Separate Loading of Related Lists of External Objects
- [x] Enable Inline Editing
- [x] Enable Enhanced Lists
- [x] 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.

- [x] Enable Tab Bar Organizer
- [x] Enable Printable List Views
- [x] Enable Customization of Chatter User Profile Pages
- [x] Enable Salesforce Notification Banner
- [x] Disable Lightning Experience IE11 Support Deprecation Notification

Sidebar

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

Calendar

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

Name Settings

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

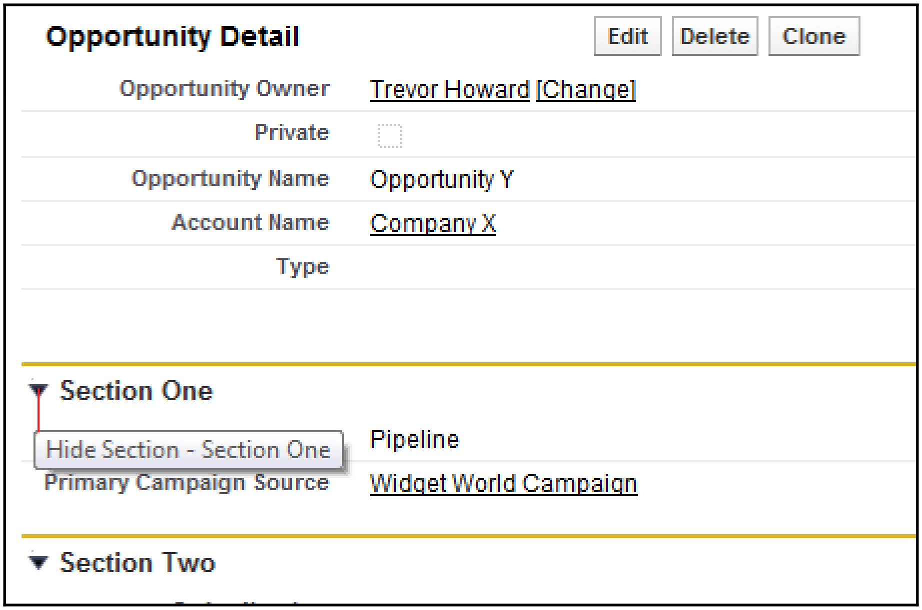
Setup

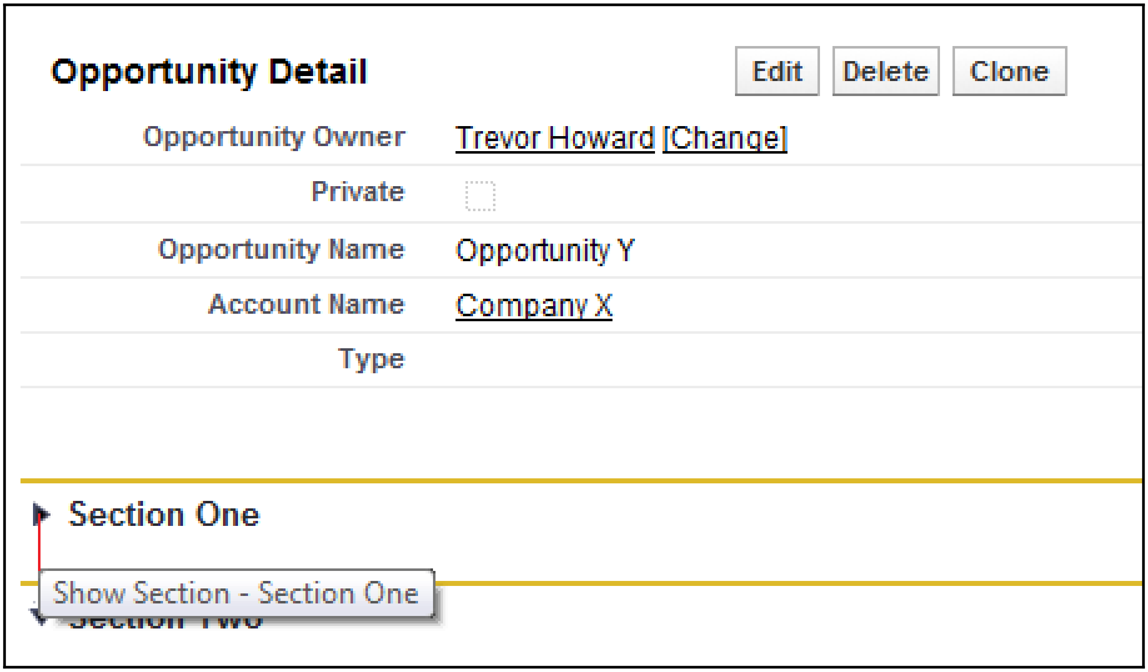
- [x] Enable Enhanced Page Layout Editor
- [x] Enable Enhanced Profile List Views
- [ ] Enable Enhanced Profile User Interface
- [x] Enable Streaming API
- [x] Enable Dynamic Streaming Channel Creation
- [ ] Enable "Set Audit Fields upon Record Creation" and "Update Records with Inactive Owners" User Permissions
- [ ] Enable Custom Object Truncate
- [x] Enable Improved Setup User Interface
- [x] Enable Advanced Setup Search (Beta)

Advanced

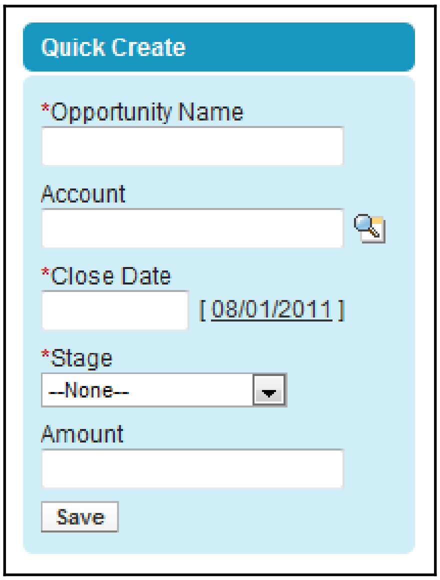
- [x] Activate Extended Mail Merge
- [x] Always save Extended Mail Merge documents to the Document tab

Save | Cancel

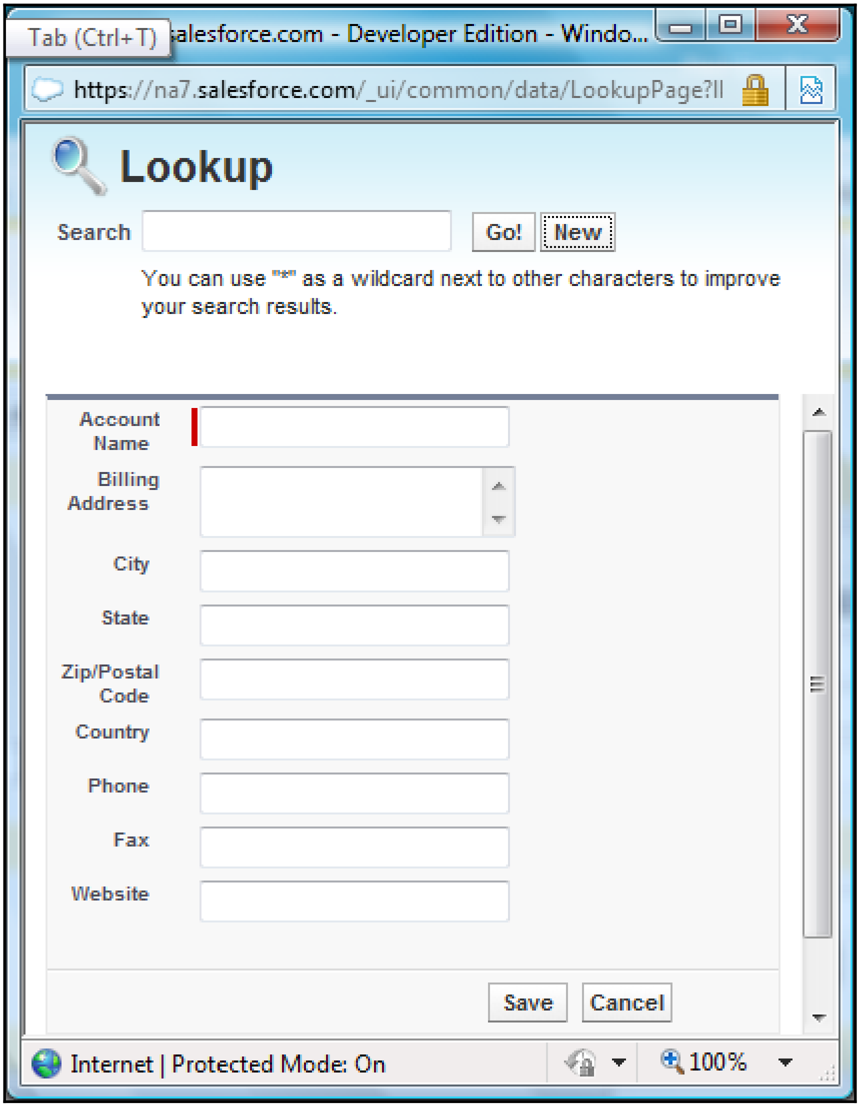

Opportunity Detail
Edit
Delete
Clone
Opportunity Owner
Trevor Howard [Change]
Private
Opportunity Name
Opportunity Y
Account Name
Company X
Type
Section One
Hide Section - Section One
Pipeline
Primary Campaign Source
Widget World Campaign
Section Two

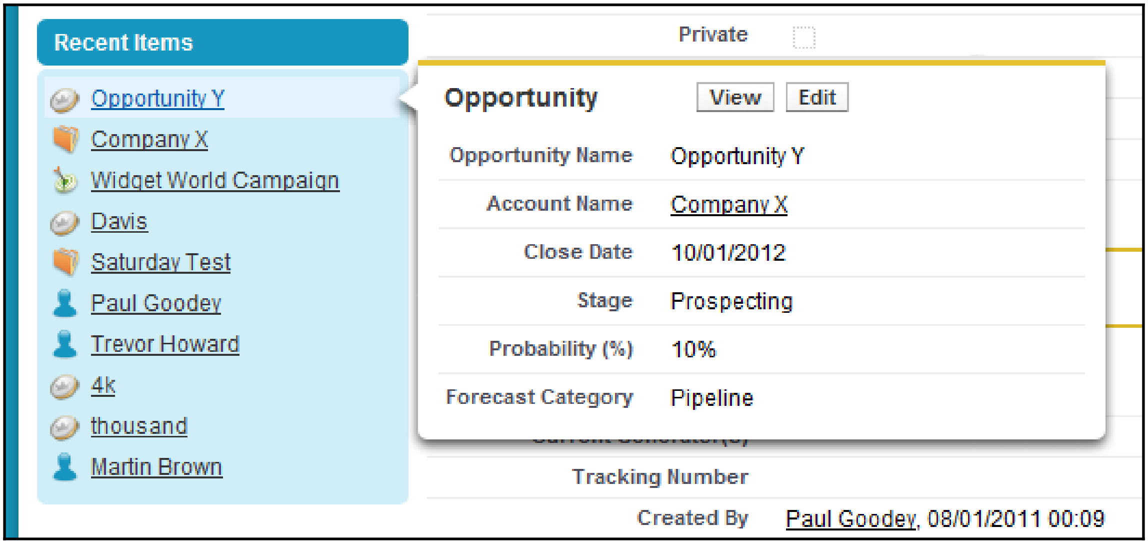


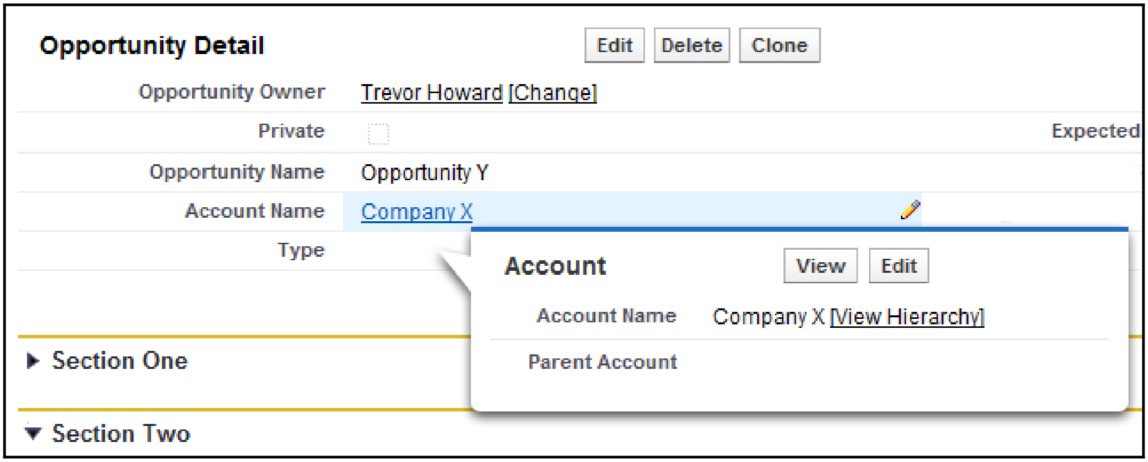
Opportunity Detail
Edit
Delete
Clone
Opportunity Owner
Trevor Howard [Change]
Private
Opportunity Name
Opportunity Y
Account Name
Company X
Type
Section One
Show Section - Section One



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

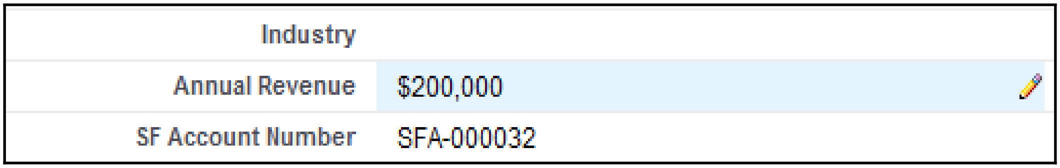

Tab (Ctrl+T)
alesforce.com - Developer Edition - Windo...
https://na7.salesforce.com/_ui/common/data/LookupPage?ll
Lookup
Search
Go!
New
You can use "*" as a wildcard next to other characters to improve your search results.
Account Name
Billing Address
City
State
Zip/Postal Code
Country
Phone
Fax
Website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

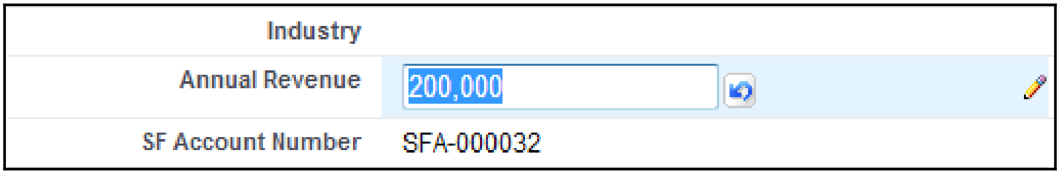

Recent Items
Opportunity Y
Company X
Widget World Campaign
Davis
Saturday Test
Paul Goodey
Trevor Howard
4k
thousand
Martin Brown
Private
Opportunity
View
Edit
Opportunity Name
Opportunity Y
Account Name
Company X
Close Date
10/01/2012
Stage
Prospecting
Probability (%)
10%
Forecast Category
Pipeline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

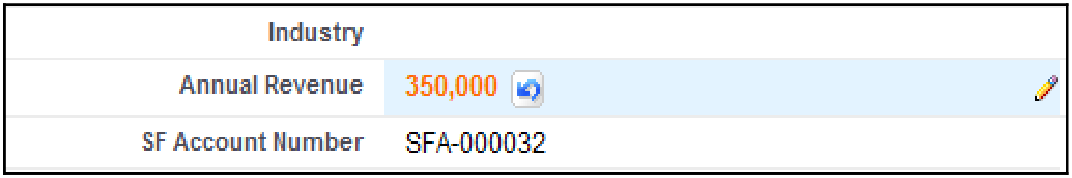

Opportunity Detail
Edit
Delete
Clone
Opportunity Owner
Trevor Howard [Change]
Private
Expected
Opportunity Name
Opportunity Y
Account Name
Company X
Type
Account
View
Edit
Account Name
Company X [View Hierarchy]
Parent Account
Section One
Section Two

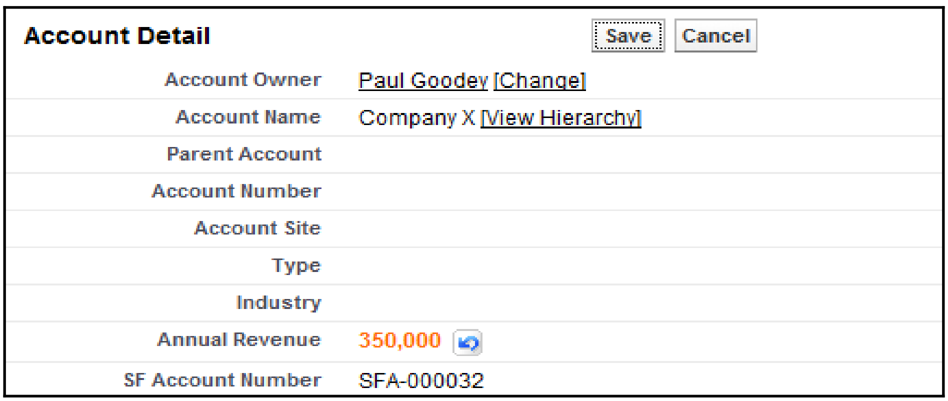

Account
Edge Communications
« Back to List: Accounts
Contacts [...] | Opportunities [...] | Cases [...] | Open Activities [...] | Activity History [...] | Notes & Attachments [...] |
Account Detail
Edit
Delete
Include Offline
Account Owner
Paul Goodey [Change]
Account Name
Edge Communications [View Hierarchy]

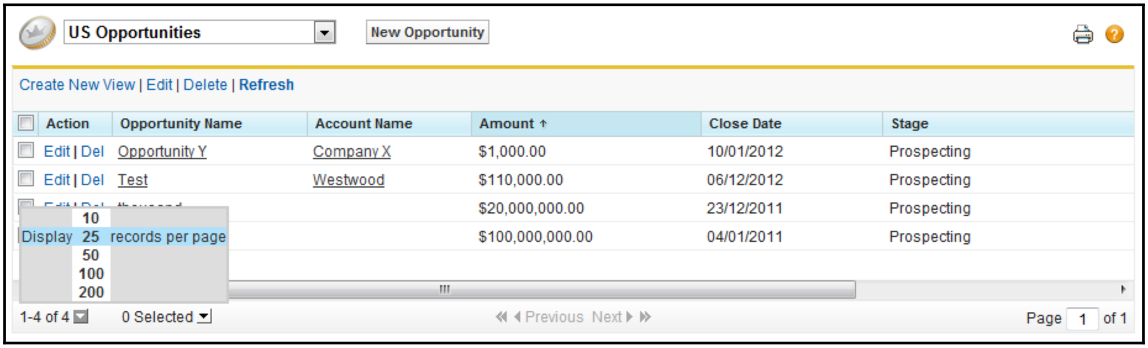

Account
Edge Communications
« Back to List: Accounts
Contacts [2] | Opportunities [4] | Cases [3] | Open Activities [0] | Activity History [0] | Notes & Attachments [0] |
Account Detail
Edit
Delete
Include Offline
Account Owner
Paul Goodey [Change]
Account Name
Edge Communications [View Hierarchy]

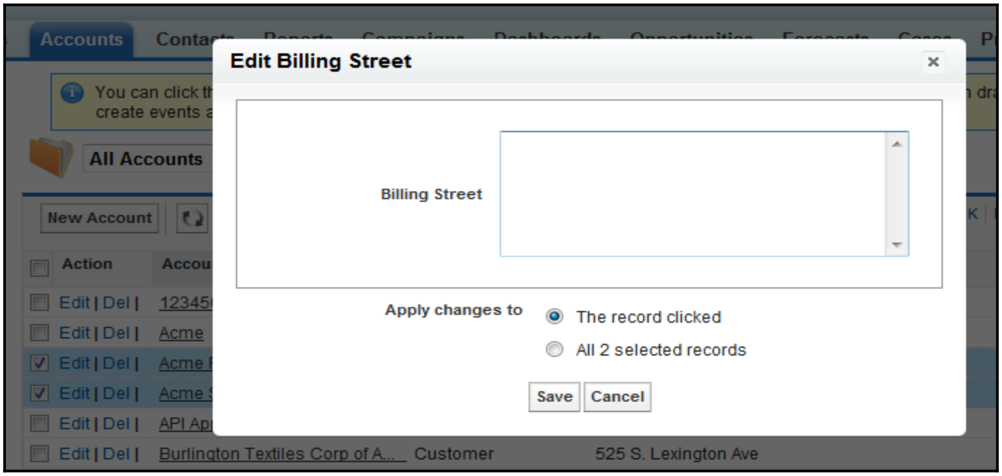

Industry
Annual Revenue
$200,000
SF Account Number
SFA-000032

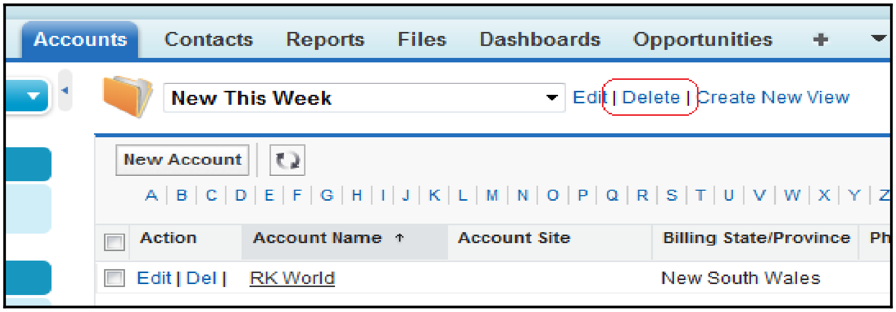

Industry
Annual Revenue
200,000
SF Account Number
SFA-000032

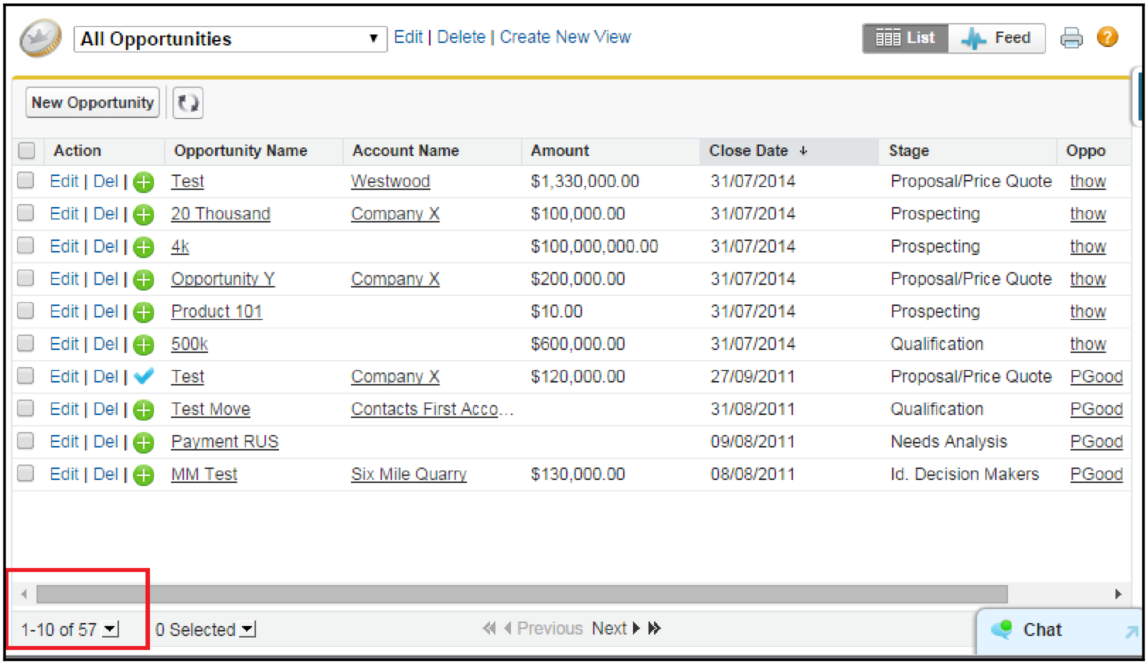

Industry
Annual Revenue
350,000
SF Account Number
SFA-000032

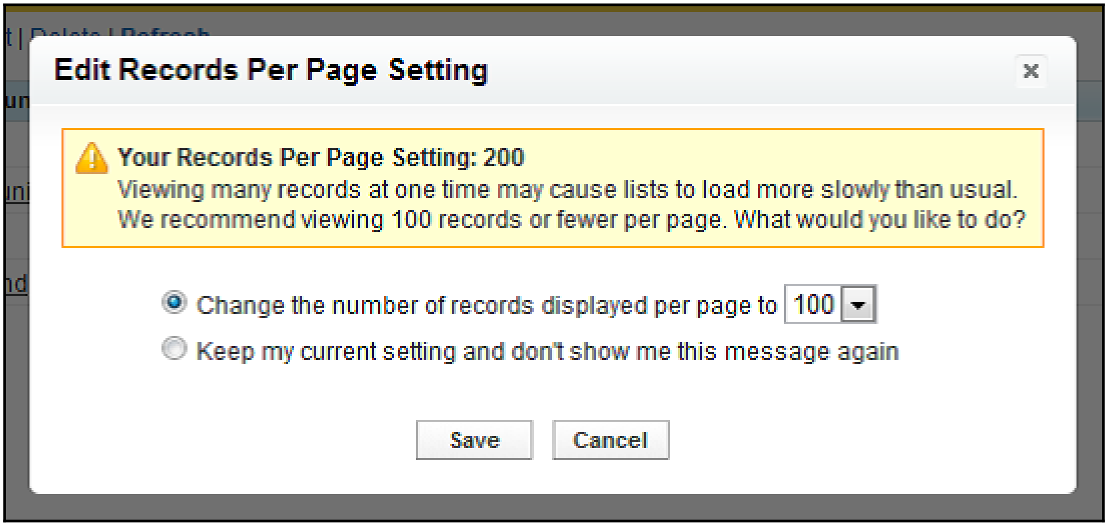

Account Detail
Save
Cancel
Account Owner
Paul Goodey [Change]
Account Name
Company X [View Hierarchy]
Parent Account
Account Number
Account Site
Type
Industry
Annual Revenue
350,000
SF Account Number
SFA-000032

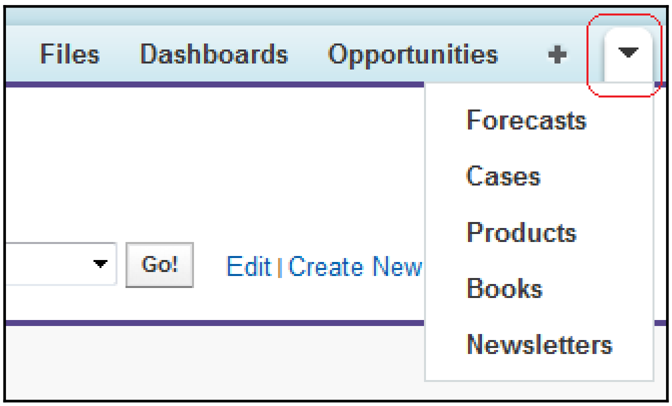

US Opportunities
New Opportunity
Create New View | Edit | Delete | Refresh
Action
Opportunity Name
Account Name
Amount
Close Date
Stage
Edit | Del
Opportunity Y
Company X
$1,000.00
10/01/2012
Prospecting
Edit | Del
Test
Westwood
$110,000.00
06/12/2012
Prospecting
$20,000,000.00
23/12/2011
Prospecting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

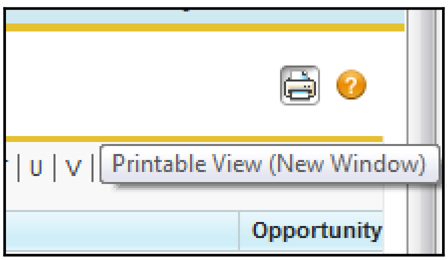

Accounts
Edit Billing Street
Billing Street
Apply changes to
The record clicked
All 2 selected records
Save
Cancel
All Accounts
New Account
Action
Edit | Del |
Burlington Textiles Corp of A...
Customer
525 S. Lexington Ave


Accounts
Contacts
Reports
Files
Dashboards
Opportunities
New This Week
Edit | Delete | Create New View
New Account
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z
Action
Account Name
Account Site
Billing State/Province
Edit | Del |
RK World
New South Wales


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


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


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


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

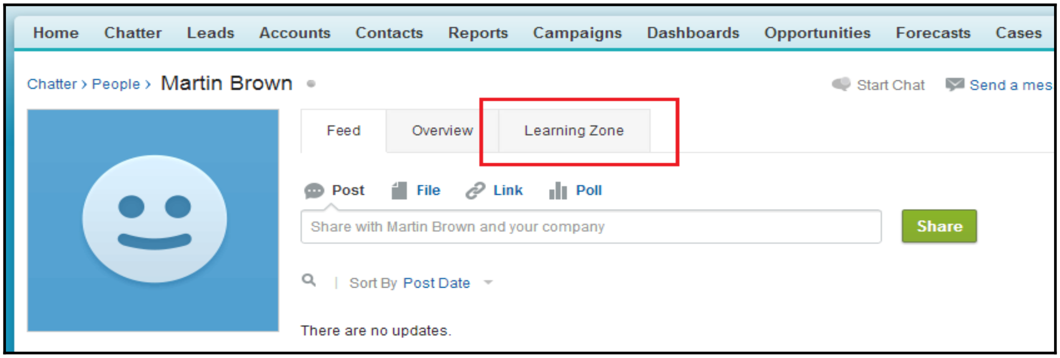
salesforce.com Success On Demand.

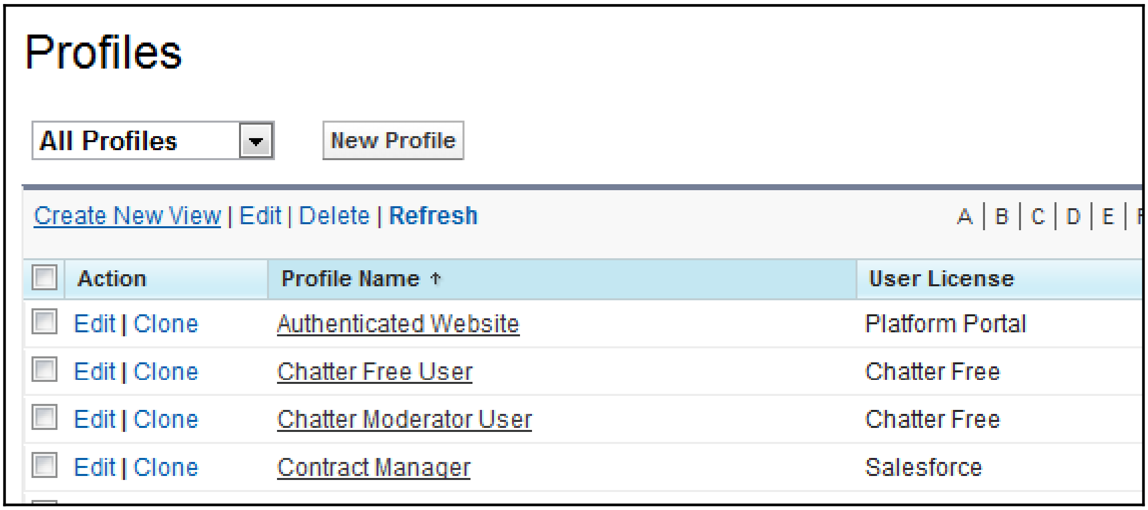
- Close Window
- Print This Page

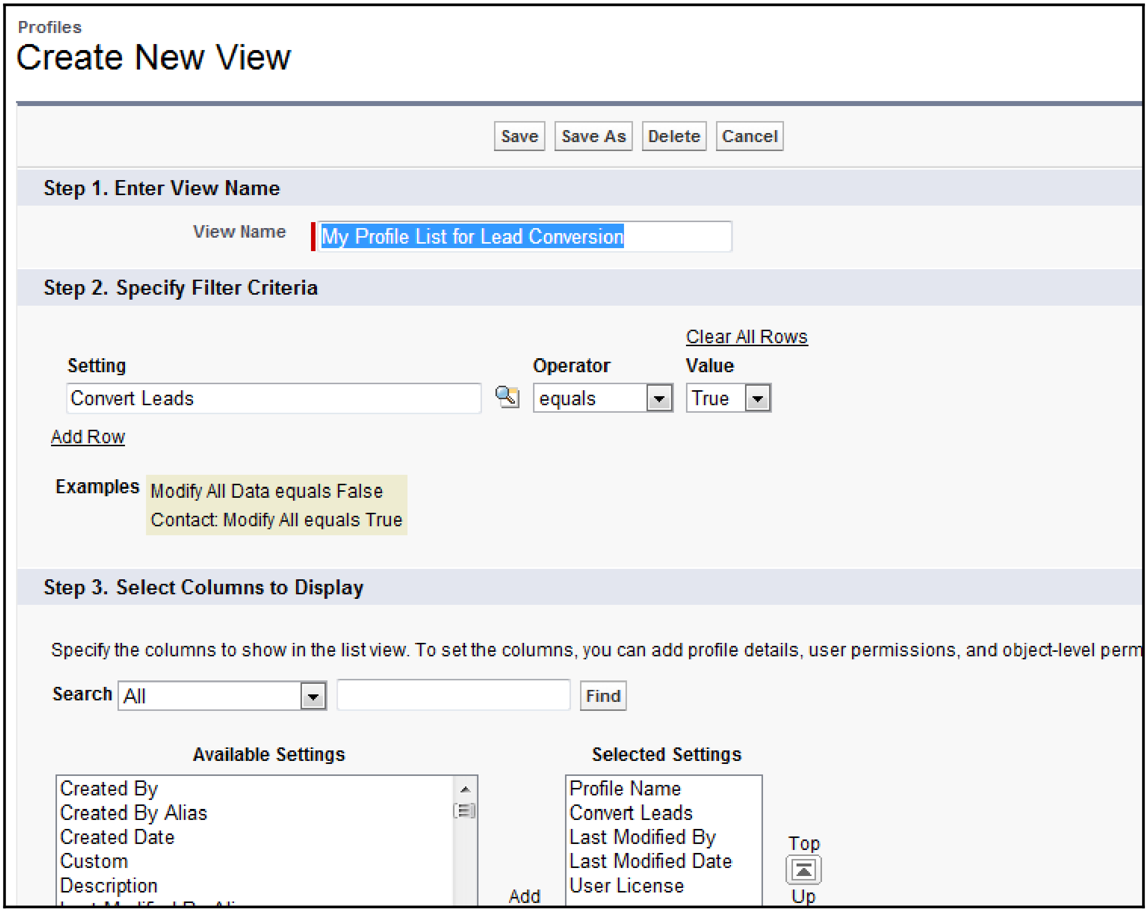
US Opportunities
Displaying records 1 - 4

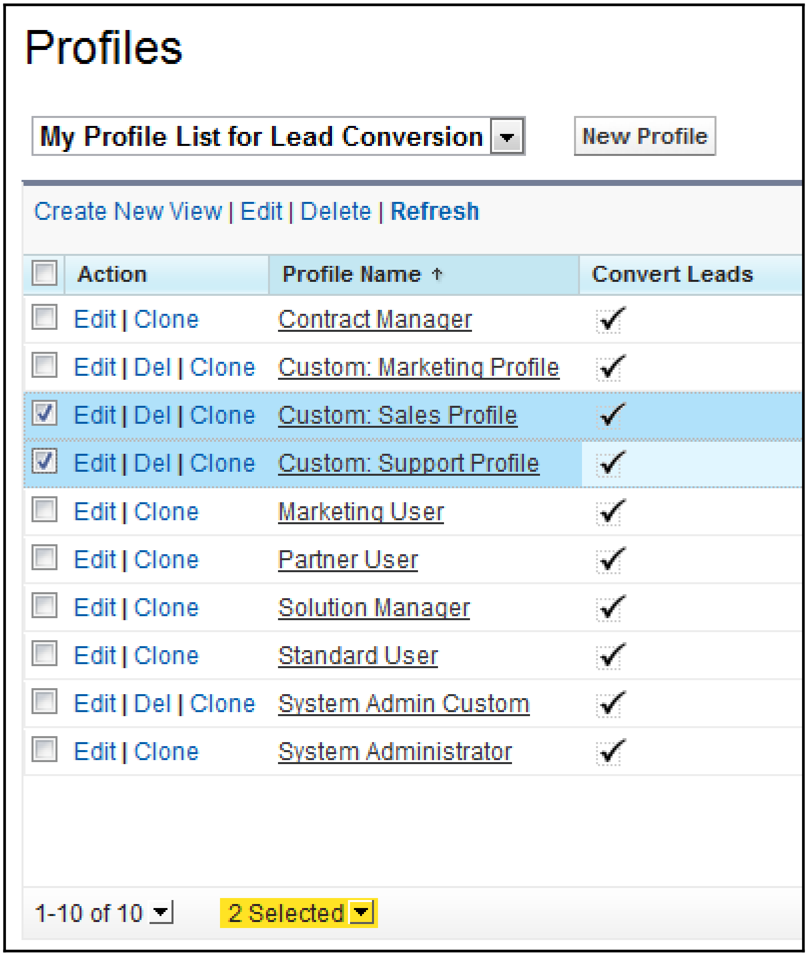
Number of records 4

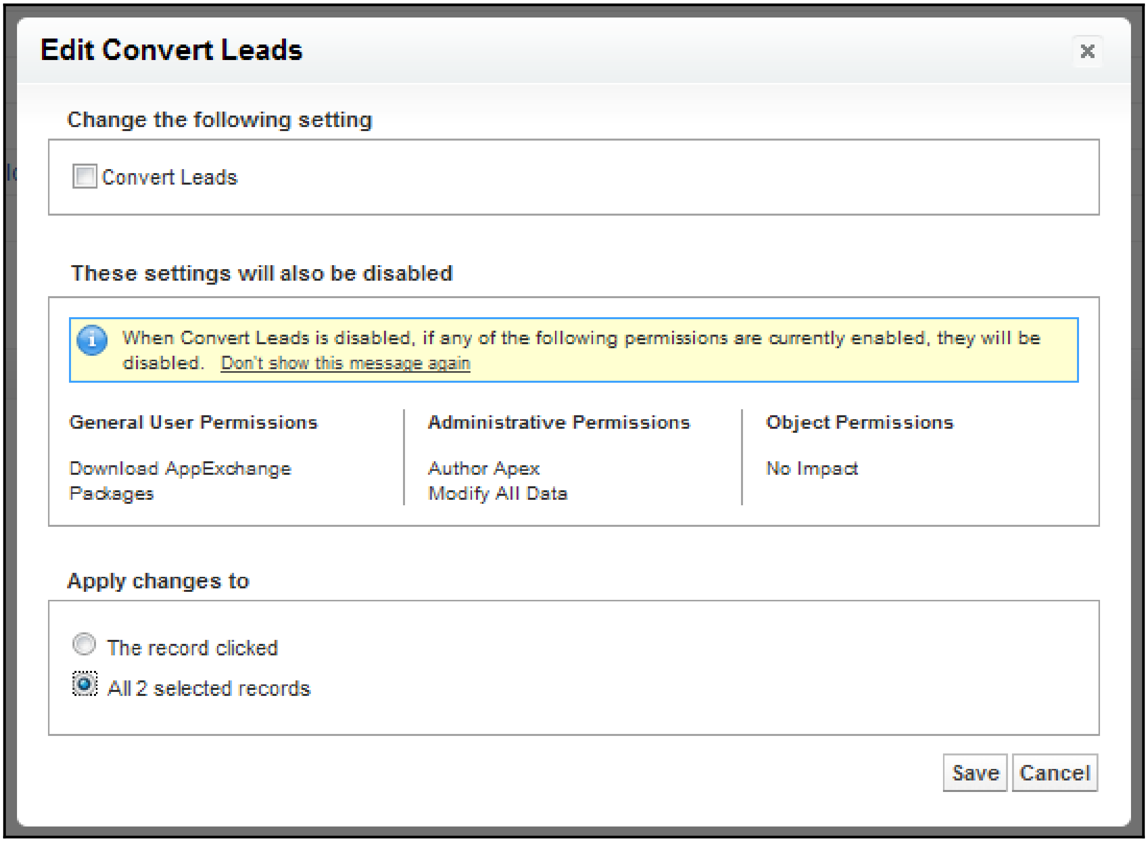
Opportunity Name ↑	Account Name	Amount	Close Date	Stage	Opportunity Owner Alias
4k		$100,000,000.00	04/01/2011	Prospecting	jsmit
Opportunity Y	Company X	$1,000.00	10/01/2012	Prospecting	jsmit
Test	Westwood	$110,000.00	06/12/2012	Prospecting	jsmit
thousand		$20,000,000.00	23/12/2011	Prospecting	jsmit

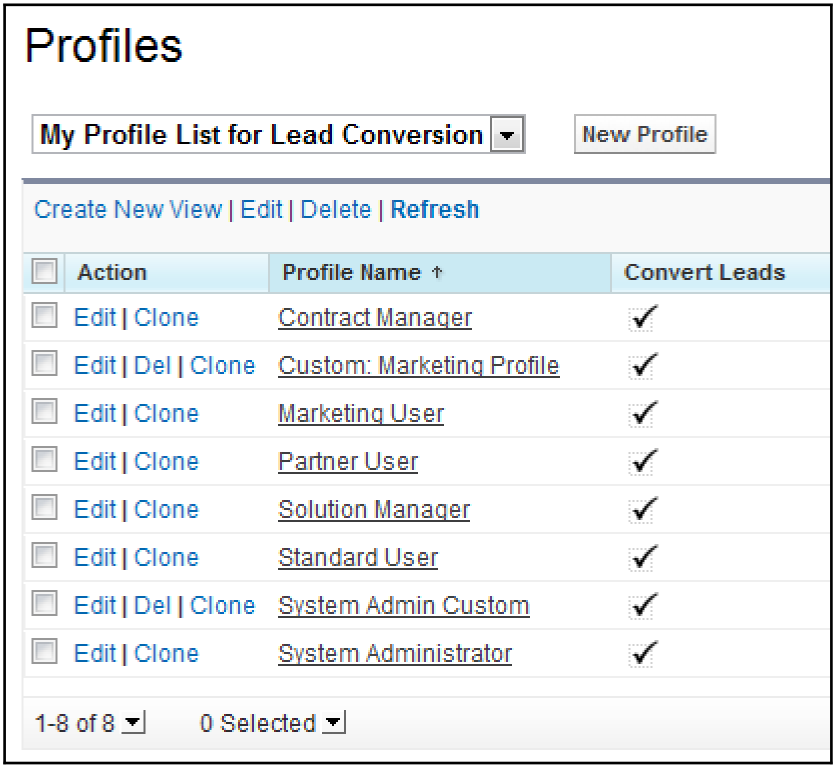

Home Chatter Leads Accounts Contacts Reports Campaigns Dashboards Opportunities Forecasts Cases
Chatter › People › Martin Brown
Start Chat
Send a mes
Feed
Overview
Learning Zone
Post
File
Link
Poll
Share with Martin Brown and your company
Share
Sort By Post Date
There are no updates.

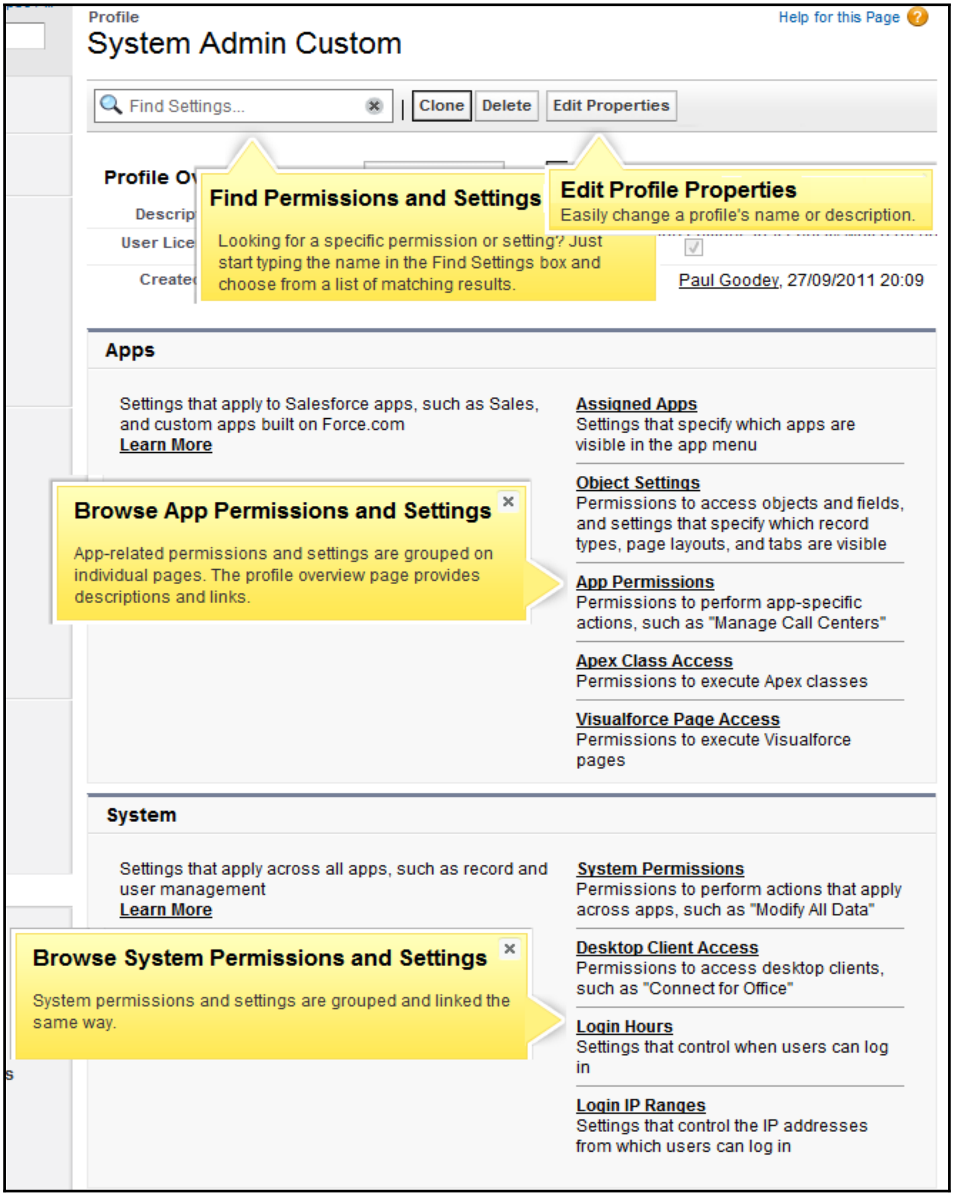

Profiles
All Profiles
New Profile
Create New View | Edit | Delete | Refresh
A | B | C | D | E |
Action
Profile Name ↑
User License
Edit | Clone
Authenticated Website
Platform Portal
Edit | Clone
Chatter Free User
Chatter Free
Edit | Clone
Chatter Moderator User
Chatter Free
Edit | Clone
Contract Manager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

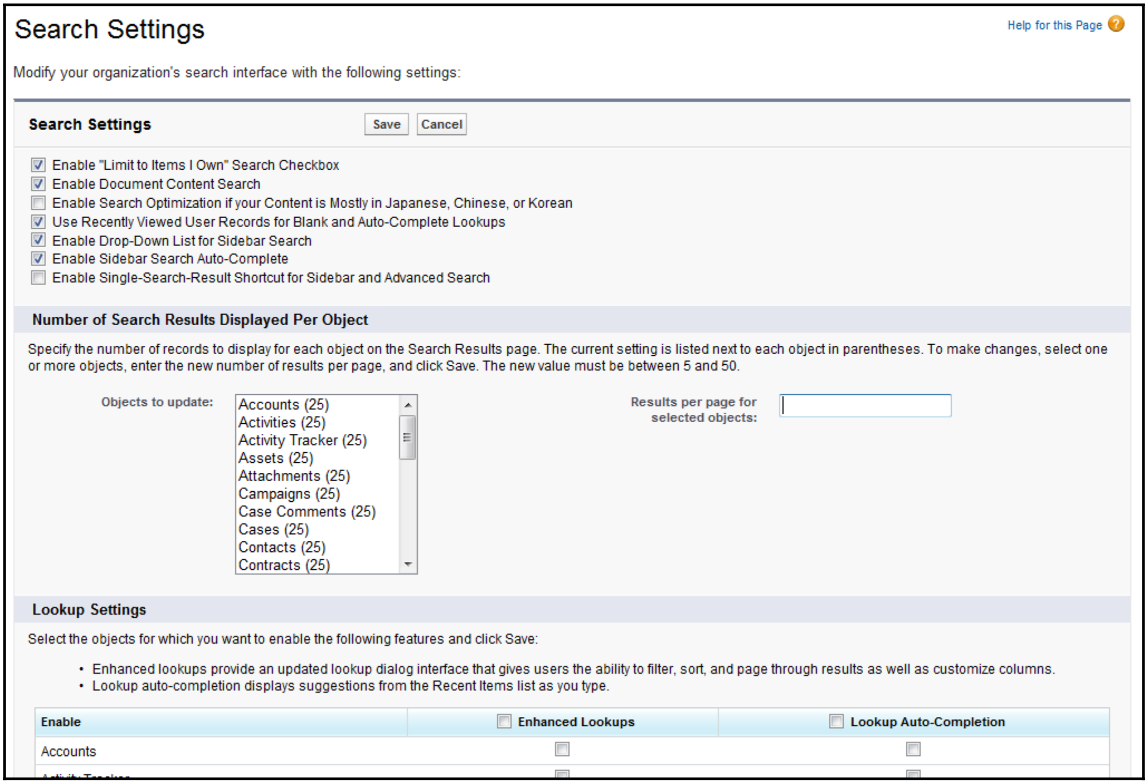

Profiles
Create New View
Save
Save As
Delete
Cancel
Step 1. Enter View Name
View Name
My Profile List for Lead Conversion
Step 2. Specify Filter Criteria
Clear All Rows
Setting
Operator
Value
Convert Leads
equals
True
Add Row
Examples
Modify All Data equals False
Contact: Modify All equals True
Step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

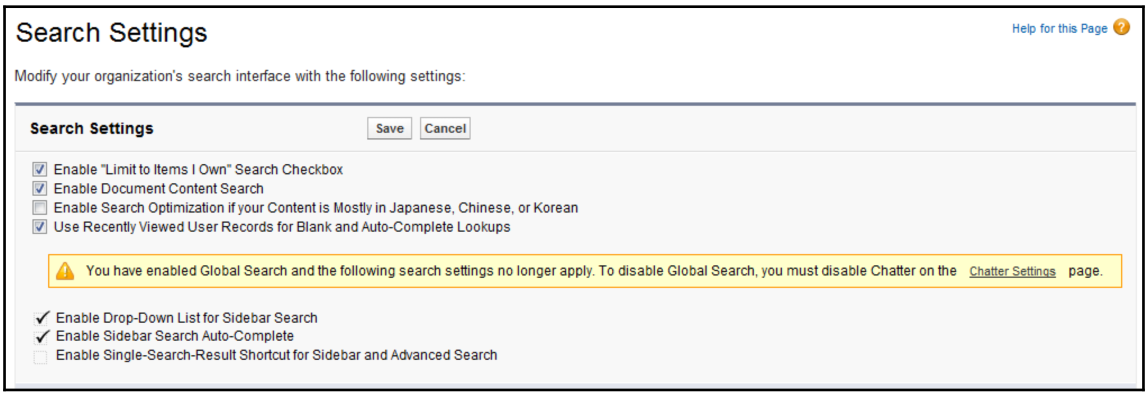

Profiles
My Profile List for Lead Conversion
New Profile
Create New View | Edit | Delete | Refresh
Action
Profile Name ↑
Convert Leads
Edit | Clone
Contract Manager
Edit | Del | Clone
Custom: Marketing Profile
Edit | Del | Clone
Custom: Sales Profile
Edit | Del | Clone
Custom: Support Profile
Edit | Clone
Marketing User
Edit | Clone
Partner User
Edit | Clone
Solution Manager
Edit | Clone
Standard User
Edit | Del | Clone
System Admin Custom
Edit | Clone
System Administrator
1-10 of 10
2 Selected

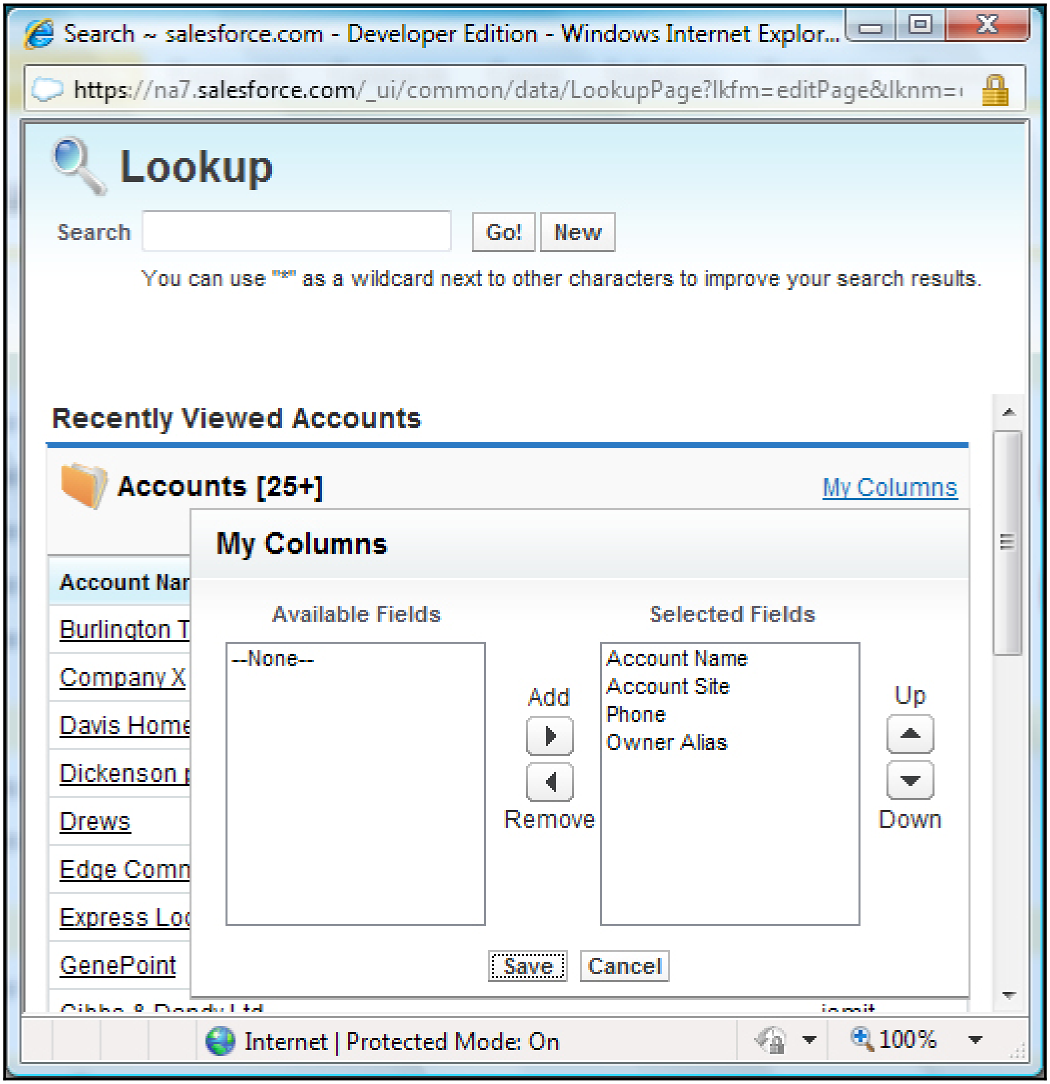

Edit Convert Leads
Change the following setting
Convert Leads
These settings will also be disabled
When Convert Leads is disabled, if any of the following permissions are currently enabled, they will be disabled. Don't show this message again
General User Permissions
Download AppExchange Packages
Administrative Permissions
Author Apex
Modify All Data
Object Permissions
No Impact
Apply changes to
The record clicked
All 2 selected records
Save
Cancel


Profiles
My Profile List for Lead Conversion
New Profile
Create New View | Edit | Delete | Refresh
Action
Profile Name
Convert Leads
Edit | Clone
Contract Manager
Edit | Del | Clone
Custom: Marketing Profile
Edit | Clone
Marketing User
Edit | Clone
Partner User
Edit | Clone
Solution Manager
Edit | Clone
Standard User
Edit | Del | Clone
System Admin Custom
Edit | Clone
System Administrator
1-8 of 8
0 Selected

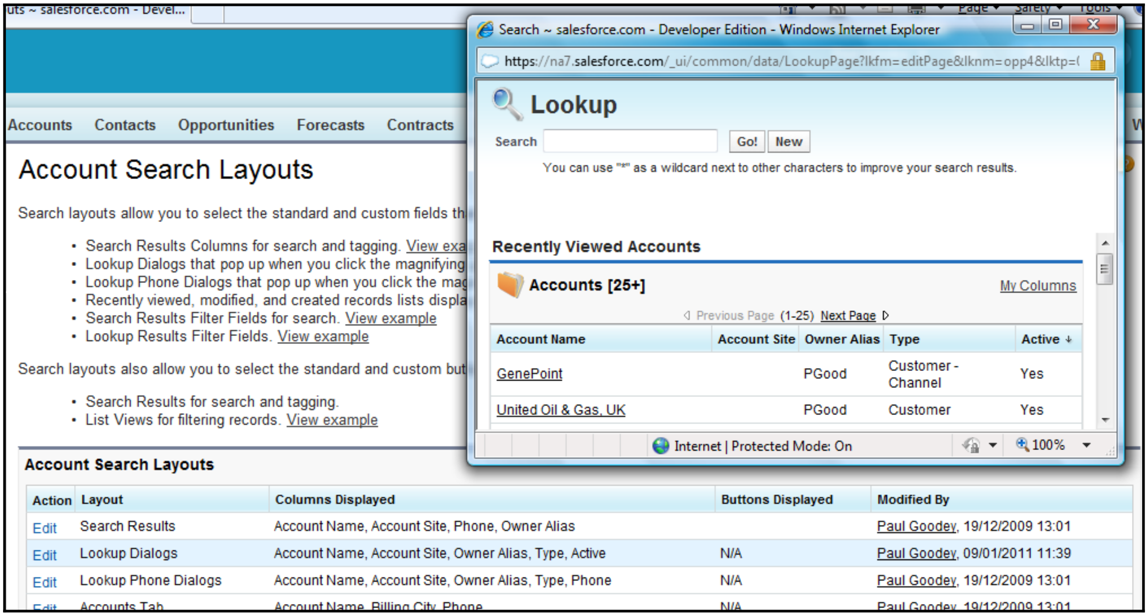

Profile
System Admin Custom
Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Profile Ov
Descrip
User Lice
Create
Find Permissions and Settings
Looking for a specific permission or setting? Just start typing the name in the Find Settings box and choose from a list of matching results.
Edit Profile Properties
Easily change a profile's name or description.
Paul Goodey, 27/09/2011 20:09
Apps
Settings that apply to Salesforce apps, such as Sales, and custom apps built on Force.com
Learn More
Assigned Apps
Settings that specify which apps are visible in the app menu
Object Settings
Permissions to access objects and fields, and settings that specify which record types, page layouts, and tabs are visible
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.


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

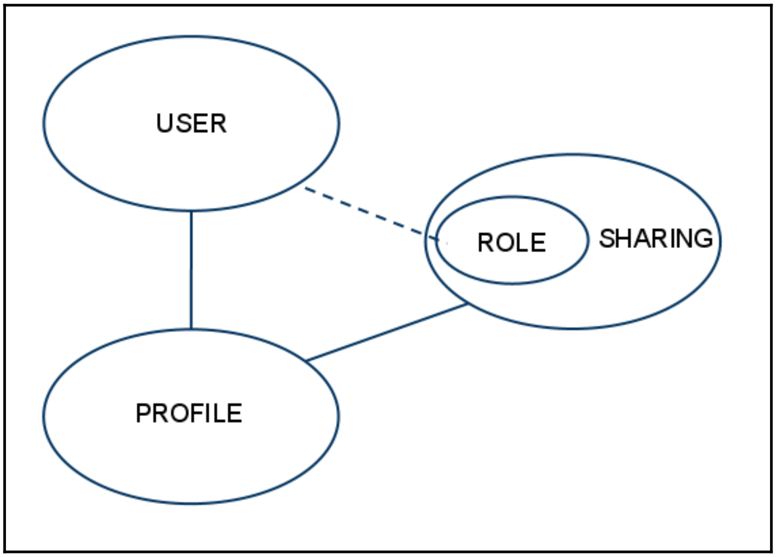

Search Settings
Help for this Page
Modify your organization's search interface with the following settings:
Search Settings
Save
Cancel
Enable "Limit to Items I Own" Search Checkbox
Enable Document Content Search
Enable Search Optimization if your Content is Mostly in Japanese, Chinese, or Korean
Use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

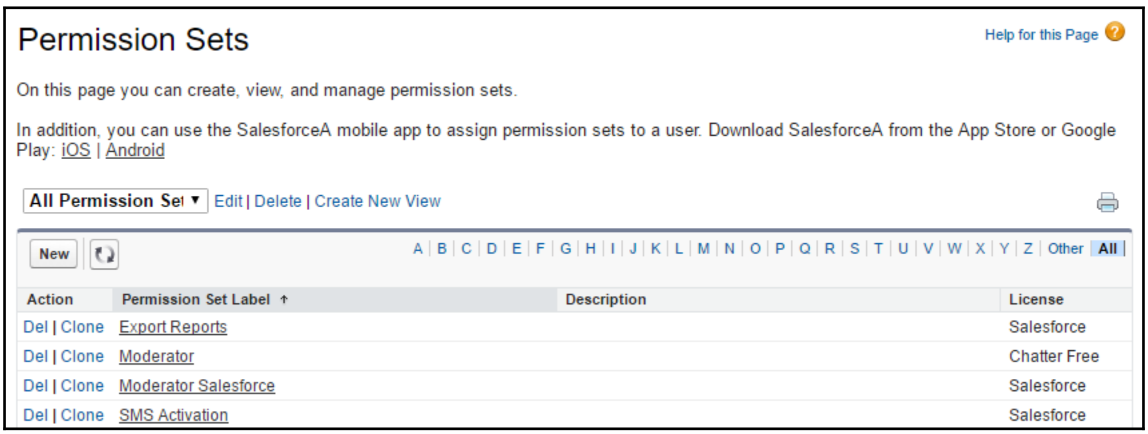


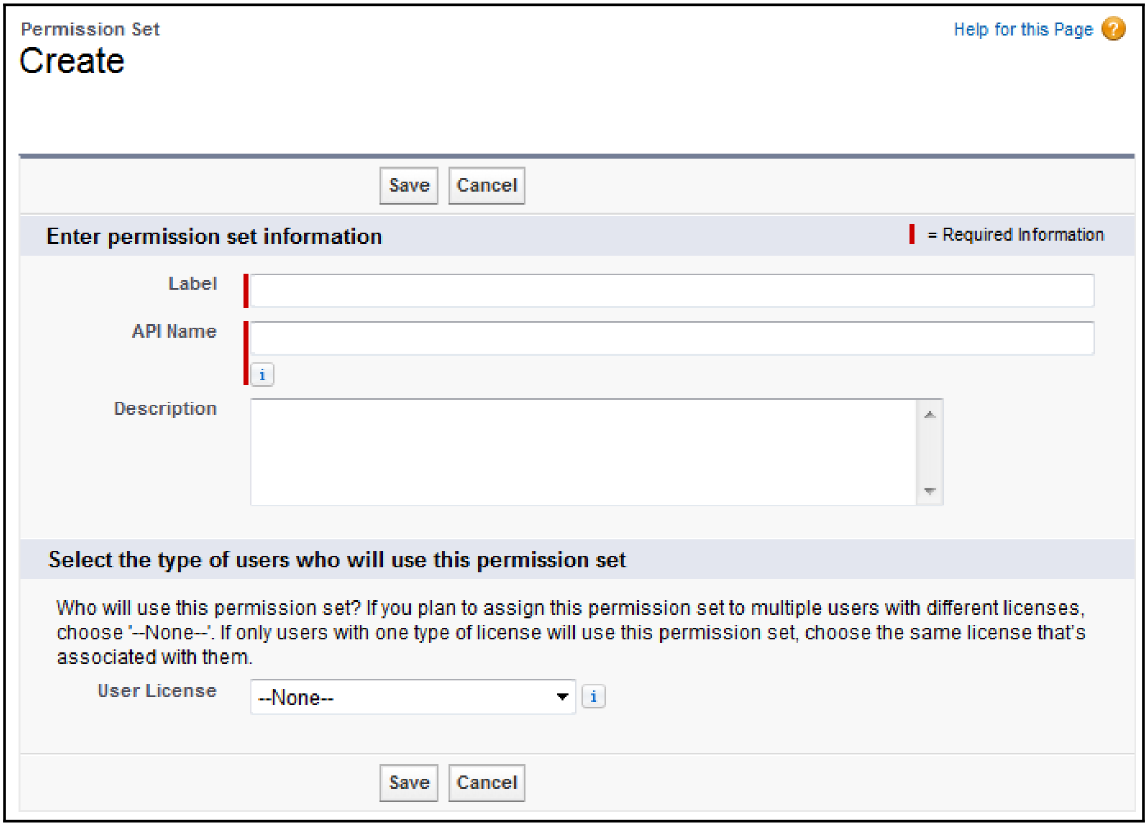
Search ~ salesforce.com - Developer Edition - Windows Internet Explor...
https://na7.salesforce.com/_ui/common/data/LookupPage?lkfm=editPage&lknm=
Lookup
Search
Go!
New
You can use "*" as a wildcard next to other characters to improve your search results.
Recently Viewed Accounts
Accounts [25+]
My Columns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

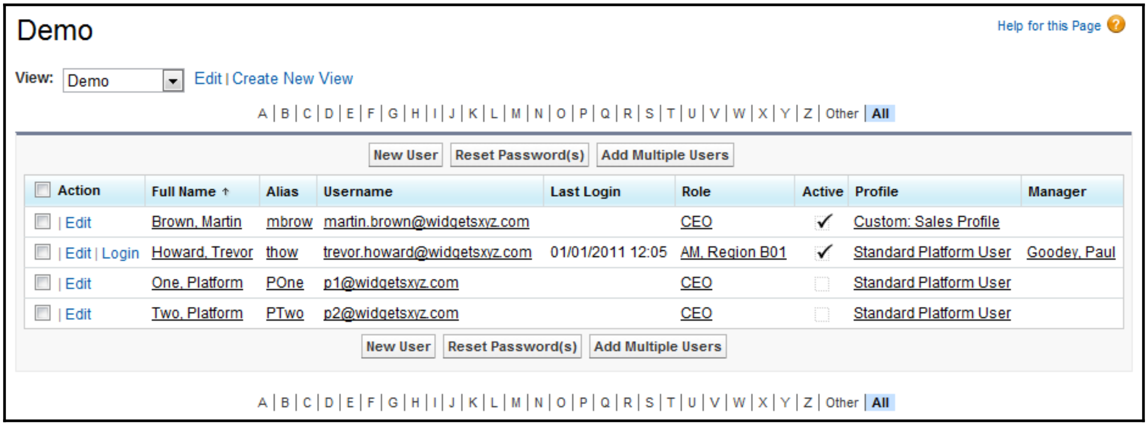

Account Search Layouts
Search layouts allow you to select the standard and custom fields th
Search Results Columns for search and tagging. View exa
Lookup Dialogs that pop up when you click the magnifying
Lookup Phone Dialogs that pop up when you click the mag
Recently viewed, modified, and created records 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
Search ~ salesforce.com - Developer Edition - Windows Internet Explorer
https://na7.salesforce.com/_ui/common/data/LookupPage?lkfm=editPage&lknm=opp4&lktp=(
Lookup
Search
Go!
New
You can use "*" as a wildcard next to other characters to improve your search results.
Recently Viewed Accounts
Accounts [25+]
My Columns
Previous Page (1-25) Next Page
Account Name | Account Site | Owner Alias | Type | Active
GenePoint | PGood | Customer - Channel | Yes
United Oil & Gas, UK | PGood | Customer | Yes
Internet | Protected Mode: On
100%
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
Accounts Tab | Account Name, Billing City, Phone | N/A

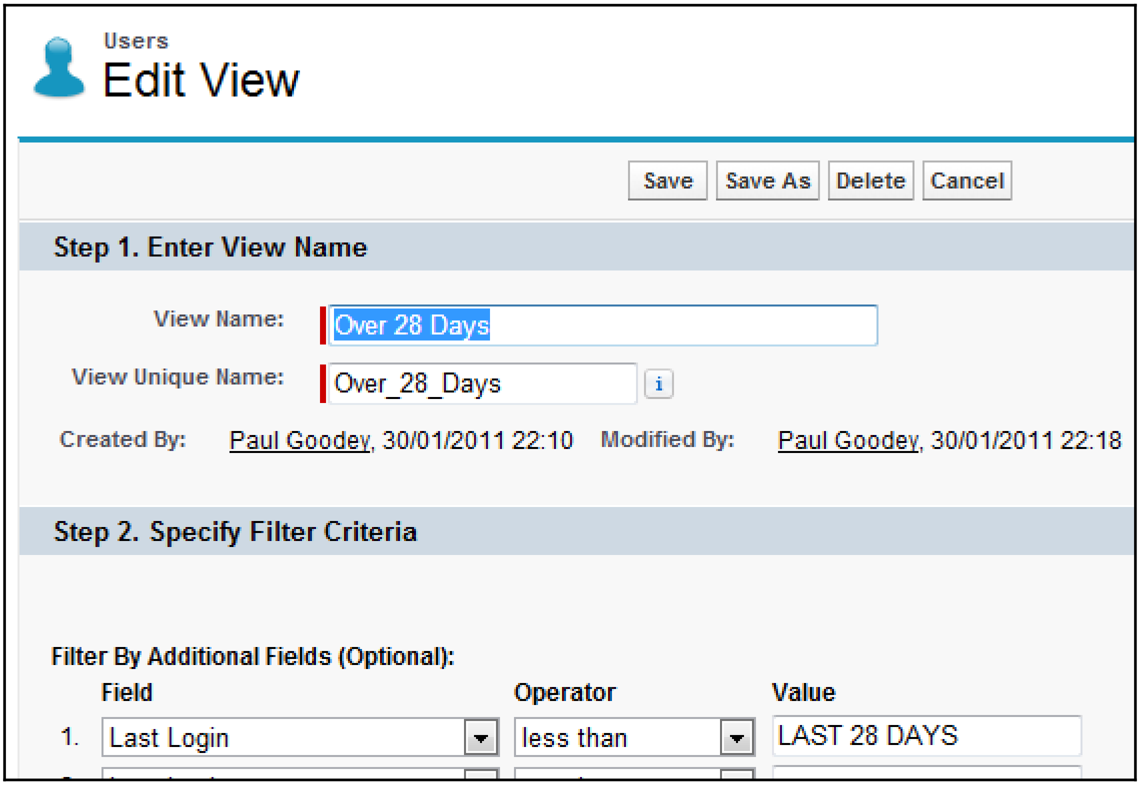
Chapter 2: Managing Users and Controlling System Access

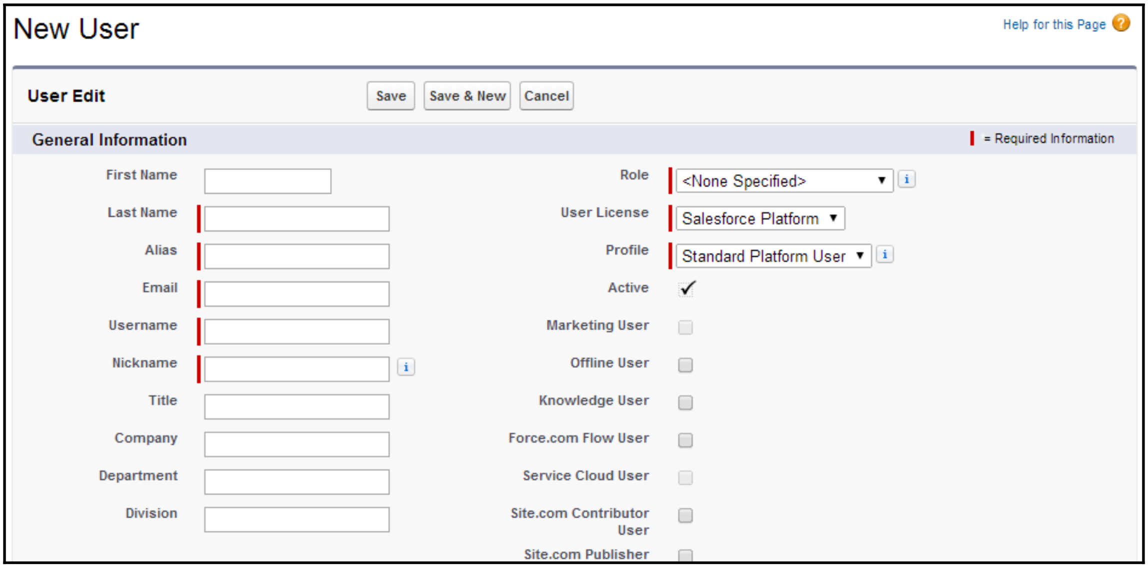


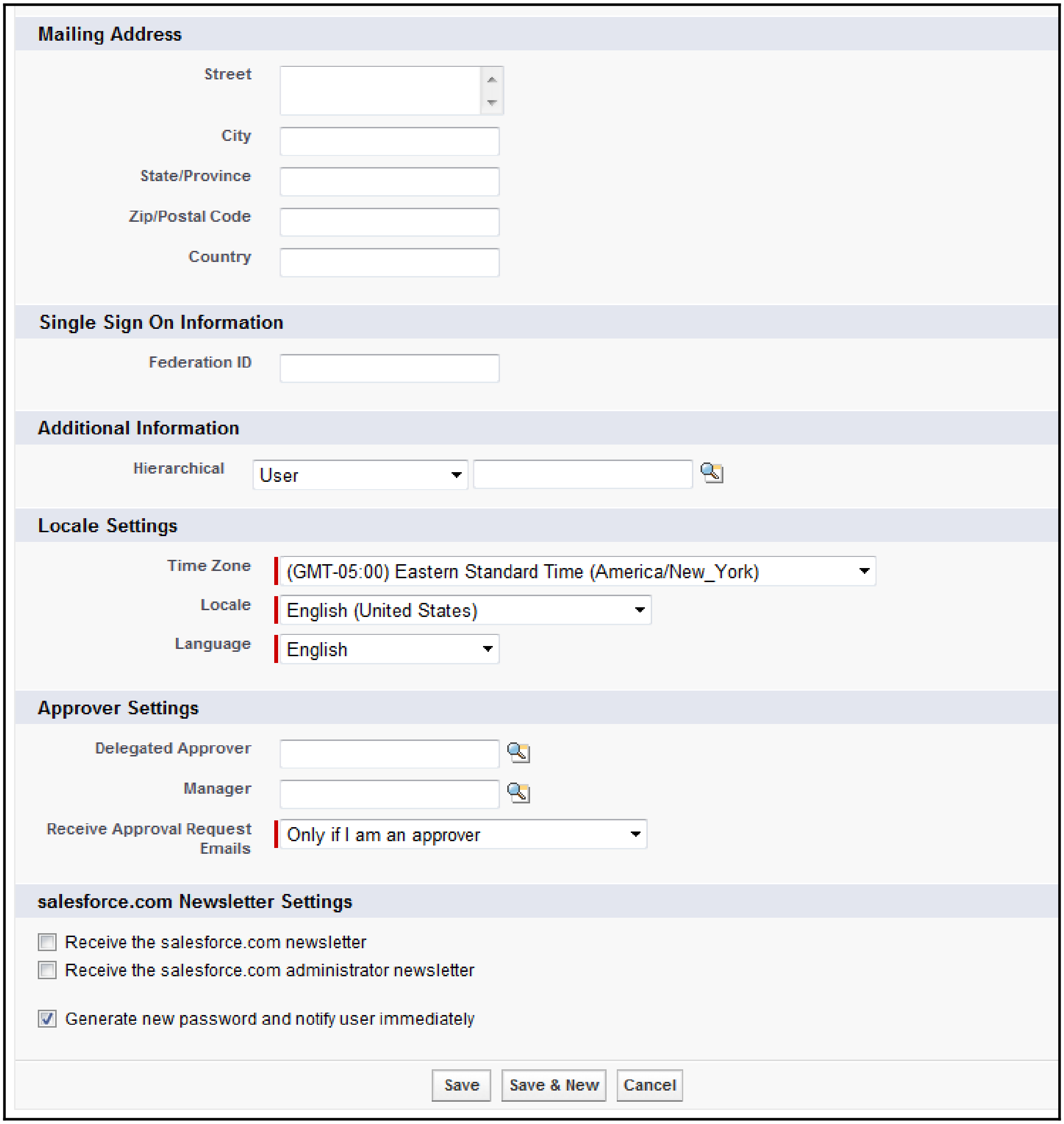



Permission Set
Create
Help for this Page
Save
Cancel
Enter permission set information
= Required Information
Label
API Name
Description
Select the type of users who will use this permission set
Who will use this permission set? If you plan to assign this permission set to multiple users with different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


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


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


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



Mailing Address

Street

City

State/Province

Zip/Postal Code

Country

Single Sign On Information

Federation ID

Additional Information

Hierarchical User

Locale Settings

Time Zone (GMT-05:00) Eastern Standard Time (America/New_York)

Locale English (United States)

Language English

Approver Settings

Delegated Approver

Manager

Receive Approval Request Emails Only if I am an approver

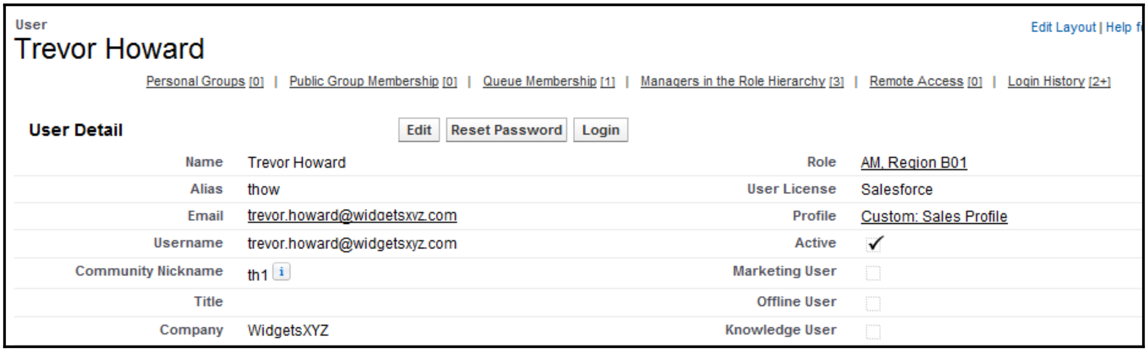
salesforce.com Newsletter Settings

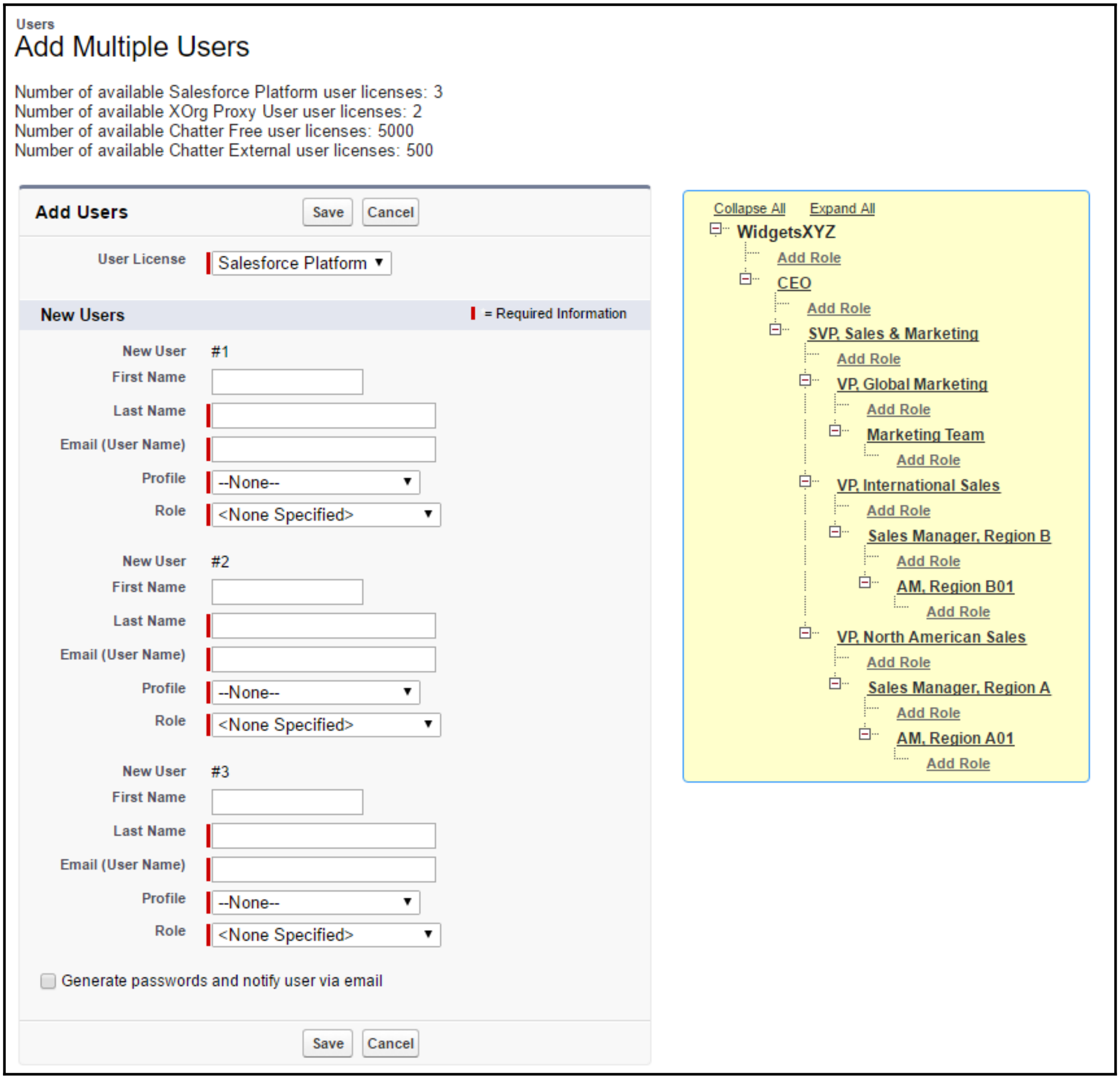
☐ Receive the salesforce.com newsletter

☐ Receive the salesforce.com administrator newsletter

☑ Generate new password and notify user immediately

Save | Save & New | Cancel


User
Trevor Howard
Edit Layout | Help f
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
Community Nickname
th1
Marketing User
Title
Offline User
Company
WidgetsXYZ
Knowledge User


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

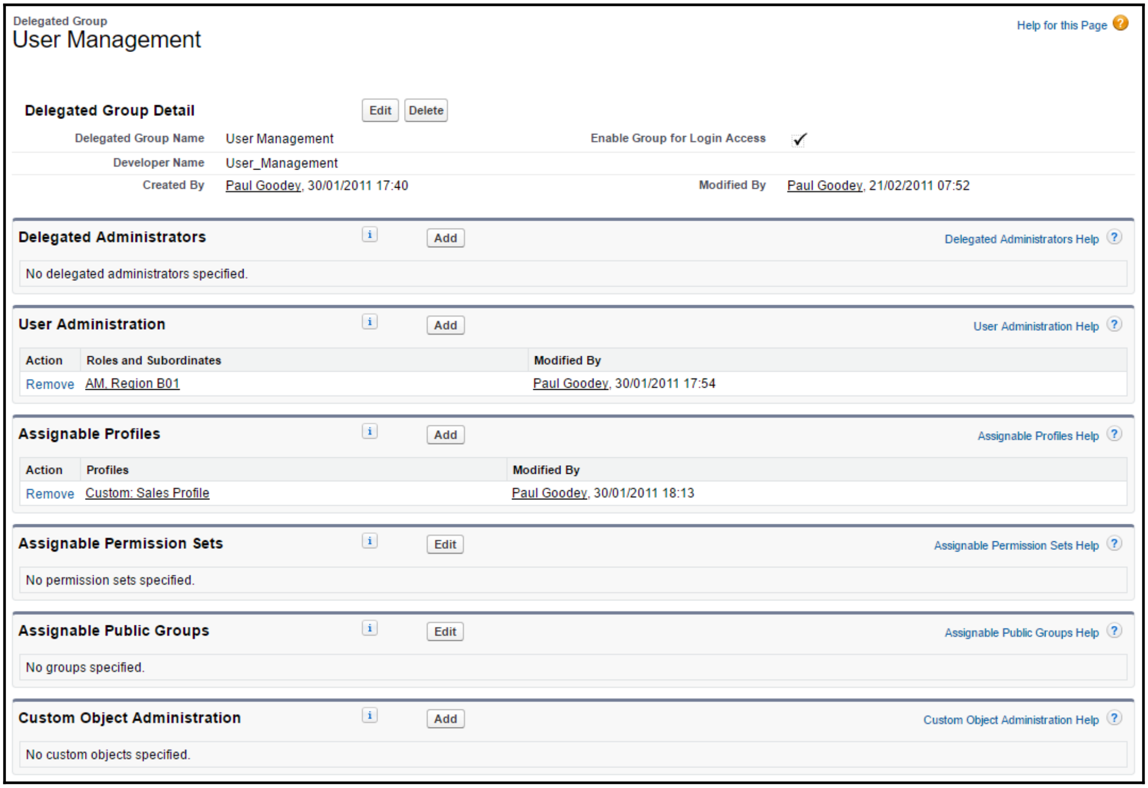
Manage Delegated Groups

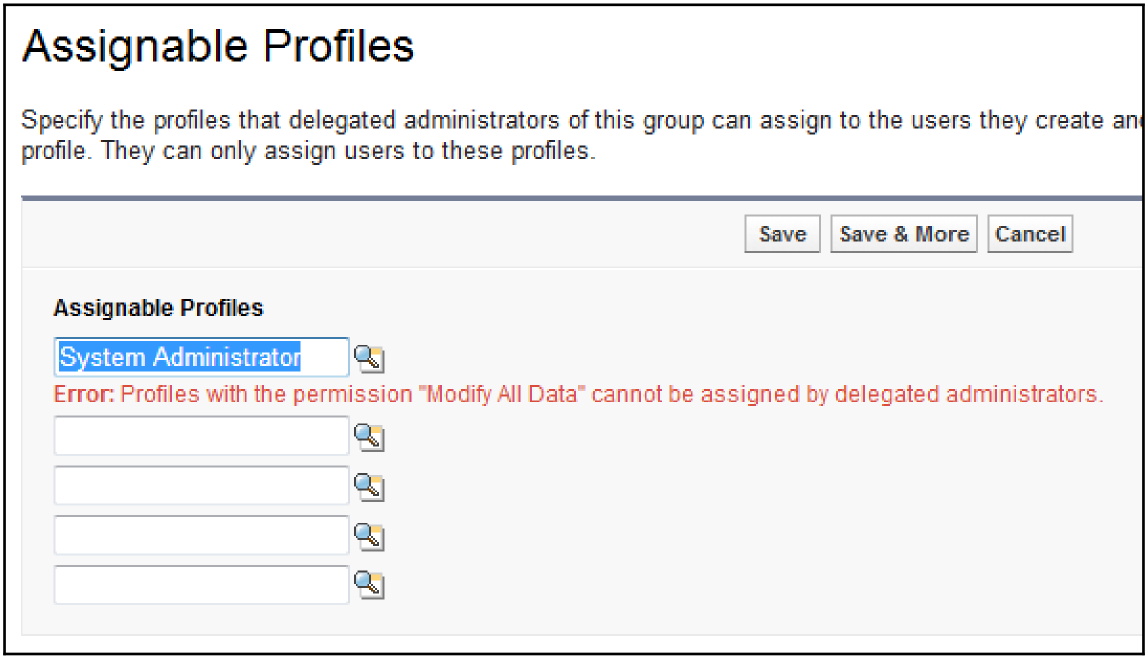
Help for this Page

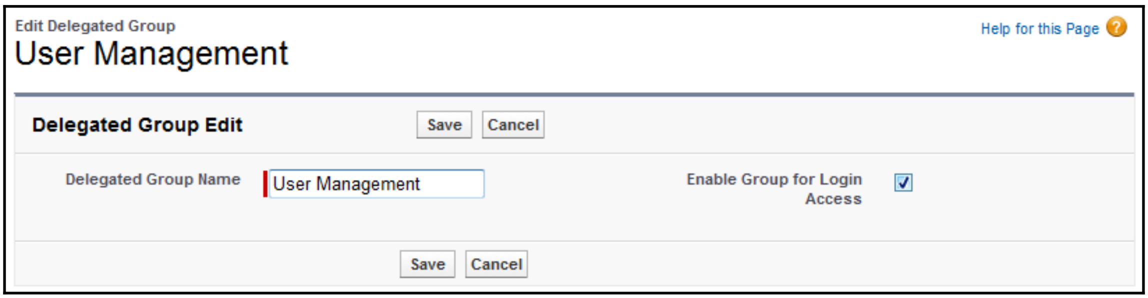
Below are delegated groups defined for your organization. You can choose to delegate user administration, custom object administration, or both to the delegated administrators of this group.

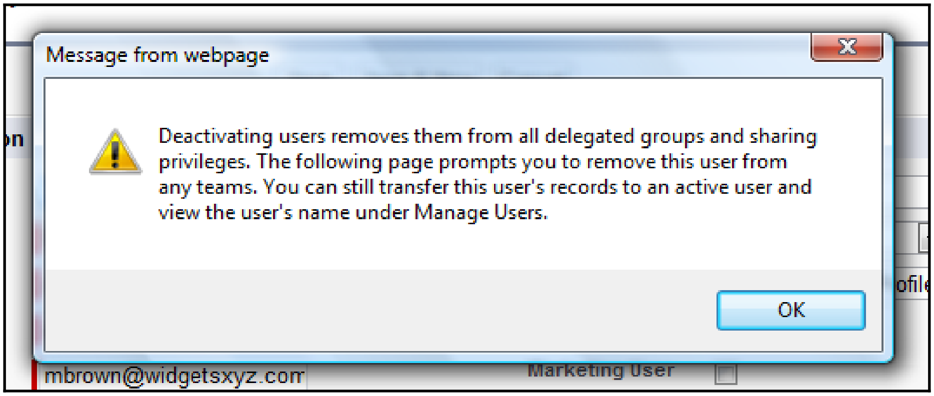
Delegated Groups New

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

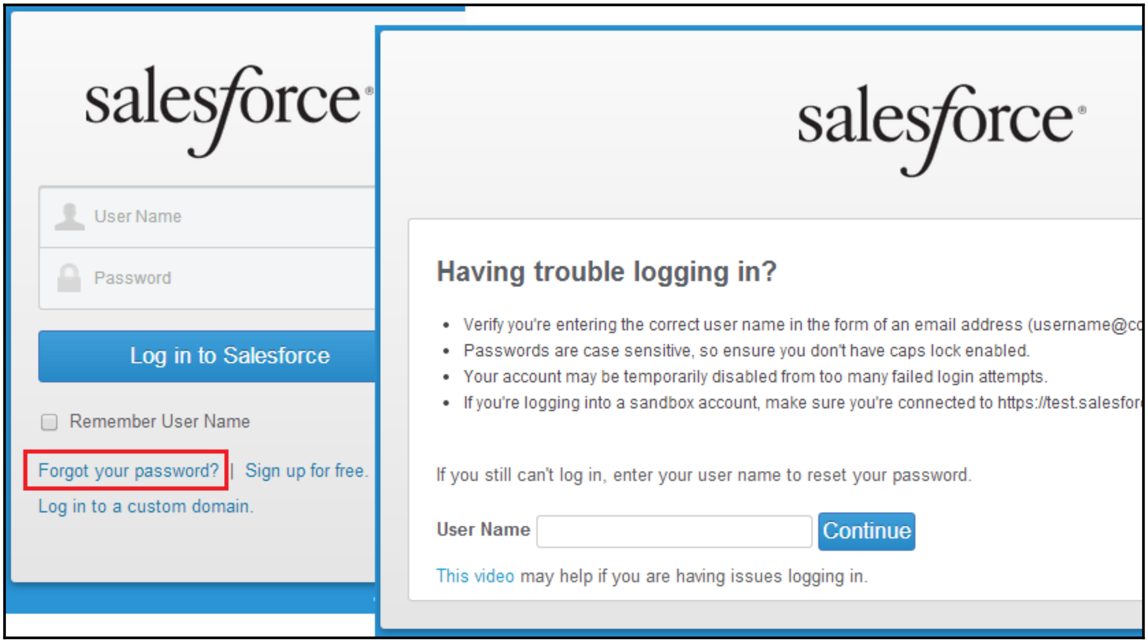

Delegated Group
User Management
Help for this Page
Delegated Group Detail
Edit
Delete
Delegated Group Name
User Management
Enable Group for Login Access
Developer Name
User_Management
Created By
Paul Goodey, 30/01/2011 17:40
Modified By
Paul Goodey, 21/02/2011 07:52
Delegated Administrators
Add
Delegated Administrators Help
No delegated administrators specified.
User Administration
Add
User Administration Help
Action
Roles and Subordinates
Modified By
Remove
AM, Region B01
Paul Goodey, 30/01/2011 17:54
Assignable Profiles
Add
Assignable Profiles Help
Action
Profiles
Modified By
Remove
Custom: Sales Profile
Paul Goodey, 30/01/2011 18:13
Assignable Permission Sets
Edit
Assignable Permission Sets Help
No permission sets specified.
Assignable Public Groups
Edit
Assignable Public Groups Help
No groups specified.
Custom Object Administration
Add
Custom Object Administration Help
No custom objects specified.


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

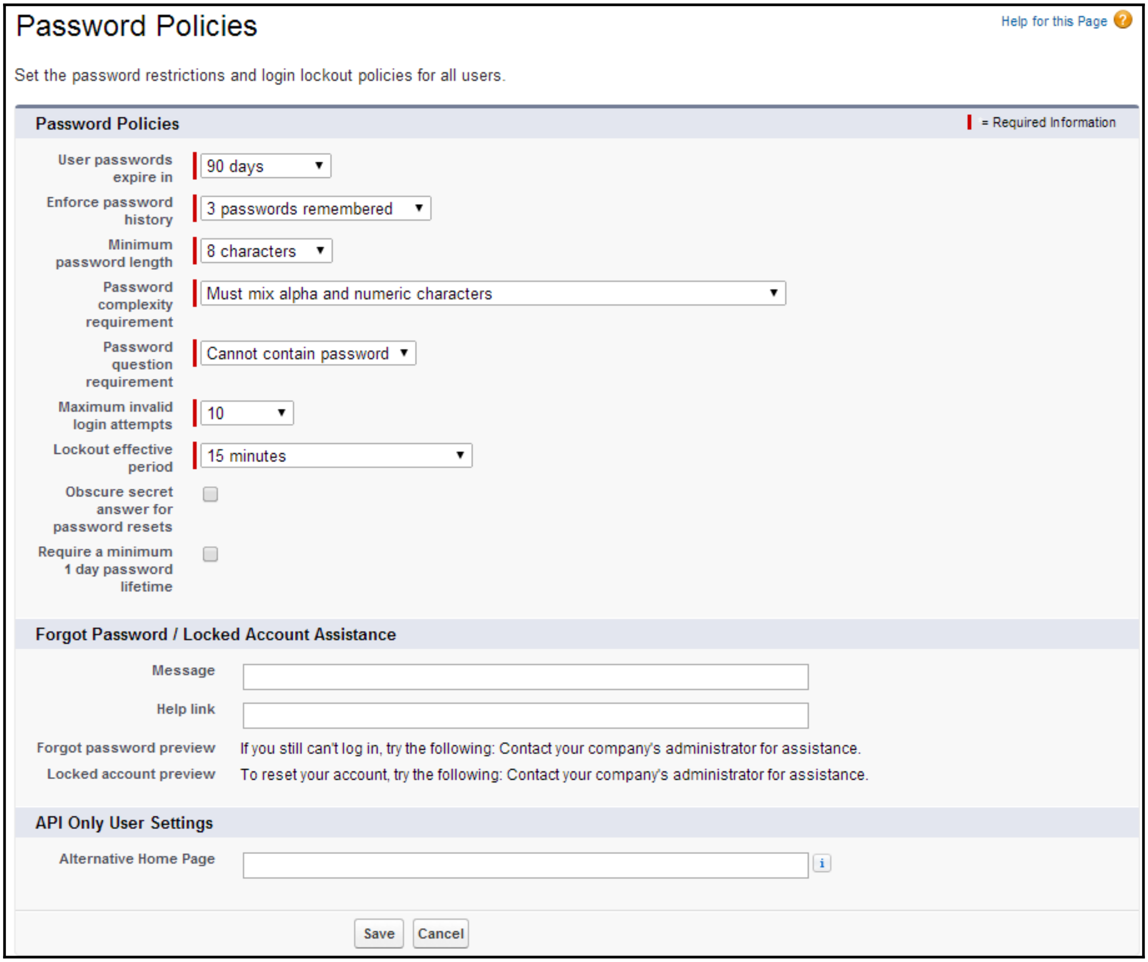

Edit Delegated Group
User Management
Help for this Page
Delegated Group Edit
Save
Cancel
Delegated Group Name
User Management
Enable Group for Login Access
Save
Cancel



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



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


Password Policies

Help for this Page

Set the password restrictions and login lockout policies for all users.

Password Policies

= Required Information

User passwords expire in	90 days
Enforce password history	3 passwords remembered
Minimum password length	8 characters
Password complexity requirement	Must mix alpha and numeric characters
Password question requirement	Cannot contain password
Maximum invalid login attempts	10
Lockout effective period	15 minutes
Obscure secret answer for password resets	
Require a minimum 1 day password lifetime	

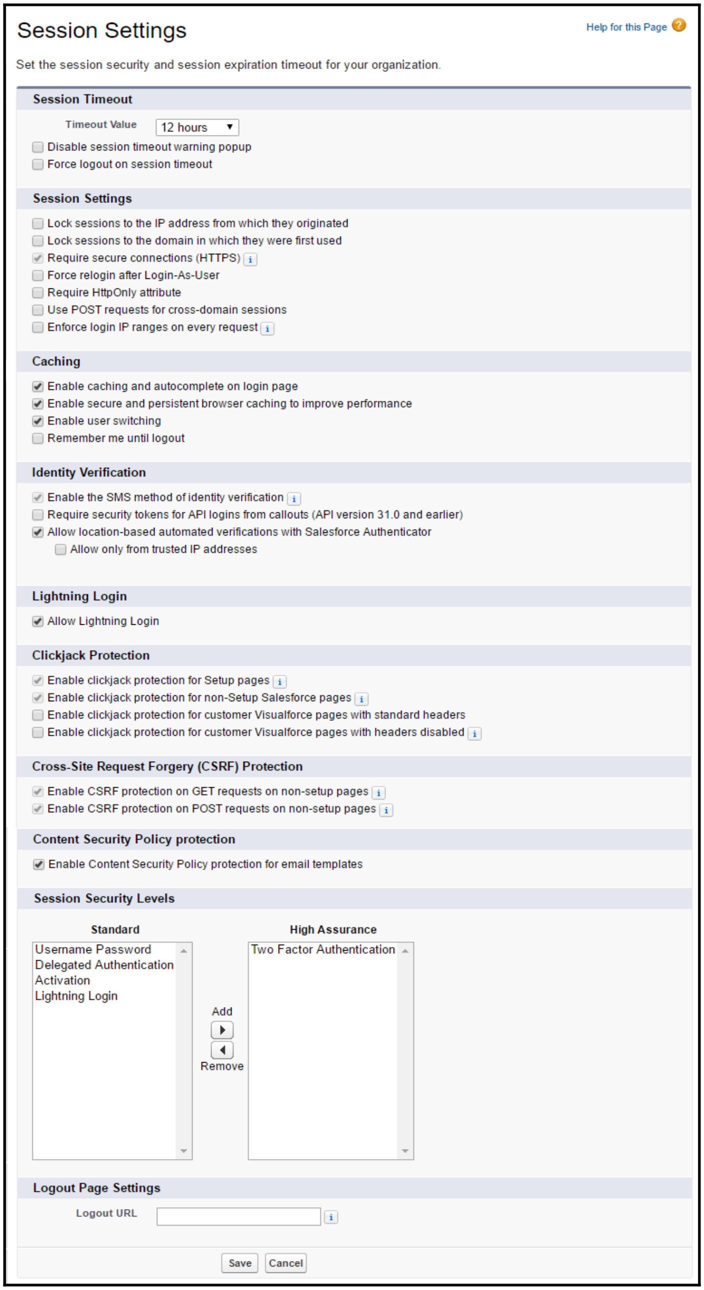
Forgot Password / Locked Account Assistance

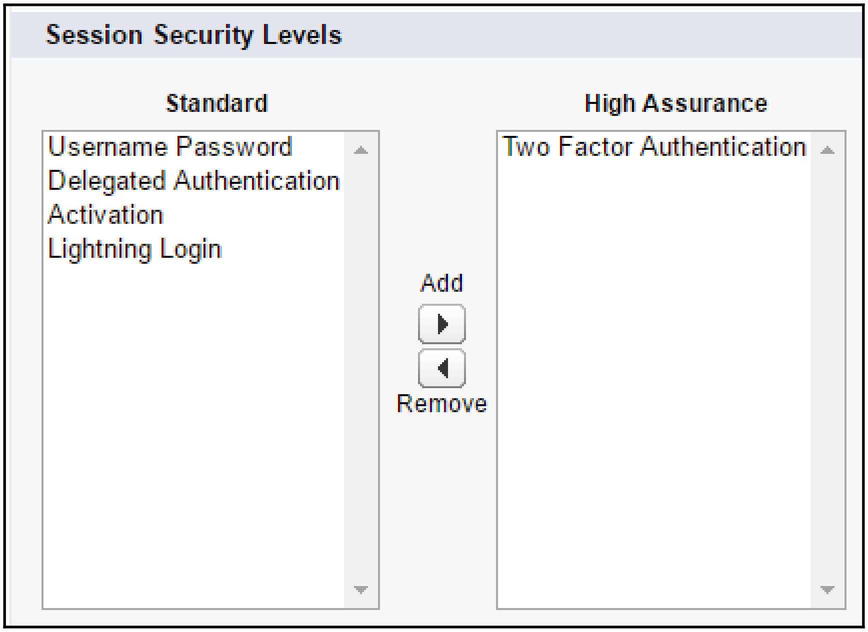
Message	
Help link	
Forgot password preview	If you still can't log in, try the following: Contact your company's administrator for assistance.
Locked account preview	To reset your account, try the following: Contact your company's administrator for assistance.

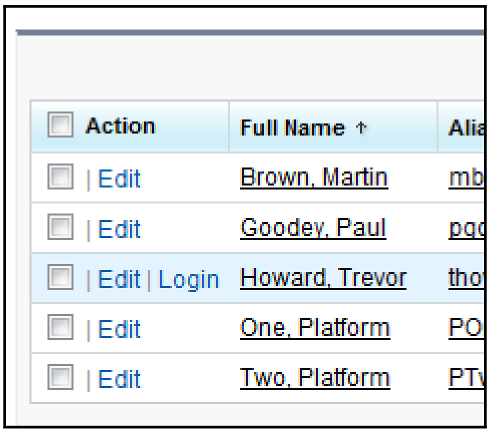
API Only User Settings

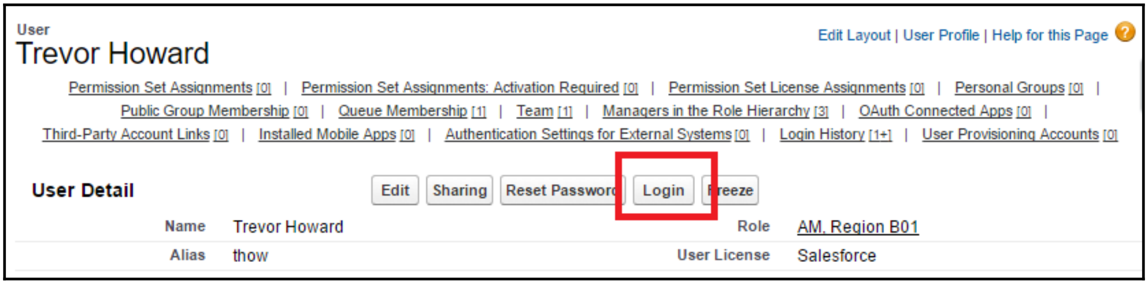
Alternative Home Page	

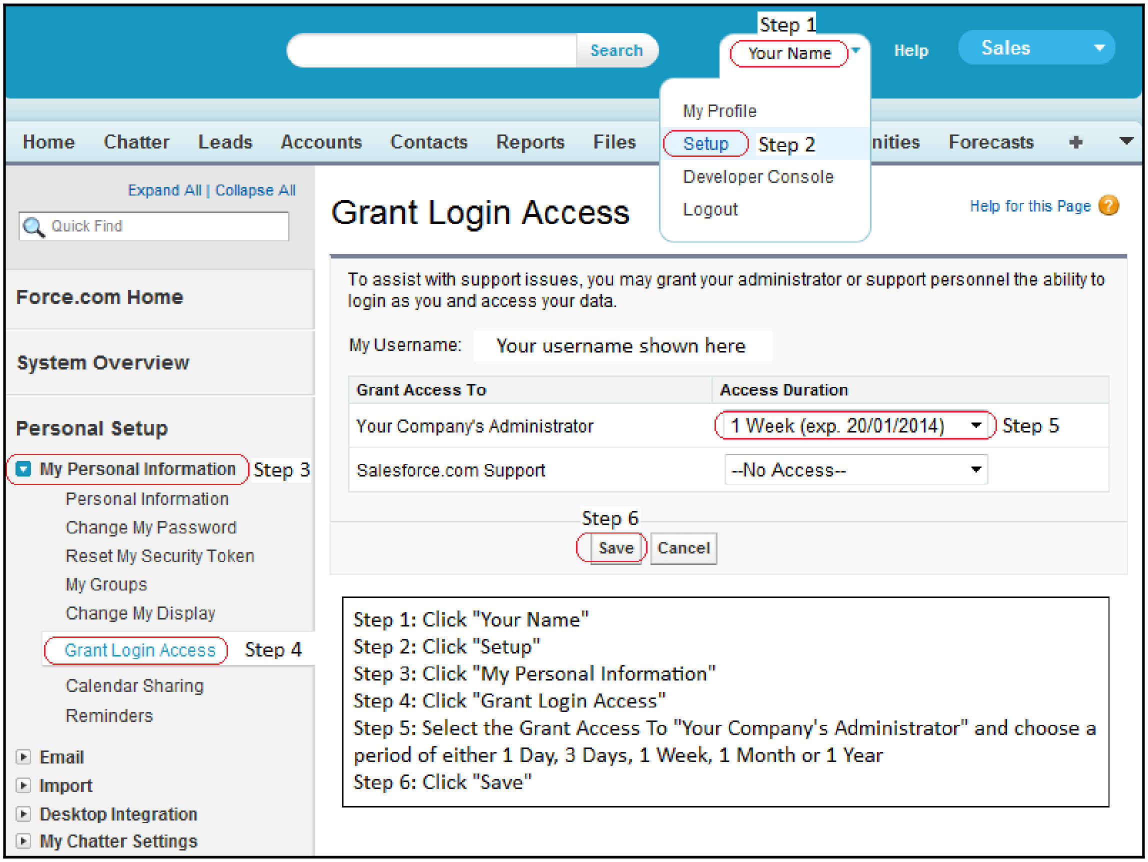
Save Cancel

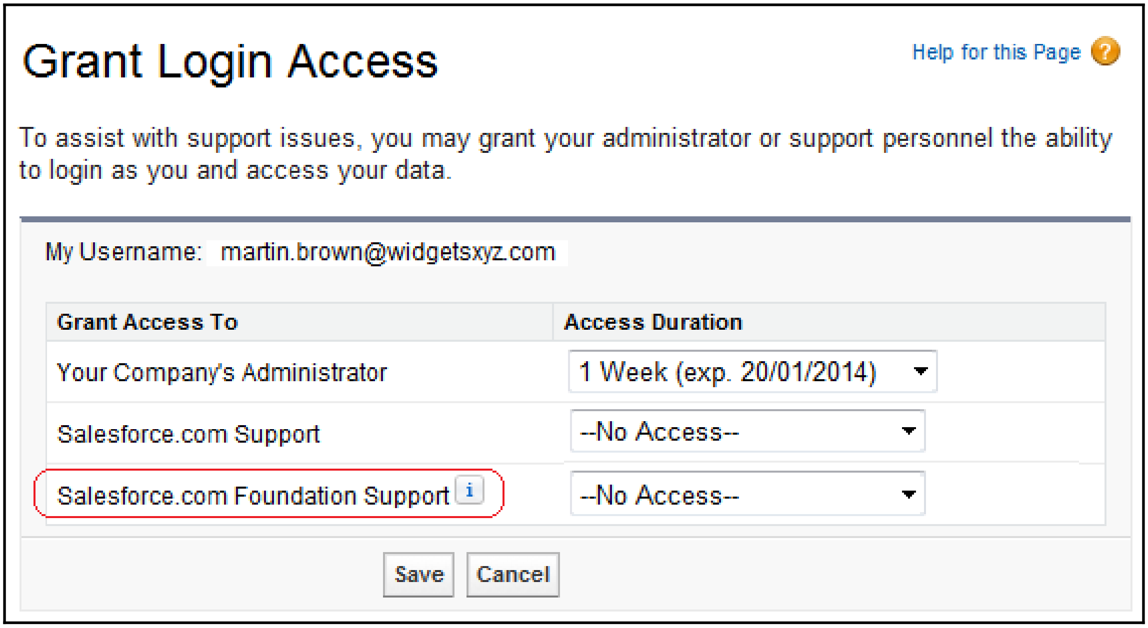

Session Settings
Help for this Page
Set the session security and session expiration timeout for your organization.
Session Timeout
Timeout Value
12 hours
Disable session timeout warning popup
Force logout on session timeout
Session Settings
Lock sessions to the IP address from which they originated
Lock sessions to the domain in which they were first used
Require secure connections (HTTPS)
Force relogin after Login-As-User
Require HttpOnly attribute
Use POST requests for cross-domain sessions
Enforce login IP ranges on every request
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
Enable the SMS method of identity verification
Require security tokens for API logins from callouts (API version 31.0 and earlier)
Allow location-based automated verifications with Salesforce Authenticator
Allow only from trusted IP addresses
Lightning Login
Allow Lightning Login
Clickjack Protection
Enable clickjack protection for Setup pages
Enable clickjack protection for non-Setup Salesforce pages
Enable clickjack protection for customer Visualforce pages with standard headers
Enable clickjack protection for customer Visualforce pages with headers disabled
Cross-Site Request Forgery (CSRF) Protection
Enable CSRF protection on GET requests on non-setup pages
Enable CSRF protection on POST requests on non-setup pages
Content Security Policy protection
Enable Content Security Policy protection for email templates
Session Security Levels
Standard
Username Password
Delegated Authentication
Activation
Lightning Login
High Assurance
Two Factor Authentication
Add
Remove
Logout Page Settings
Logout URL
Save
Cancel

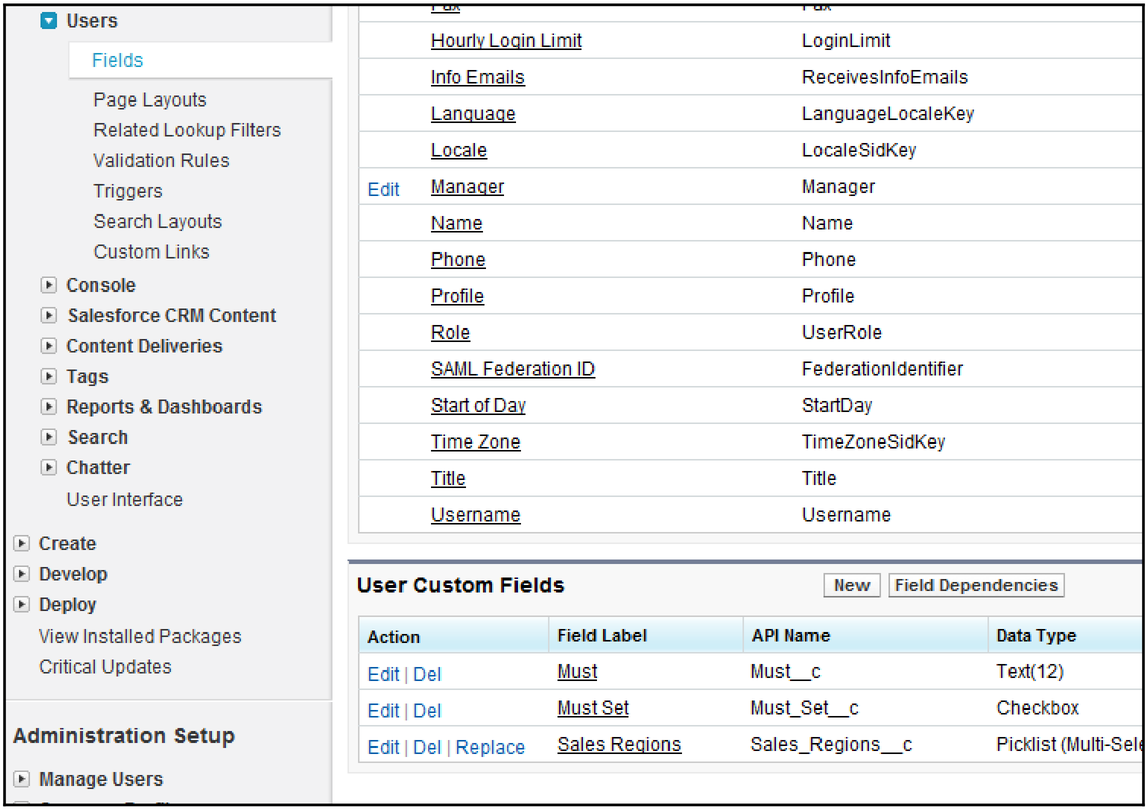

Session Security Levels
Standard
High Assurance
Username Password
Delegated Authentication
Activation
Lightning Login
Add
Remove
Two Factor Authentication

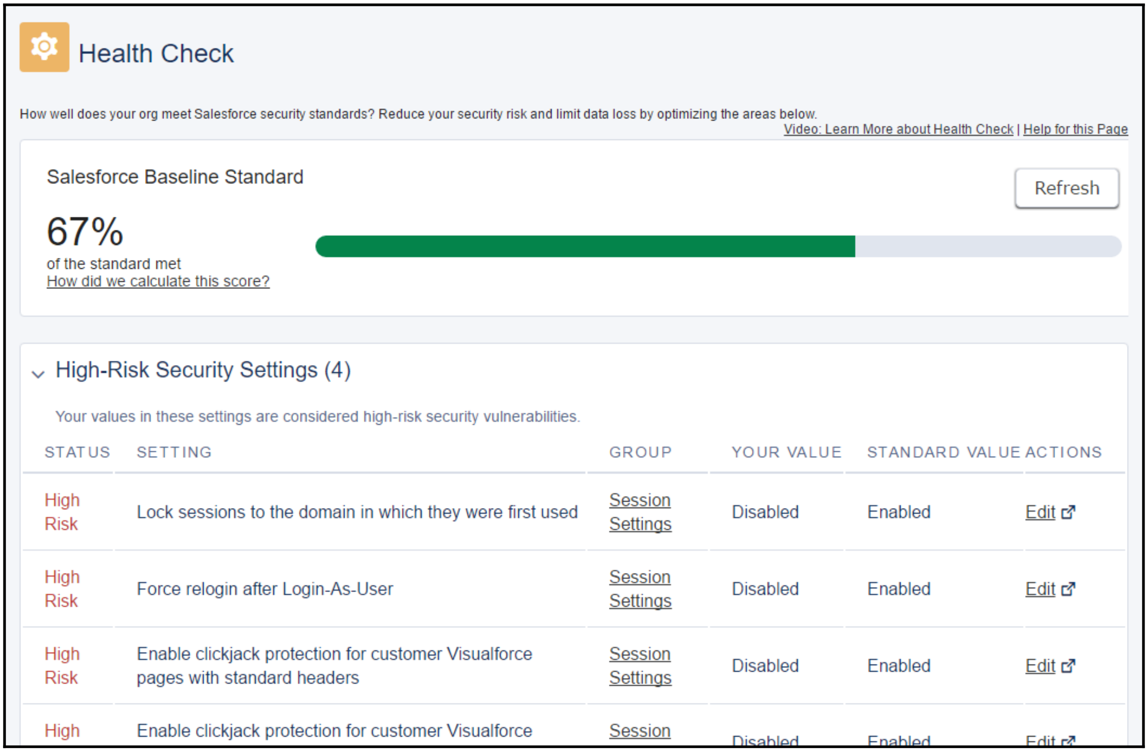

Action
Full Name ↑
| Edit
Brown, Martin
| Edit
Goodey, Paul
| Edit | Login
Howard, Trevor
| Edit
One, Platform
| Edit
Two, Platform


User
Trevor Howard
Edit Layout | User Profile | Help for this Page
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
Login
Name
Trevor Howard
Role
AM, Region B01
Alias
thow
User License
Salesforce

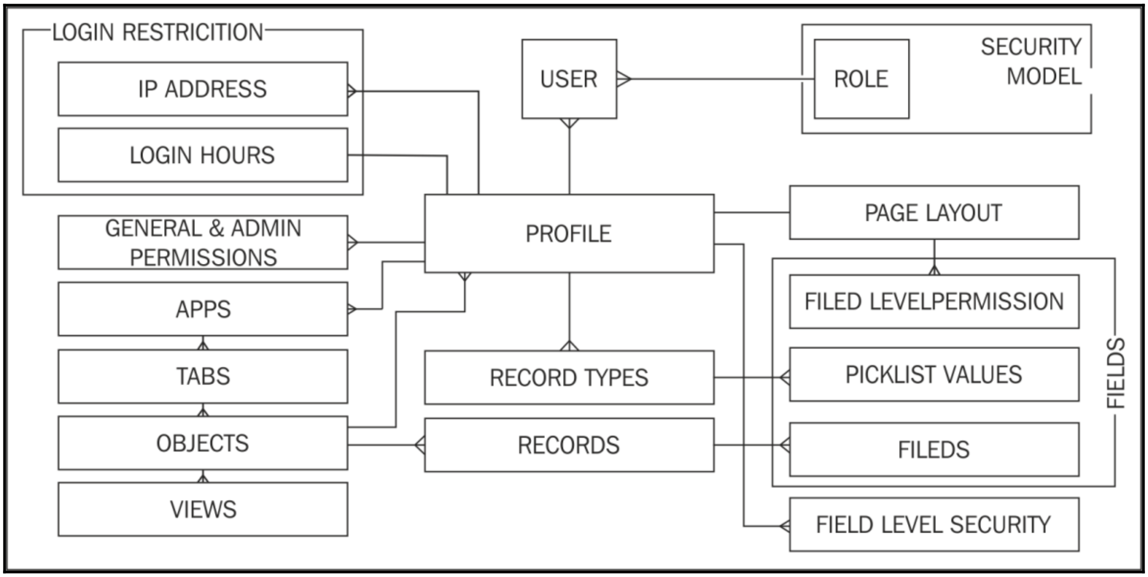

Search
Step 1
Your Name
Help
Sales
My Profile
Setup
Step 2
Developer Console
Logout
Home
Chatter
Leads
Accounts
Contacts
Reports
Files
Forecasts
Expand All | Collapse All
Quick Find
Force.com Home
System Overview
Personal Setup
My Personal Information
Step 3
Personal Information
Change My Password
Reset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

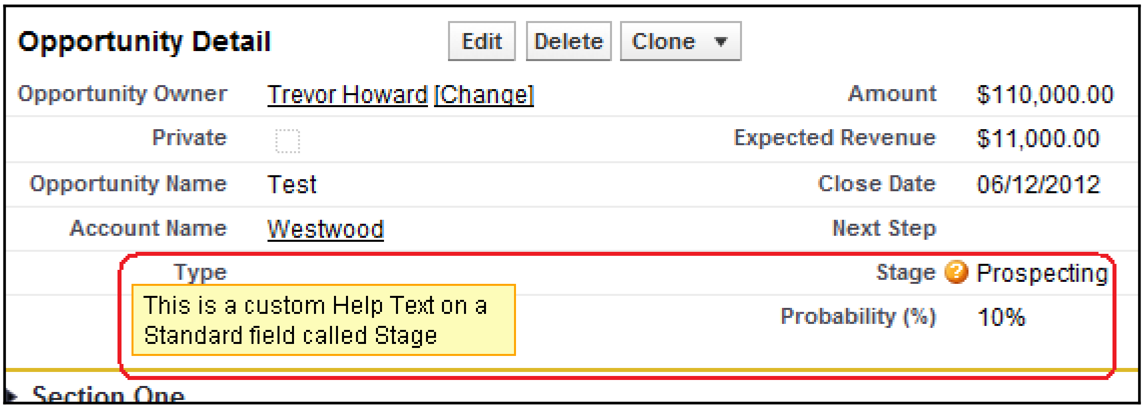

Grant Login Access
Help for this Page
To assist with support issues, you may grant your administrator or support personnel the ability to login as you and access your data.
My Username: martin.brown@widgetsxyz.com
Grant Access To
Access Duration
Your Company's Administrator
1 Week (exp. 20/01/2014)
Salesforce.com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

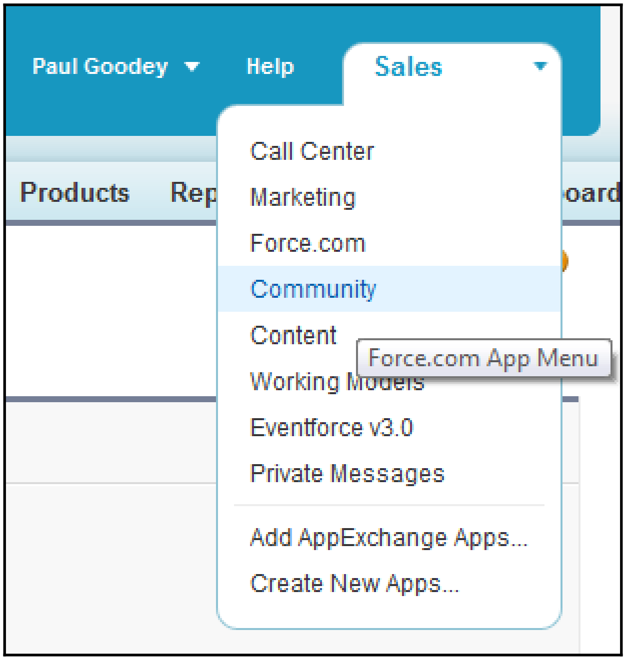

Users
Fields
Page Layouts
Related Lookup Filters
Validation Rules
Triggers
Search Layouts
Custom Links
Console
Salesforce CRM Content
Content Deliveries
Tags
Reports & Dashboards
Search
Chatter
User Interface
Create
Develop
Deploy
View Installed Packages
Critical Updates
Administration Setup
Manage Users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

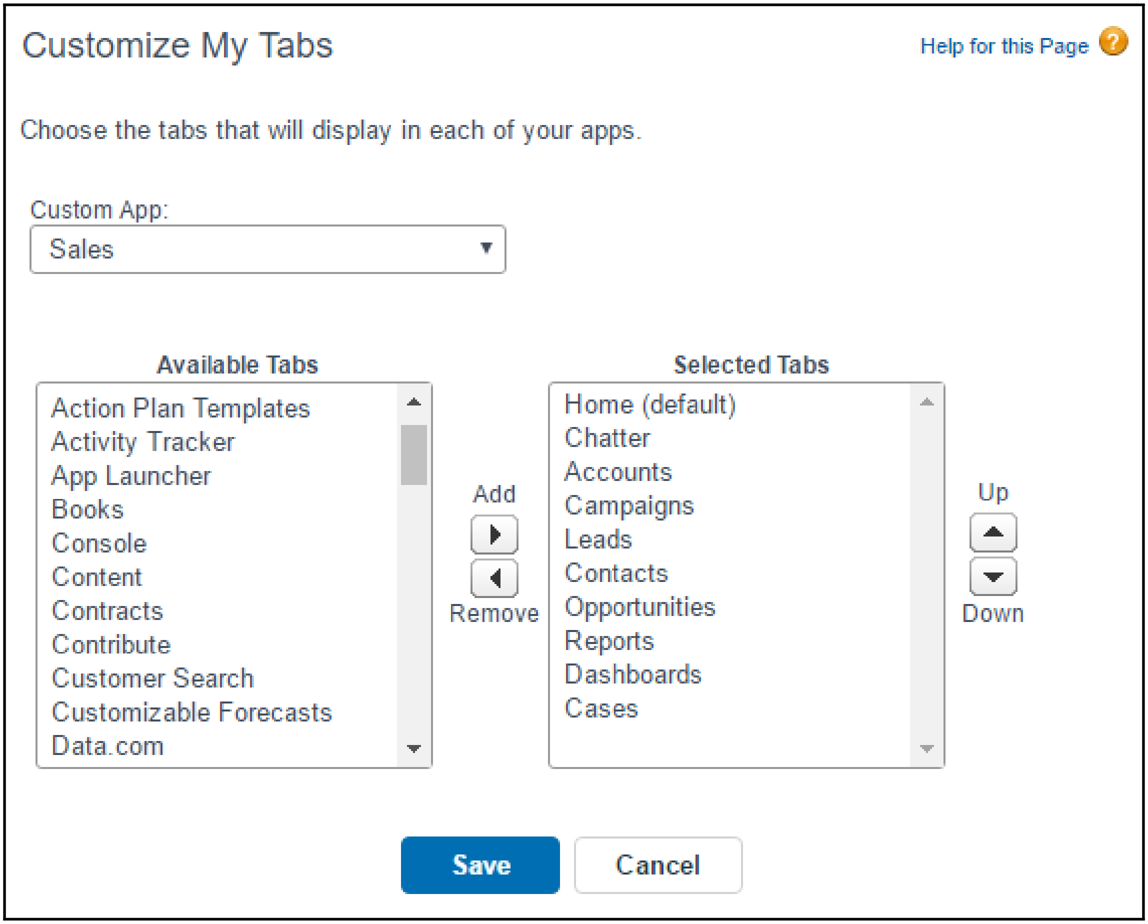

Health Check
How well does your org meet Salesforce security standards? Reduce your security risk and limit data loss by optimizing the areas below.
Video: Learn More about Health Check | Help for this Page
Salesforce Baseline Standard
Refresh
67%
of the standard met
How did we calculate this score?
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

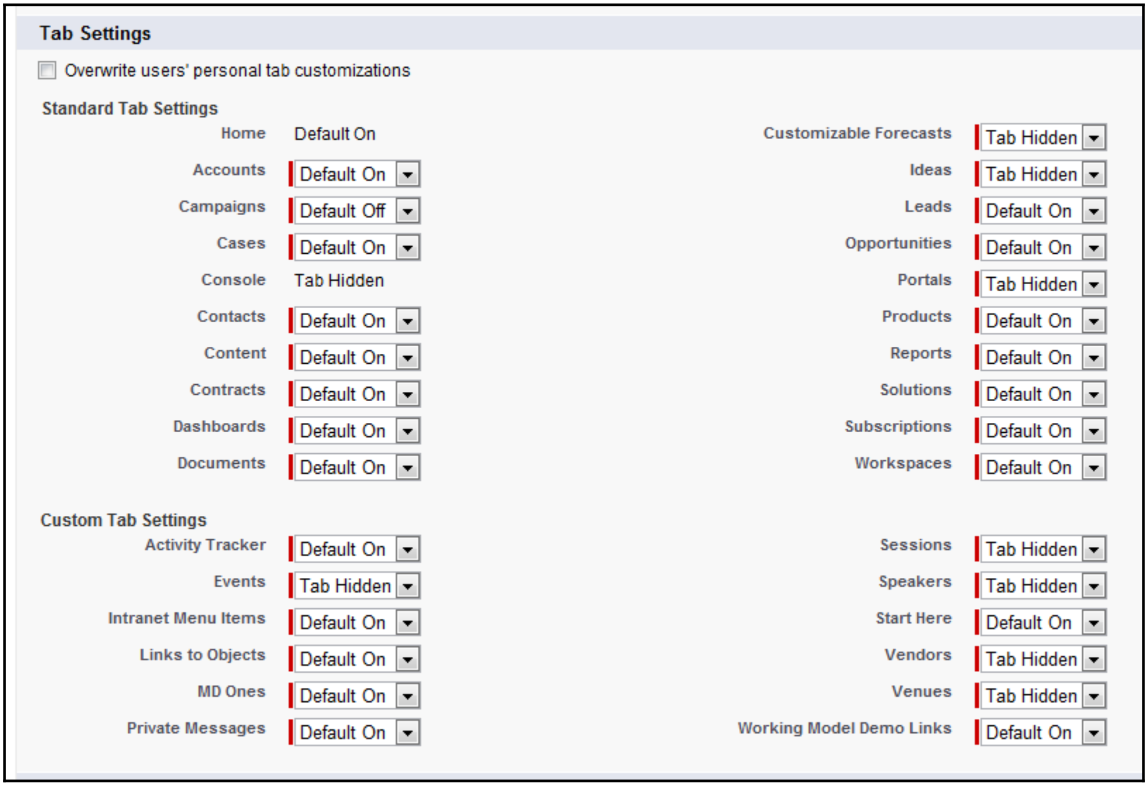
Chapter 3: Configuring Objects and Apps

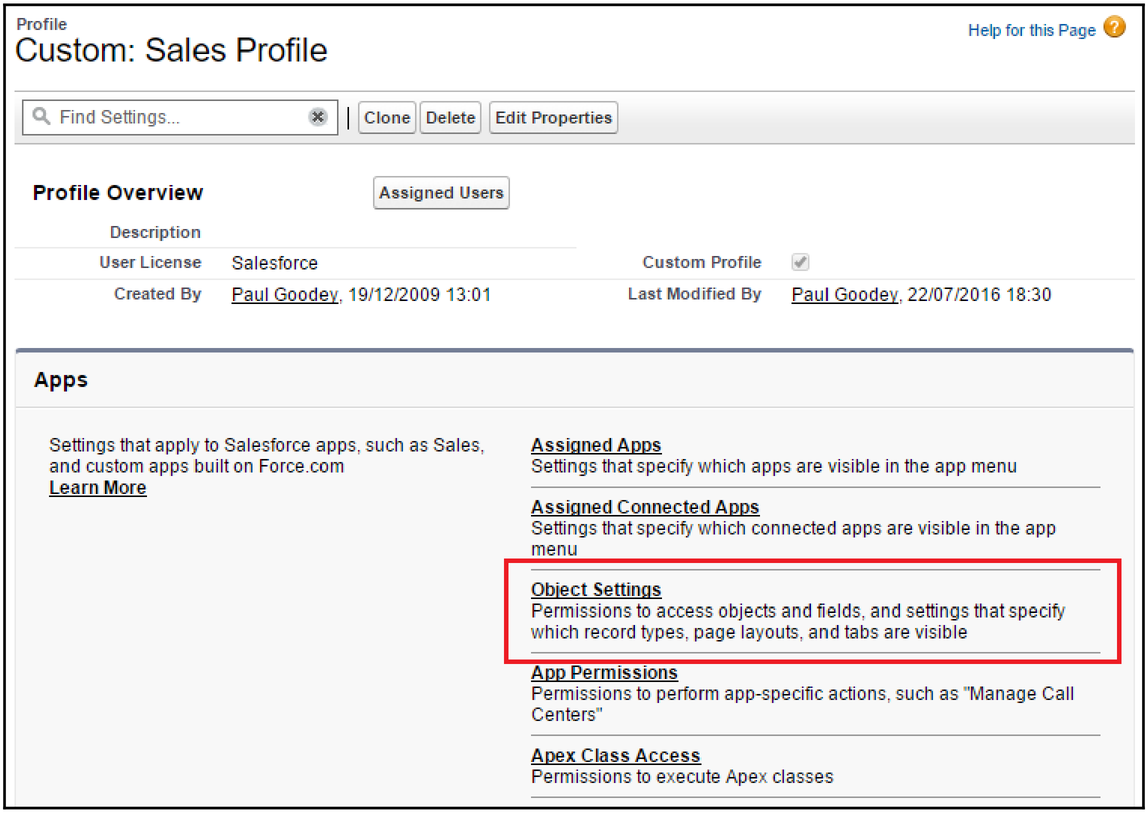


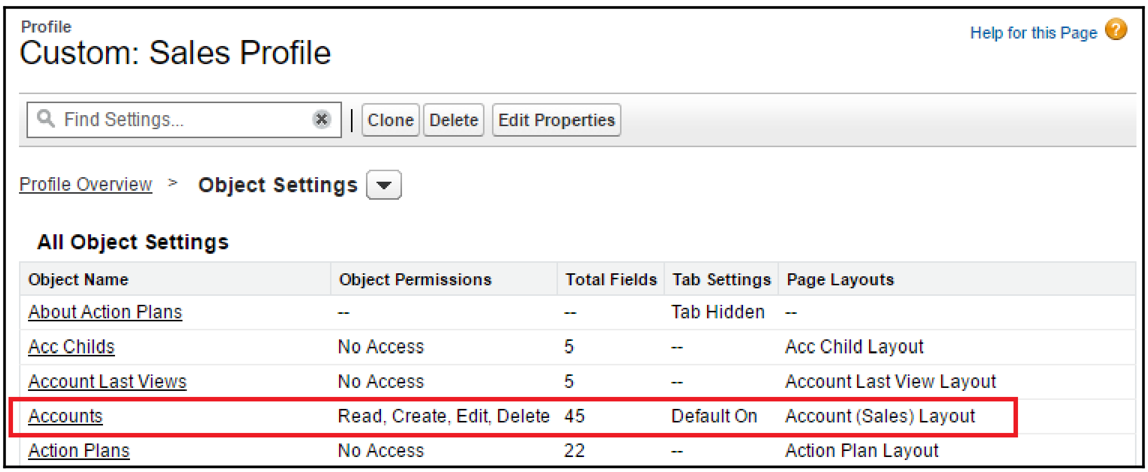


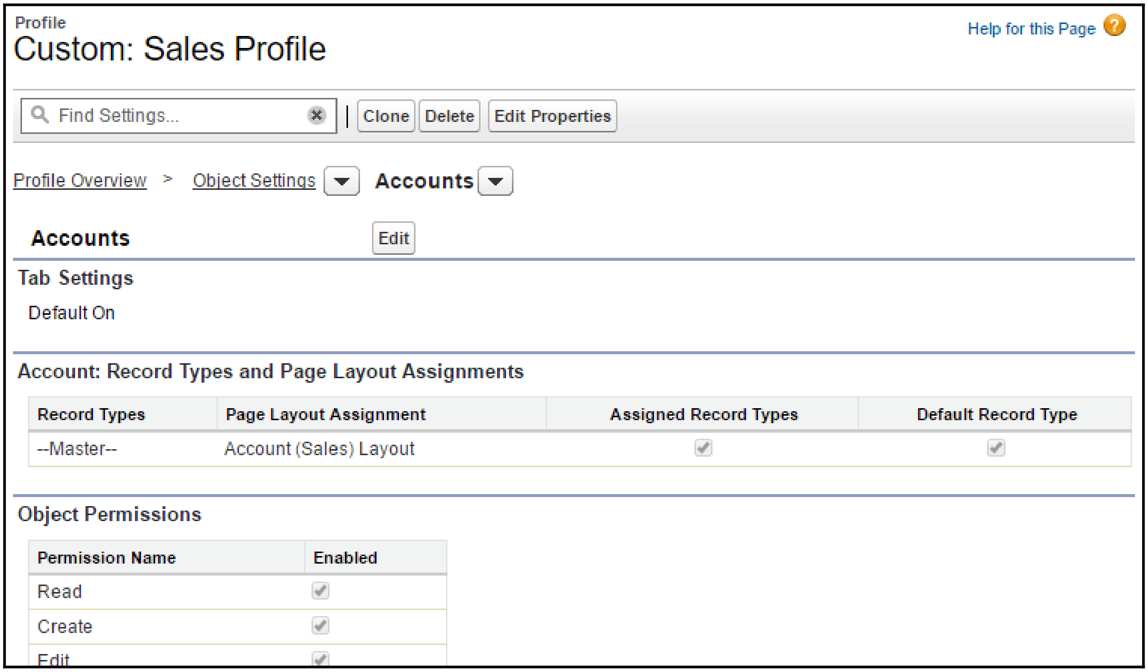

Paul Goodey
Help
Sales
Products
Call Center
Marketing
Force.com
Community
Content
Force.com App Menu
Working Models
Eventforce v3.0
Private Messages
Add AppExchange Apps...
Create New Apps...

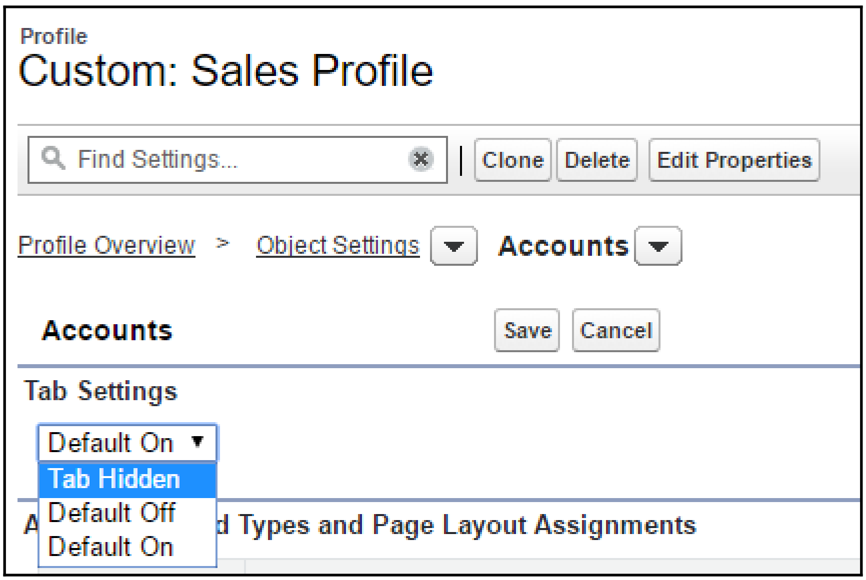

Customize My Tabs
Help for this Page
Choose the tabs that will display in each of your apps.
Custom App:
Sales
Available Tabs
Action Plan Templates
Activity Tracker
App Launcher
Books
Console
Content
Contracts
Contribute
Customer Search
Customizable Forecasts
Data.com
Add
Remove
Selected Tabs
Home (default)
Chatter
Accounts
Campaigns
Leads
Contacts
Opportunities
Reports
Dashboards
Cases
Up
Down
Save
Cancel

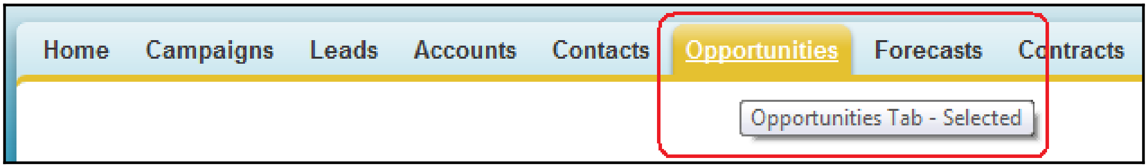

Tab Settings
Overwrite users' personal tab customizations
Standard Tab Settings
Home Default On
Accounts Default On
Campaigns Default Off
Cases Default On
Console Tab Hidden
Contacts Default On
Content Default On
Contracts Default On
Dashboards Default On
Documents Default On
Customizable Forecasts Tab 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

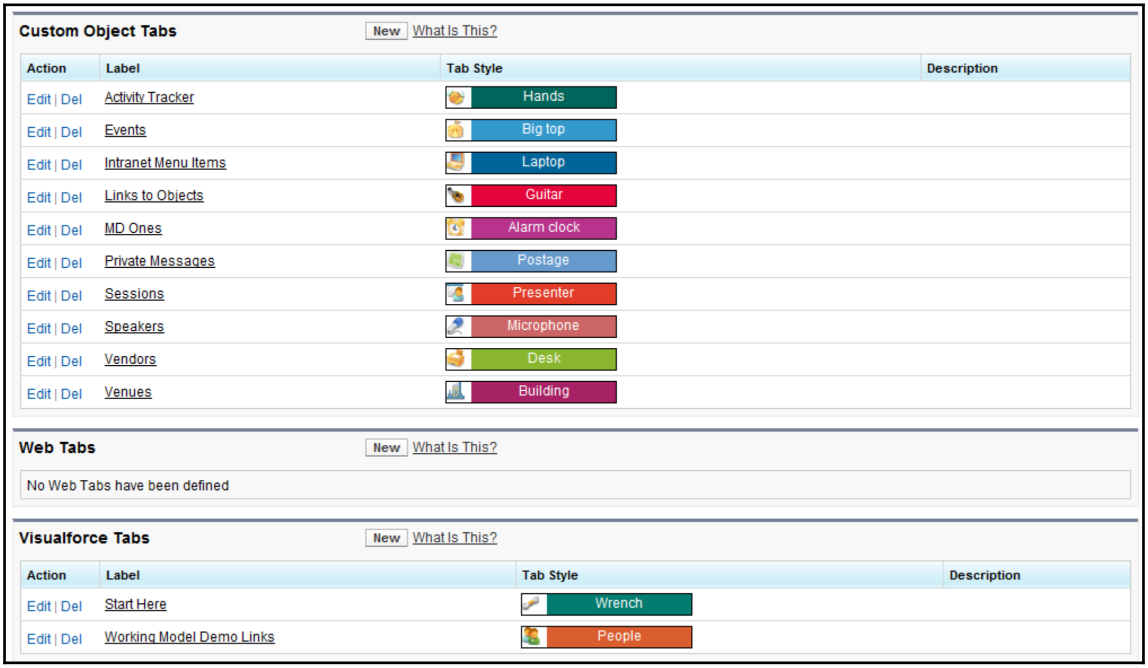

Profile
Custom: Sales Profile
Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Profile Overview
Assigned Users
Description
User License
Salesforce
Custom Profile
Created By
Paul Goodey, 19/12/2009 13:01
Last Modified By
Paul Goodey, 22/07/2016 18:30
Apps
Settings that apply to Salesforce 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
Custom: Sales Profile
Help for this Page
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
Custom: Sales Profile
Help for this Page
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
Edit


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
d Types and Page Layout Assignments


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


Custom Object Tabs New What Is This?

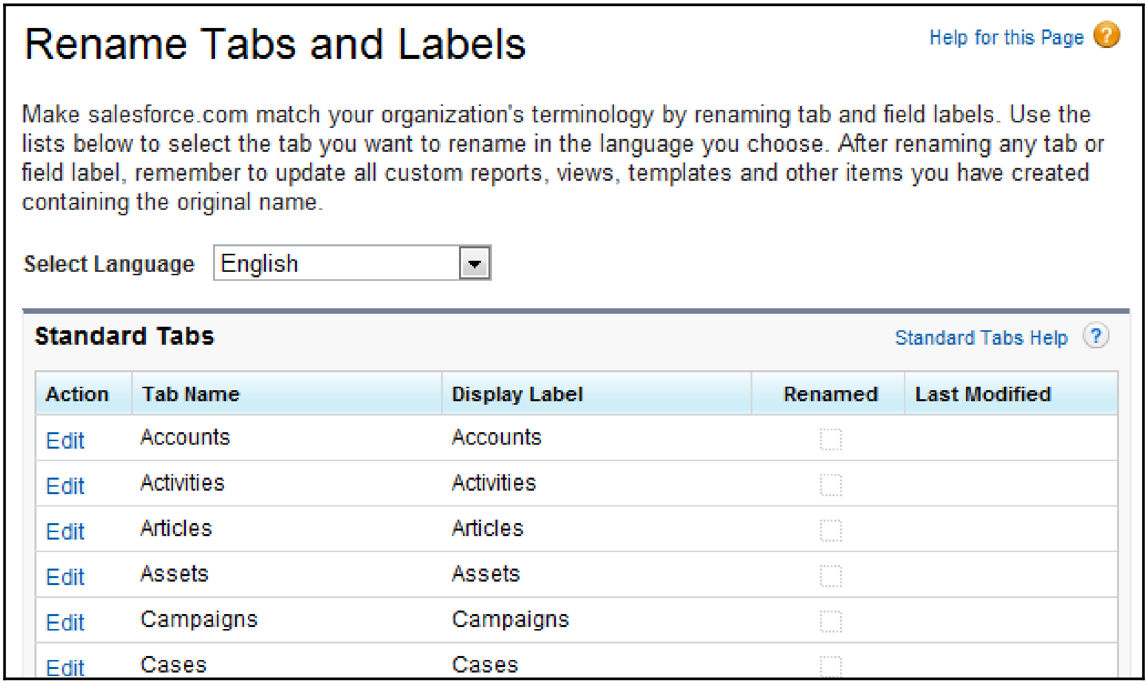
Action	Label	Tab Style	Description
Edit | Del	Activity Tracker	Hands	
Edit | Del	Events	Big top	
Edit | Del	Intranet Menu Items	Laptop	
Edit | Del	Links to Objects	Guitar	
Edit | Del	MD Ones	Alarm clock	
Edit | Del	Private Messages	Postage	
Edit | Del	Sessions	Presenter	
Edit | Del	Speakers	Microphone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

Web Tabs New What Is This?

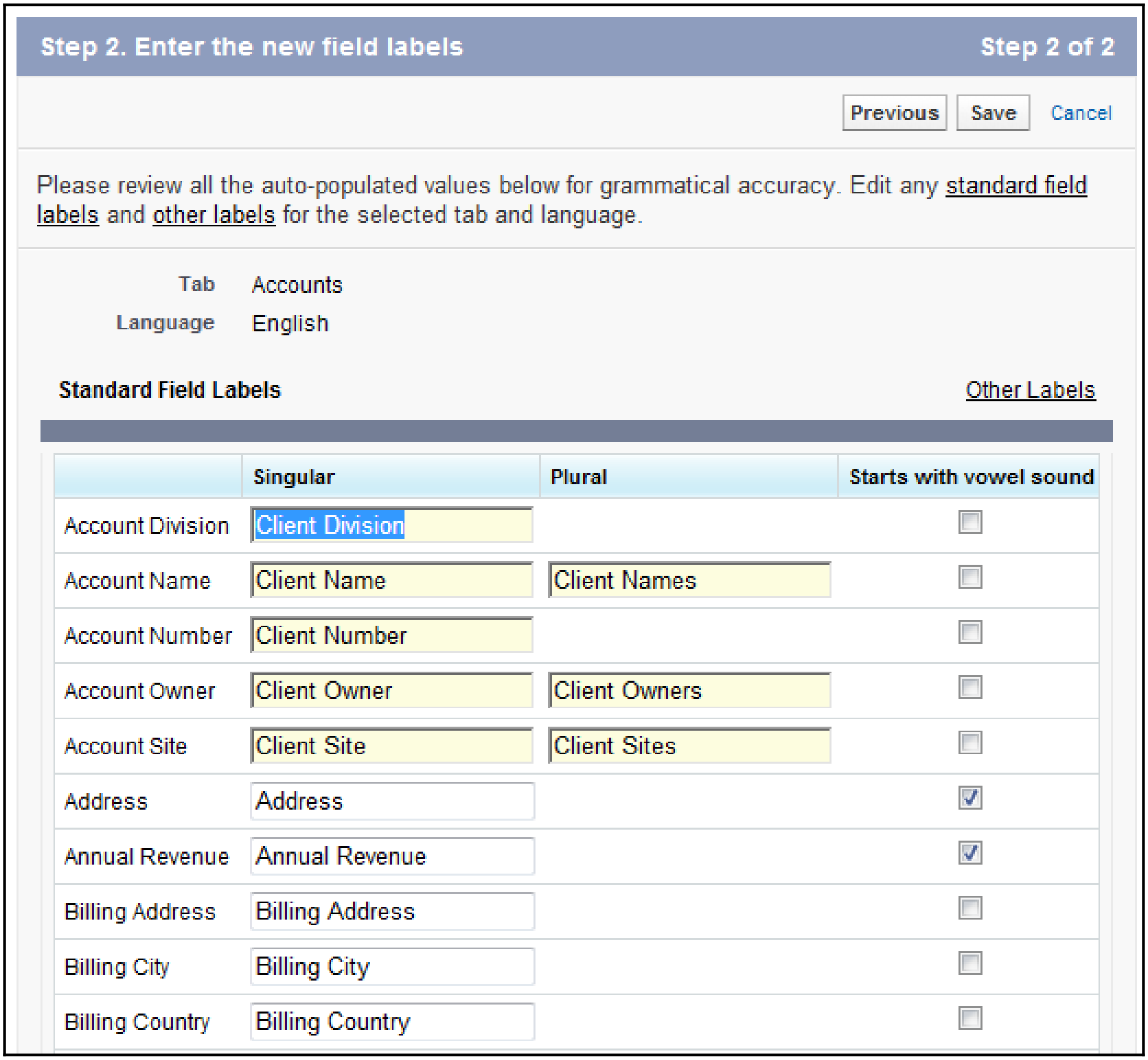
No Web Tabs have been defined

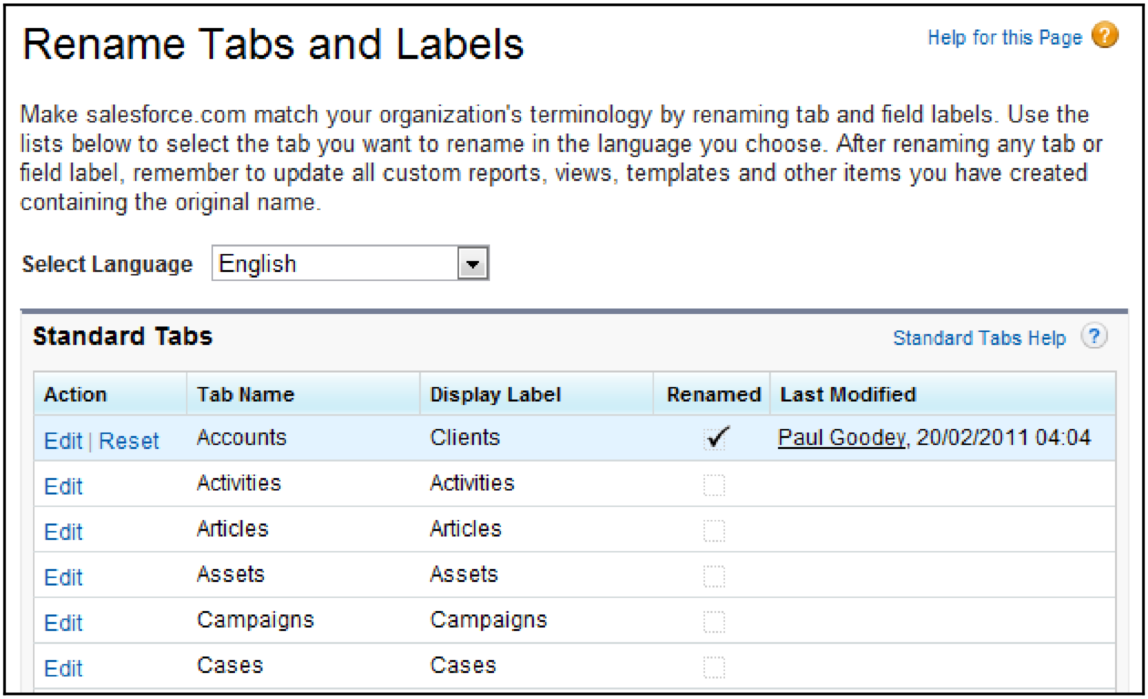
Visualforce Tabs New What Is This?

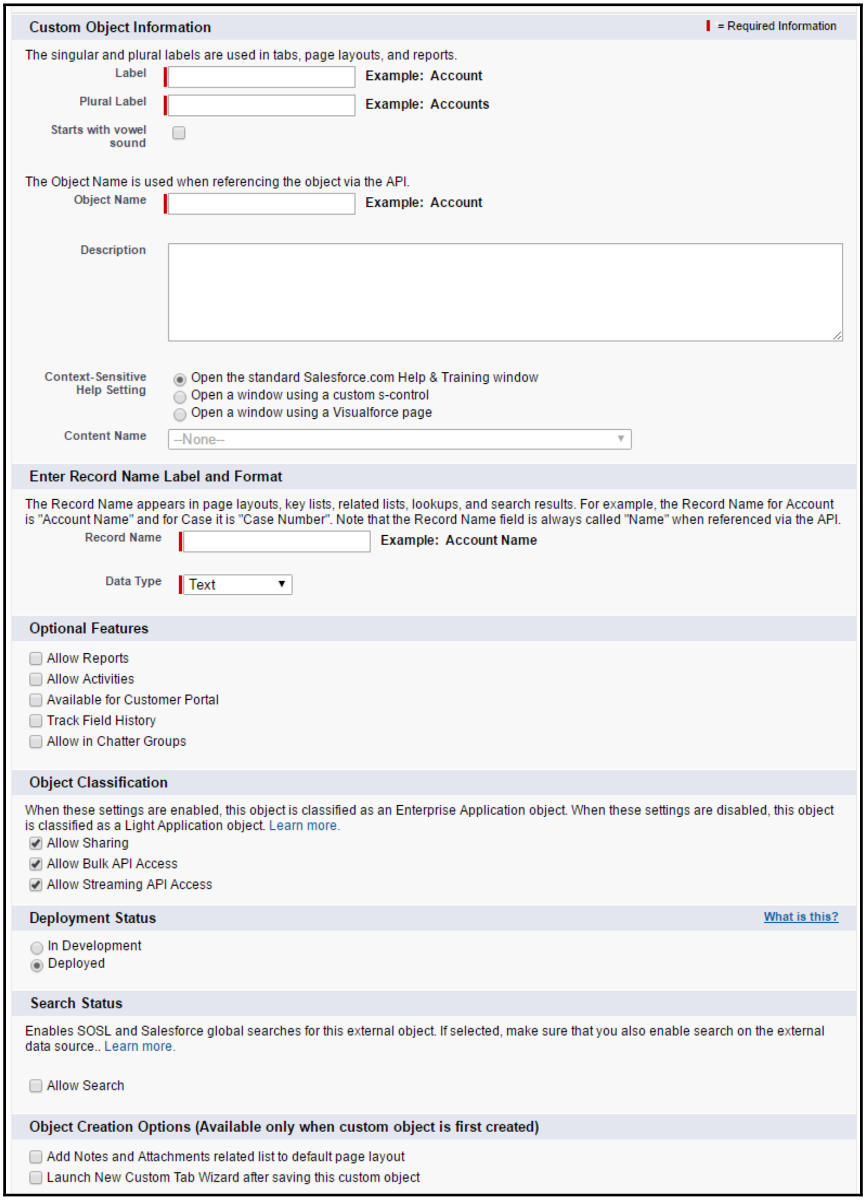
Action	Label	Tab Style	Description
Edit | Del	Start Here	Wrench	
Edit | Del	Working Model Demo Links	People	

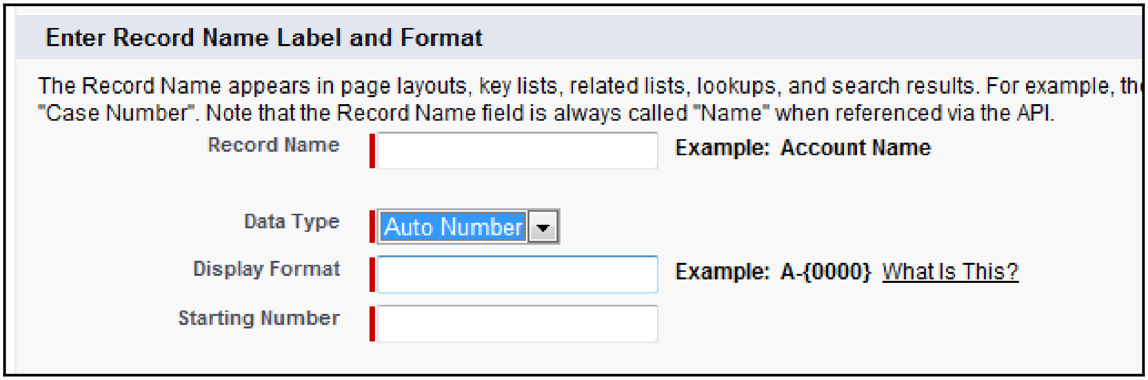

Rename Tabs and Labels
Help for this Page
Make salesforce.com match your organization's terminology by renaming tab and field labels. Use the lists below to select the tab you want to rename in the language you choose. After renaming any tab or field label, remember to update all custom reports, views, templates and other items you have created containing the original name.
Select Language
English
Standard Tabs
Standard Tabs Help
Action
Tab Name
Display Label
Renamed
Last Modified
Edit
Accounts
Accounts
Edit
Activities
Activities
Edit
Articles
Articles
Edit
Assets
Assets
Edit
Campaigns
Campaigns
Edit
Cases
Cases


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


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


Rename Tabs and Labels
Help for this Page
Make salesforce.com match your organization's terminology by renaming tab and field labels. Use the lists below to select the tab you want to rename in the language you choose. After renaming any tab or field label, remember to update all custom reports, views, templates and other items you have created containing the original name.
Select Language
English
Standard Tabs
Standard Tabs Help
Action
Tab Name
Display Label
Renamed
Last Modified
Edit | Reset
Accounts
Clients
Paul Goodey, 20/02/2011 04:04
Edit
Activities
Activities
Edit
Articles
Articles
Edit
Assets
Assets
Edit
Campaigns
Campaigns
Edit
Cases
Cases


Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Example: Account
Plural Label
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a custom s-control
Open a window using a Visualforce page
Content Name
--None--
Enter Record Name Label and Format
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
Record Name
Example: Account Name
Data Type
Text
Optional Features
Allow Reports
Allow Activities
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, th
"Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
Record Name
Example: Account Name
Data Type
Auto Number
Display Format
Example: A-{0000} What Is This?
Starting Number

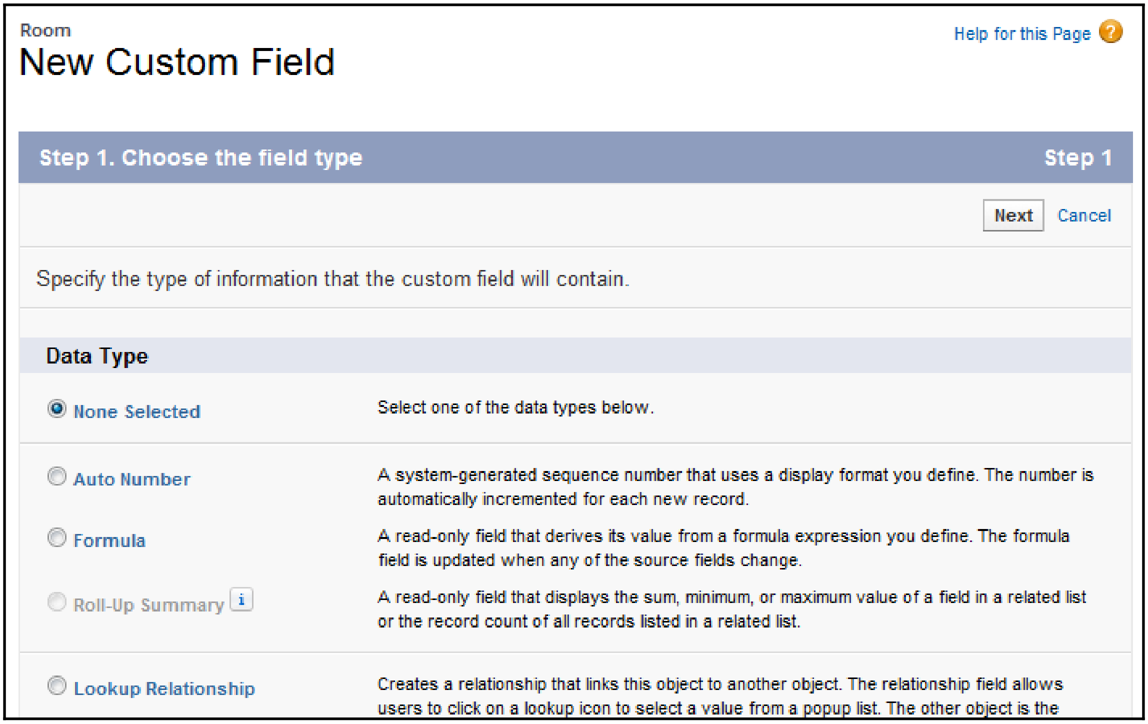
Account Limits

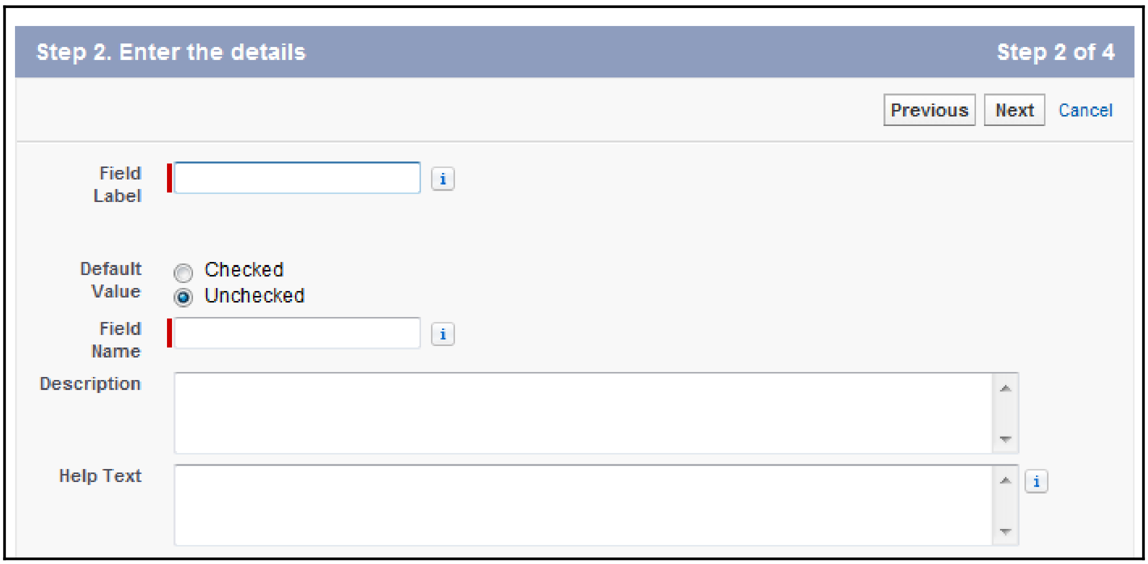
Help for this Page

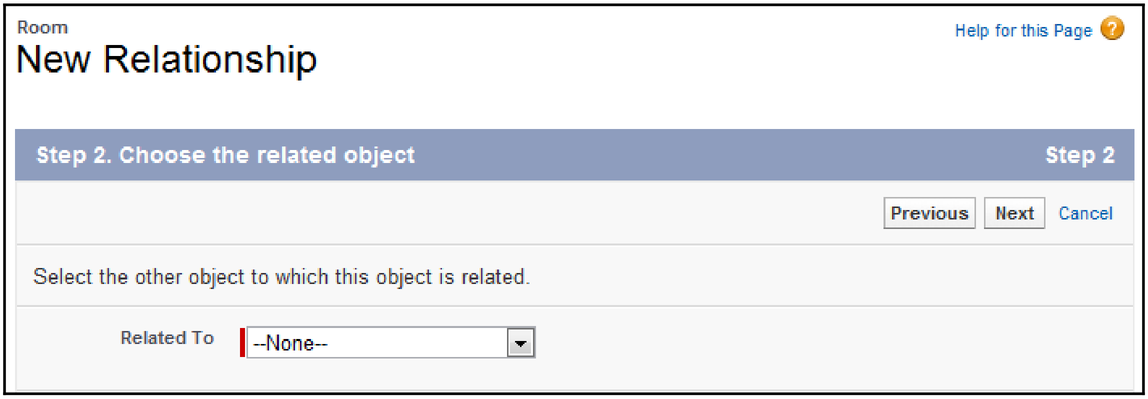
These limits apply to the setup of this object in your organization. Some limits may vary by object. For a complete list of system limits, see Editions and Limits.

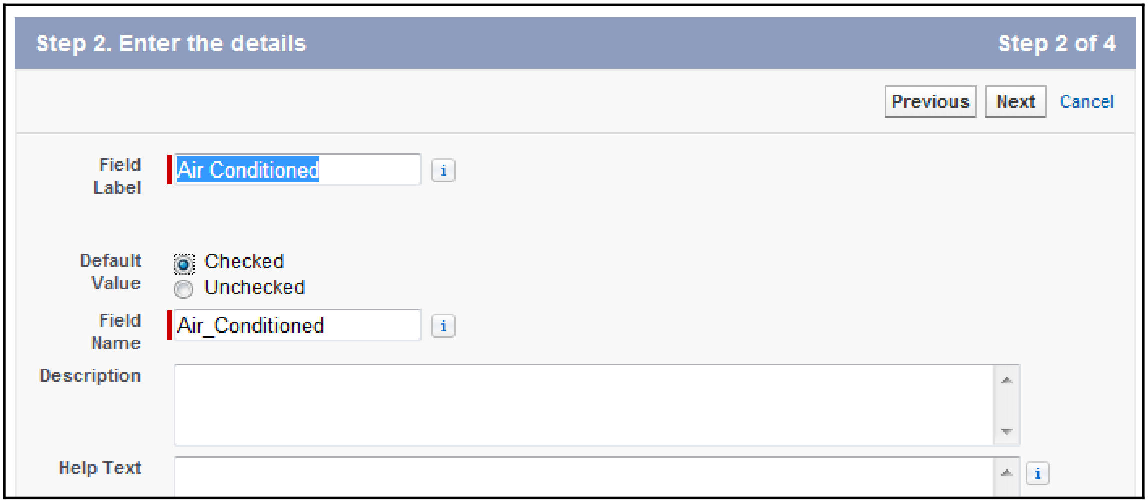
Object Limits

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

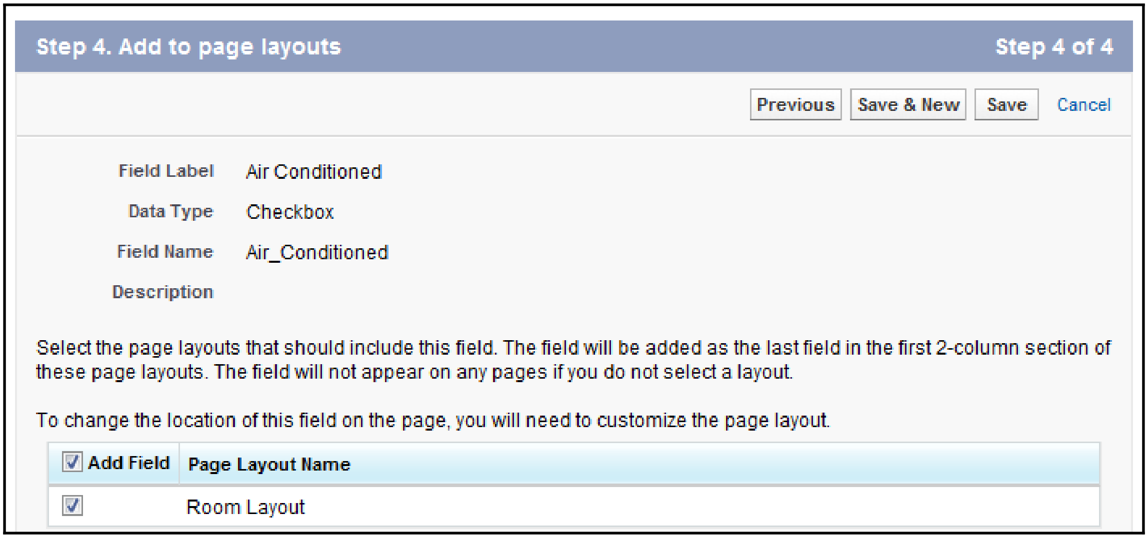

Room
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define.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

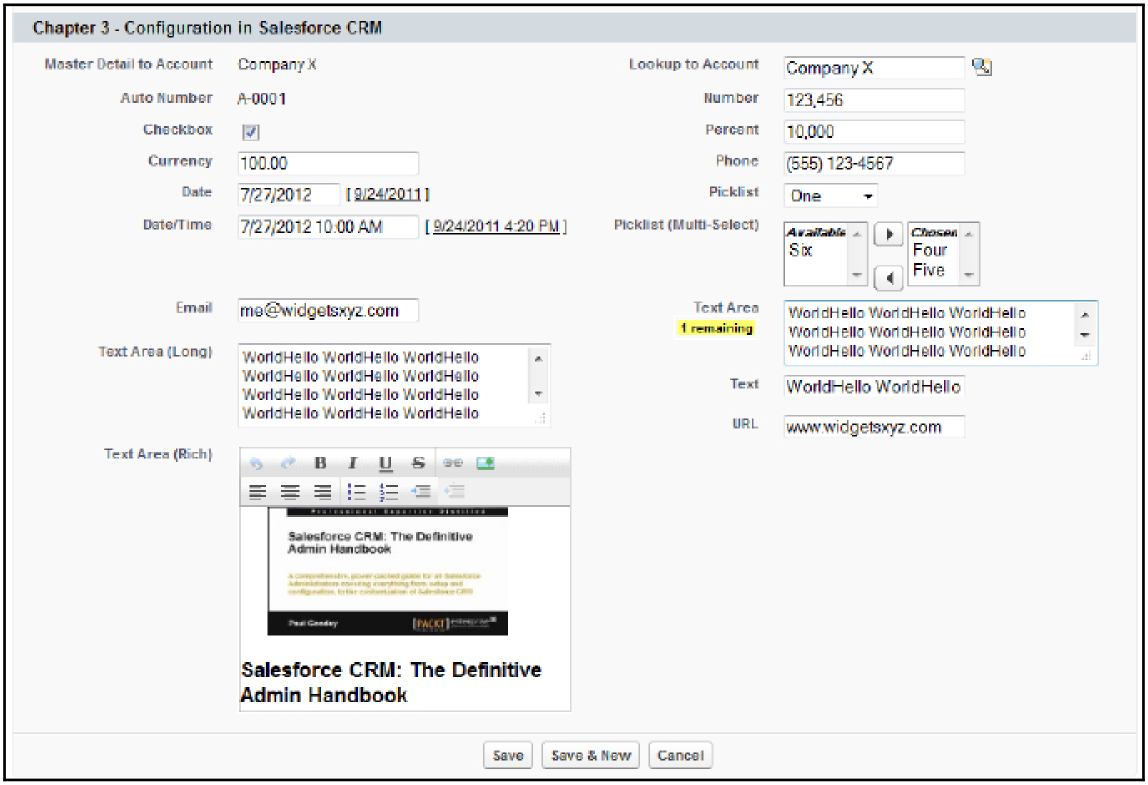

Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Default Value
Checked
Unchecked
Field Name
Description
Help Text

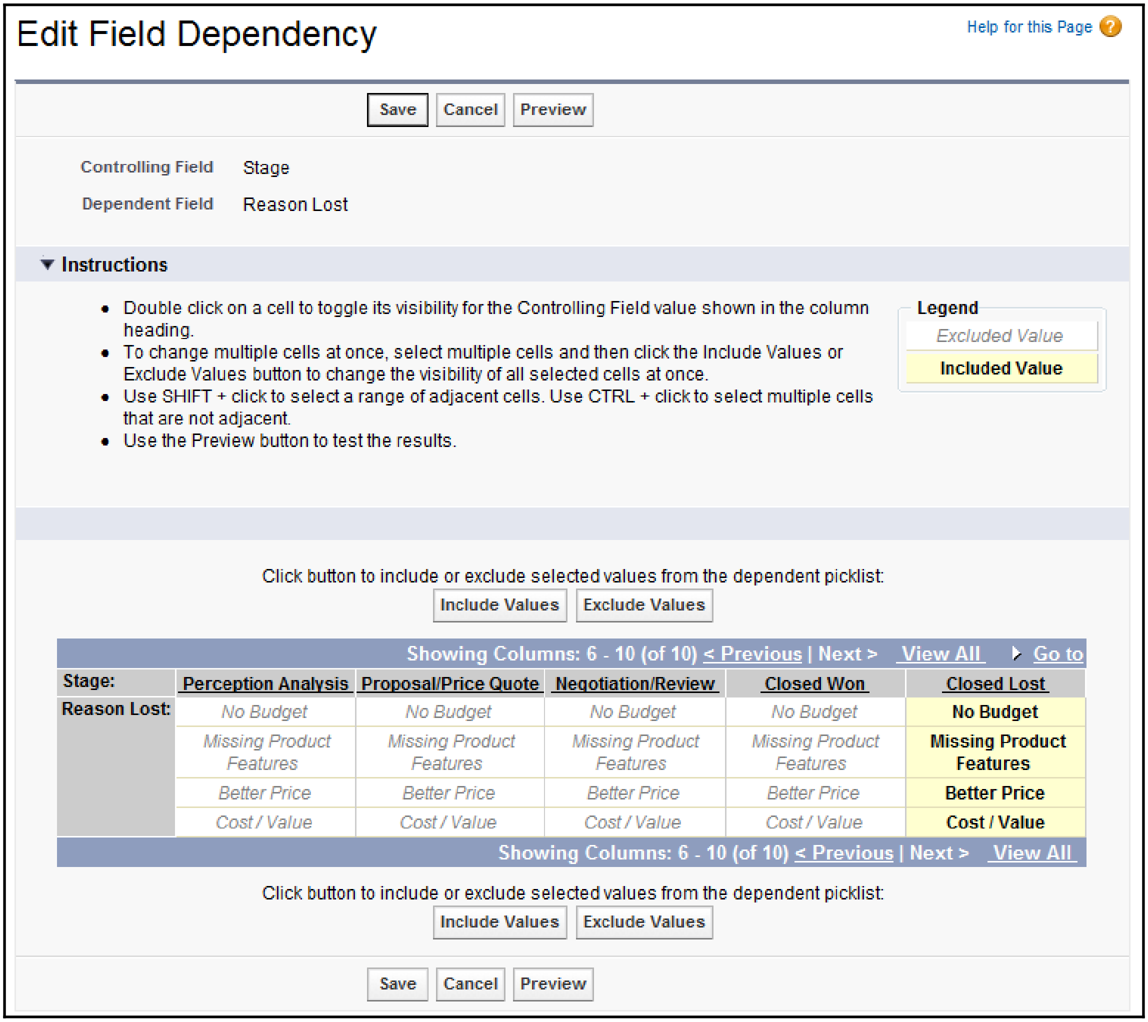

Room
New Relationship
Help for this Page
Step 2. Choose the related object
Step 2
Previous
Next
Cancel
Select the other object to which this object is related.
Related To
--None--

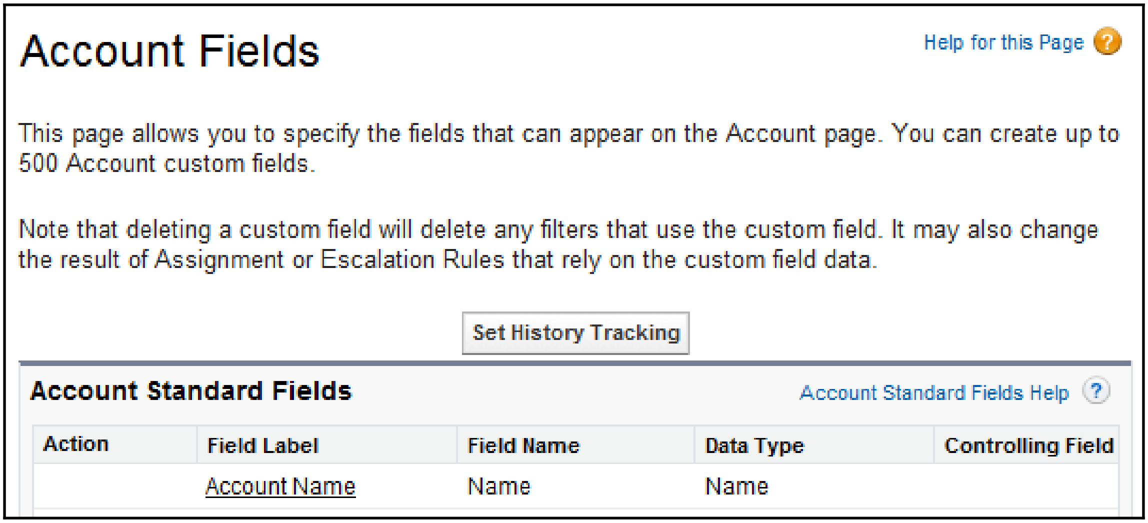

Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Air Conditioned
Default Value
Checked
Unchecked
Field Name
Air_Conditioned
Description
Help Text

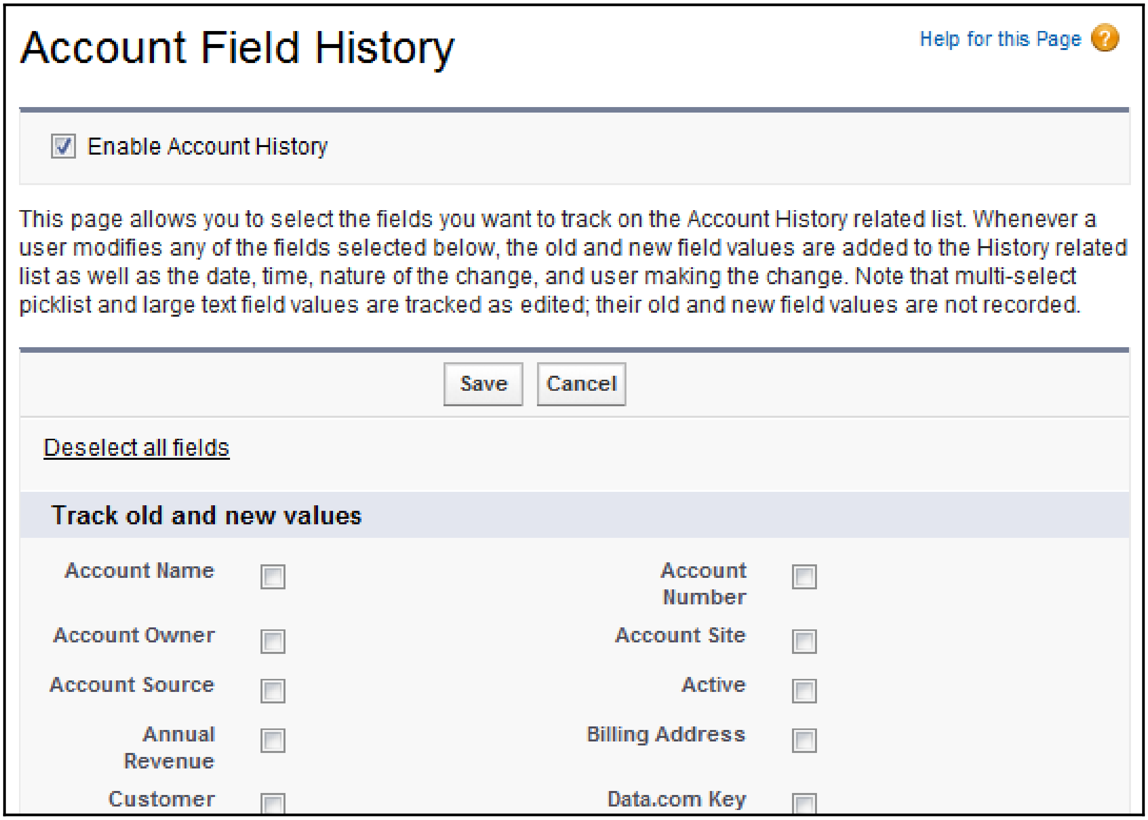

Step 3. Establish field-level security
Step 3 of 4
Previous
Next
Cancel
Field Label
Air Conditioned
Data Type
Checkbox
Field Name
Air_Conditioned
Description
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if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

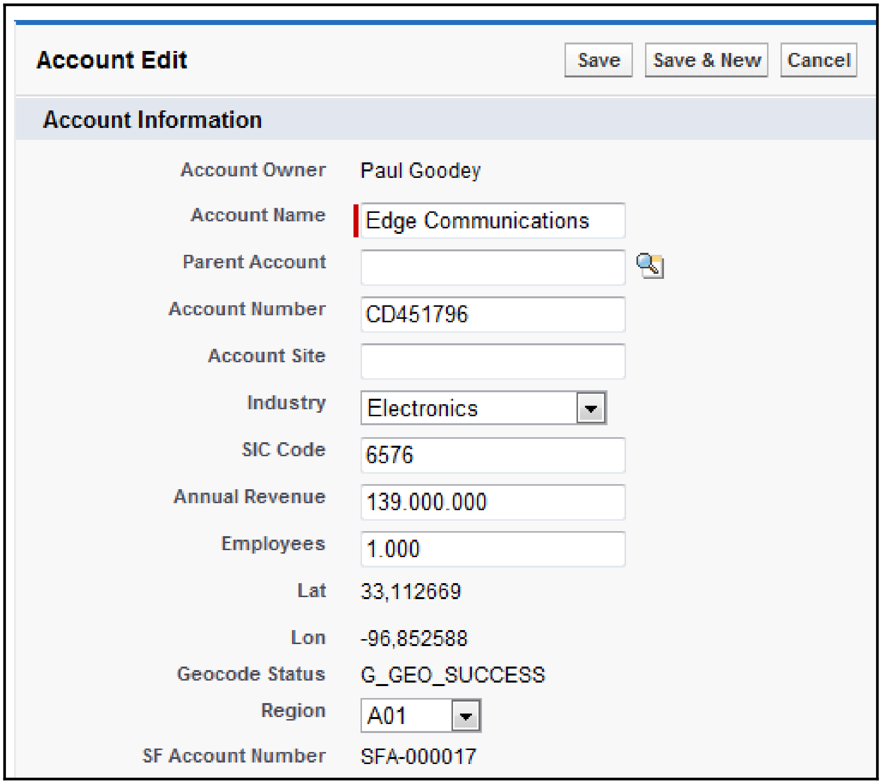

Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label
Air Conditioned
Data Type
Checkbox
Field Name
Air_Conditioned
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts.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

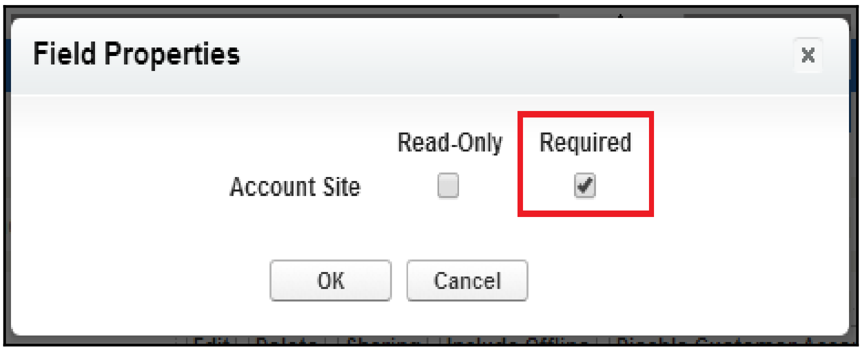

Chapter 3 - Configuration in Salesforce CRM
Master Detail to Account
Company X
Lookup to Account
Company X
Auto Number
A-0001
Number
123,456
Checkbox
Percent
10,000
Currency
100.00
Phone
(555) 123-4567
Date
7/27/2012
[9/24/2011]
Picklist
One
Date/Time
7/27/2012 10:00 AM
[9/24/2011 4:20 PM]
Picklist (Multi-Select)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

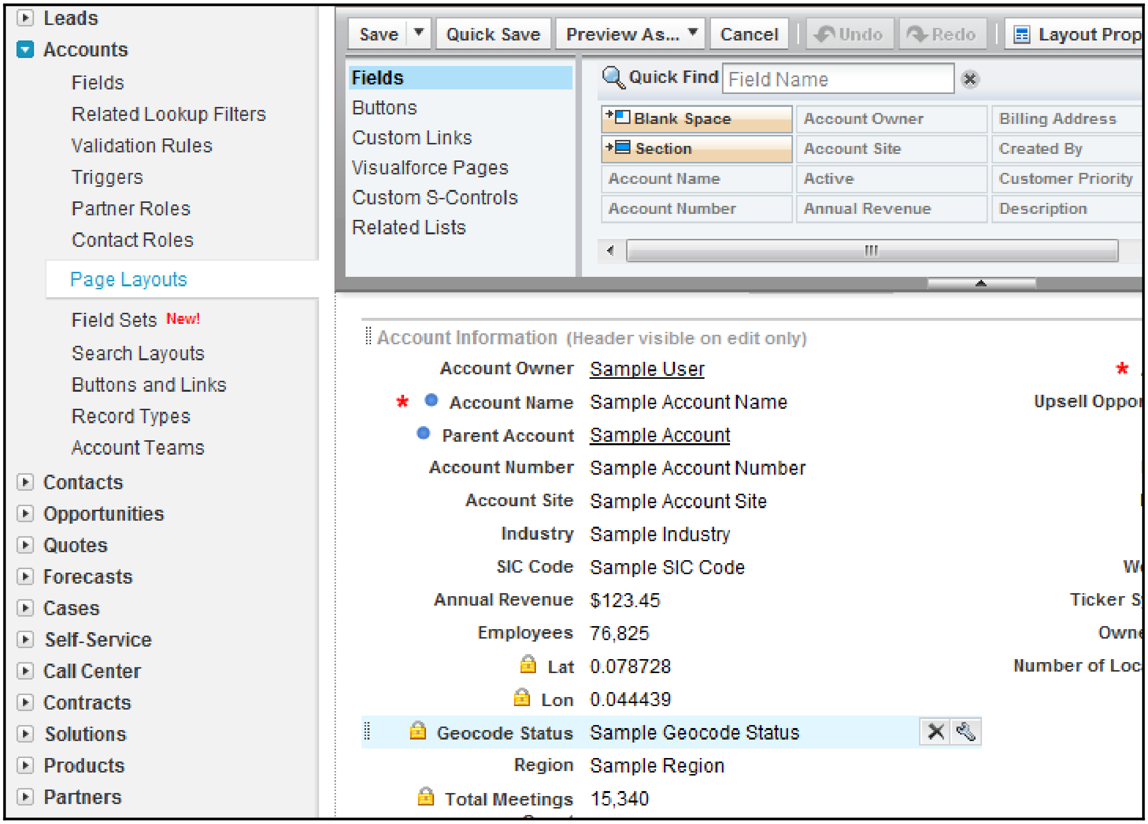

Edit Field Dependency
Help for this Page
Save
Cancel
Preview
Controlling Field Stage
Dependent Field Reason Lost
Instructions
Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
To change multiple cells at once, select multiple cells and then click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

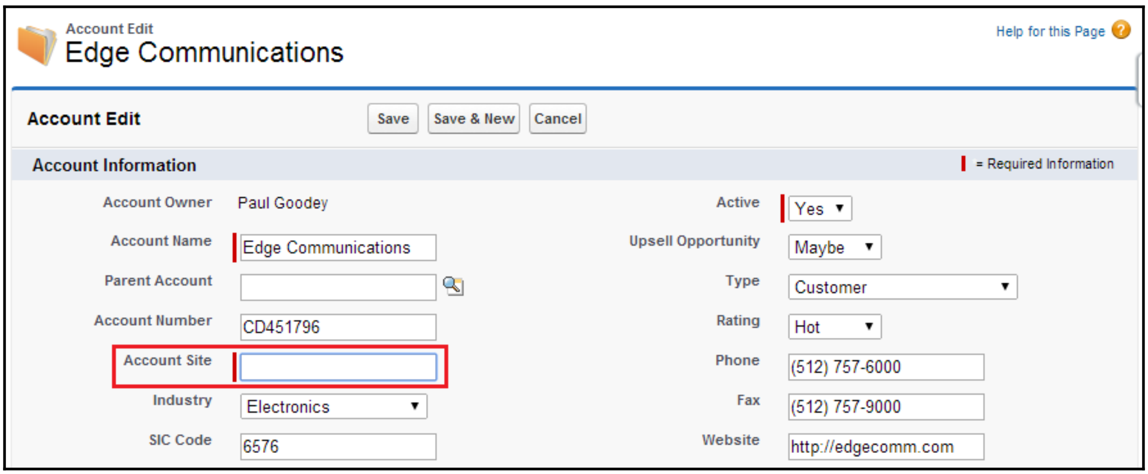

Account Fields
Help for this Page
This page allows you to specify the fields that can appear on the Account page. You can create up to 500 Account custom fields.
Note that deleting a custom field will delete any filters that use the custom field. It may also change the result of Assignment or Escalation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

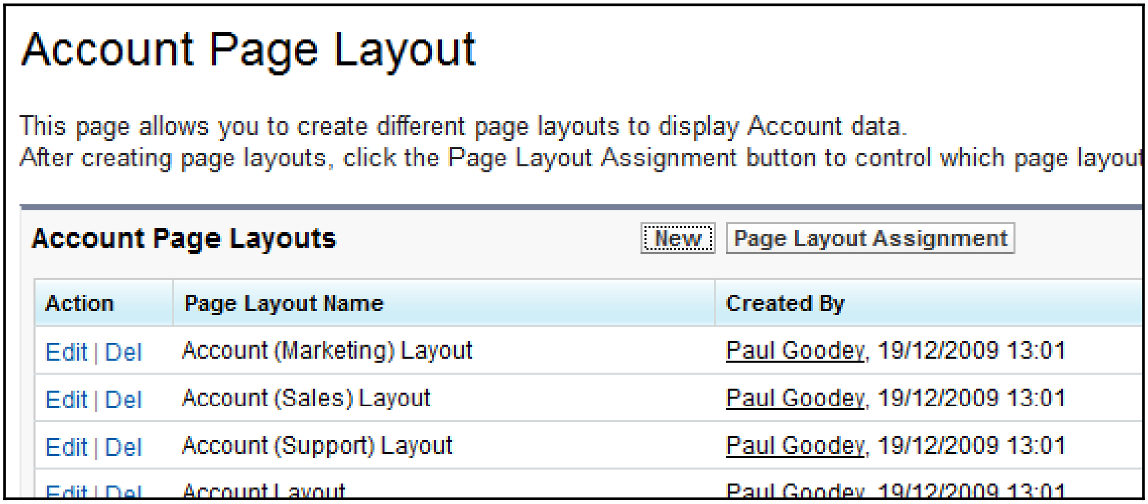

Account Field History
Help for this Page
Enable Account History
This page allows you to select the fields you want to track on the Account History related list. Whenever a user modifies any of the fields selected below, the old and new field values are added to the History related list as well as the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


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

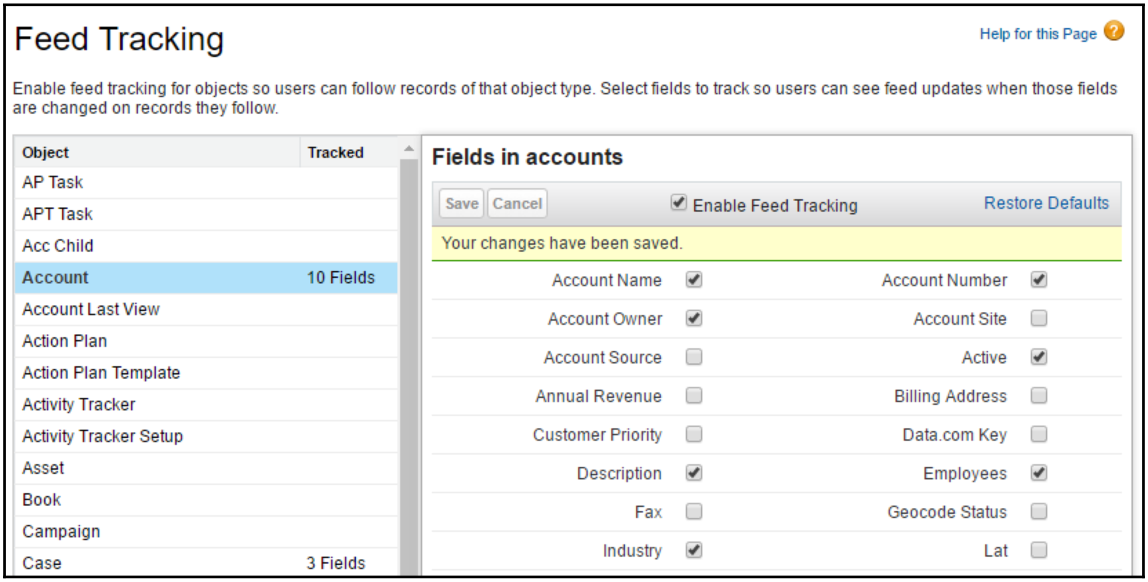

Field Properties
Read-Only
Required
Account Site
OK
Cancel

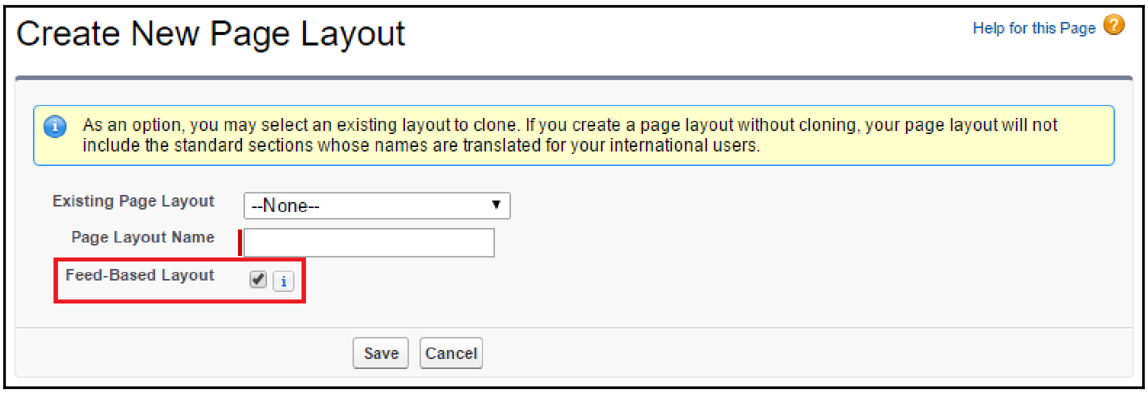

Leads
Accounts
Fields
Related Lookup Filters
Validation Rules
Triggers
Partner Roles
Contact Roles
Page Layouts
Field Sets New!
Search Layouts
Buttons and Links
Record Types
Account Teams
Contacts
Opportunities
Quotes
Forecasts
Cases
Self-Service
Call Center
Contracts
Solutions
Products
Partners
Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Prop
Fields
Buttons
Custom Links
Visualforce Pages
Custom S-Controls
Related Lists
Quick Find
Field Name
Blank Space
Section
Account Name
Account Number
Account Owner
Account Site
Active
Annual Revenue
Billing Address
Created By
Customer Priority
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
Upsell Oppor
Ticker S
Number of Loc

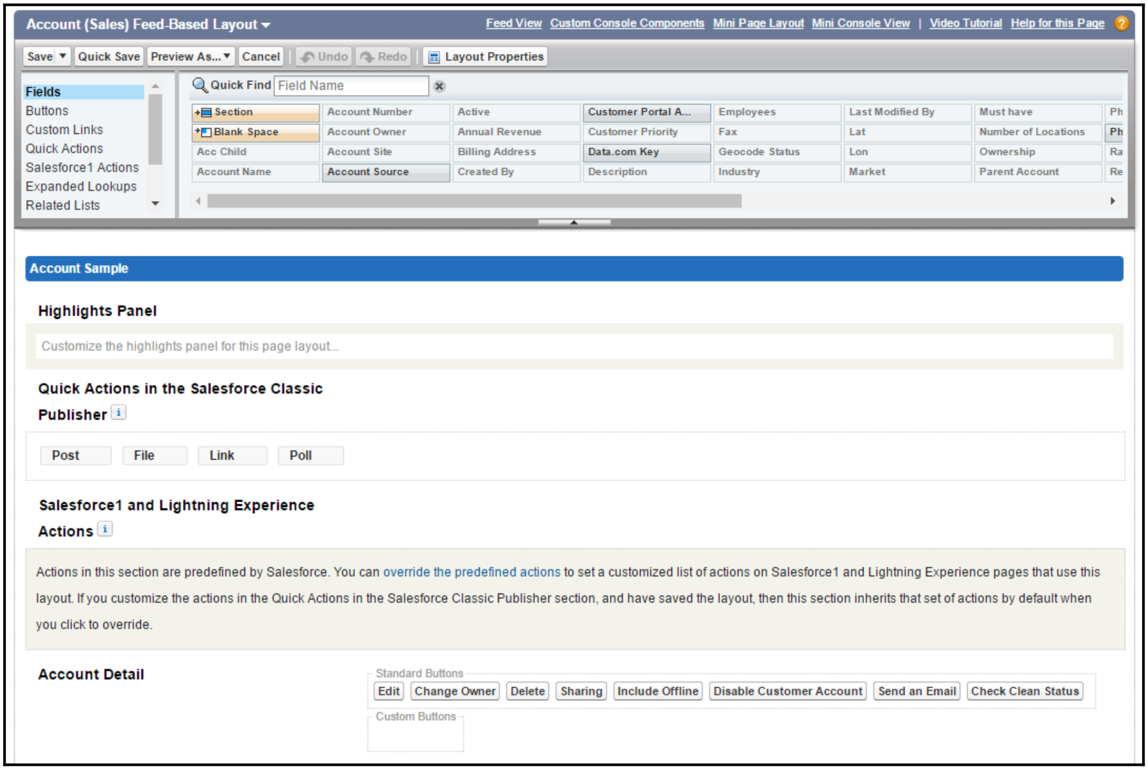

Account Edit
Edge Communications
Help for this Page
Account Edit
Save
Save & New
Cancel
Account Information
= Required Information
Account Owner Paul Goodey
Account Name Edge Communications
Parent Account
Account Number CD451796
Account Site
Industry Electronics
SIC Code 6576
Active Yes
Upsell Opportunity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


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

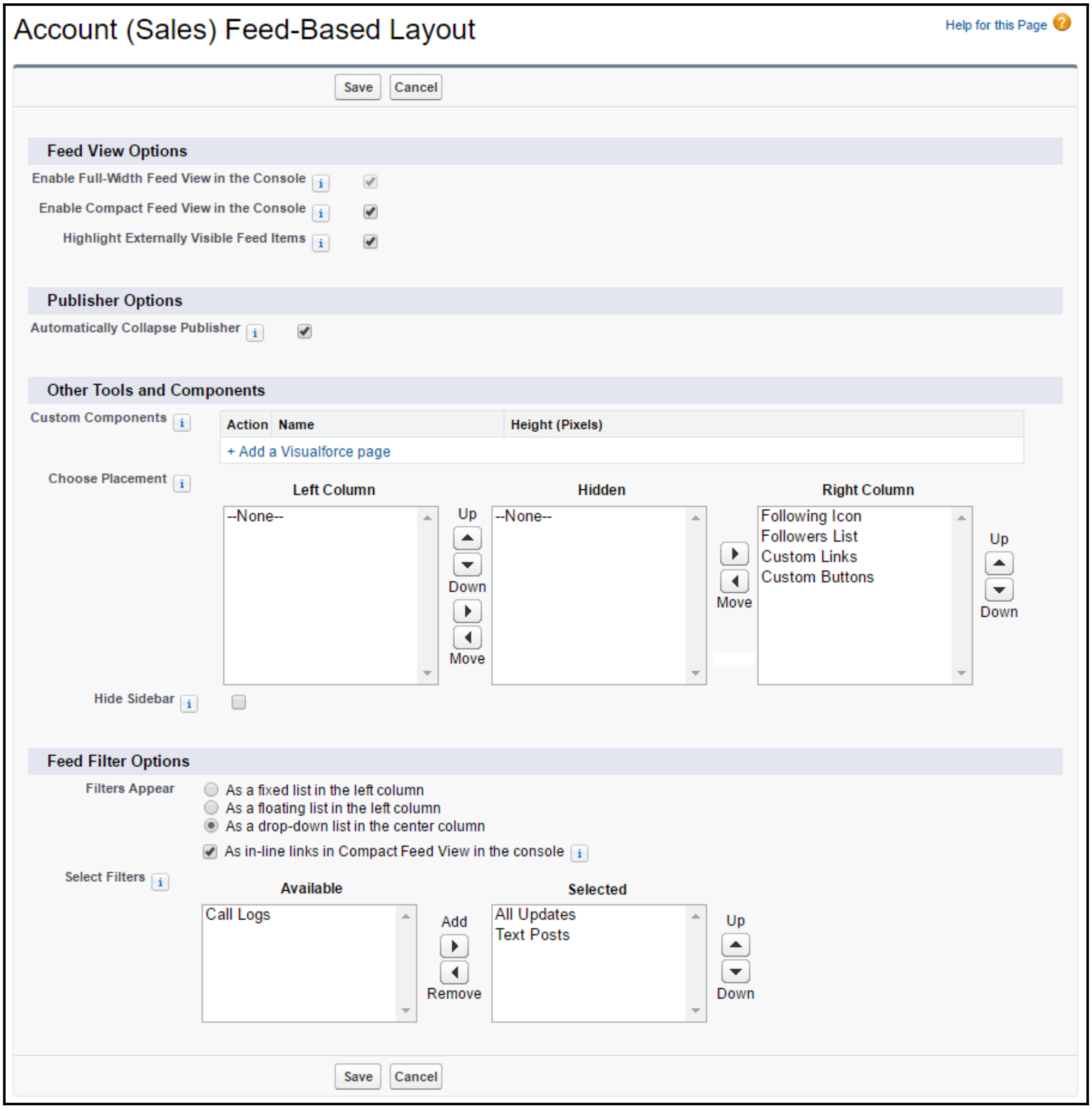

Account
United Oil & Gas Corp.
Feed
Details
Post
File
Link
Poll
Click here to expand the Post action.
Show All Updates
Paul Goodey changed Type from Customer to Customer - Direct, Phone from (212) 842-5500 to (212) 555-5500, and Employees from 100,000 to 100,001.
Comment · Like · Today at 22:44
Paul Goodey changed Description.
Comment · Like · Today at 22:38

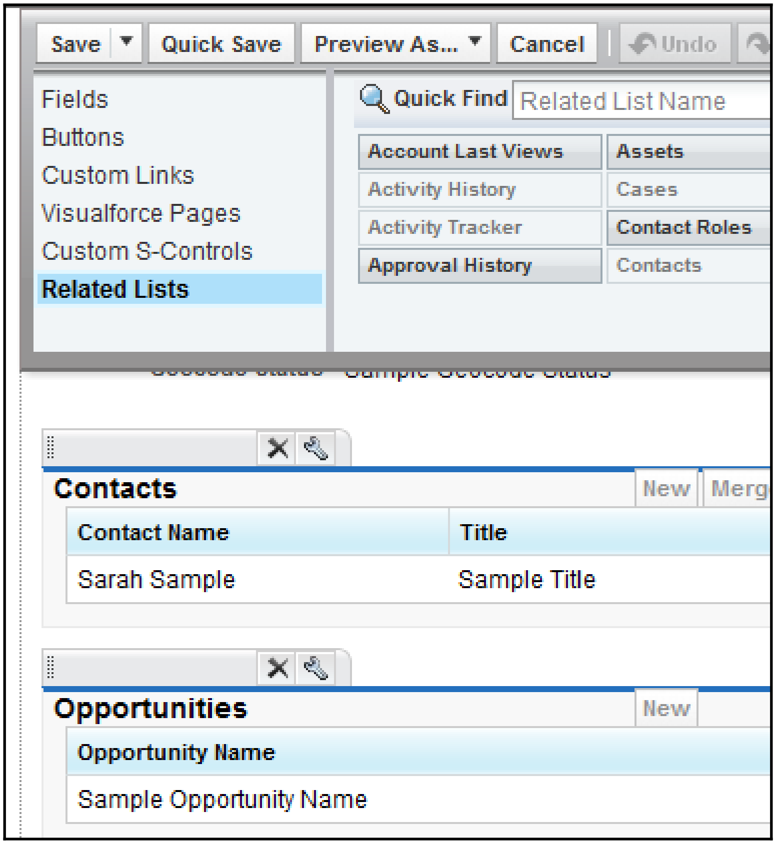

Feed Tracking
Help for this Page
Enable feed tracking for objects so users can follow records of that object type. Select fields to track so users can see feed updates when those fields are changed on records they follow.
Object
Tracked
AP Task
APT Task
Acc Child
Account
10 Fields
Account Last View
Action Plan
Action Plan Template
Activity Tracker
Activity Tracker Setup
Asset
Book
Campaign
Case
3 Fields
Fields in accounts
Save
Cancel
Enable Feed Tracking
Restore Defaults
Your changes have been saved.
Account Name
Account Number
Account Owner
Account Site
Account Source
Active
Annual Revenue
Billing Address
Customer Priority
Data.com Key
Description
Employees
Fax
Geocode Status
Industry
Lat

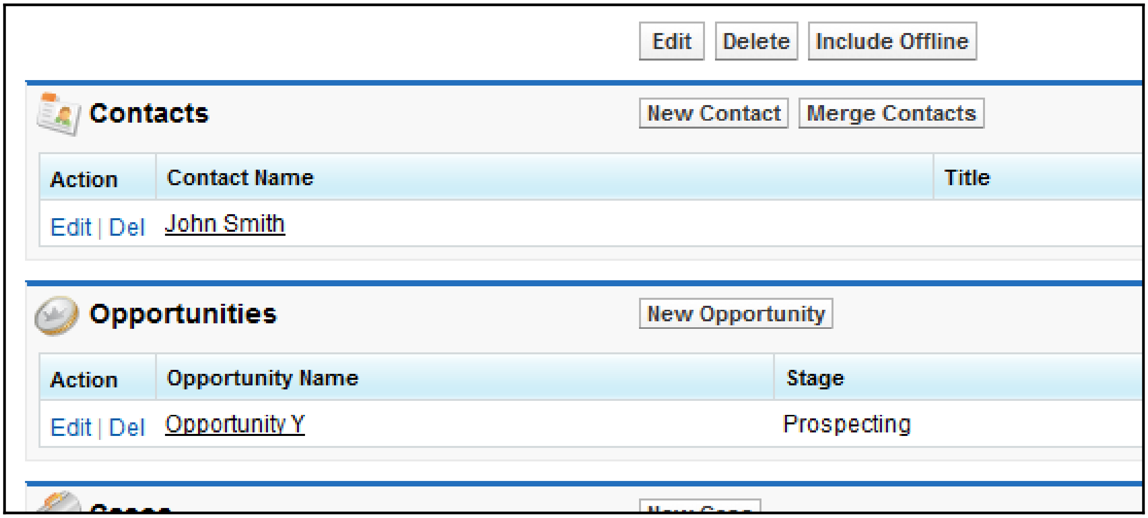

Create New Page Layout
Help for this Page
As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections whose names are translated for your international users.
Existing Page Layout
--None--
Page Layout Name
Feed-Based Layout
Save
Cancel

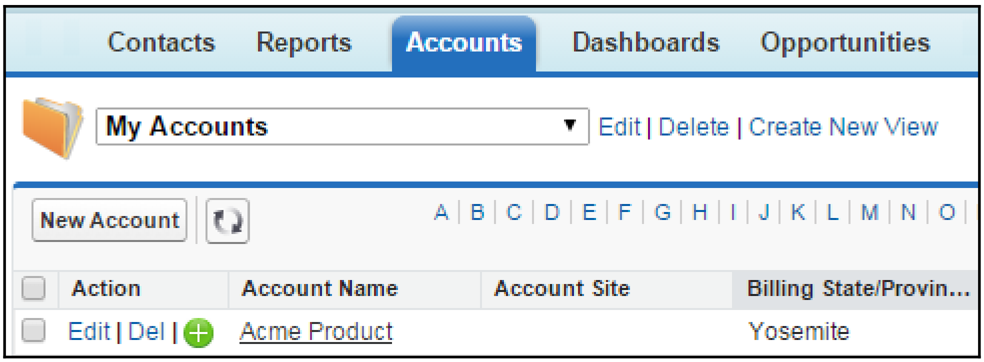

Account (Sales) Feed-Based Layout
Feed View Custom Console Components Mini Page Layout Mini Console View | Video Tutorial Help for this Page
Save Quick Save Preview As... Cancel Undo Redo Layout Properties
Fields
Buttons
Custom Links
Quick Actions
Salesforce1 Actions
Expanded Lookups
Related Lists
Quick Find Field Name
Section
Blank Space
Acc Child
Account Name
Account Number
Account Owner
Account Site
Account Source
Active
Annual Revenue
Billing Address
Created By
Customer Portal A...
Customer Priority
Data.com Key
Description
Employees
Fax
Geocode Status
Industry
Last Modified By
Lat
Lon
Market
Must have
Number of Locations
Ownership
Parent Account
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
Edit
Change Owner
Delete
Sharing
Include Offline
Disable Customer Account
Send an Email
Check Clean Status
Custom Buttons

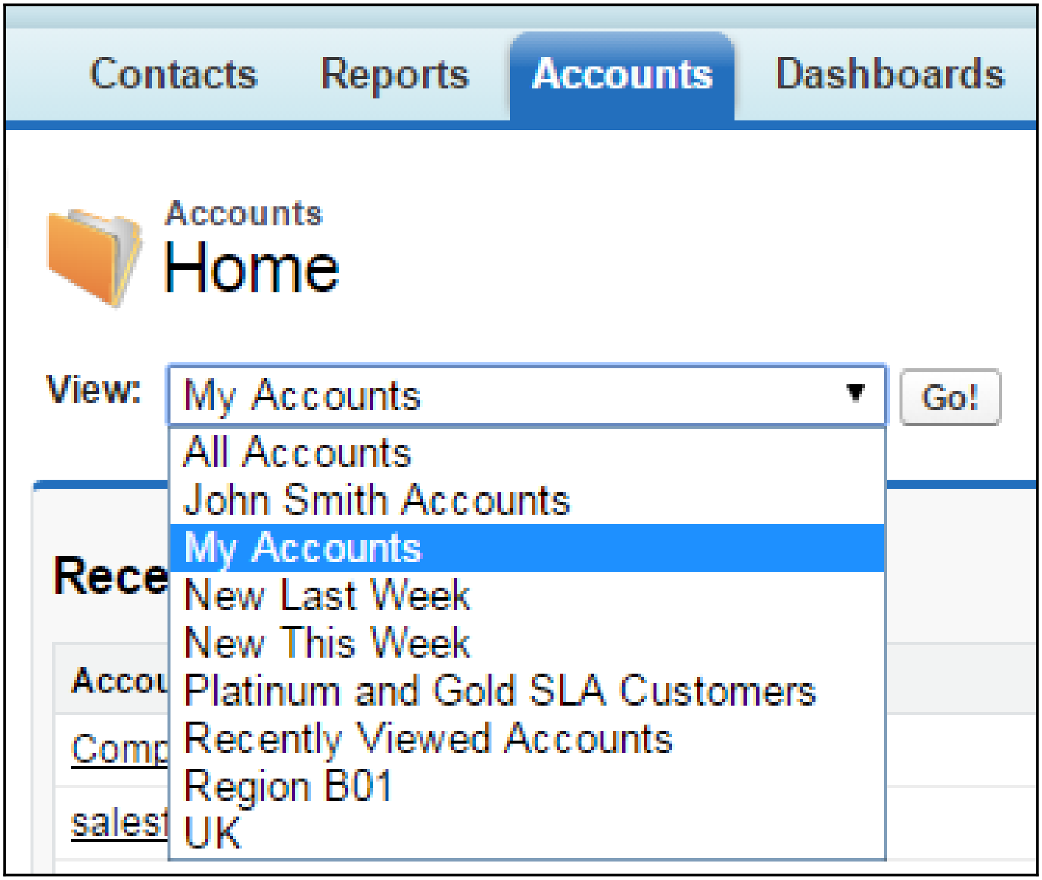

Account (Sales) Feed-Based Layout
Feed View
Custom Console Components
Mini Page Layout
Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties

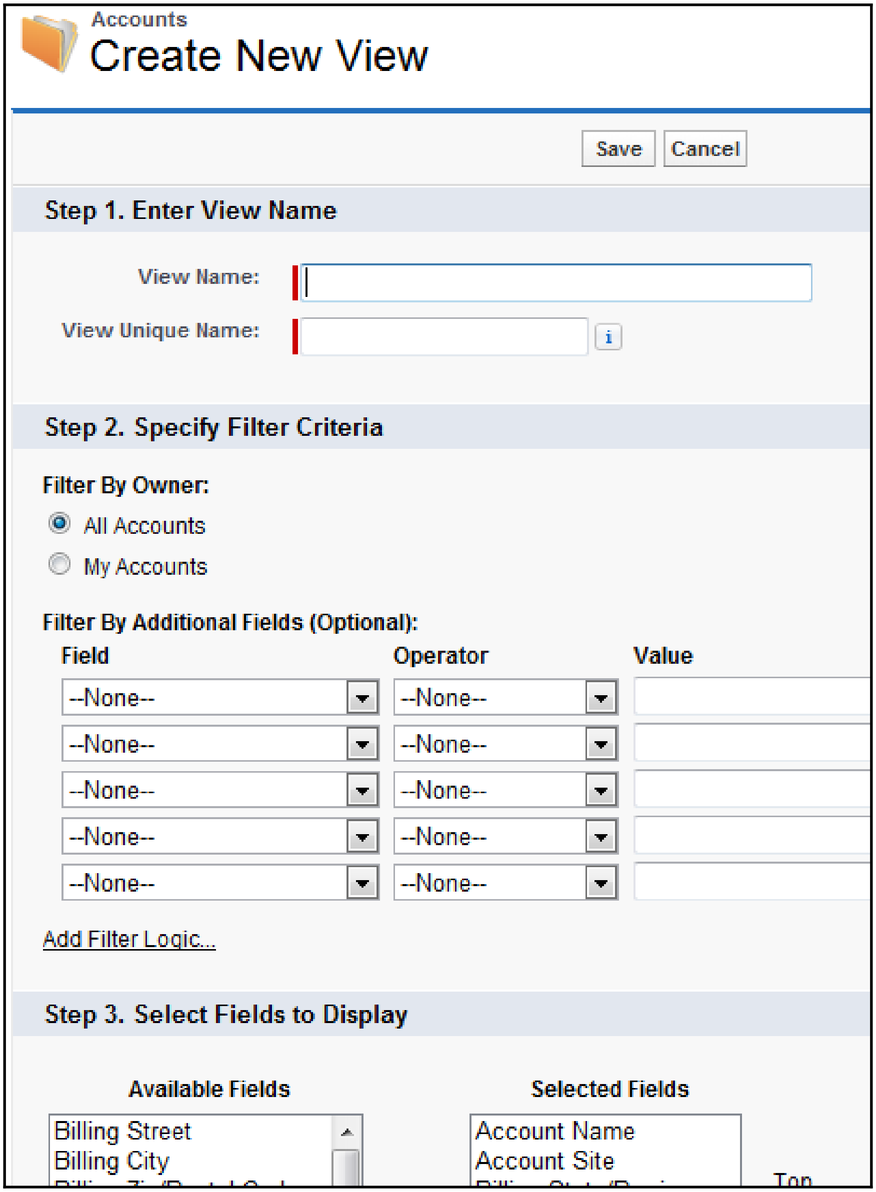

Account (Sales) Feed-Based Layout
Help for this Page
Save
Cancel
Feed View Options
Enable Full-Width Feed View in the Console
Enable Compact Feed View in the Console
Highlight Externally Visible Feed Items
Publisher Options
Automatically Collapse Publisher
Other Tools and Components
Custom Components
Action
Name
Height (Pixels)
+ Add a Visualforce page
Choose Placement
Left Column
--None--
Up
Down
Move
Hidden
--None--
Move
Right Column
Following Icon
Followers List
Custom Links
Custom Buttons
Up
Down
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
Call Logs
Add
Remove
Selected
All Updates
Text Posts
Up
Down
Save
Cancel

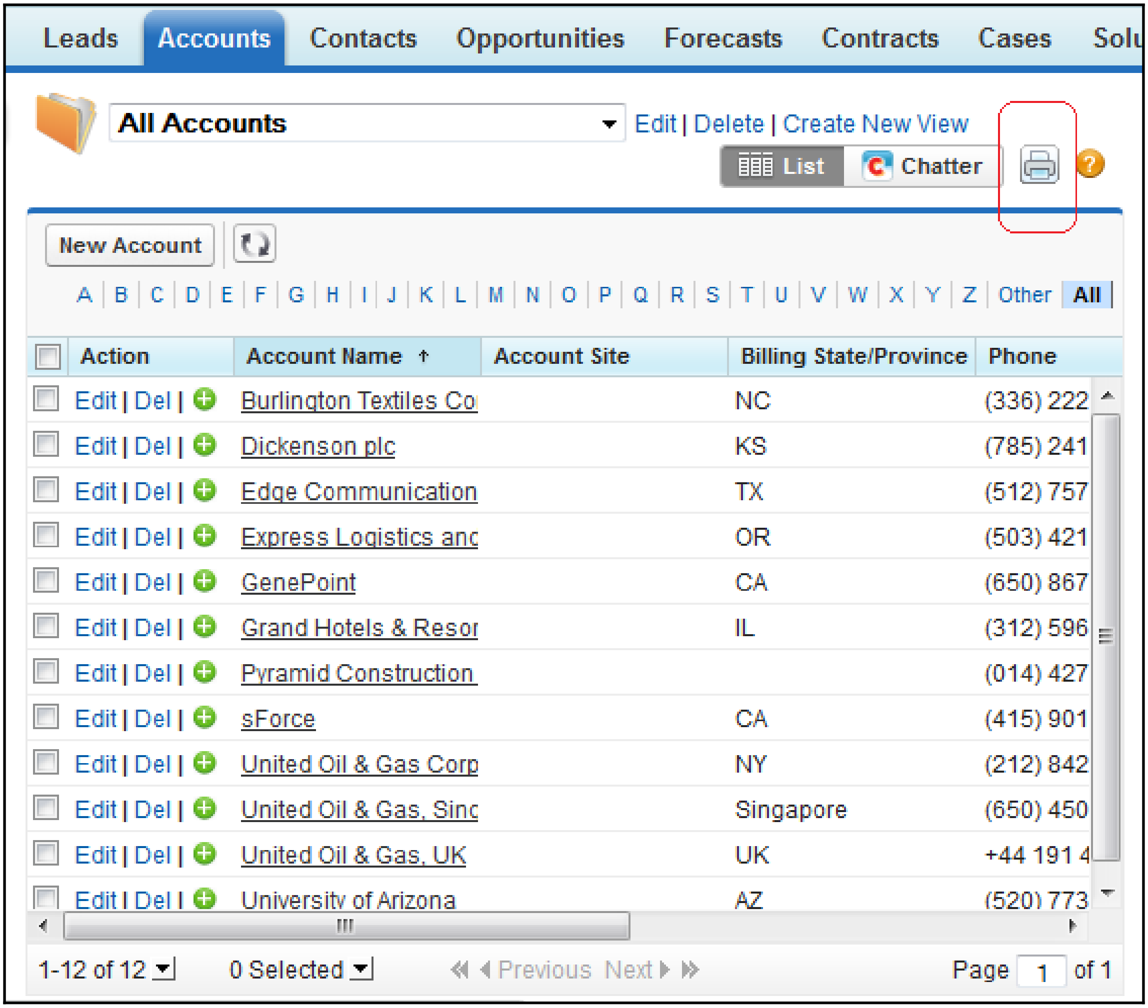

Save
Quick Save
Preview As...
Cancel
Undo
Fields
Buttons
Custom Links
Visualforce Pages
Custom S-Controls
Related Lists
Quick Find
Related List Name
Account Last Views
Assets
Activity History
Cases
Activity Tracker
Contact Roles
Approval History
Contacts
Contacts
New
Contact Name
Title
Sarah Sample
Sample Title
Opportunities
New
Opportunity Name
Sample Opportunity Name


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

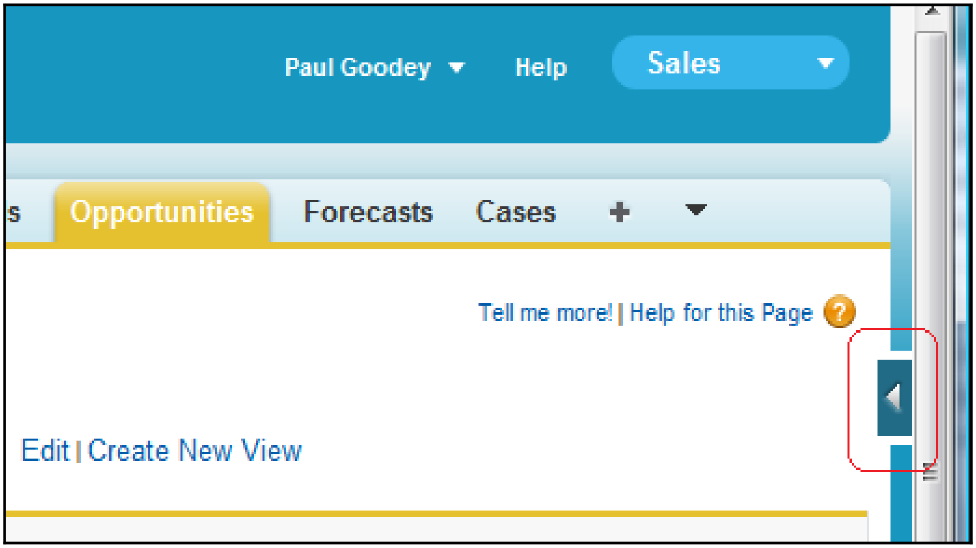

Contacts
Reports
Accounts
Dashboards
Opportunities
My Accounts
Edit | Delete | Create New View
New Account
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O
Action
Account Name
Account Site
Billing State/Provin...
Edit | Del |
Acme Product
Yosemite

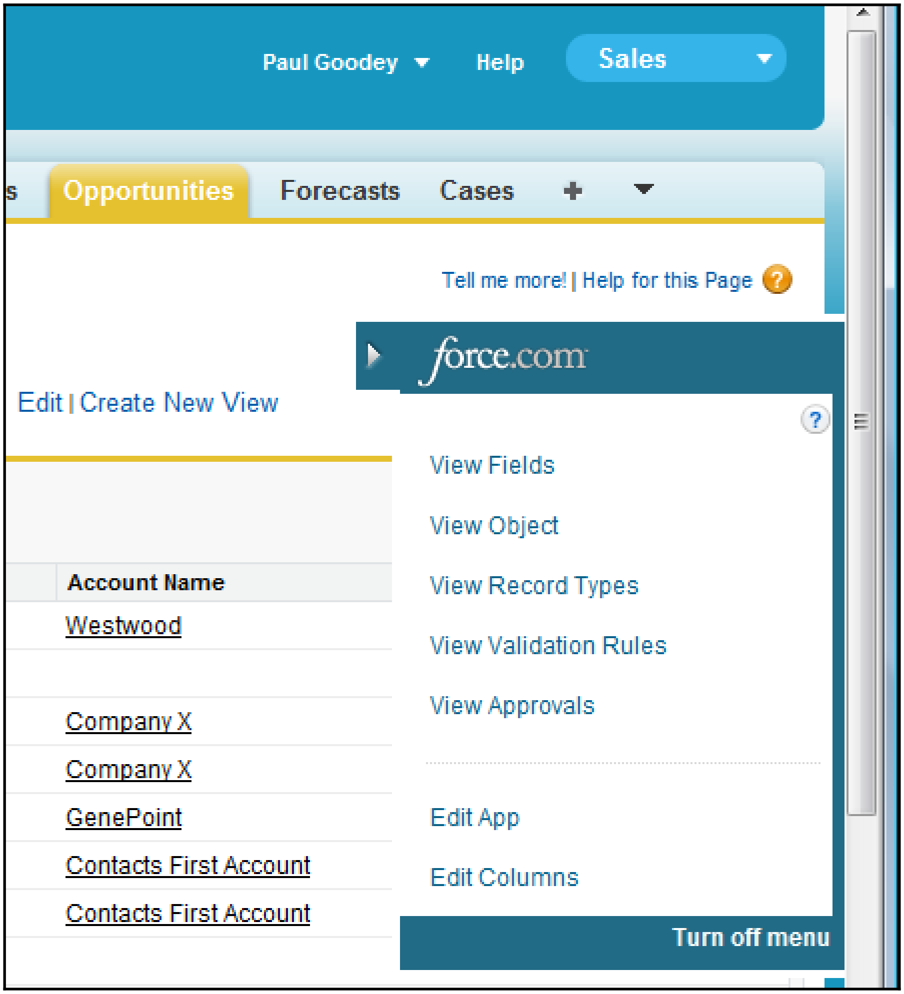

Contacts
Reports
Accounts
Dashboards
Accounts
Home
View:
My Accounts
Go!
All Accounts
John Smith Accounts
My Accounts
New Last Week
New This Week
Platinum and Gold SLA Customers
Recently Viewed Accounts
Region B01
UK


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

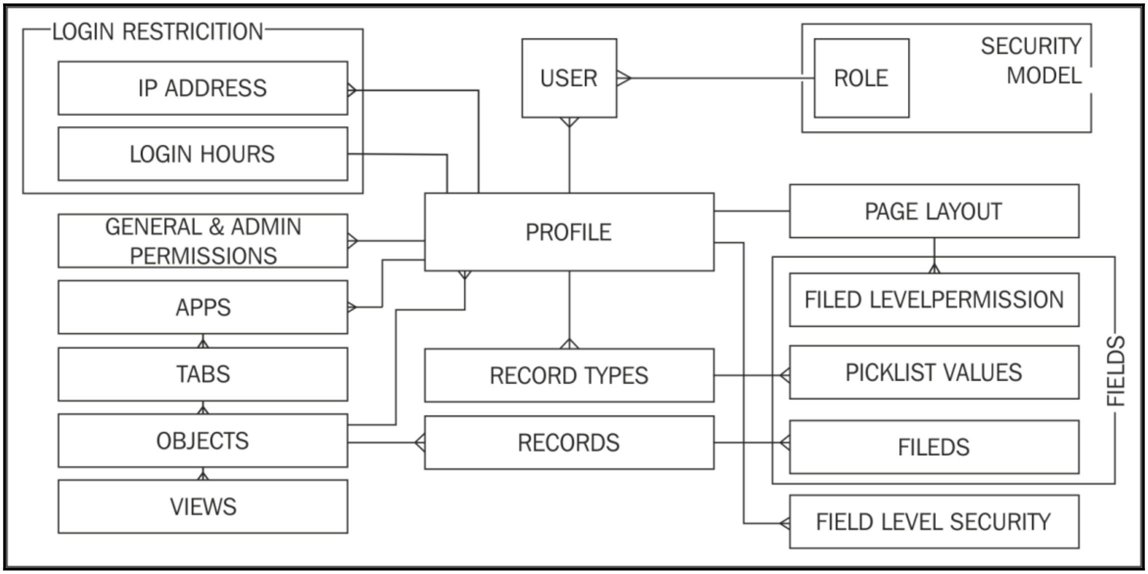


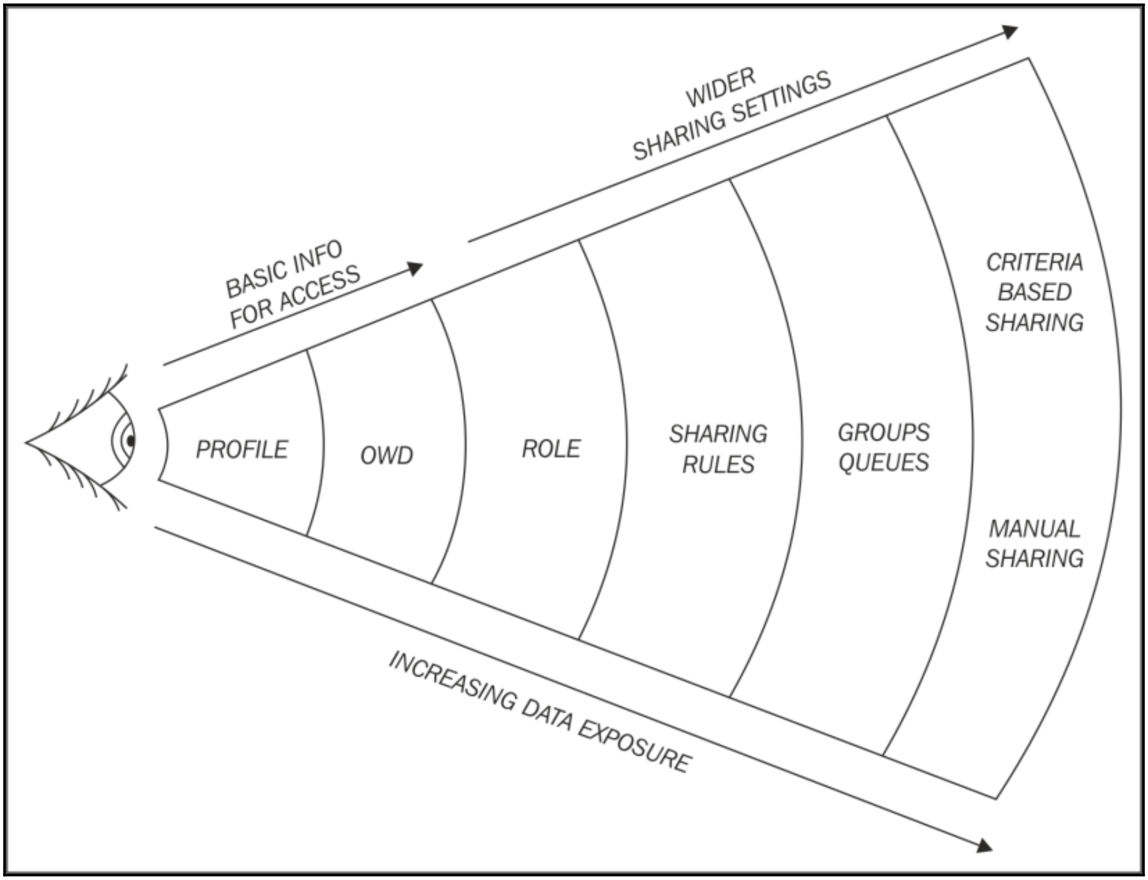
Leads
Accounts
Contacts
Opportunities
Forecasts
Contracts
Cases
All Accounts
Edit | Delete | Create New View
List
Chatter
New Account
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other All
Action
Account Name
Account Site
Billing State/Province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

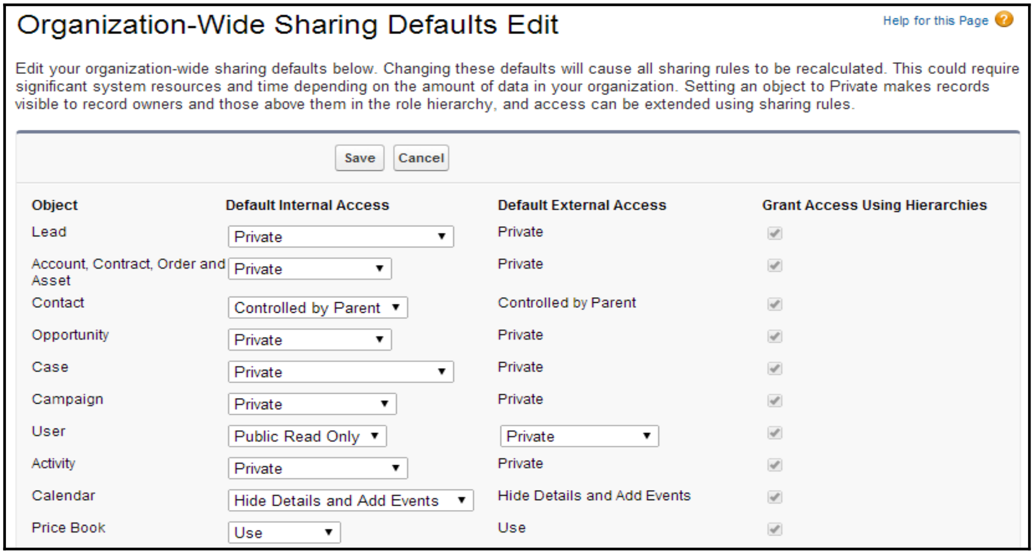

Paul Goodey
Help
Sales
Opportunities
Forecasts
Cases
Tell me more! | Help for this Page
Edit | Create New View

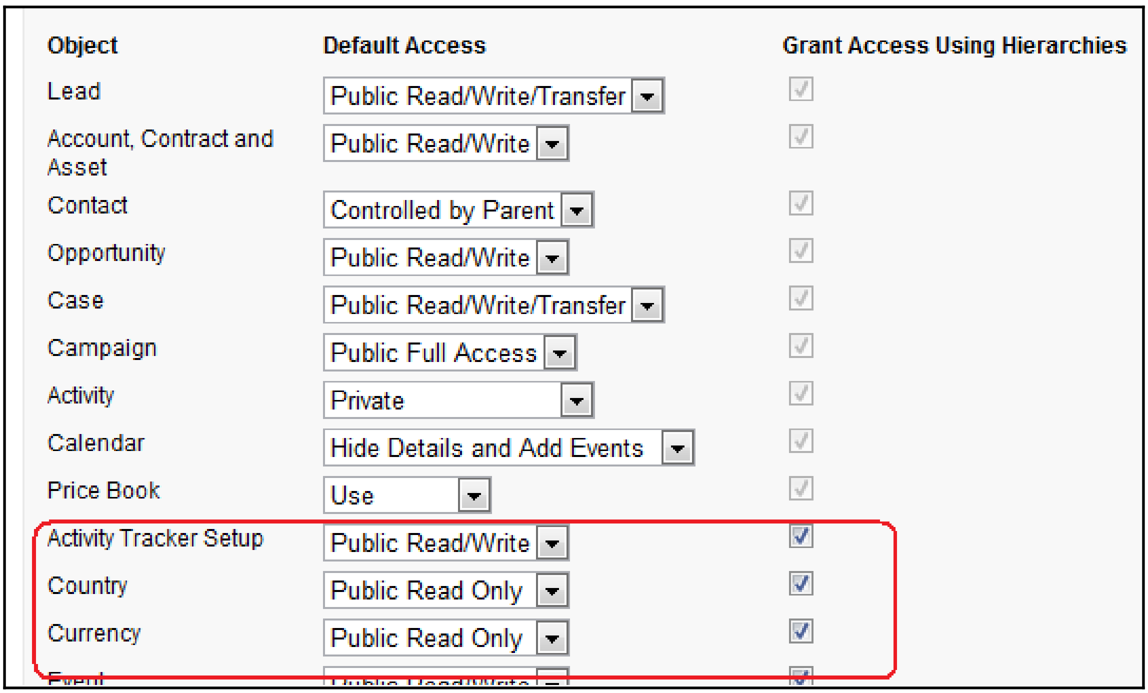

Paul Goodey
Help
Sales
Opportunities
Forecasts
Cases
Tell me more! | Help for this Page
force.com
Edit | Create New View
Account Name
Westwood
Company X
Company X
GenePoint
Contacts First Account
Contacts First Account
View Fields
View Object
View Record Types
View Validation Rules
View Approvals
Edit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

Chapter 4: Securing Access to Data and Data Validation




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


Organization-Wide Sharing Defaults Edit
Help for this Page
Edit your organization-wide sharing defaults below. Changing these defaults will cause all sharing rules to be recalculated. This could require significant system resources and time depending on the amount of data in your organization. Setting an object to Private makes records visible to record owners and those above them in the role hierarchy, and access can be extended using sharing rules.
Save
Cancel
Object
Default Internal Access
Default External Access
Grant Access Using Hierarchies
Lead
Private
Private
Account, Contract, Order and Asset
Private
Private
Contact
Controlled by Parent
Controlled by Parent
Opportunity
Private
Private
Case
Private
Private
Campaign
Private
Private
User
Public Read Only
Private
Activity
Private
Private
Calendar
Hide Details and Add Events
Hide Details and Add Events
Price Book
Use
Use


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

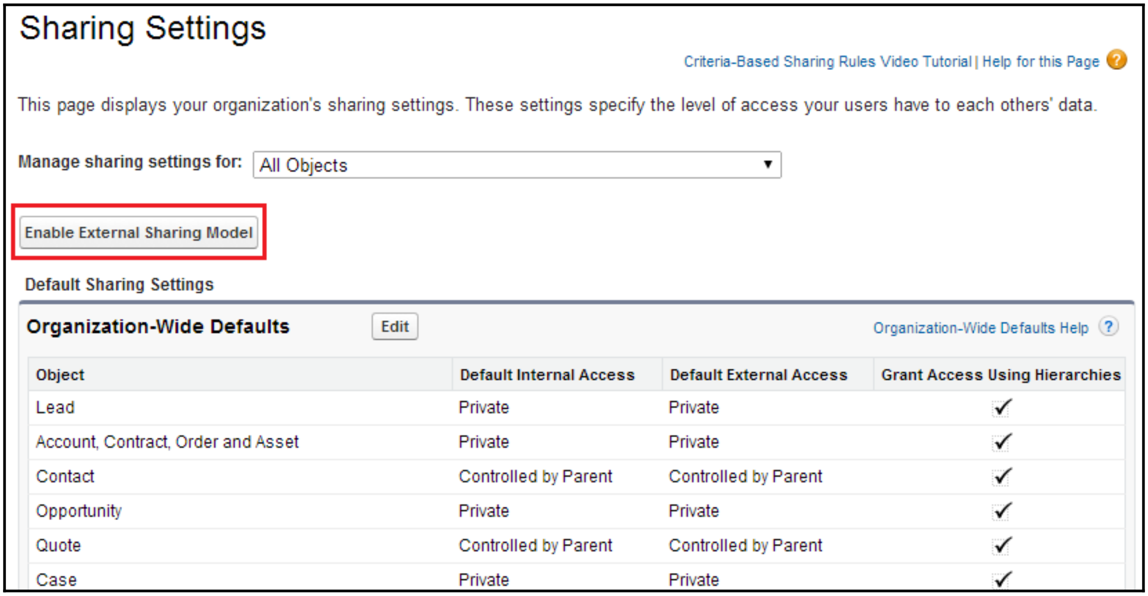
Default Sharing Settings

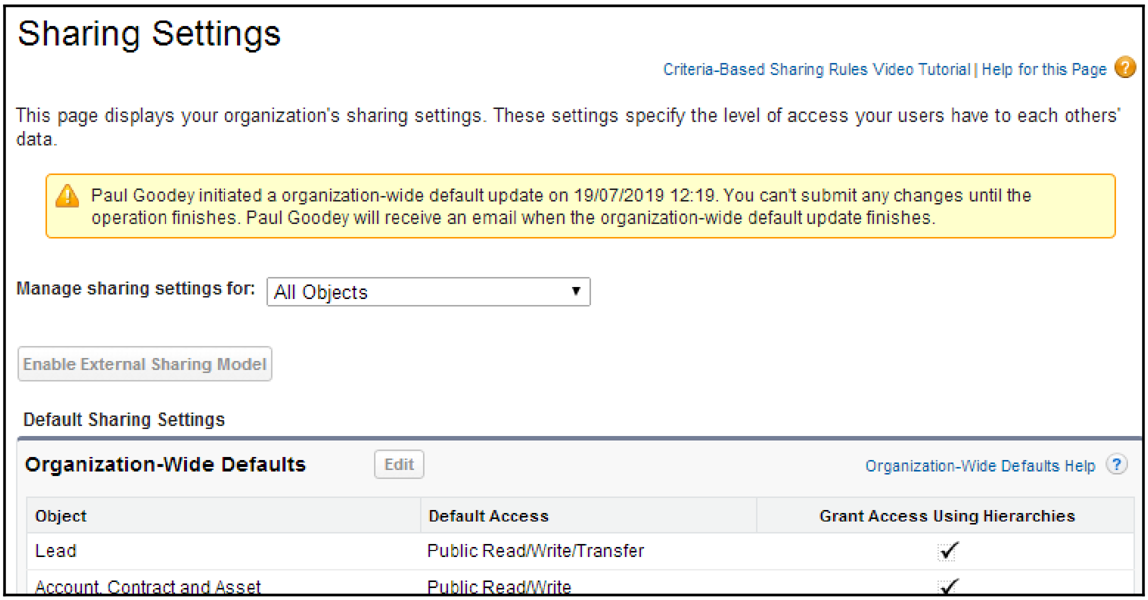
Organization-Wide Defaults

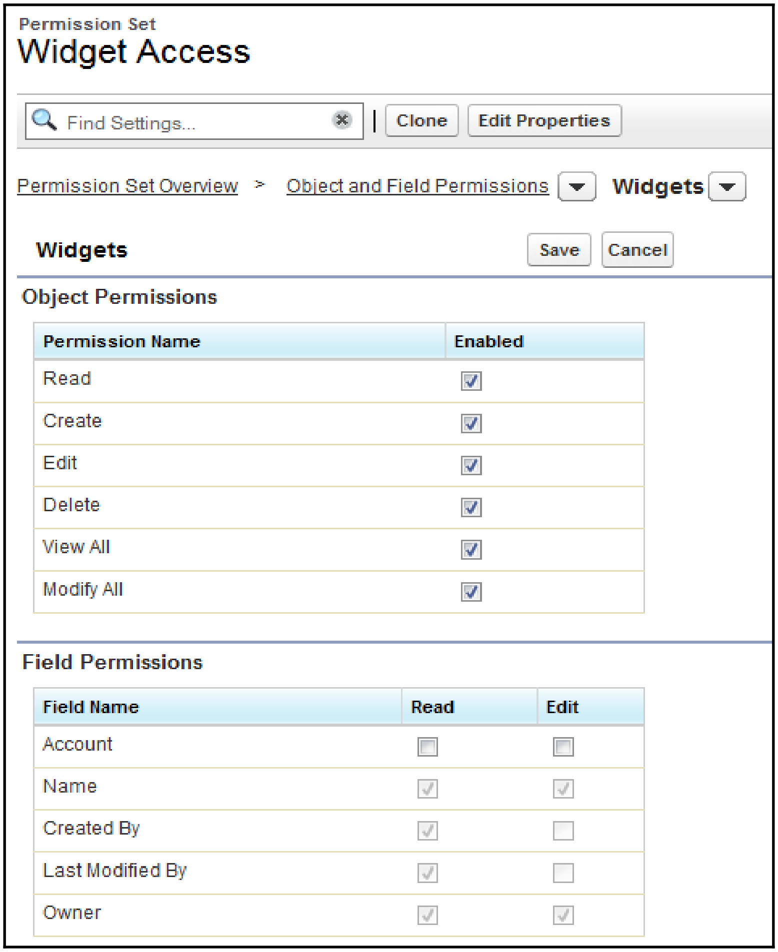
Edit

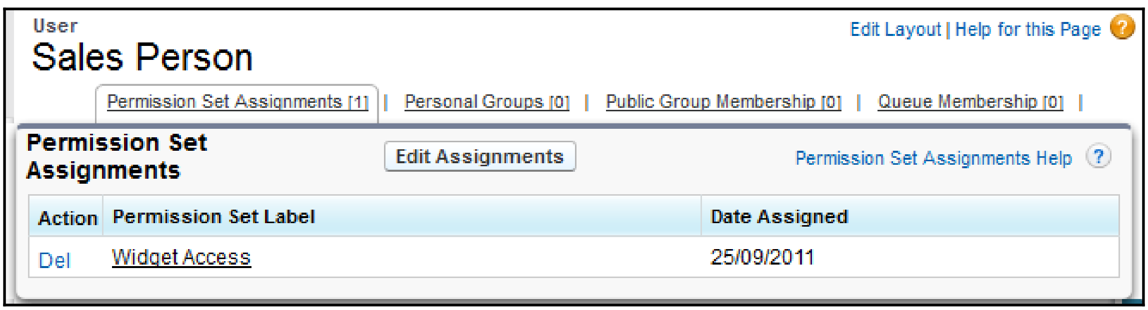
Organization-Wide Defaults Help ?

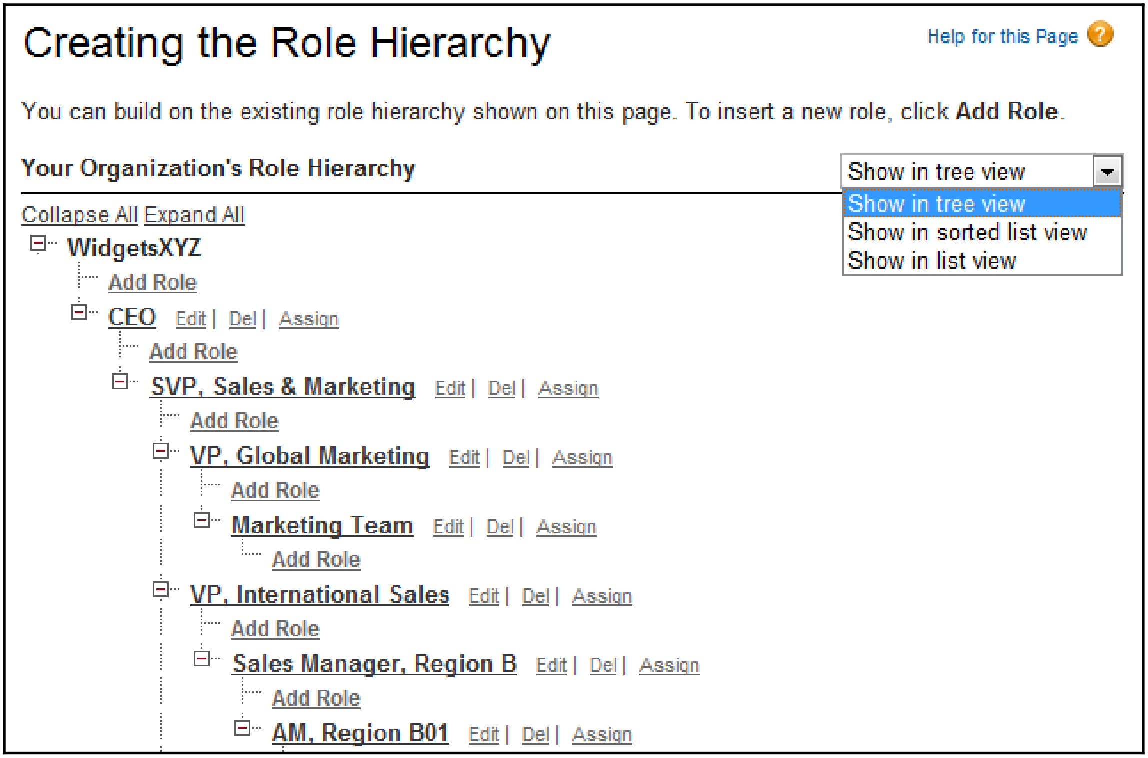
Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Private	Private	✓
Account, Contract, Order and Asset	Private	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Opportunity	Private	Private	✓
Quote	Controlled by Parent	Controlled by Parent	✓
Case	Private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

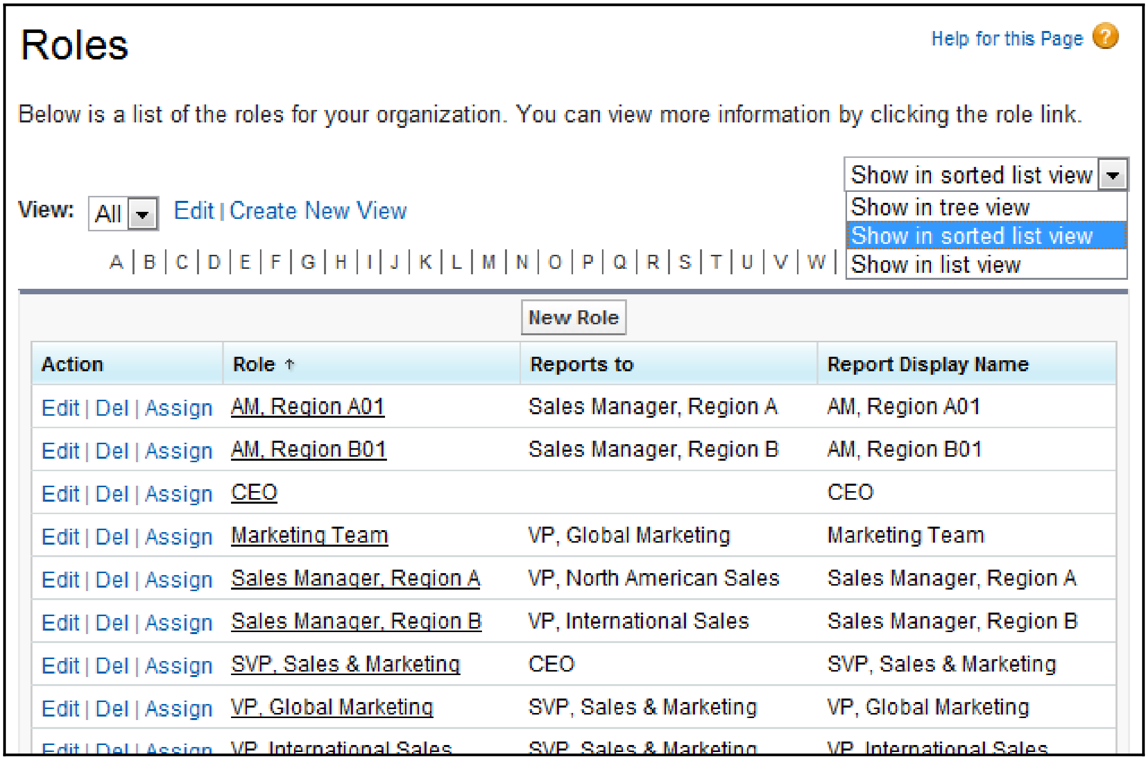

Sharing Settings
Criteria-Based Sharing Rules Video Tutorial | Help for this Page
This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data.
Manage sharing settings for:
All Objects
Enable External Sharing Model
Default Sharing Settings
Organization-Wide Defaults
Edit
Organization-Wide Defaults Help
Object
Default Internal Access
Default External Access
Grant Access Using Hierarchies
Lead
Private
Private
Account, Contract, Order and Asset
Private
Private
Contact
Controlled by Parent
Controlled by Parent
Opportunity
Private
Private
Quote
Controlled by Parent
Controlled by Parent
Case
Private
Private

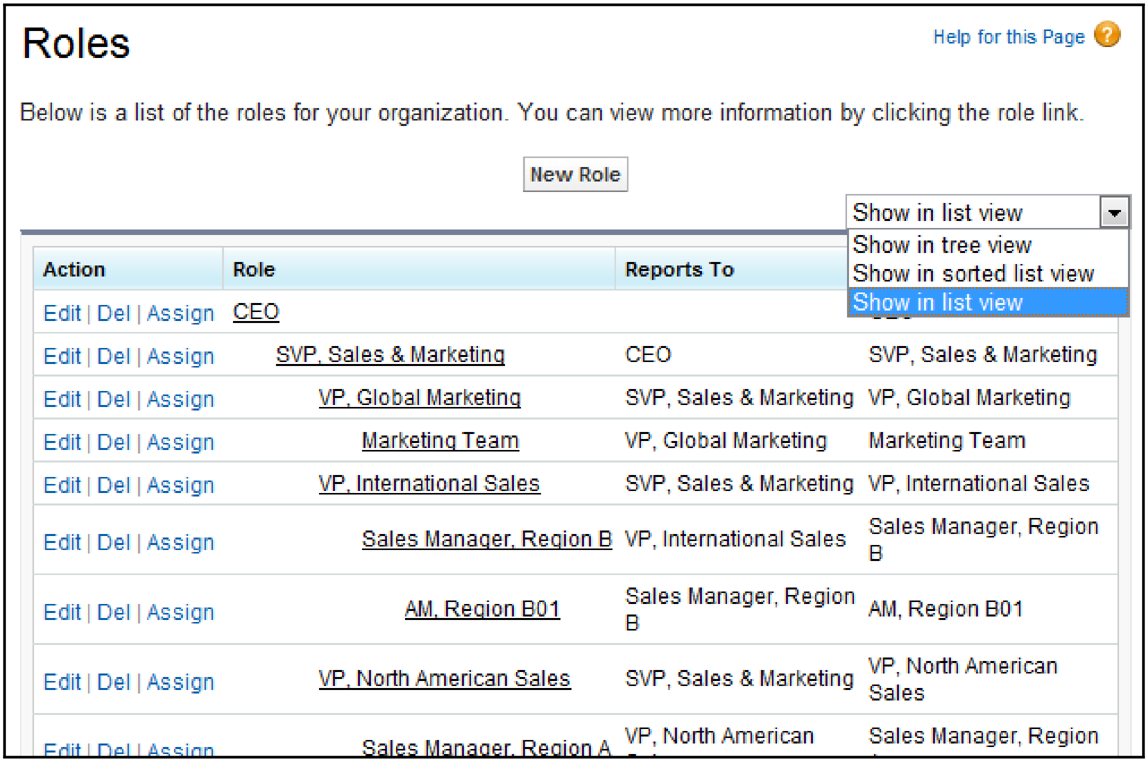

Sharing Settings
Criteria-Based Sharing Rules Video Tutorial | Help for this Page
This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data.
Paul Goodey initiated a organization-wide default update on 19/07/2019 12:19. You can't submit any changes until the operation finishes. Paul Goodey will receive an email when the organization-wide default update finishes.
Manage sharing settings for:
All Objects
Enable External Sharing Model
Default Sharing Settings
Organization-Wide Defaults
Edit
Organization-Wide Defaults Help
Object
Default Access
Grant Access Using Hierarchies
Lead
Public Read/Write/Transfer
Account, Contract and Asset
Public Read/Write


Permission Set
Widget Access
Find Settings...
Clone
Edit Properties
Permission Set Overview > Object and Field Permissions
Widgets
Widgets
Save
Cancel
Object Permissions
Permission Name
Enabled
Read
Create
Edit
Delete
View All
Modify All
Field Permissions
Field Name
Read
Edit
Account
Name
Created By
Last Modified By
Owner


User
Sales Person
Edit Layout | Help for this Page
Permission Set Assignments [1] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] |
Permission Set Assignments
Edit Assignments
Permission Set Assignments Help
Action
Permission Set Label
Date Assigned
Del
Widget Access
25/09/2011


Creating the Role Hierarchy
Help for this Page
You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.
Your Organization's Role Hierarchy
Show in tree view
Show in tree view
Show in sorted list view
Show in list view
Collapse All Expand All
WidgetsXYZ
Add Role
CEO Edit | Del | Assign
Add Role
SVP, Sales & Marketing Edit | Del | Assign
Add Role
VP, Global Marketing Edit | Del | Assign
Add Role
Marketing Team Edit | Del | Assign
Add Role
VP, International Sales Edit | Del | Assign
Add Role
Sales Manager, Region B Edit | Del | Assign
Add Role
AM, Region B01 Edit | Del | Assign


Roles
Help for this Page
Below is a list of the roles for your organization. You can view more information by clicking the role link.
Show in sorted list view
View: All Edit | Create New 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

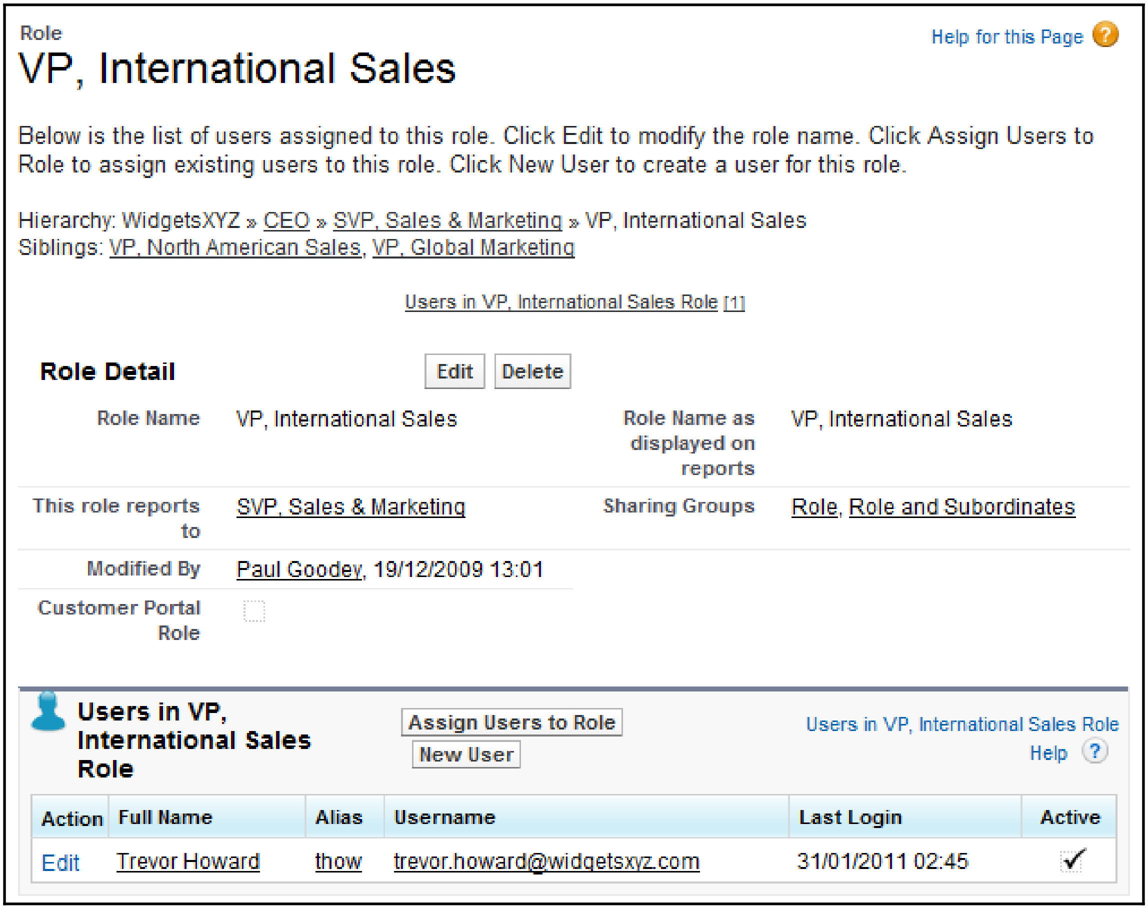
Help for this Page

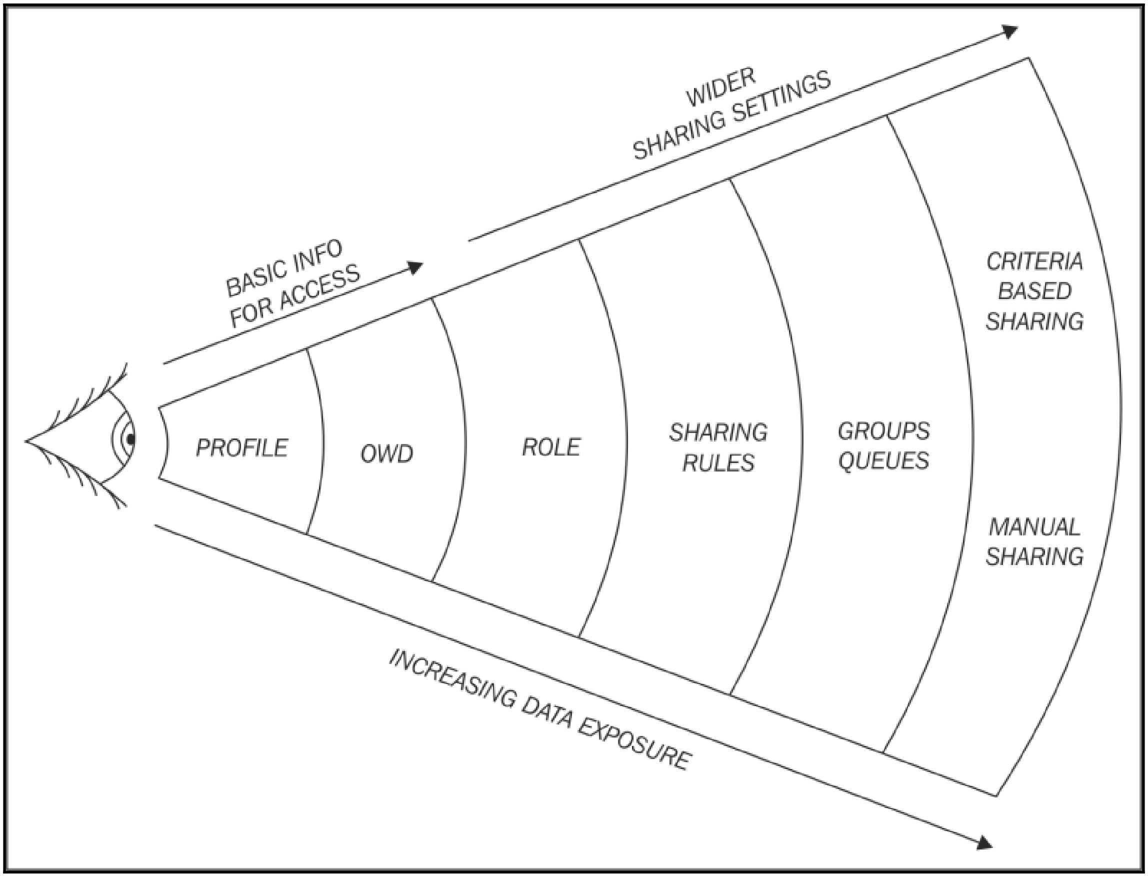
Below is a list of the roles for your organization. You can view more information by clicking the role link.

New Role

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

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


Role
VP, International Sales
Help for this Page
Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.
Hierarchy: WidgetsXYZ » CEO » SVP, Sales & Marketing » VP, International Sales
Siblings: VP, North American Sales, VP, Global Marketing
Users in VP, International Sales Role [1]
Role Detail
Edit
Delete
Role Name
VP, International Sales
Role Name as displayed on reports
VP, International Sales
This role reports to
SVP, Sales & Marketing
Sharing Groups
Role, Role and Subordinates
Modified By
Paul Goodey, 19/12/2009 13:01
Customer Portal Role
Users in VP, International Sales Role
Assign Users to Role
New User
Users in VP, International Sales Role Help
Action
Full Name
Alias
Username
Last Login
Active
Edit
Trevor Howard
thow
trevor.howard@widgetsxyz.com
31/01/2011 02:45


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

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

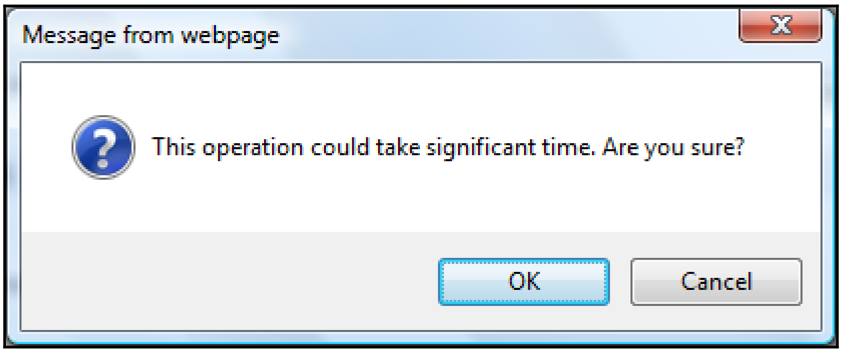
Contact Sharing Rules New Recalculate Contact Sharing Rules Help

No sharing rules specified.

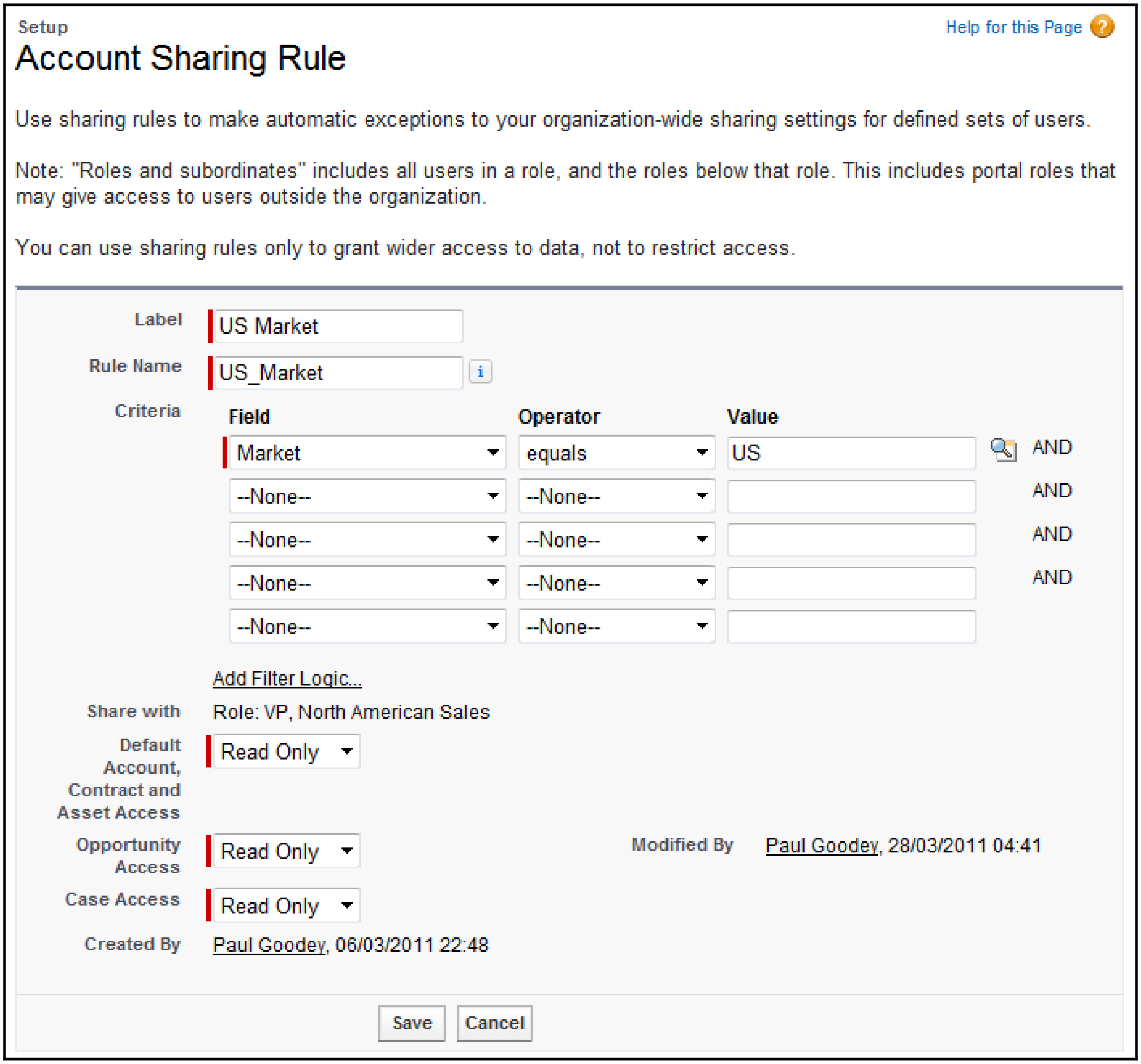
Opportunity Sharing Rules New Recalculate Opportunity Sharing Rules Help

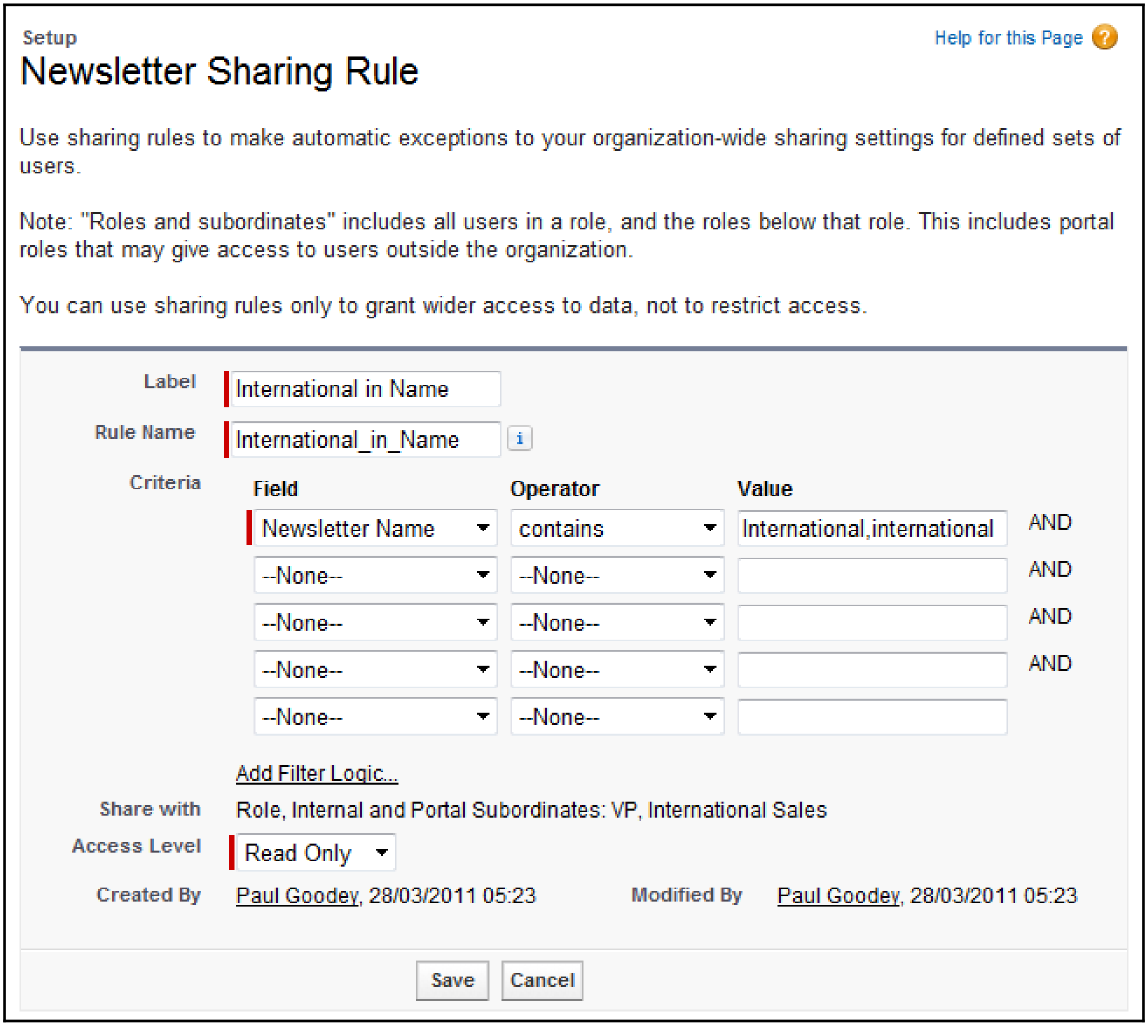
Action	Criteria	Shared With	Opportunity
Edit | Del	Owner in Role and Subordinates: Sales Manager, Region A	Role: Sales Manager, Region B	Read Only
Edit | Del	Owner in Role and Subordinates: Sales Manager, Region B	Role: Sales Manager, Region A	Read Only

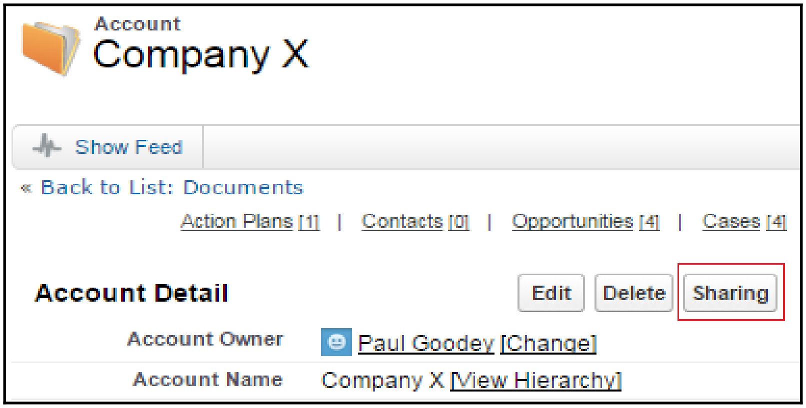
Case Sharing Rules New Recalculate Case Sharing Rules Help



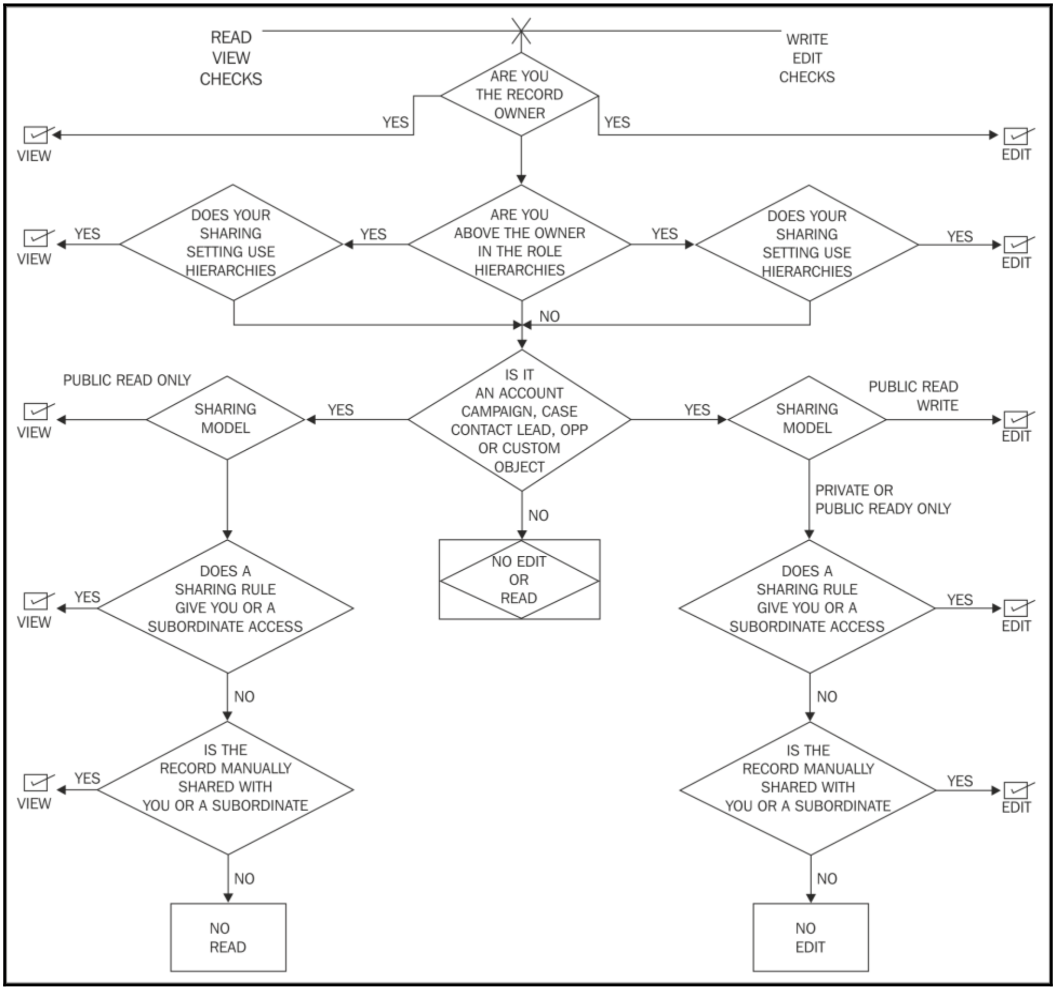

Sharing Rules
Lead Sharing Rules
New
Recalculate
Lead Sharing Rules Help
No sharing rules specified.
Account Sharing Rules
New
Recalculate
Account Sharing Rules Help
Action
Criteria
Shared With
Account, Contract and Asset
Opportunity
Case
Edit | Del
Account: Market EQUALS US
Role: VP, North American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

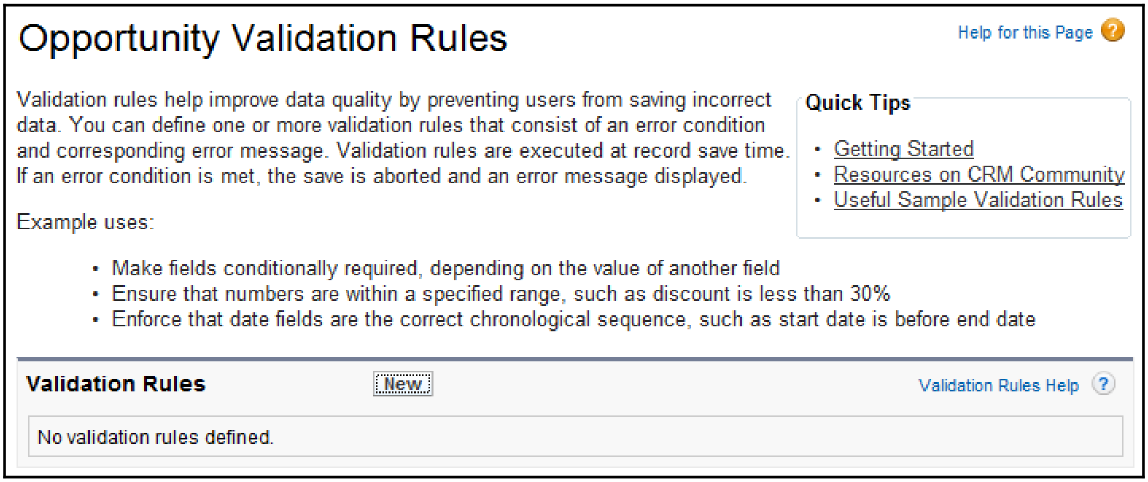

Setup
Account Sharing Rule
Help for this Page
Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.
Note: "Roles and subordinates" includes all users in a role, and the roles below that role. This includes portal roles that may give access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

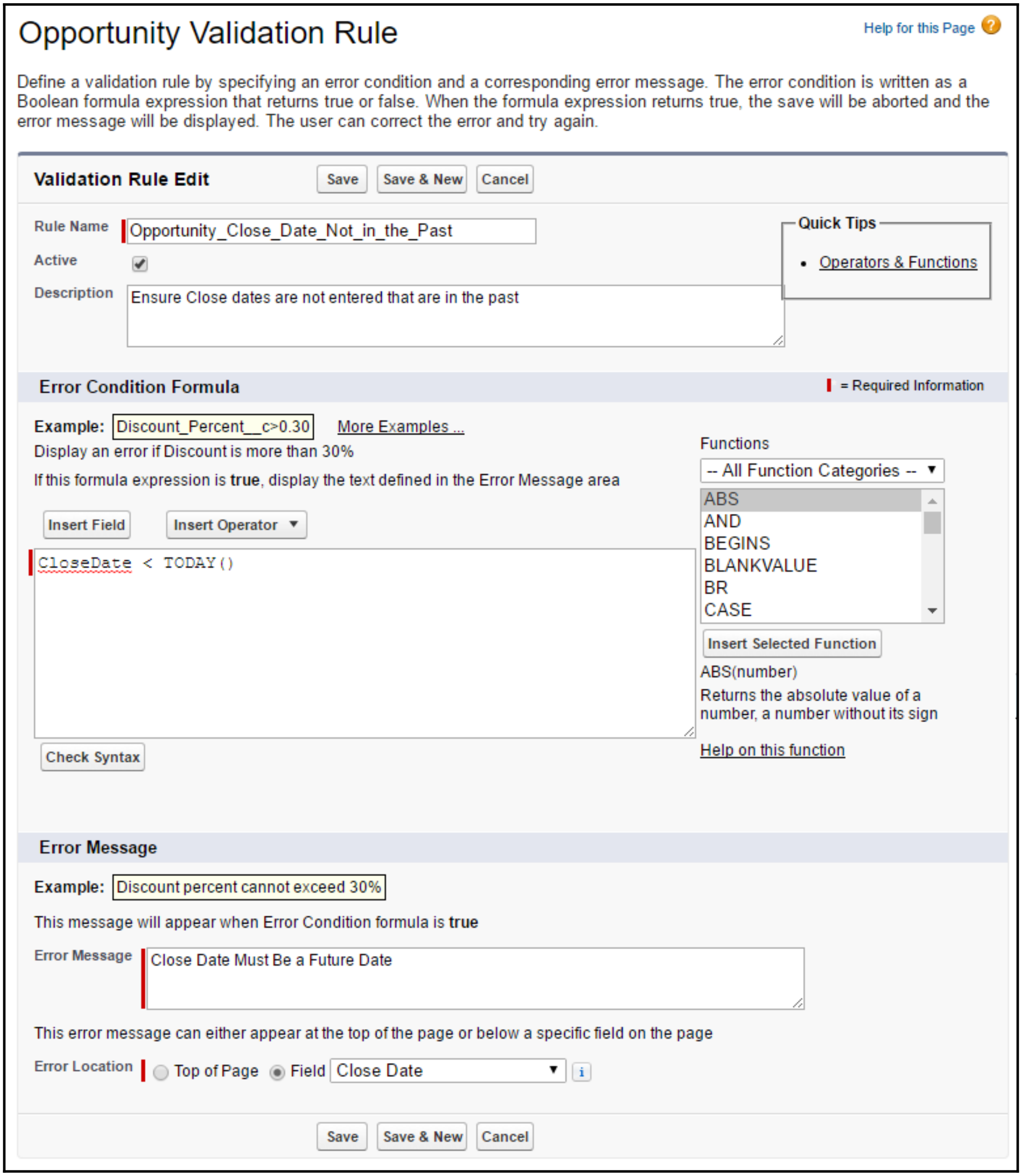

Setup
Newsletter Sharing Rule
Help for this Page
Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.
Note: "Roles and subordinates" includes all users in a role, and the roles below that role. This includes portal roles that may give access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


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


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


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


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



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 Save | Save & New | Cancel

Rule Name: Opportunity_Close_Date_Not_in_the_Past

Active: ☑

Description: Ensure Close dates are not entered that are in the past

Quick Tips
- Operators & Functions

Error Condition Formula

= Required Information

Example: Discount_Percent__c>0.30 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

Insert Field | Insert Operator

```
CloseDate < TODAY()
```

Check Syntax

Functions

-- All Function Categories --

ABS
AND
BEGINS
BLANKVALUE
BR
CASE

Insert Selected Function

ABS(number)

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

Help on this function

Error Message

Example: Discount percent cannot exceed 30%

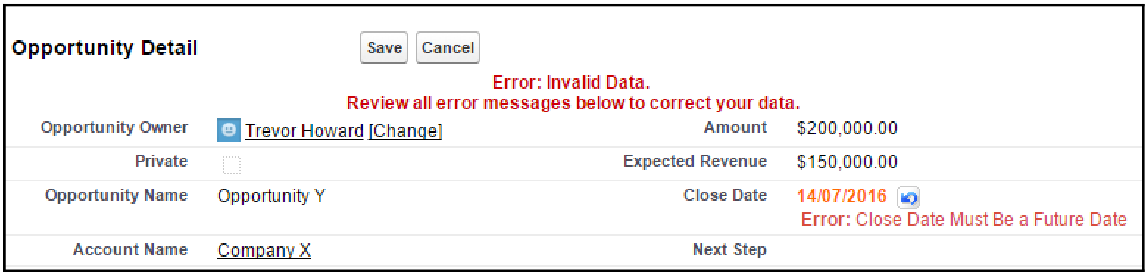
This message will appear when Error Condition formula is **true**

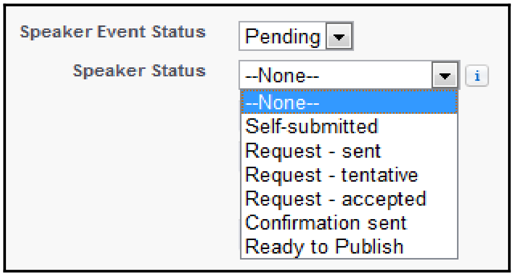
Error Message: Close Date Must Be a Future Date

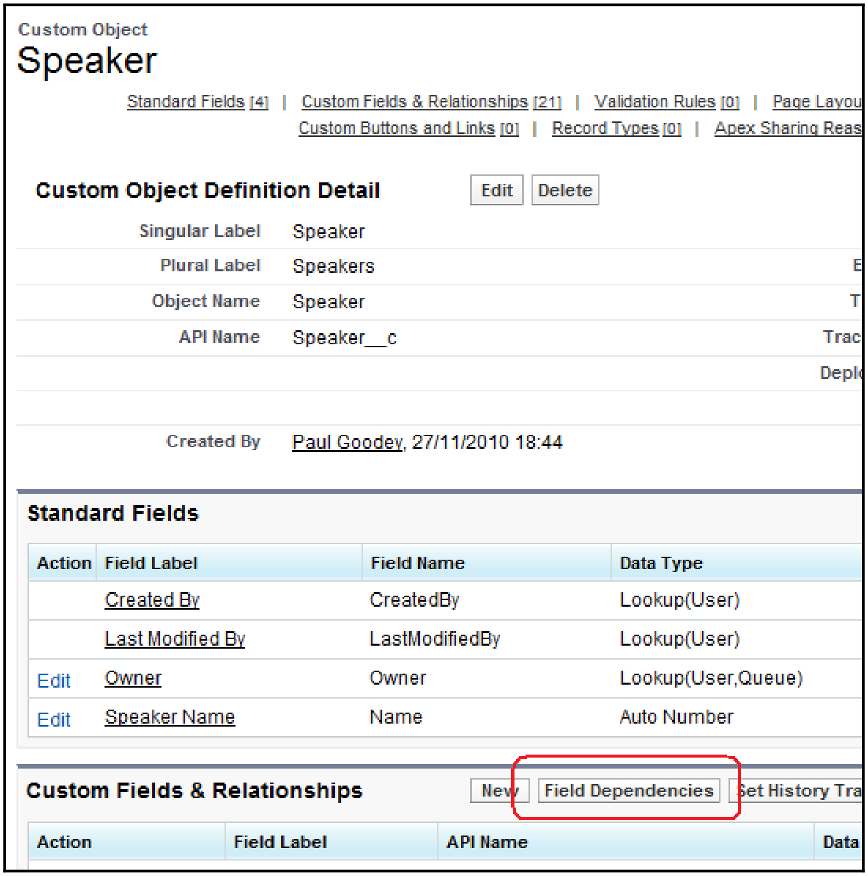
This error message can either appear at the top of the page or below a specific field on the page

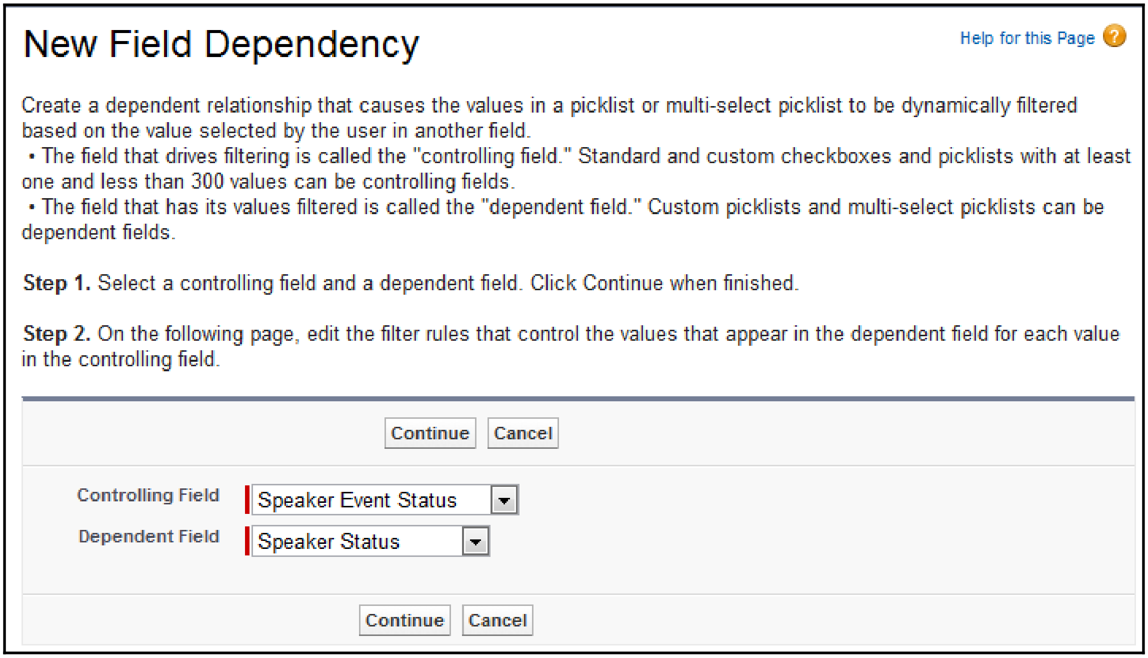
Error Location: ○ Top of Page ◉ Field Close Date

Save | Save & New | Cancel


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
Expected Revenue
$150,000.00
Opportunity Name
Opportunity Y
Close Date
14/07/2016
Error: Close Date Must Be a Future Date
Account Name
Company X
Next Step


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 Layou
Custom Buttons and Links [0] | Record Types [0] | Apex Sharing Reas
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
Set History Tra
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.

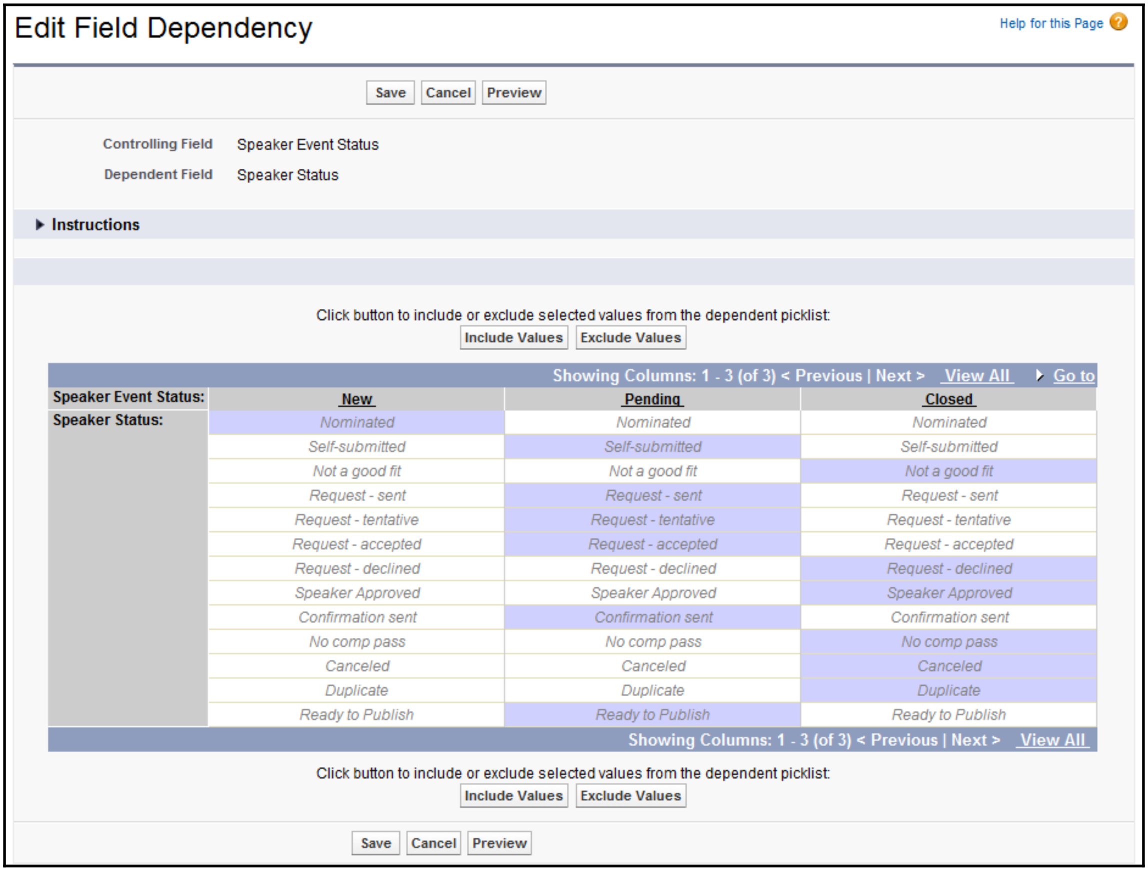
Step 2. On the following page, edit the filter rules that control the values that appear in the dependent field for each value in the controlling field.

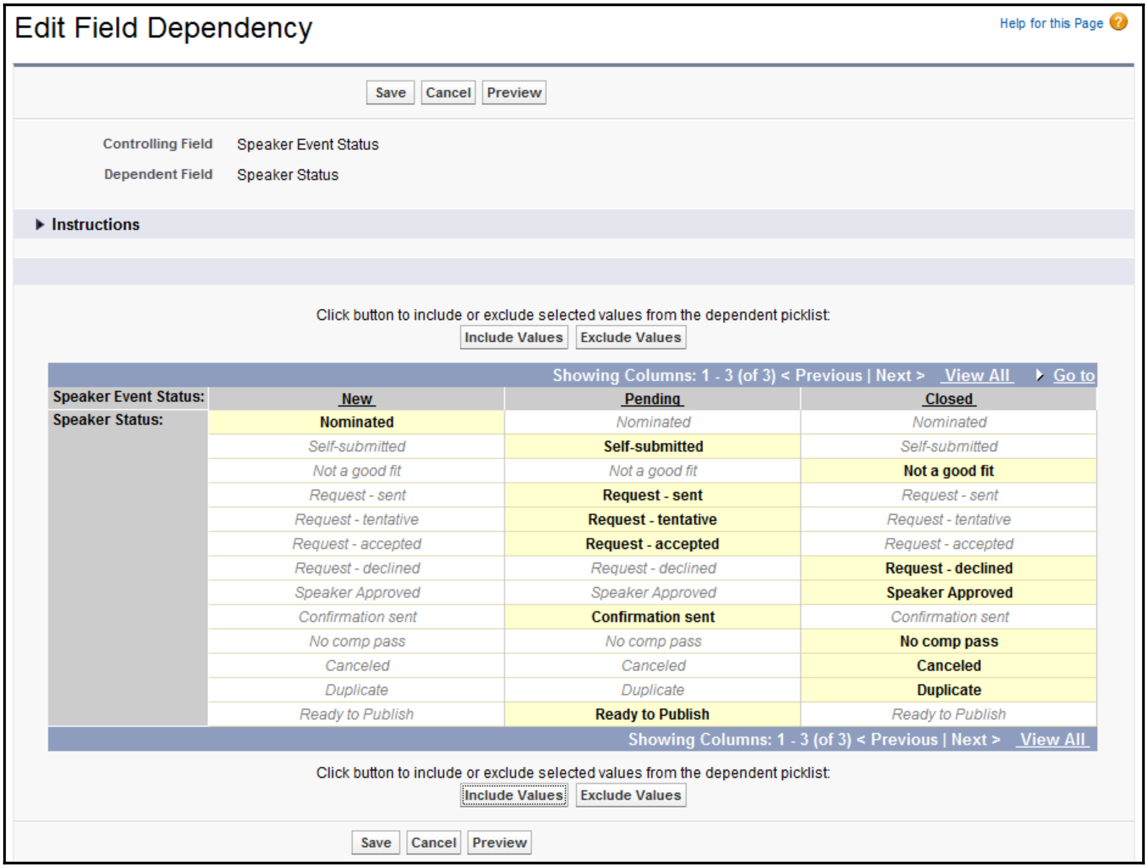
Continue Cancel

Controlling Field: Speaker Event Status

Dependent Field: Speaker Status

Continue Cancel


Edit Field Dependency
Help for this Page
Save
Cancel
Preview
Controlling Field
Speaker Event Status
Dependent Field
Speaker Status
Instructions
Click button to include or exclude selected values from the dependent picklist:
Include Values
Exclude Values
Showing Columns: 1 - 3 (of 3) < Previous | Next > View All
Go to
Speaker Event Status:
New
Pending
Closed
Speaker Status:
Nominated
Self-submitted
Not a good fit
Request - sent
Request - tentative
Request - accepted
Request - declined
Speaker Approved
Confirmation sent
No comp pass
Canceled
Duplicate
Ready to Publish
Showing Columns: 1 - 3 (of 3) < Previous | Next > View All
Click button to include or exclude selected values from the dependent picklist:
Include Values
Exclude Values
Save
Cancel
Preview



Edit Field Dependency

Help for this Page

Save | Cancel | Preview

Controlling Field: Speaker Event Status

Dependent Field: Speaker Status

▶ Instructions

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

Include Values | Exclude Values

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

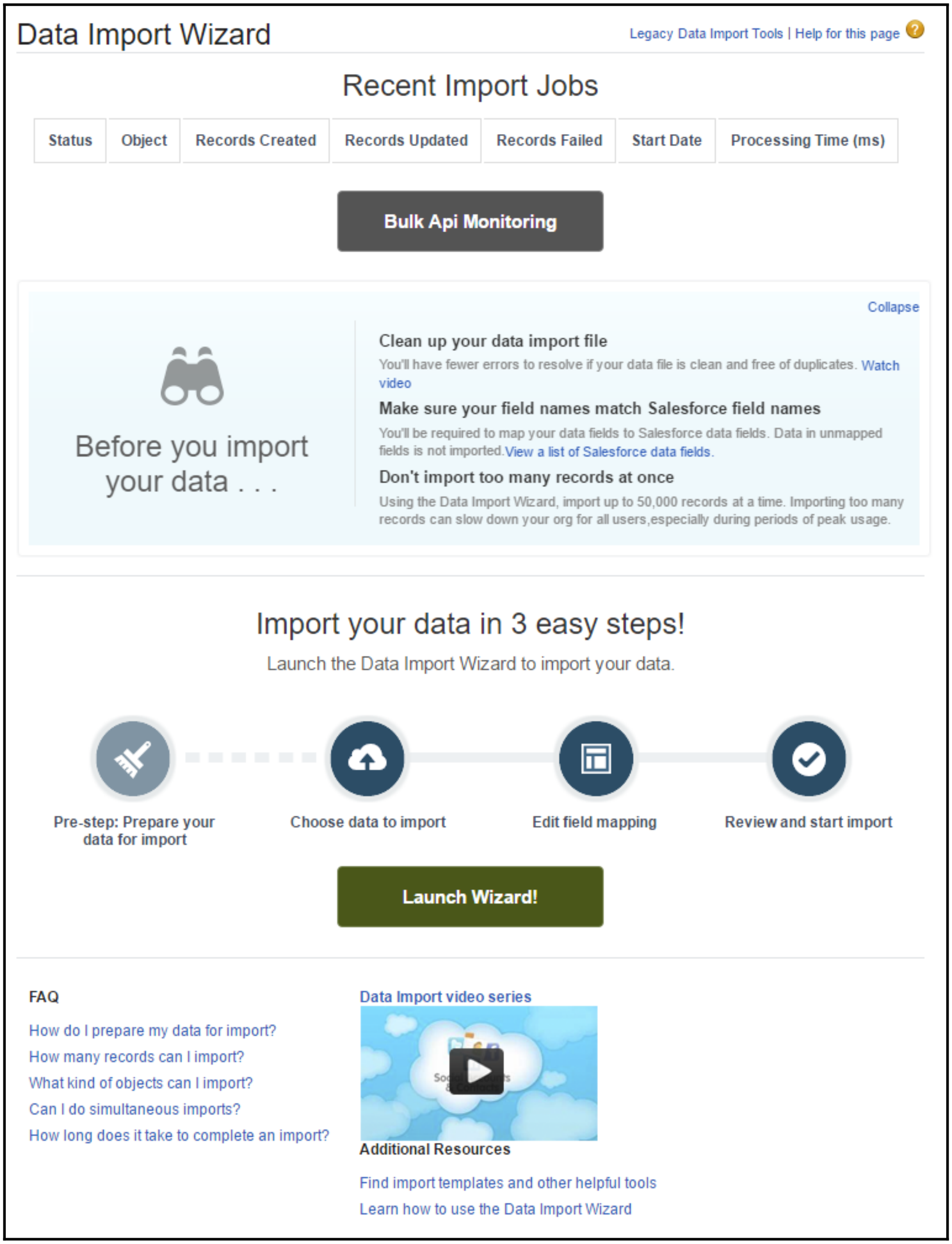
Speaker Event Status:	New	Pending	Closed
Speaker Status:	**Nominated**	*Nominated*	*Nominated*
	Self-submitted	**Self-submitted**	*Self-submitted*
	Not a good fit	*Not a good fit*	**Not a good fit**
	Request - sent	**Request - sent**	*Request - sent*
	Request - tentative	**Request - tentative**	*Request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

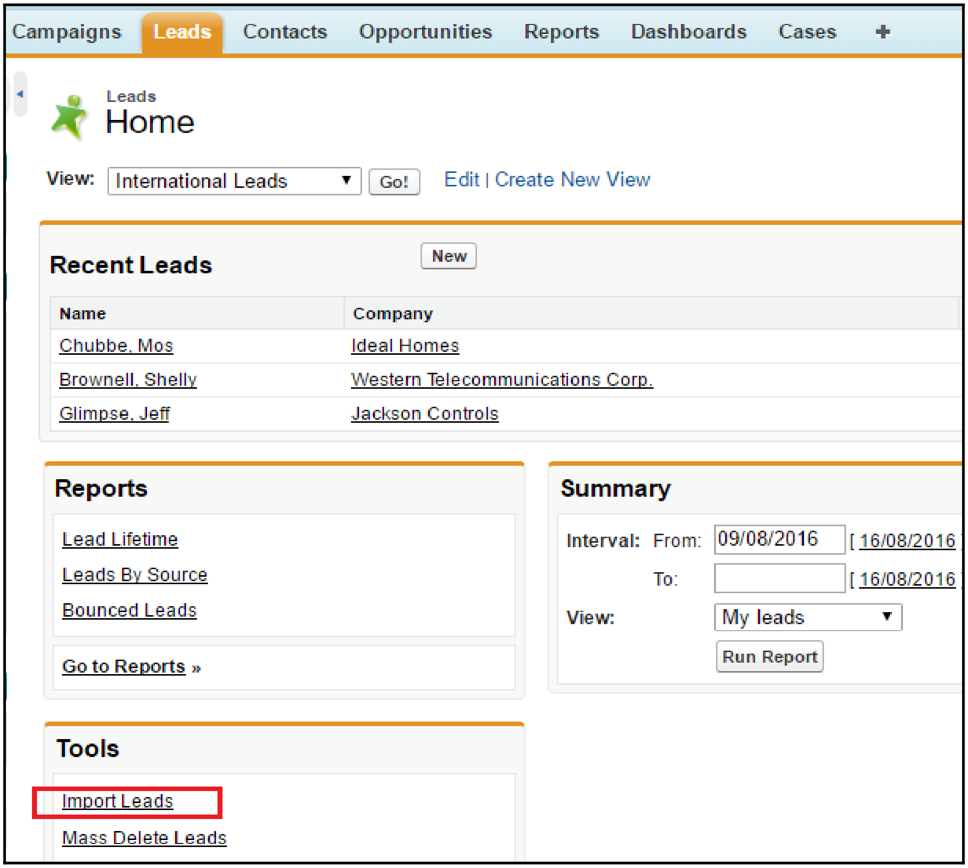
Showing Columns: 1 - 3 (of 3) < Previous | Next > View All

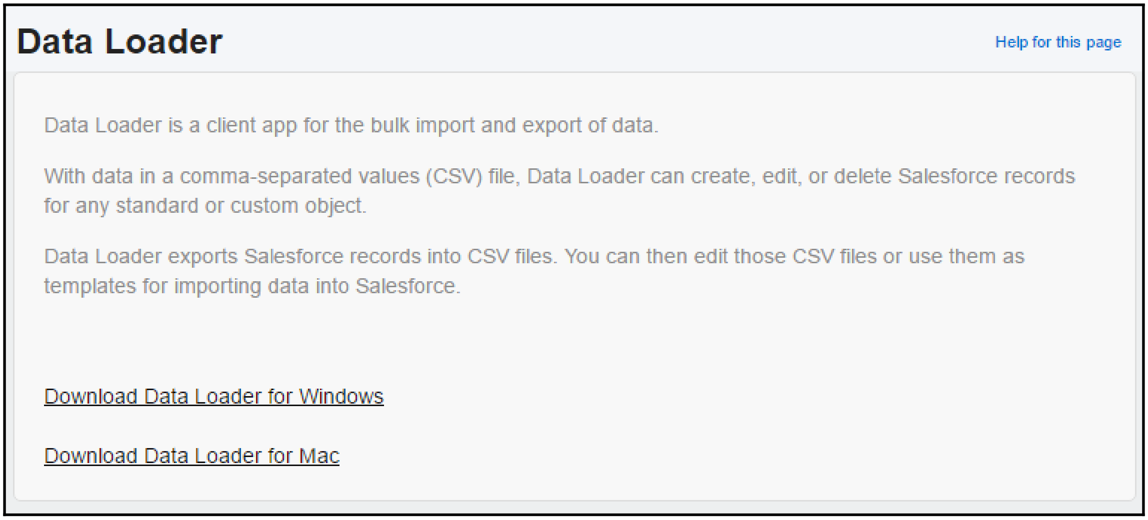
Click button to include or exclude selected values from the dependent picklist:

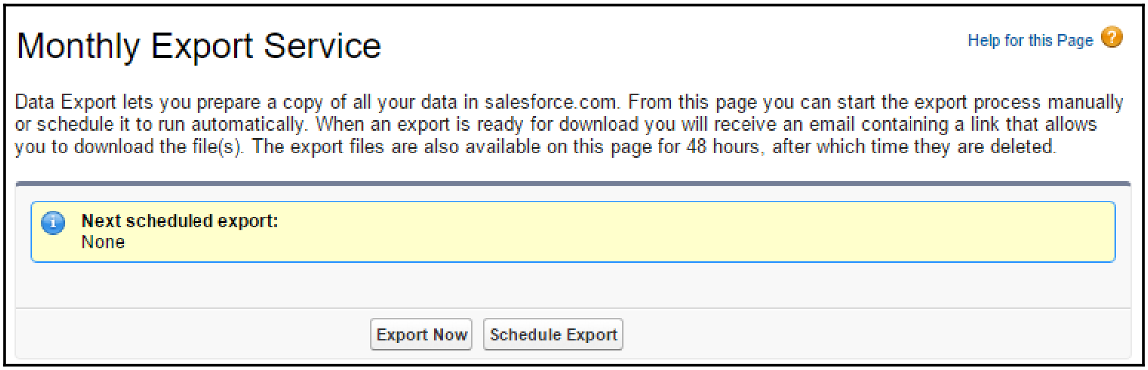
Include Values | Exclude Values

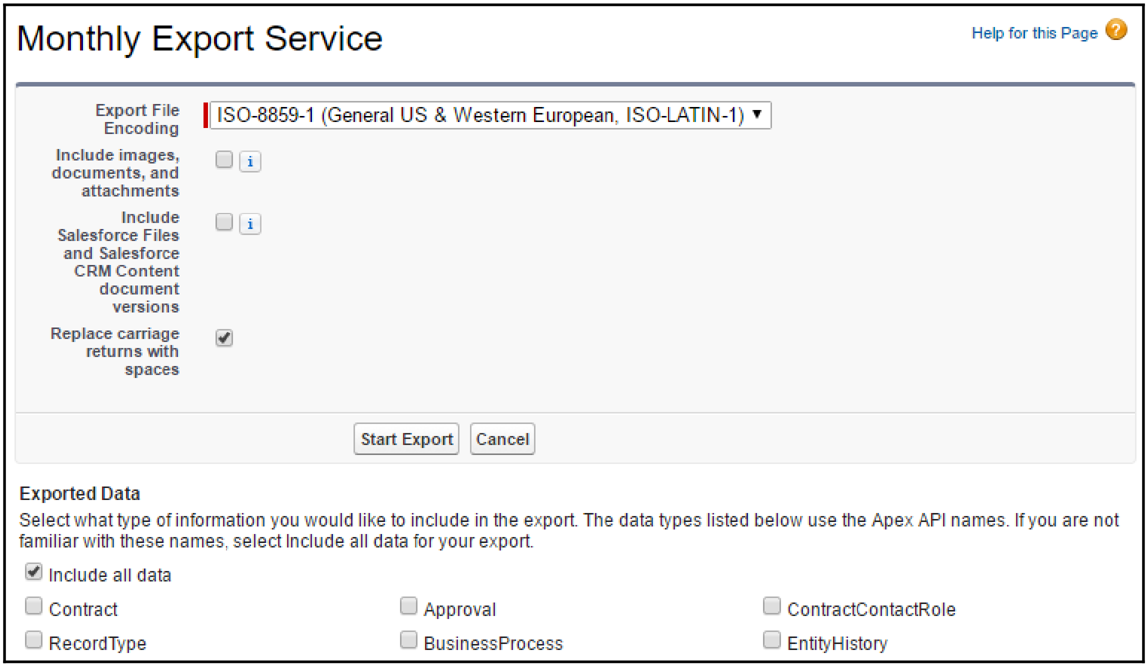
Save | Cancel | Preview


Data Import Wizard
Legacy Data Import Tools | Help for this page
Recent Import Jobs
Status
Object
Records Created
Records Updated
Records Failed
Start Date
Processing Time (ms)
Bulk Api Monitoring
Collapse
Before you import your data . . .
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!
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


Campaigns
Leads
Contacts
Opportunities
Reports
Dashboards
Cases
Leads
Home
View: International Leads
Go!
Edit | Create New View
Recent Leads
New
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: 09/08/2016 [16/08/2016]
To: [16/08/2016]
View: My leads
Run Report
Tools
Import Leads
Mass Delete Leads


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
- [x] Replace carriage returns with spaces

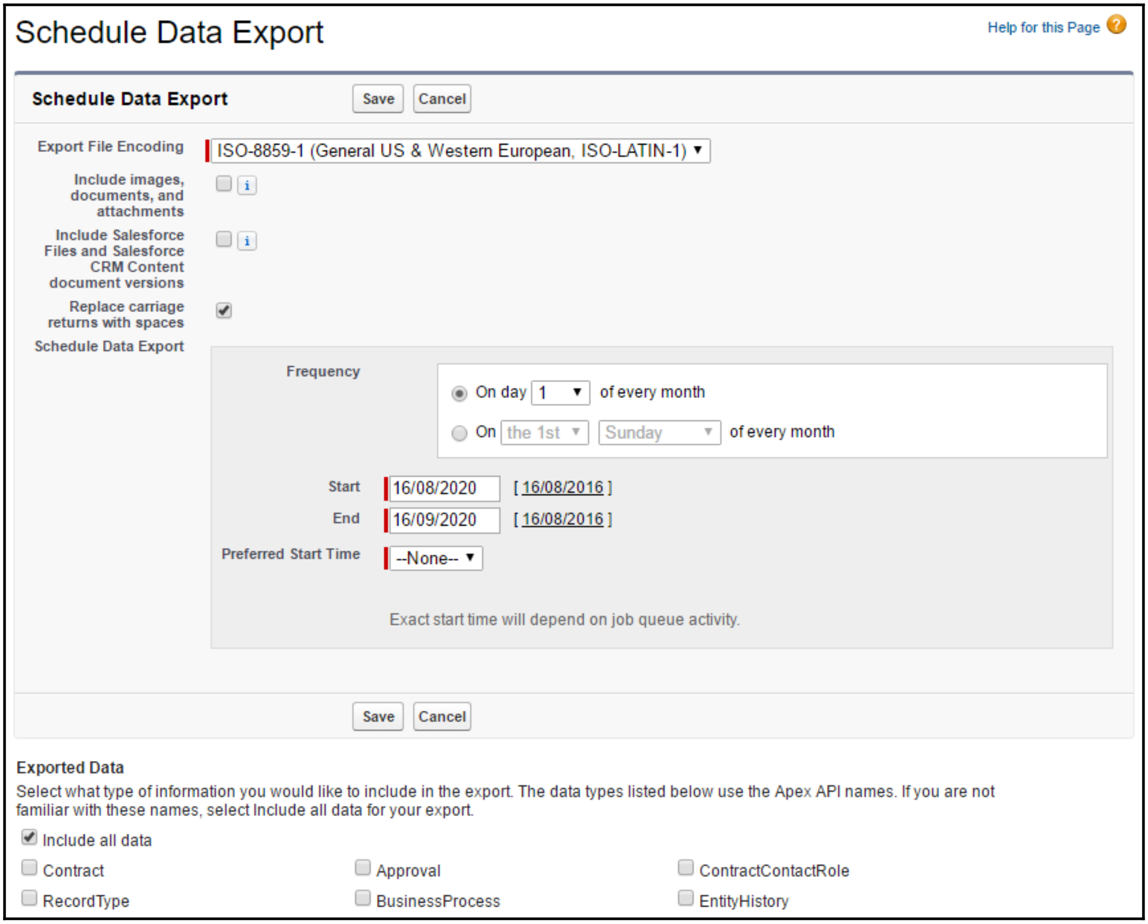
Start Export | Cancel

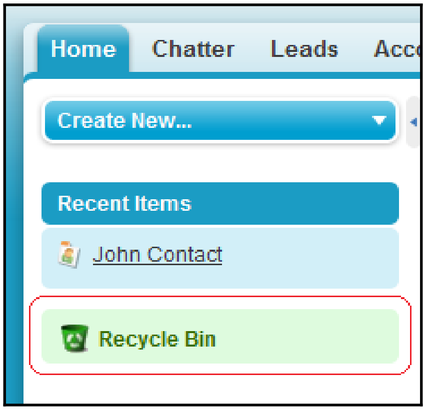
Exported Data

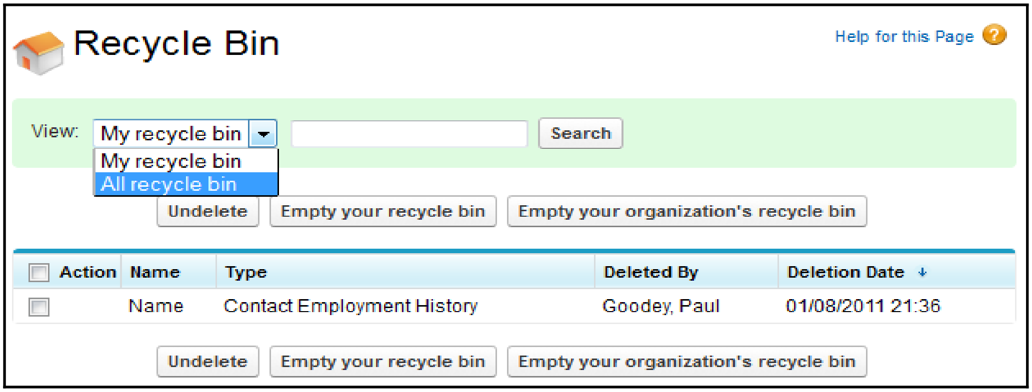
Select what type of information you would like to include in the export. The data types listed below use the Apex API names. If you are not familiar with these names, select Include all data for your export.

- [x] Include all data

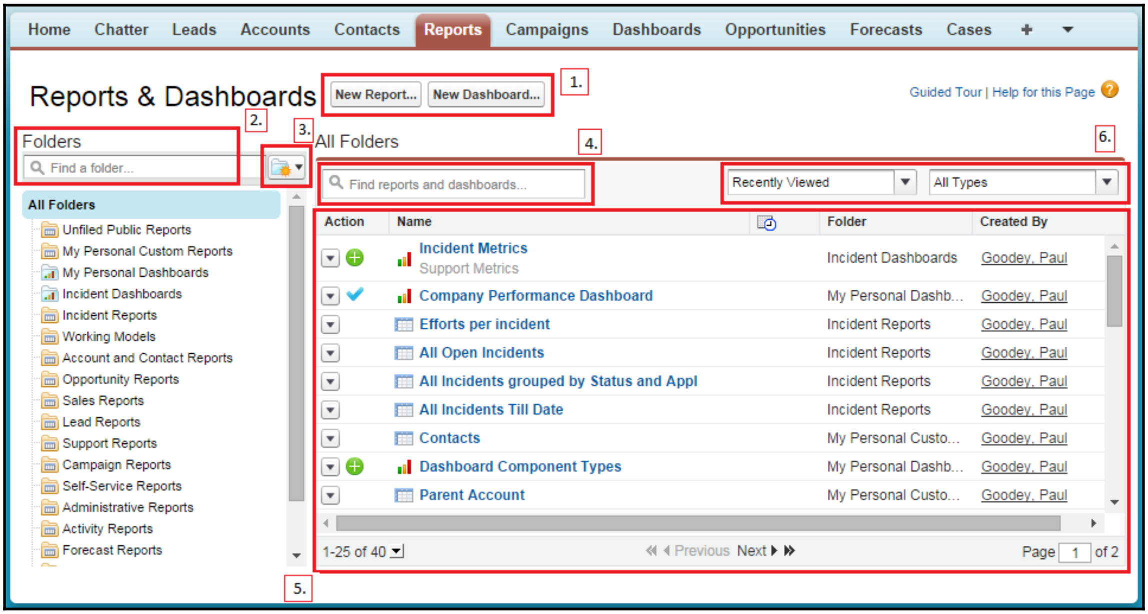
[ ] Contract	[ ] Approval	[ ] ContractContactRole
[ ] RecordType	[ ] BusinessProcess	[ ] EntityHistory

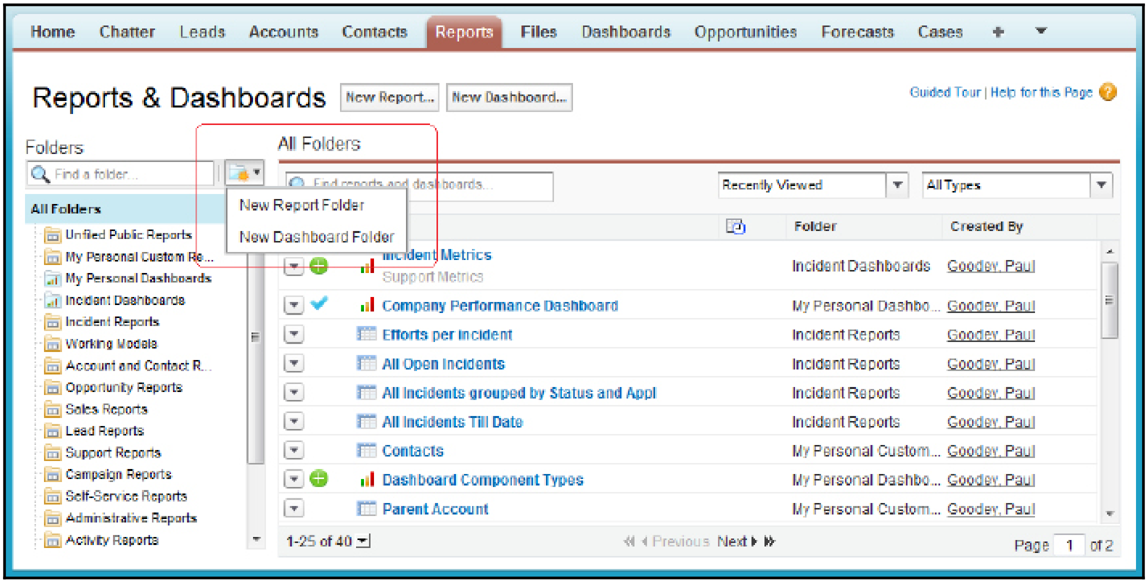

Schedule Data Export
Help for this Page
Schedule Data Export
Save
Cancel
Export File Encoding
ISO-8859-1 (General US & Western European, ISO-LATIN-1)
Include images, documents, and attachments
Include Salesforce Files and Salesforce CRM Content document versions
Replace carriage returns with spaces
Schedule Data Export
Frequency
On day 1 of every month
On the 1st Sunday of every month
Start 16/08/2020 [16/08/2016]
End 16/09/2020 [16/08/2016]
Preferred Start Time --None--
Exact start time will depend on job queue activity.
Save
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

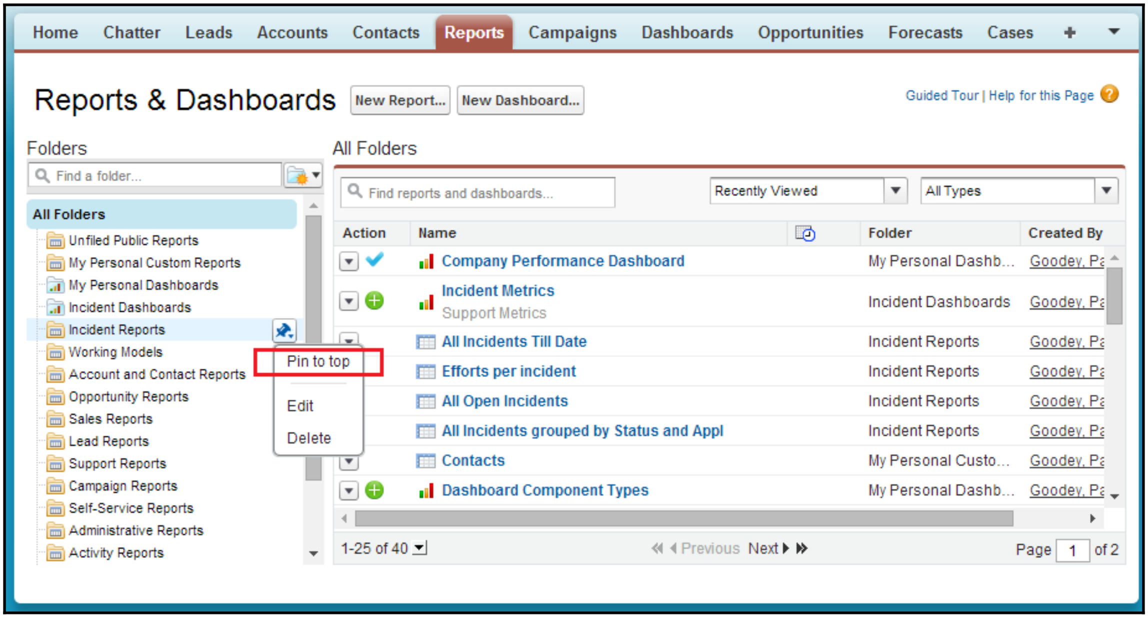

Home
Chatter
Leads
Acc
Create New...
Recent Items
John Contact
Recycle Bin

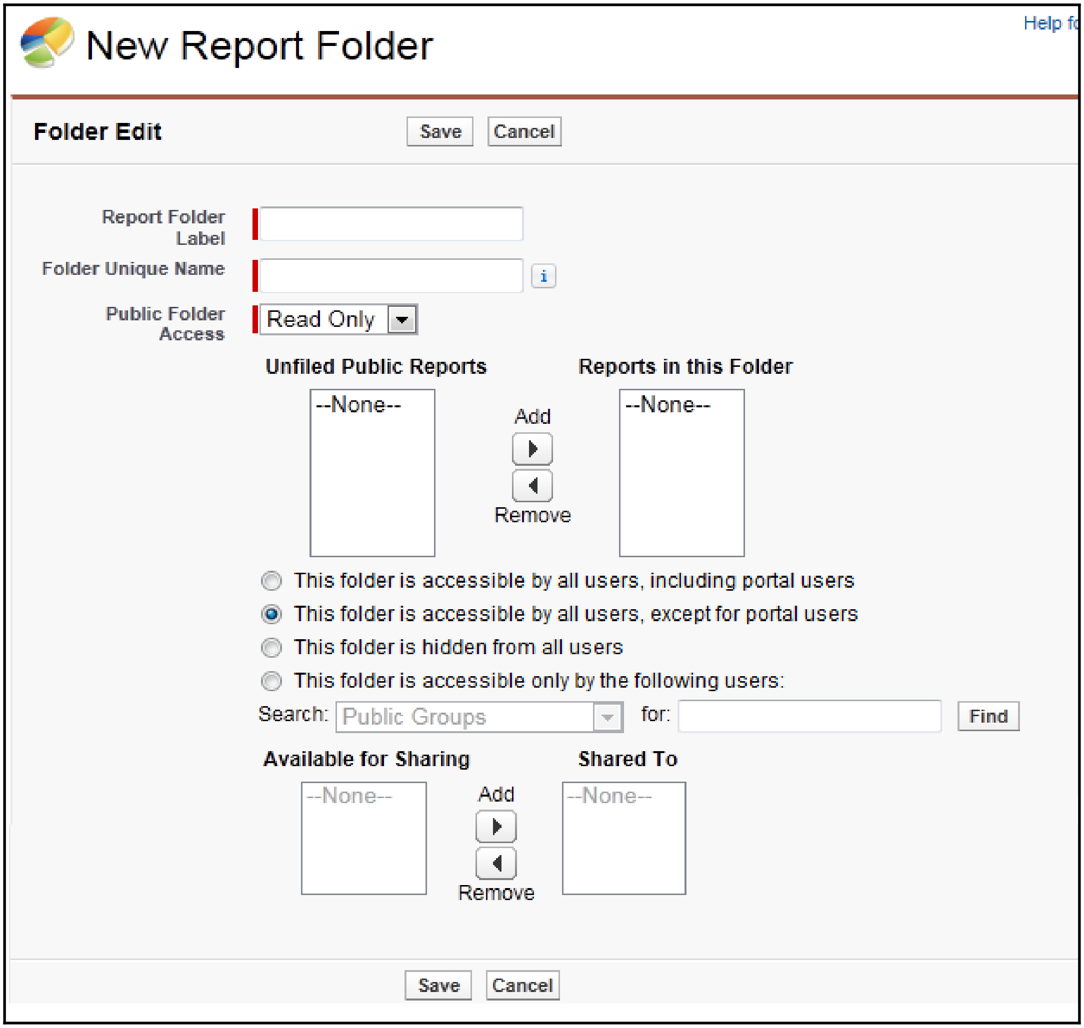

Recycle Bin
Help for this Page
View:
My recycle bin
My recycle bin
All recycle bin
Search
Undelete
Empty your recycle bin
Empty your organization's recycle bin
Action
Name
Type
Deleted By
Deletion Date
Name
Contact Employment History
Goodey, Paul
01/08/2011 21:36
Undelete
Empty your recycle bin
Empty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

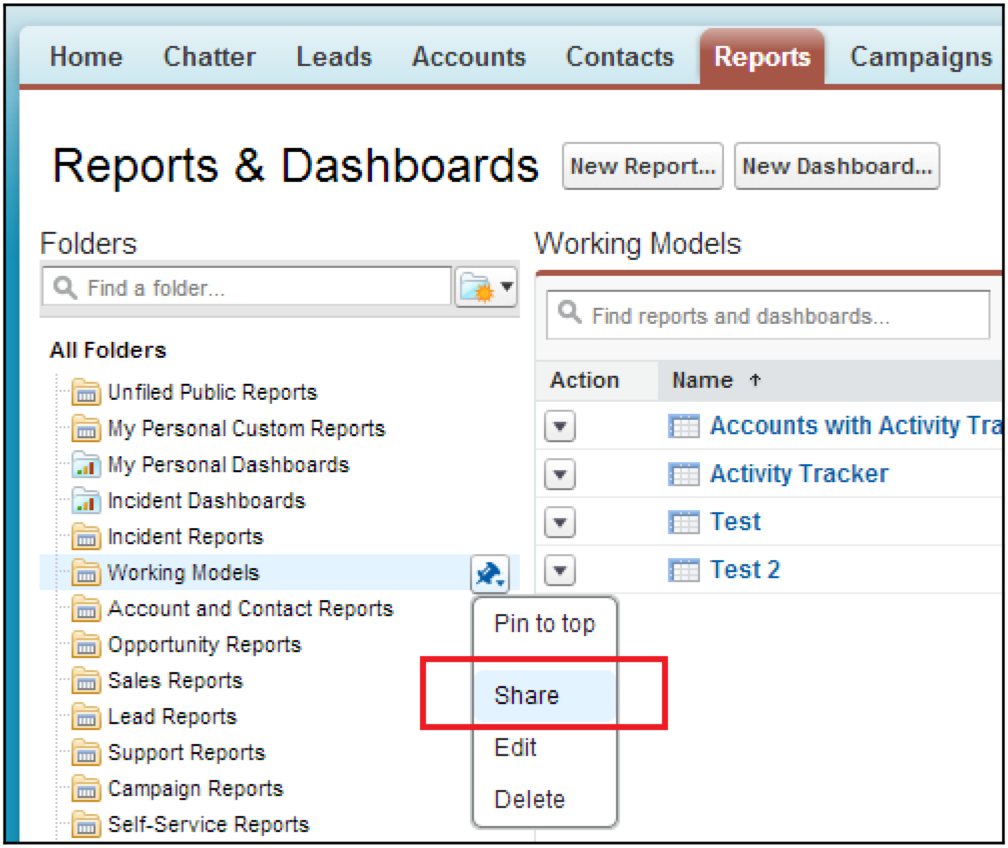
Chapter 6: Generating Data Analytics with Reports and Dashboards

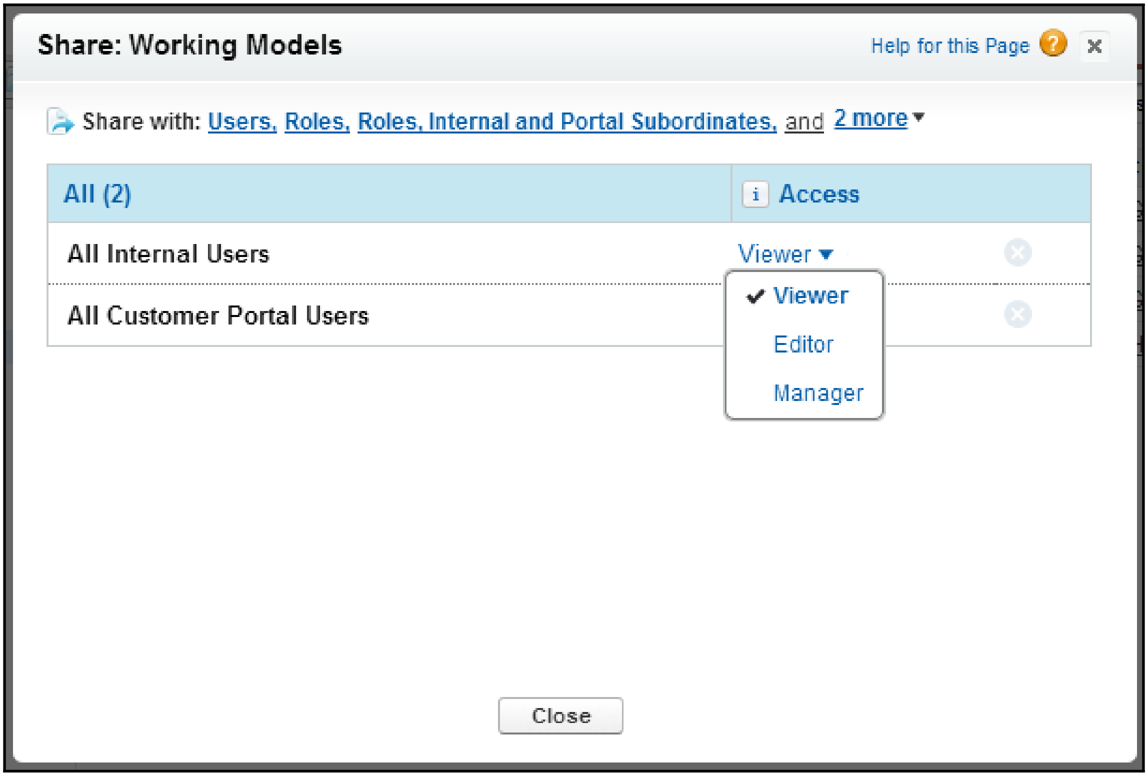


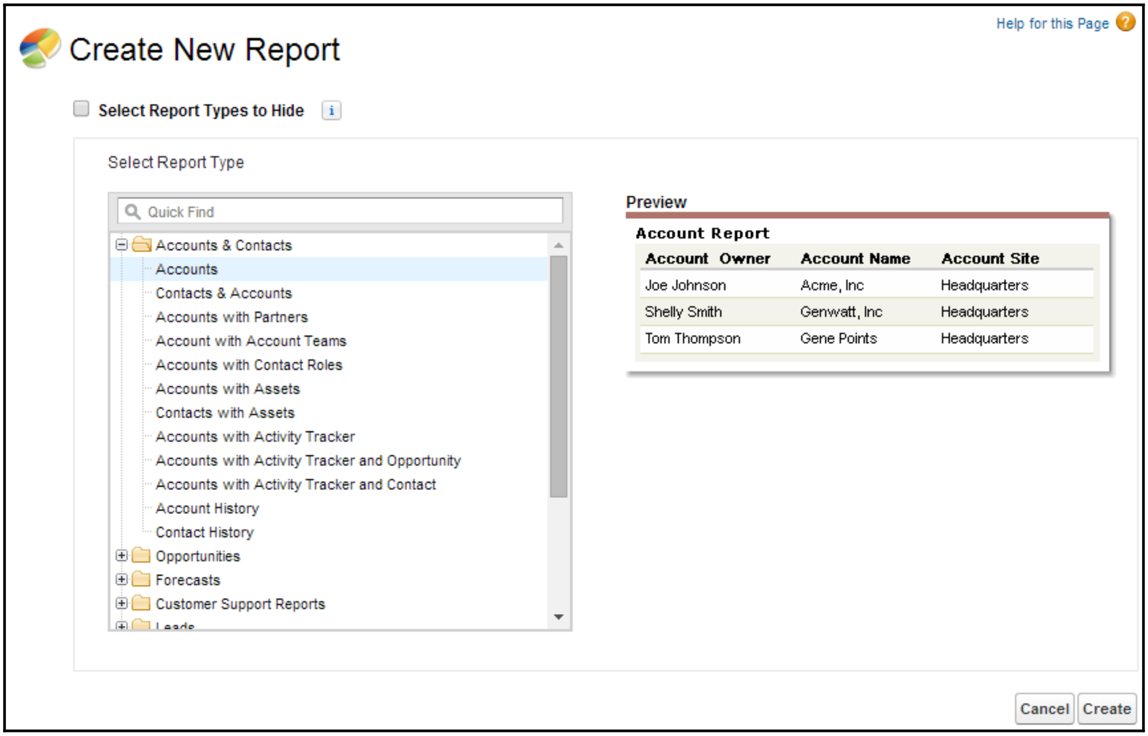

Home
Chatter
Leads
Accounts
Contacts
Reports
Files
Dashboards
Opportunities
Forecasts
Cases
Reports & Dashboards
New Report...
New Dashboard...
Guided Tour | Help for this Page
Folders
All Folders
New Report Folder
New Dashboard Folder
Unfiled Public Reports
My Personal Dashboards
Incident Dashboards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

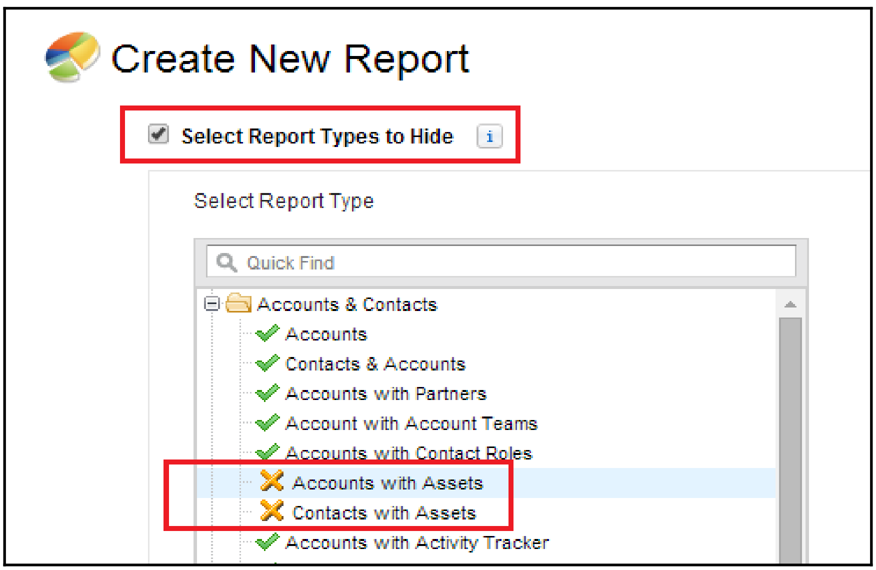

Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Dashboards
Opportunities
Forecasts
Cases
Reports & Dashboards
New Report...
New Dashboard...
Guided Tour | Help for this Page
Folders
Find a folder...
All Folders
Unfiled Public Reports
My Personal Custom Reports
My Personal Dashboards
Incident Dashboards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

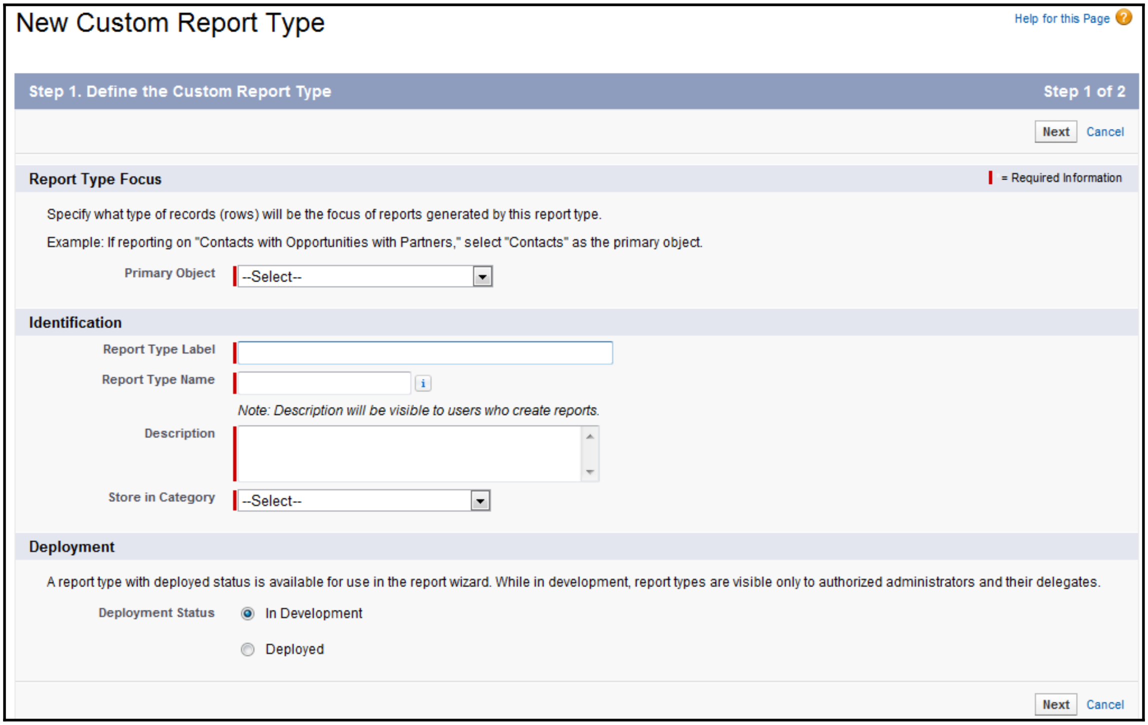

New Report Folder
Help fo
Folder Edit
Save
Cancel
Report Folder Label
Folder Unique Name
Public Folder Access
Read Only
Unfiled Public Reports
Reports in this Folder
--None--
Add
Remove
--None--
This folder is accessible by all users, including portal users
This folder is accessible by all users, except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

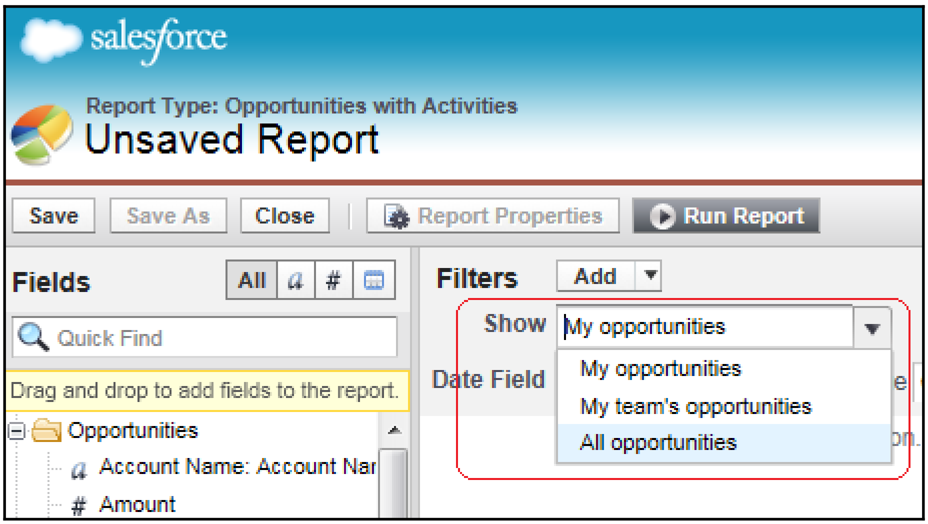

Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Reports & Dashboards
New Report...
New Dashboard...
Folders
Find a folder...
All Folders
Unfiled Public Reports
My Personal Custom Reports
My Personal Dashboards
Incident Dashboards
Incident Reports
Working Models
Account and Contact Reports
Opportunity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

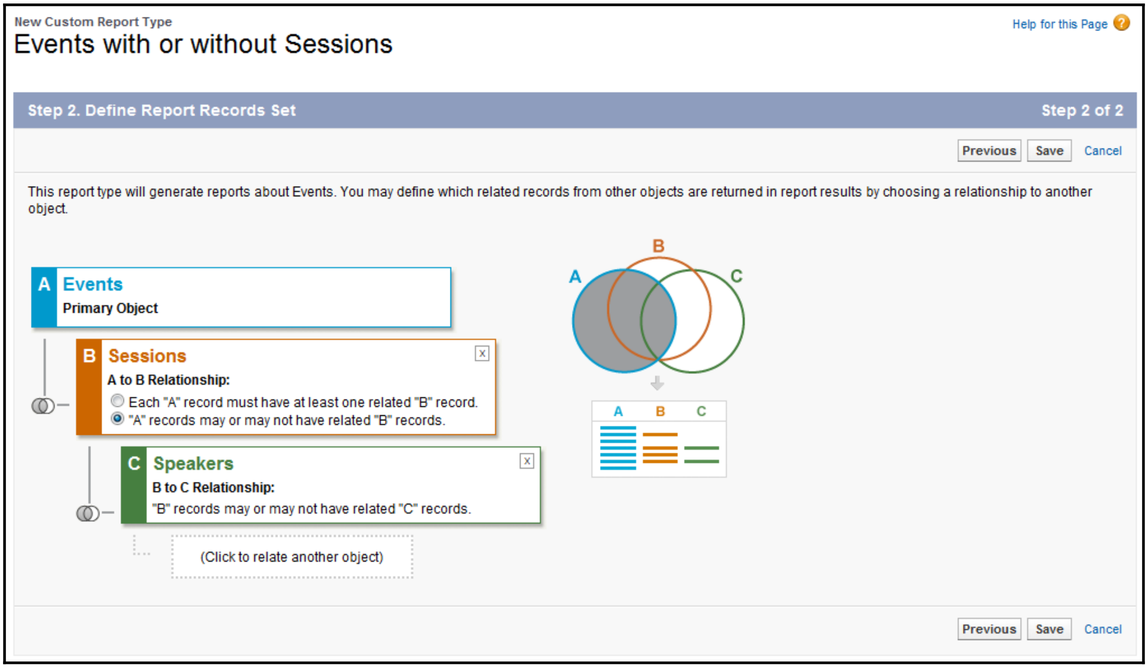

Share: Working Models
Help for this Page
Share with: Users, Roles, Roles, Internal and Portal Subordinates, and 2 more
All (2)
Access
All Internal Users
Viewer
All Customer Portal Users
Viewer
Editor
Manager
Close


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


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


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


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


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

Custom Report Type

Events with or without Sessions

« Back to List: Custom Object Definitions

Help for this Page

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

Custom Report Type Definition

Edit | Delete | Clone

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

Object Relationships

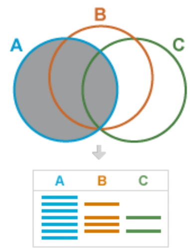
Edit

Object Relationships Help

Events (A)

with or without related records from Sessions (B)

with or without related records from Speakers (C)

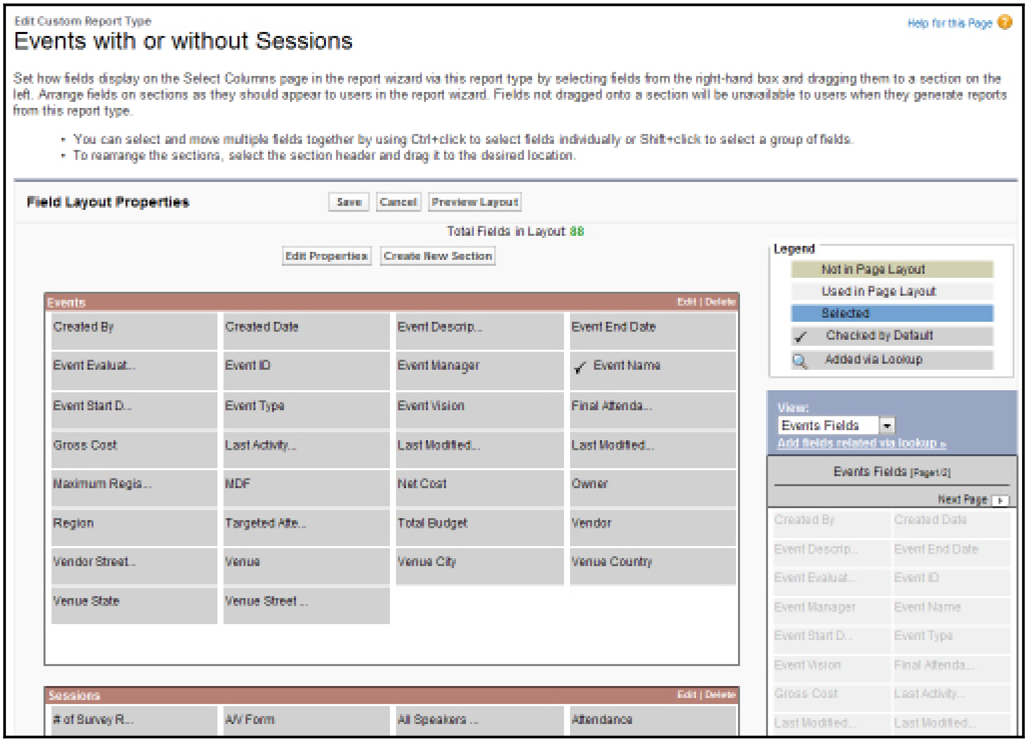


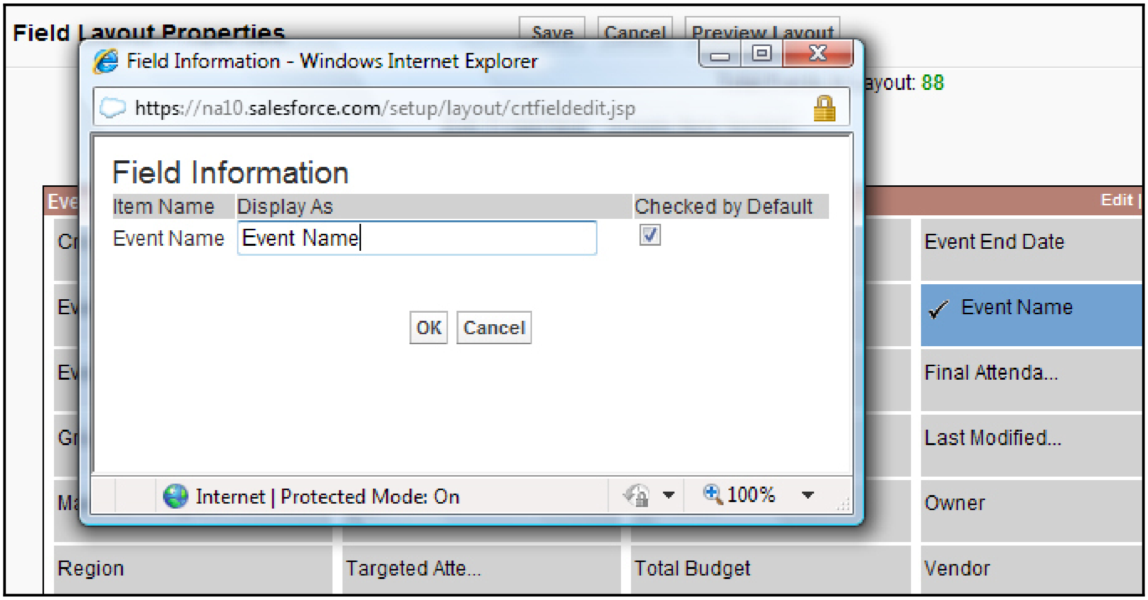
Fields Available for Reports

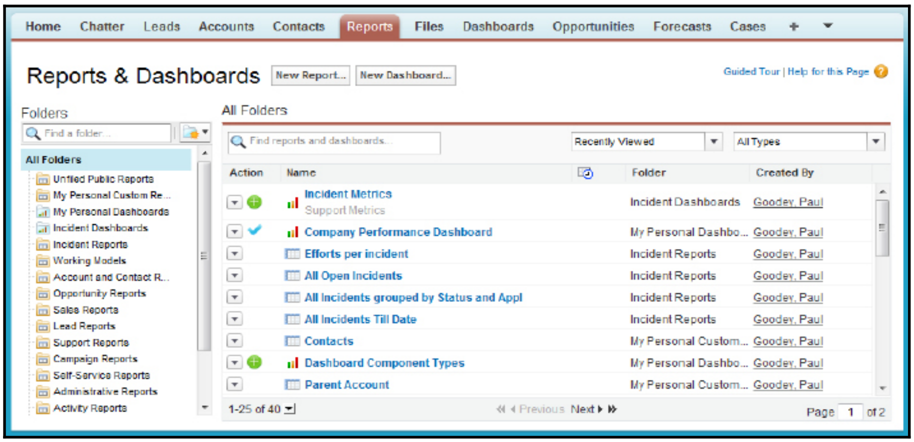
Edit Layout | Preview Layout

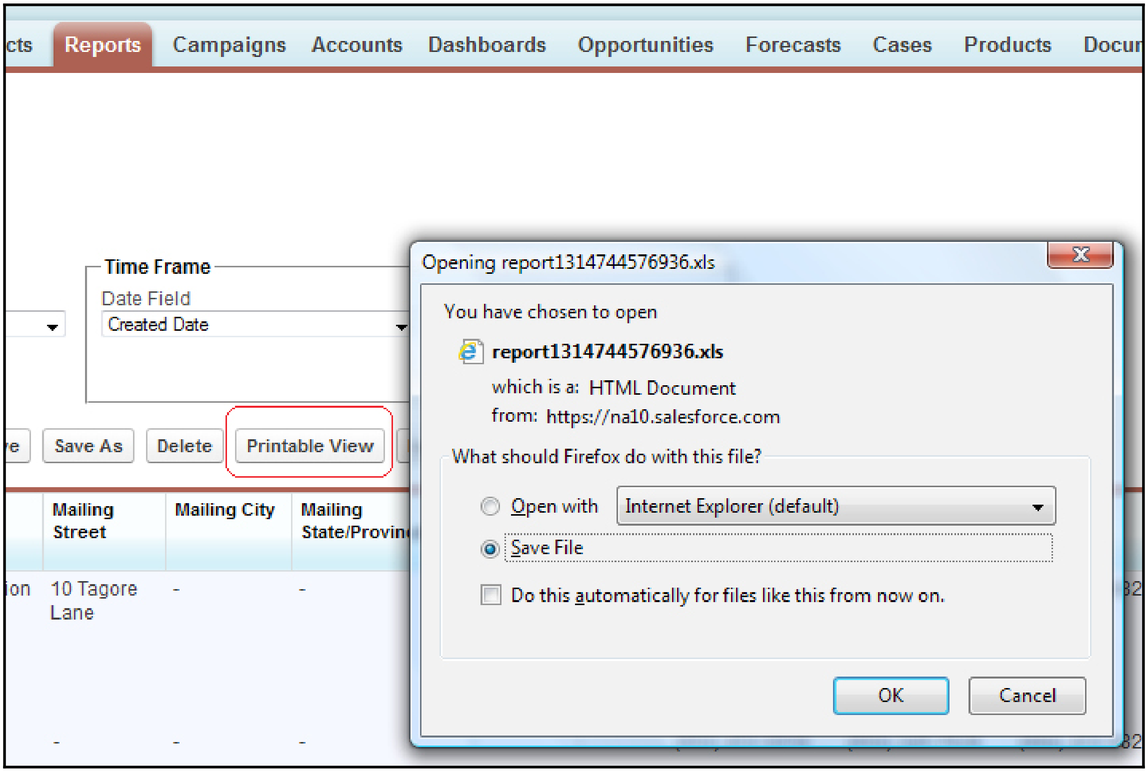
Fields Available for Reports Help

Source	Selected Fields
Events	30
Sessions	30
Speakers	28

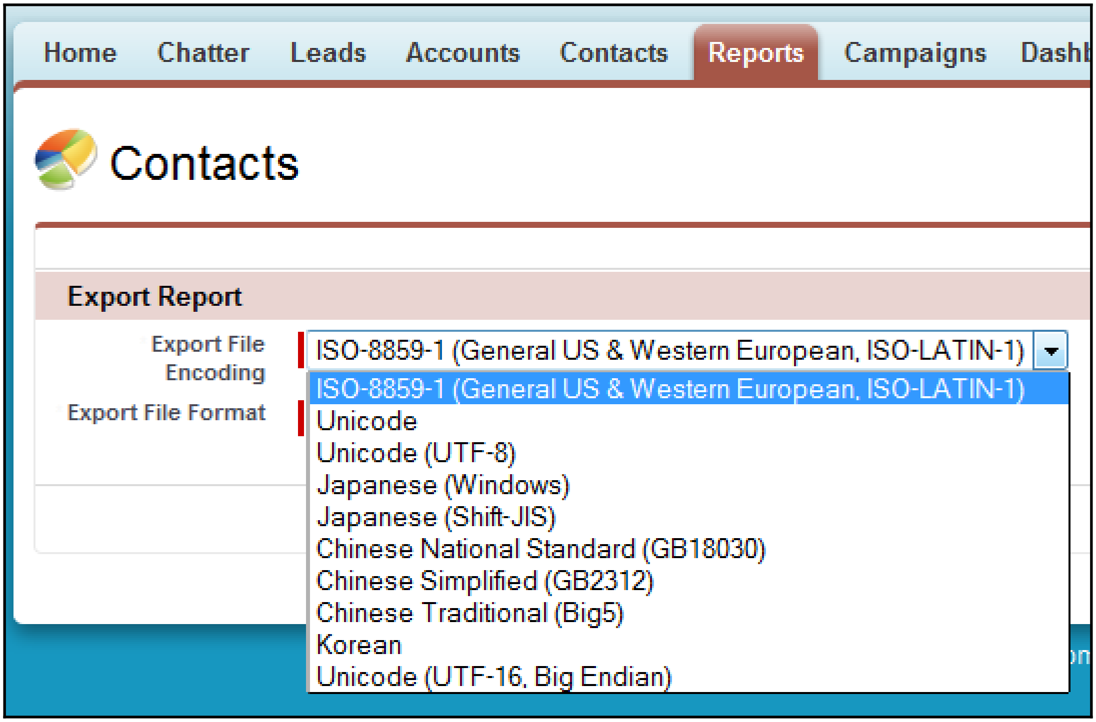

Edit Custom Report Type
Events with or without Sessions
Help for this Page
Set how fields display on the Select Columns page in the report wizard via this report type by selecting fields from the right-hand box and dragging them to a section on the left. Arrange fields on sections as they should appear to users in the report wizard. Fields not dragged onto a section will be unavailable to users when they generate reports from this report type.
You can select and move multiple fields together by using Ctrl+click to select fields individually or Shift+click to select a group of fields.
To rearrange the sections, select the section header and drag it to the desired location.
Field Layout Properties
Save
Cancel
Preview Layout
Total Fields in Layout 88
Edit Properties
Create New Section
Legend
Not in Page Layout
Used in Page Layout
Selected
Checked by Default
Added via Lookup
Events
Edit | Delete
Created By
Created Date
Event Descrip...
Event End Date
Event Evaluat...
Event ID
Event Manager
Event Name
Event Start D...
Event Type
Event Vision
Final Attenda...
Gross Cost
Last Activity...
Last Modified...
Last Modified...
Maximum Regis...
MDF
Net Cost
Owner
Region
Targeted Atte...
Total Budget
Vendor
Vendor Street...
Venue
Venue City
Venue Country
Venue State
Venue Street ...
View:
Events Fields
Add fields related via lookup »
Events Fields [Page 1/2]
Next Page
Created By
Created Date
Event Descrip...
Event End Date
Event Evaluat...
Event ID
Event Manager
Event Name
Event Start D...
Event Type
Event Vision
Final Attenda...
Gross Cost
Last Activity...
Last Modified...
Last Modified...
Sessions
Edit | Delete
# of Survey R...
A/V Form
All Speakers ...
Attendance

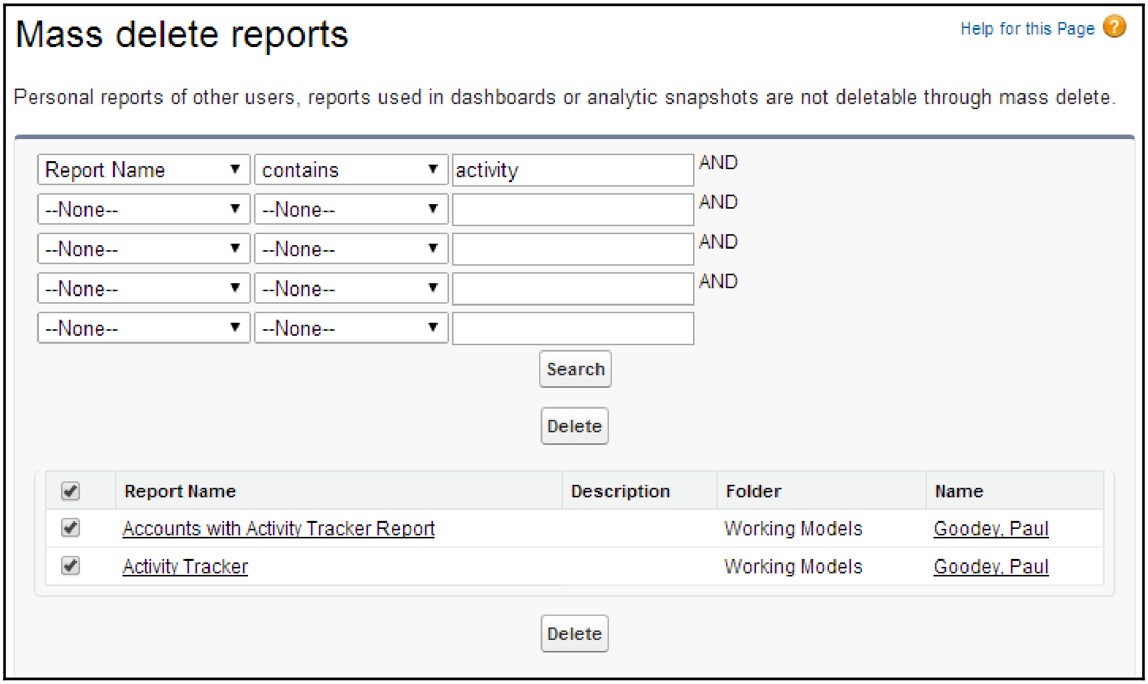

Field Layout Properties
Save
Cancel
Preview Layout
Field Information - Windows Internet Explorer
https://na10.salesforce.com/setup/layout/crtfieldedit.jsp
Field Information
Item Name
Display As
Checked by Default
Event Name
Event Name
OK
Cancel
Internet | Protected Mode: On
100%
ayout: 88
Edit |
Event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

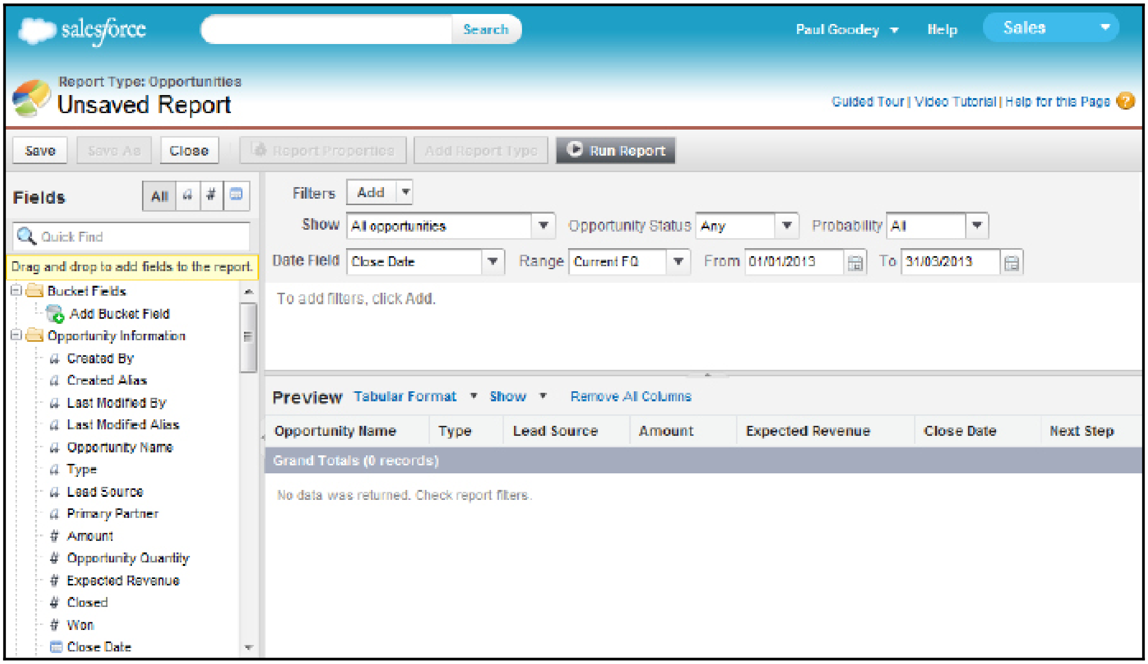

Home
Chatter
Leads
Accounts
Contacts
Reports
Files
Dashboards
Opportunities
Forecasts
Cases
Reports & Dashboards
New Report...
New Dashboard...
Guided Tour | Help for this Page
Folders
All Folders
Unfiled Public Reports
My Personal Custom Re...
My Personal Dashboards
Incident Dashboards
Incident Reports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

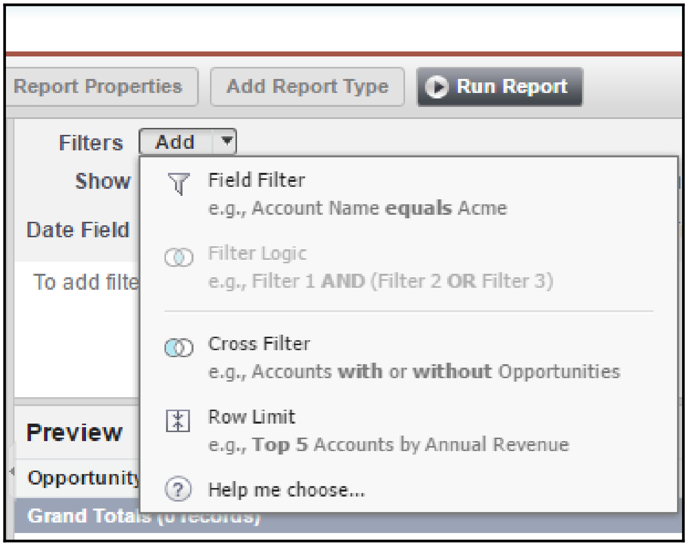


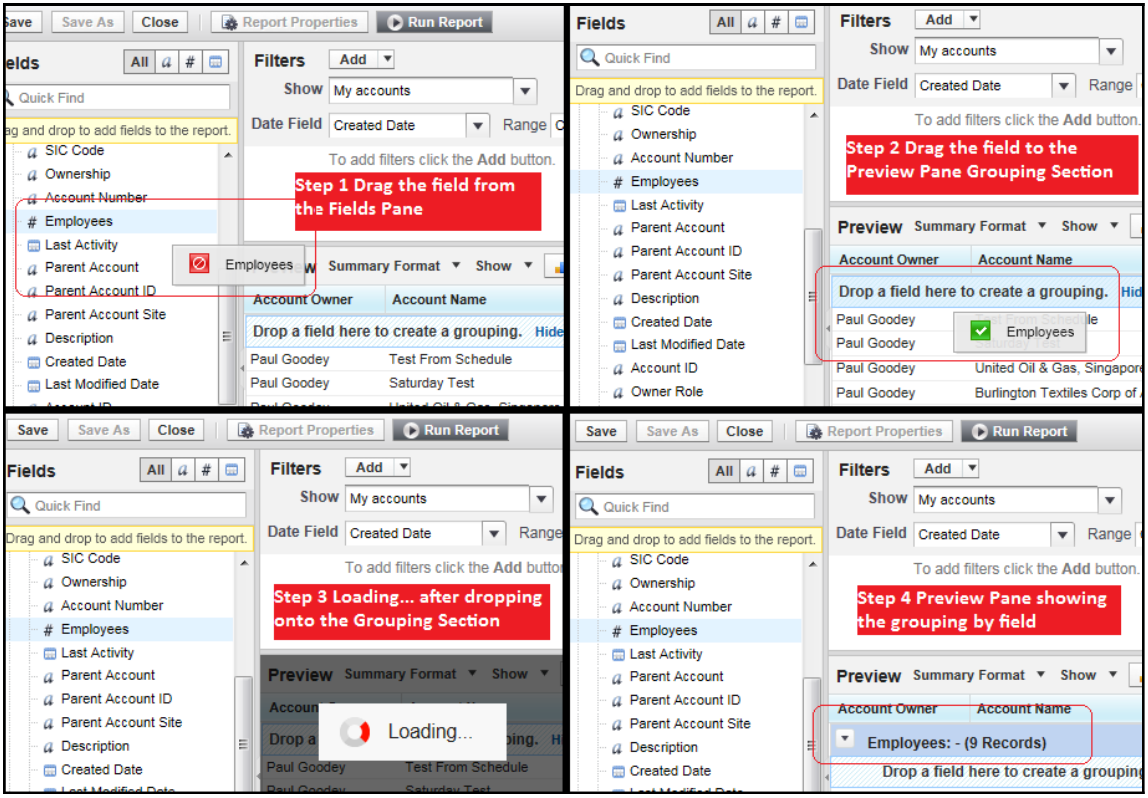
cts
Reports
Campaigns
Accounts
Dashboards
Opportunities
Forecasts
Cases
Products
Time Frame
Date Field
Created Date
Save As
Delete
Printable View
Mailing Street
Mailing City
Mailing State/Provin
10 Tagore Lane
Opening report1314744576936.xls
You have chosen to open
report1314744576936.xls
which is a: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


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

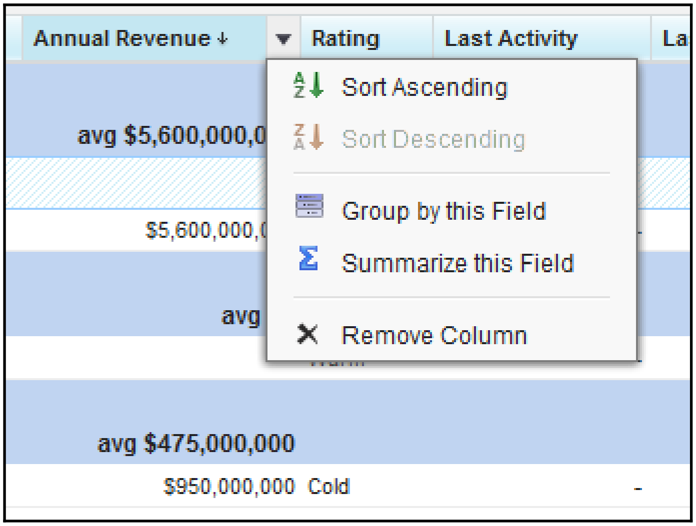

Mass delete reports
Help for this Page
Personal reports of other users, reports used in dashboards or analytic snapshots are not deletable through mass delete.
Report Name
contains
activity
AND
--None--
--None--
AND
--None--
--None--
AND
--None--
--None--
AND
--None--
--None--
Search
Delete
Report Name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

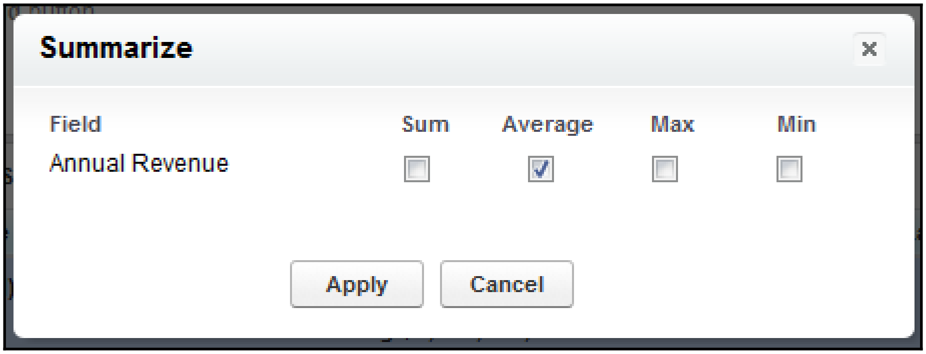

salesforce
Search
Paul Goodey
Help
Sales
Report Type: Opportunities
Unsaved Report
Guided Tour | Video Tutorial | Help for this Page
Save
Save As
Close
Report Properties
Add Report Type
Run Report
Fields
All
Quick Find
Drag and drop to add fields to the report.
Bucket Fields
Add Bucket Field
Opportunity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


Report Properties
Add Report Type
Run Report
Filters
Add
Show
Date Field
To add filte
Field Filter
e.g., Account Name equals Acme
Filter Logic
e.g., Filter 1 AND (Filter 2 OR Filter 3)
Cross Filter
e.g., Accounts with or without Opportunities
Row Limit
e.g., Top 5 Accounts by Annual Revenue
Help me choose...
Preview
Opportunity
Grand Totals


Step 1 Drag the field from the Fields Pane
Employees
Drop a field here to create a grouping.
Step 2 Drag the field to the Preview Pane Grouping Section
Drop a field here to create a grouping.
Employees
Step 3 Loading... after dropping onto the Grouping Section
Loading...
Step 4 Preview Pane showing the grouping by field
Employees: - (9 Records)
Drop a field here to create a grouping
Save
Save As
Close
Report Properties
Run Report
Fields
Quick Find
Drag and drop to add fields to the report.
SIC Code
Ownership
Account Number
Employees
Last Activity
Parent Account
Parent Account ID
Parent Account Site
Description
Created Date
Last Modified Date
Account ID
Owner Role
Filters
Add
Show
My accounts
Date Field
Created Date
Range
To add filters click the Add button.
Preview
Summary Format
Account Owner
Account Name
Paul Goodey
Test From Schedule
Saturday Test
United Oil & Gas, Singapore
Burlington Textiles Corp of

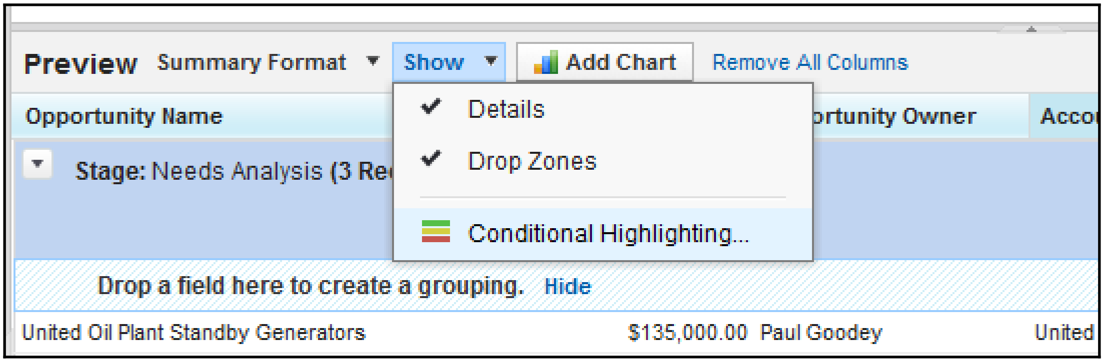
	Account Owner	Account Name	Type	Rati
☐	**Employees:** 100,000 **(1 record)**			
	Paul Goodey	United Oil & Gas Corp.	Customer	Hot
☐	**Employees:** 39,000 **(1 record)**			
	Paul Goodey	University of Arizona	Customer	Warr
☐	**Employees:** 24,000 **(2 records)**			
	Paul Goodey	Express Logistics and Transport	Customer - Channel	Cold
	Paul Goodey	United Oil & Gas, UK	Customer	-
☐	**Employees:** 5,000 **(2 records)**			
	Paul Goodey	Burlington Textiles Corp of America	Customer	Warr
	Paul Goodey	Grand Hotels & Resorts Ltd	Customer	Warr
☐	**Employees:** 3,000 **(1 record)**			
	Paul Goodey	United Oil & Gas, Singapore	Customer	-
☐	**Employees:** 1,000 **(4 records)**			
	Paul Goodey	Pyramid Construction Inc.	Customer - Channel	-
	Paul Goodey	Edge Communications	Customer	Hot
	Paul Goodey	Company X	-	-
	Paul Goodey	Carr	-	-

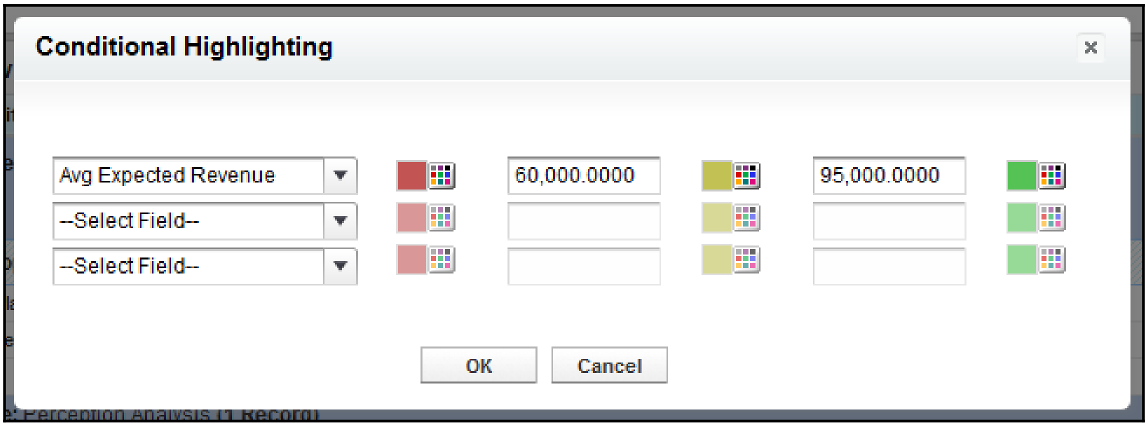

Annual Revenue
Rating
Last Activity
Sort Ascending
Sort Descending
Group by this Field
Summarize this Field
Remove Column
avg $5,600,000,0
$5,600,000,(
avg
avg $475,000,000
$950,000,000 Cold


Summarize
Field
Sum
Average
Max
Min
Annual Revenue
Apply
Cancel

Run Report ▾ | Hide Details | Customize | Save As | Printable View | Export Details

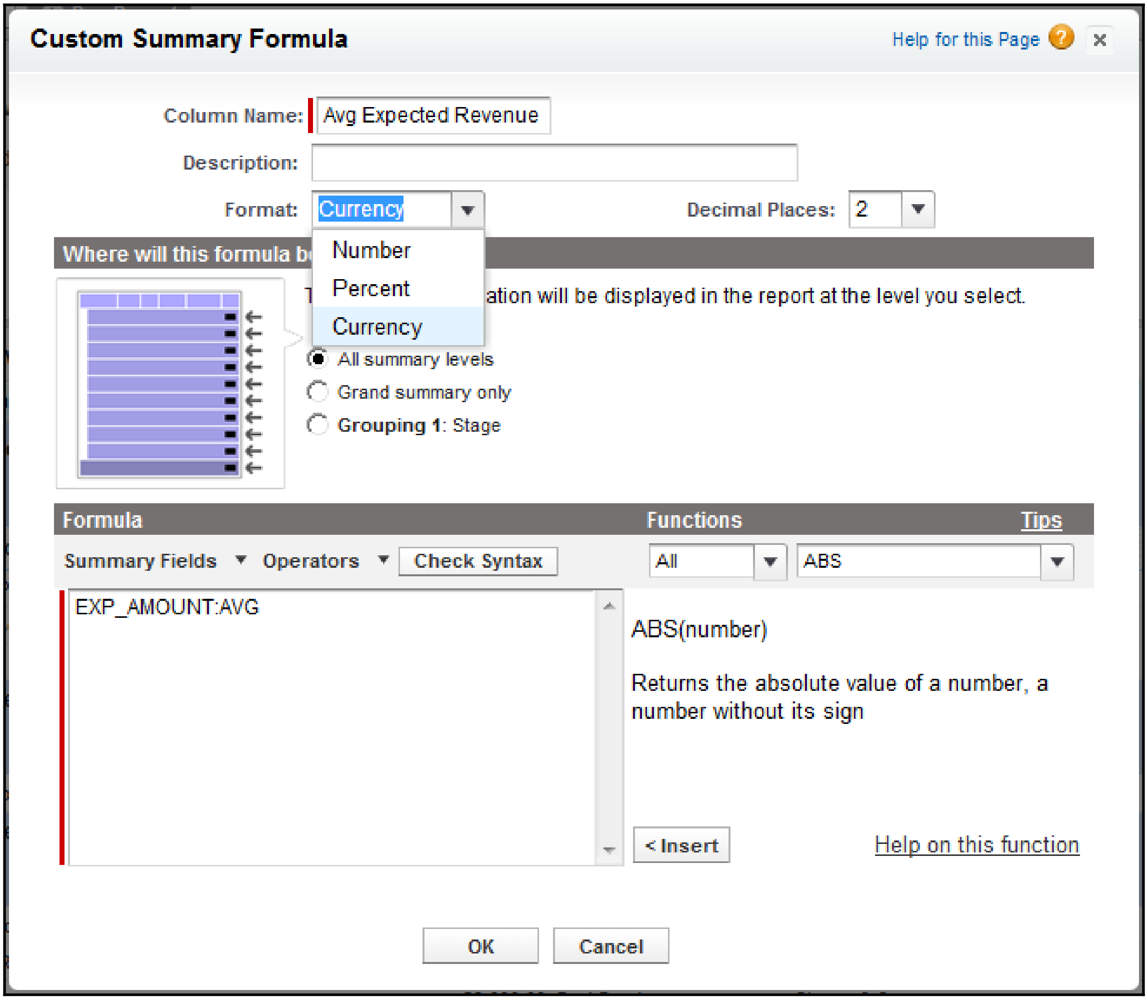
Account Owner	Account Name	Type	Rating	Annual Revenue	La
Employees: 100,000 **(1 record)**					
				avg $5,600,000,000	
Paul Goodey	United Oil & Gas Corp.	Customer	Hot	$5,600,000,000	
Employees: 39,000 **(1 record)**					
				avg $0	
Paul Goodey	University of Arizona	Customer	Warm	-	
Employees: 24,000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


Preview
Summary Format
Show
Add Chart
Remove All Columns
Opportunity Name
Details
Drop Zones
Conditional Highlighting...
ortunity Owner
Stage: Needs Analysis (3 Re
Drop a field here to create a grouping.
Hide
United Oil Plant Standby Generators
$135,000.00
Paul Goodey
United


Conditional Highlighting
Avg Expected Revenue
60,000.0000
95,000.0000
--Select Field--
--Select Field--
OK
Cancel

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

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


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

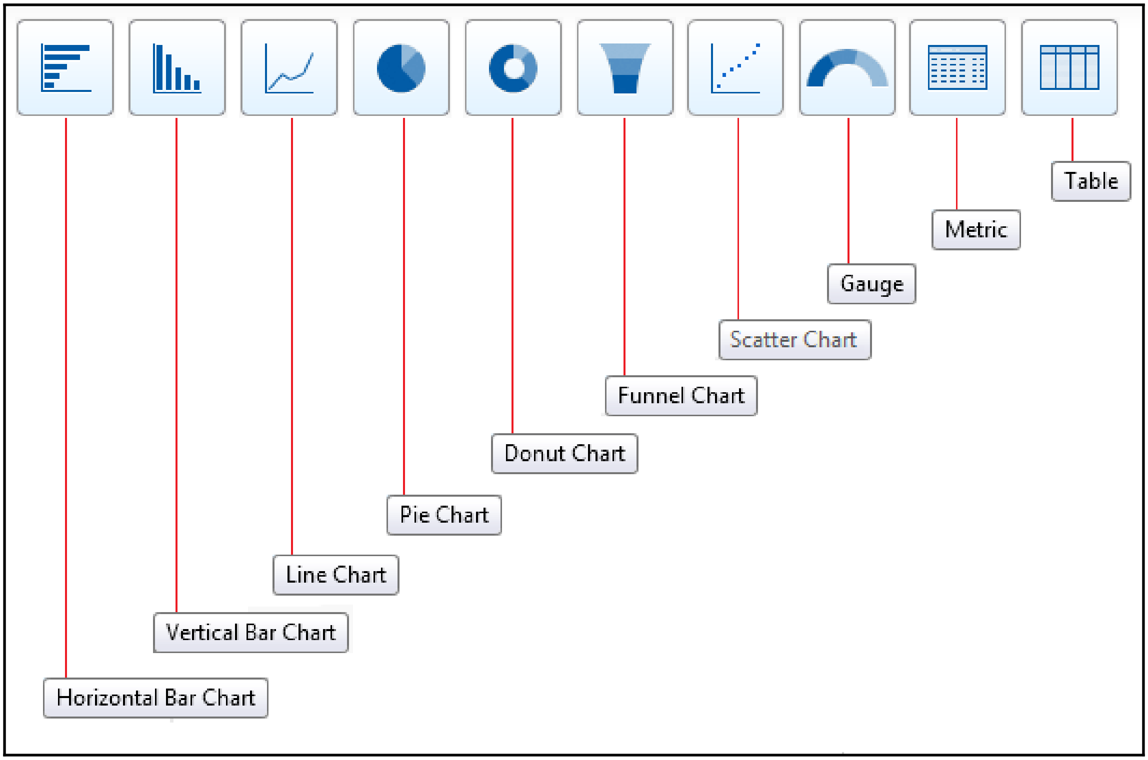
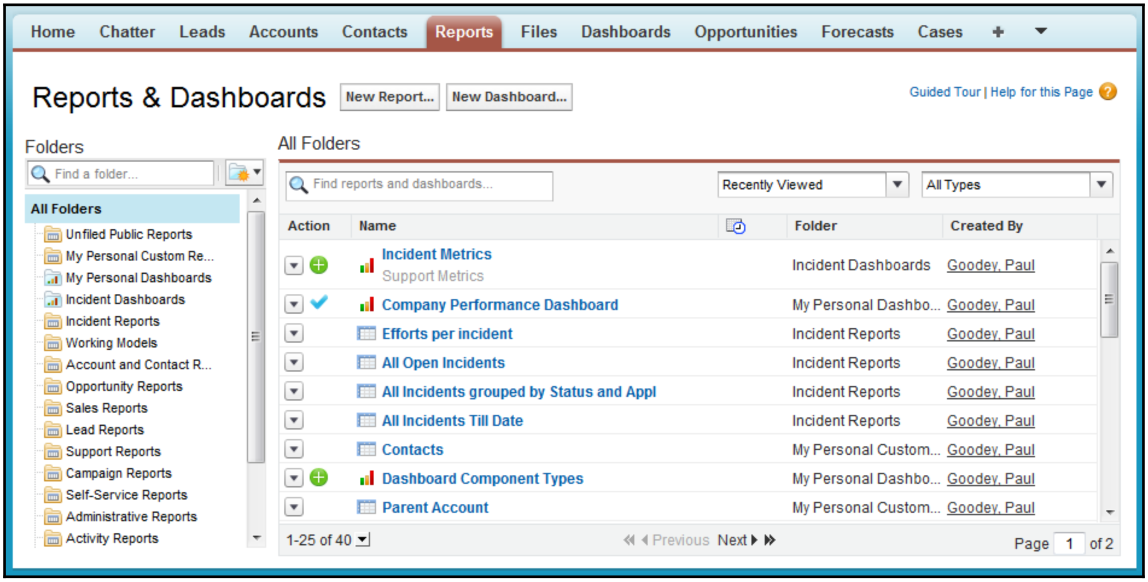
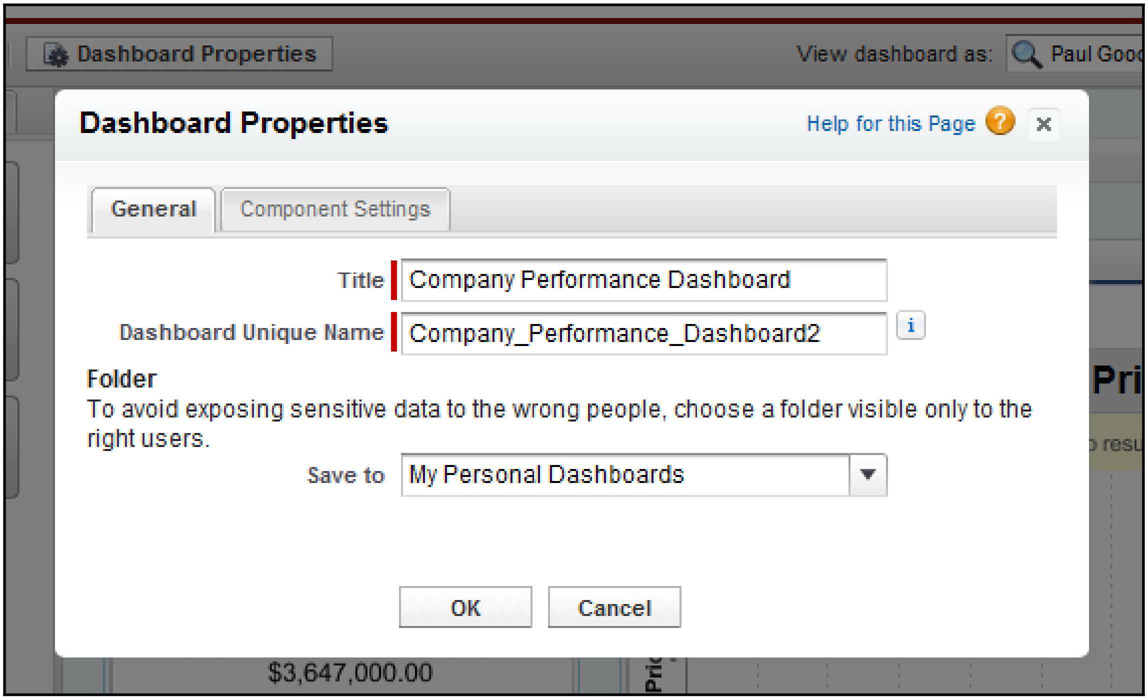
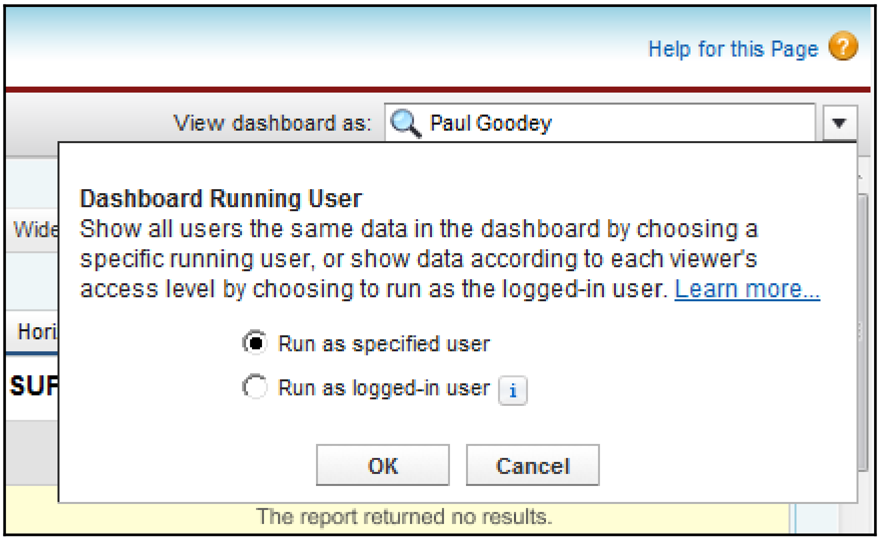
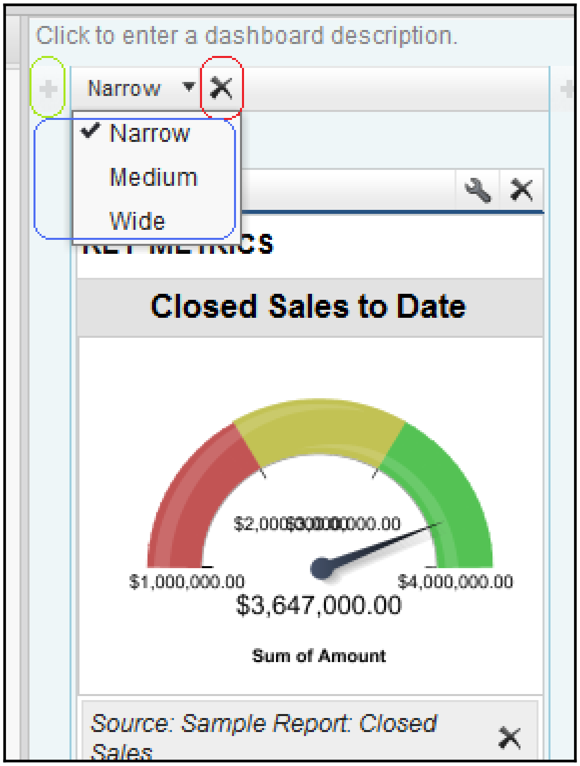


Table
Metric
Gauge
Scatter Chart
Funnel Chart
Donut Chart
Pie Chart
Line Chart
Vertical Bar Chart
Horizontal Bar Chart

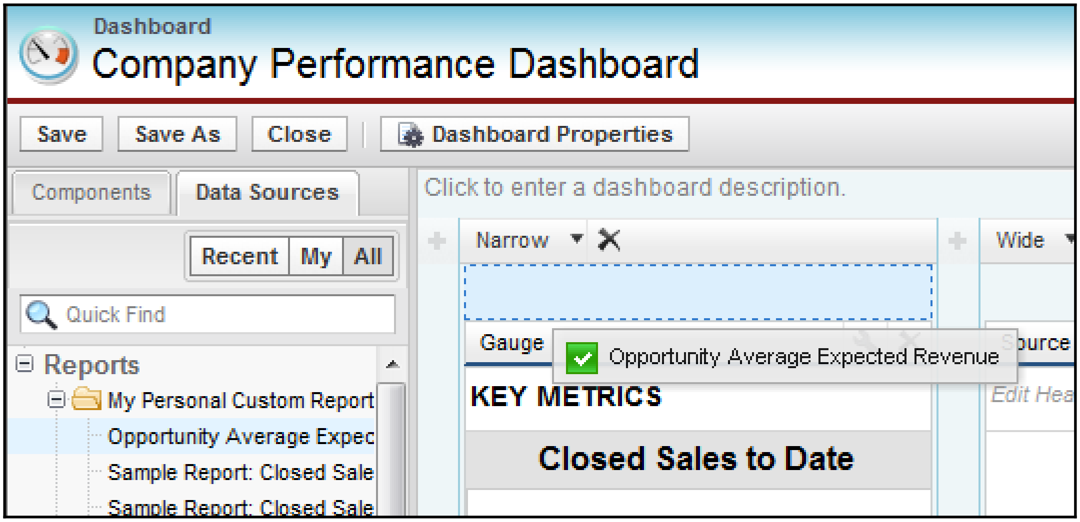

Home
Chatter
Leads
Accounts
Contacts
Reports
Files
Dashboards
Opportunities
Forecasts
Cases
Reports & Dashboards
New Report...
New Dashboard...
Guided Tour | Help for this Page
Folders
Find a folder...
All Folders
Unfiled Public Reports
My Personal Custom Re...
My Personal Dashboards
Incident Dashboards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

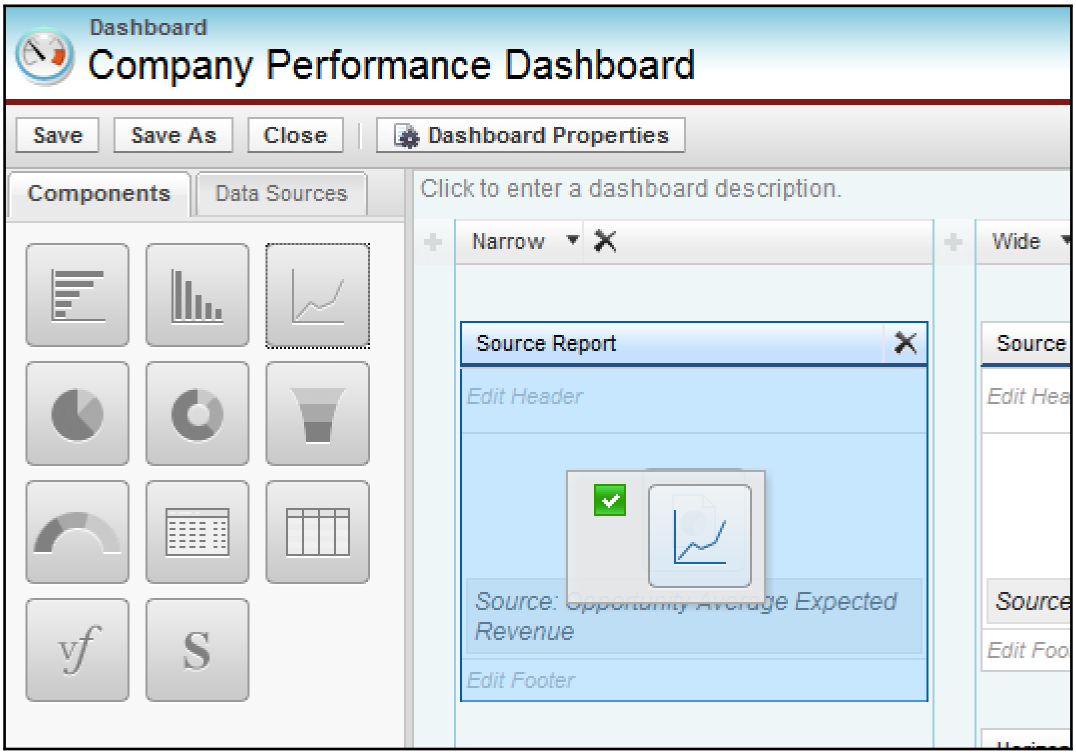

Dashboard Properties
View dashboard as:
Dashboard Properties
Help for this Page
General
Component Settings
Title
Company Performance Dashboard
Dashboard Unique Name
Company_Performance_Dashboard2
Folder
To avoid exposing sensitive data to the wrong people, choose a folder visible only to the right users.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

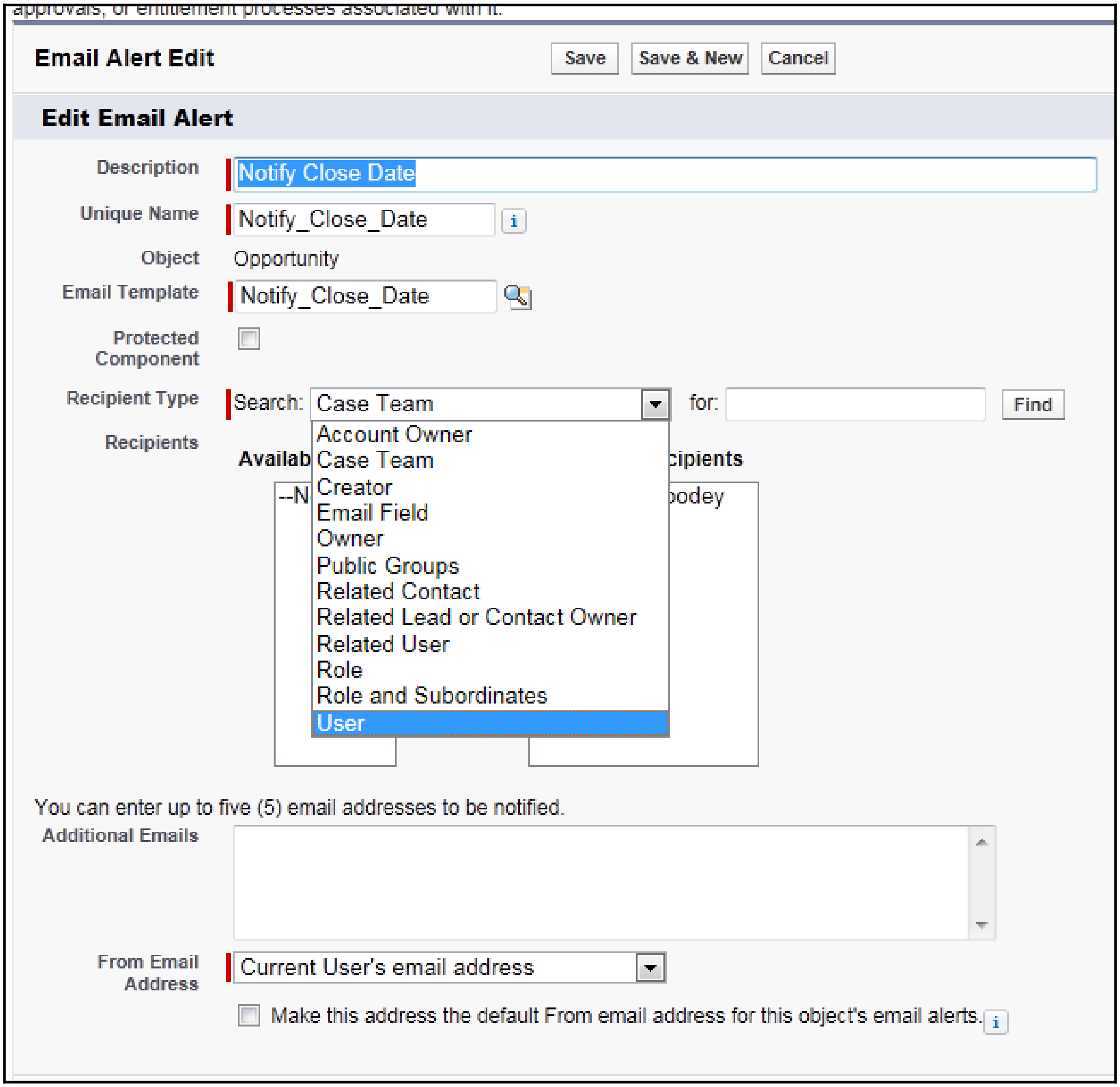

Help for this Page
View dashboard as:
Paul Goodey
Dashboard Running User
Show all users the same data in the dashboard by choosing a specific running user, or show data according to each viewer's access level by choosing to run as the logged-in user. Learn more...
Run as specified user
Run as logged-in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



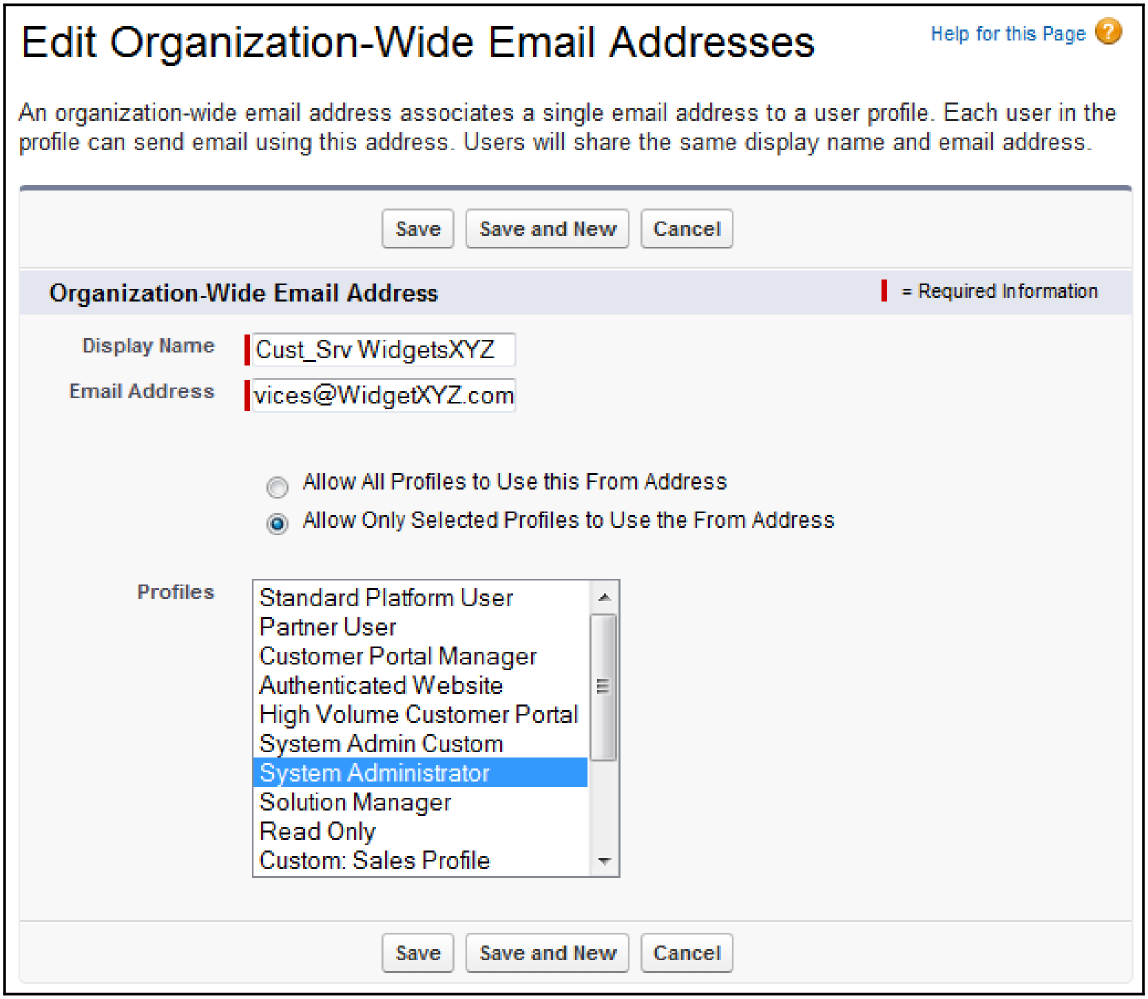
Click to enter a dashboard description.
Narrow
Narrow
Medium
Wide
KEY METRICS
Closed Sales to Date
$1,000,000.00
$4,000,000.00
$3,647,000.00
Sum of Amount
Source: Sample Report: Closed Sales

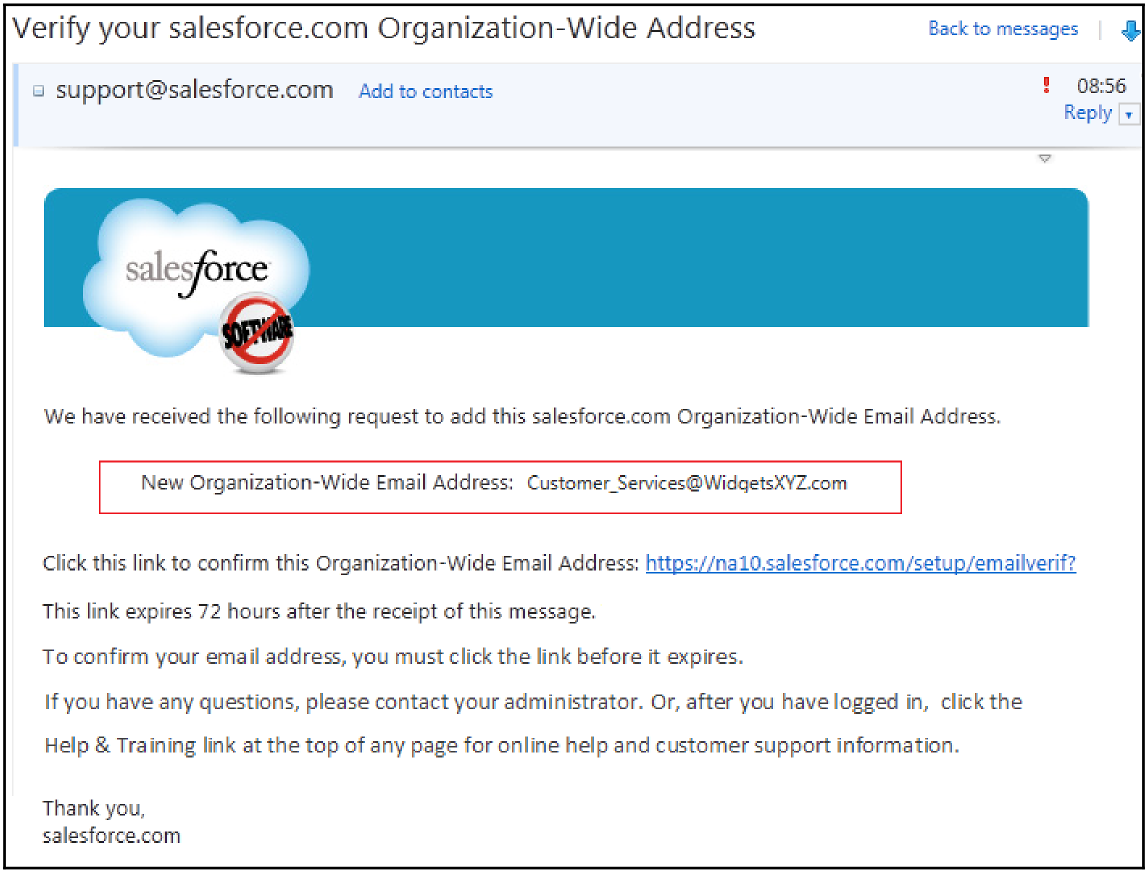

Dashboard
Company Performance Dashboard
Save
Save As
Close
Dashboard Properties
Components
Data Sources
Recent
My
All
Quick Find
Reports
My Personal Custom Report
Opportunity Average Expec
Sample Report: Closed Sale
Sample Report: Closed Sale
Click to enter a dashboard description.
Narrow
Wide
Gauge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


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



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


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


Verify your salesforce.com Organization-Wide Address

Back to messages

support@salesforce.com Add to contacts

08:56

Reply

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

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

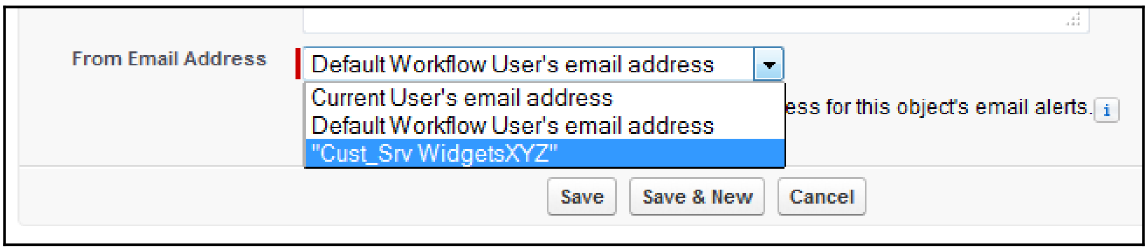
Click this link to confirm this Organization-Wide Email Address: https://na10.salesforce.com/setup/emailverif?

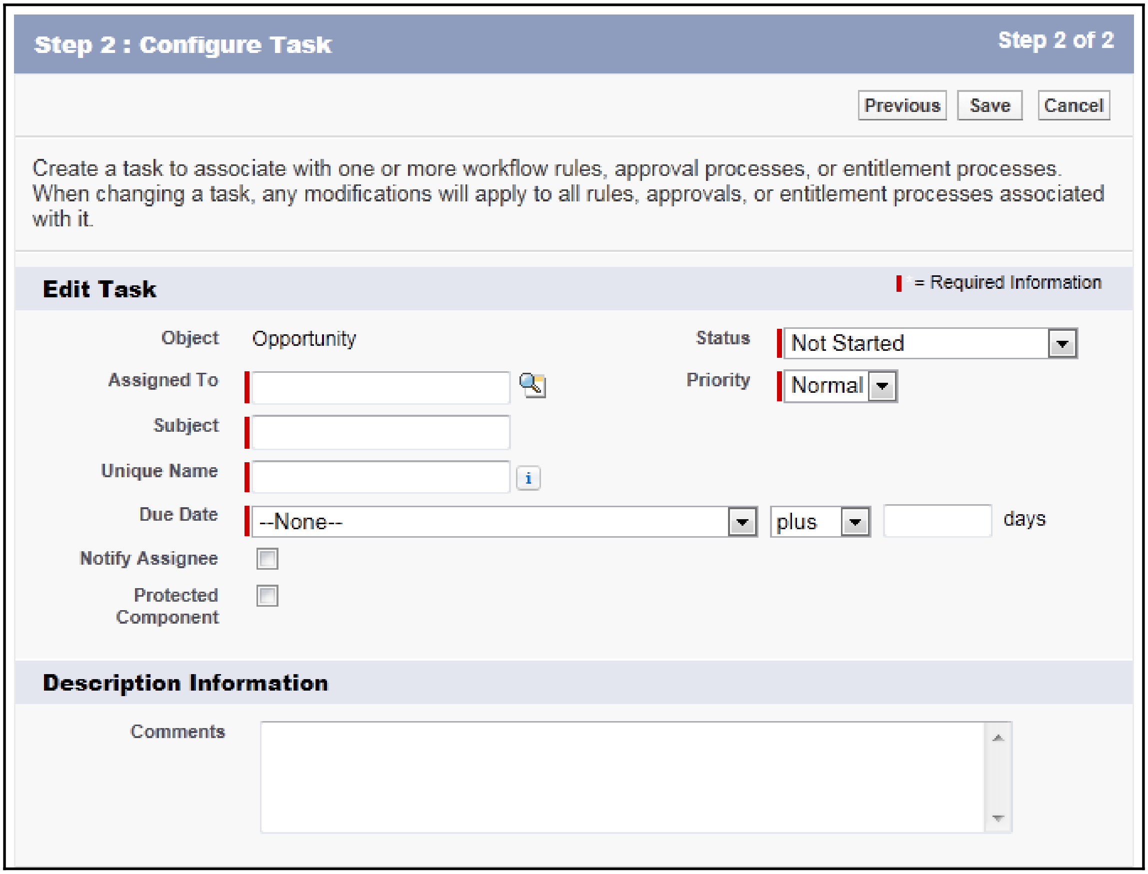
This link expires 72 hours after the receipt of this message.

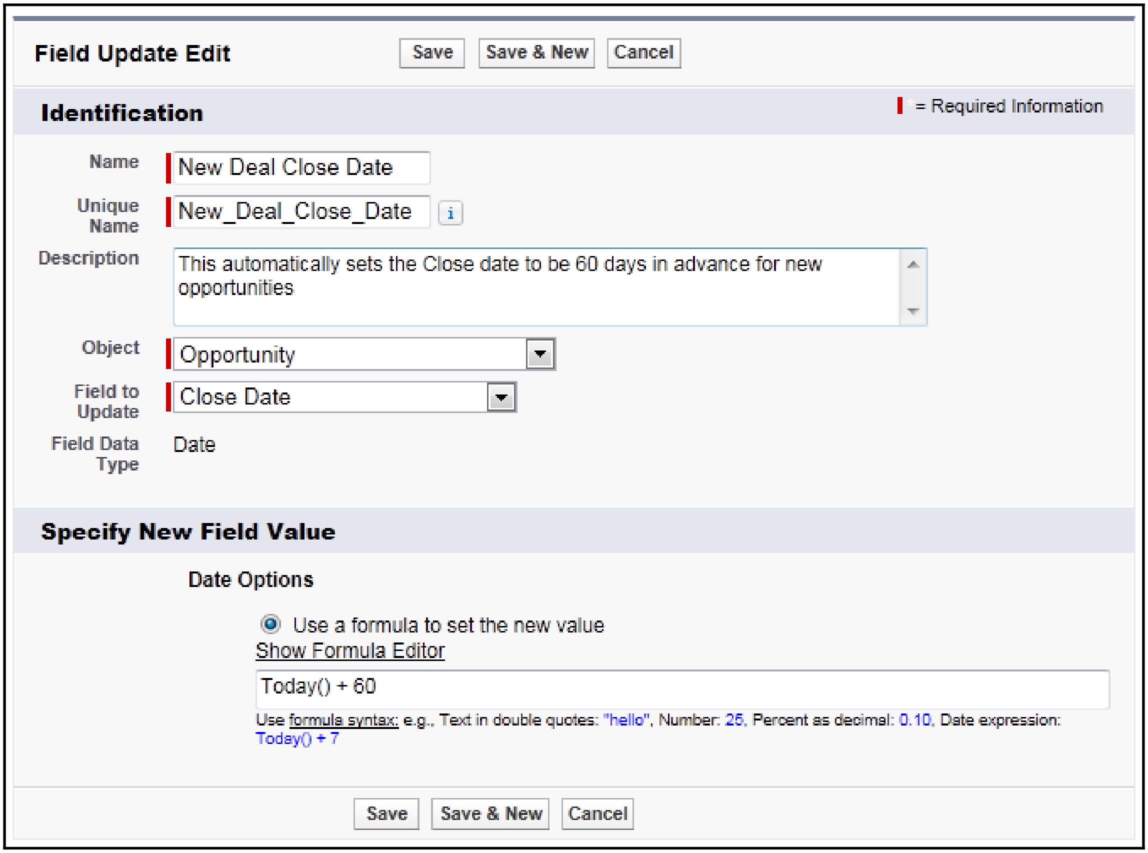
To confirm your email address, you must click the link before it expires.

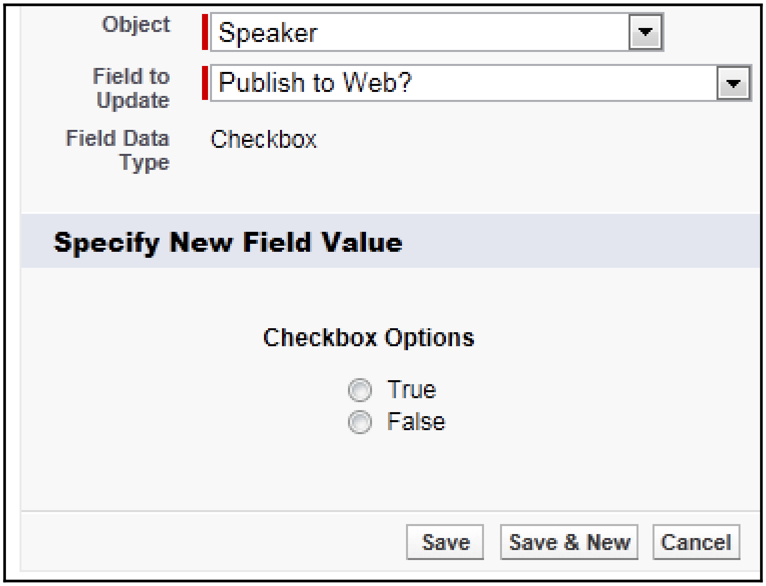
If you have any questions, please contact your administrator. Or, after you have logged in, click the Help & Training link at the top of any page for online help and customer support information.

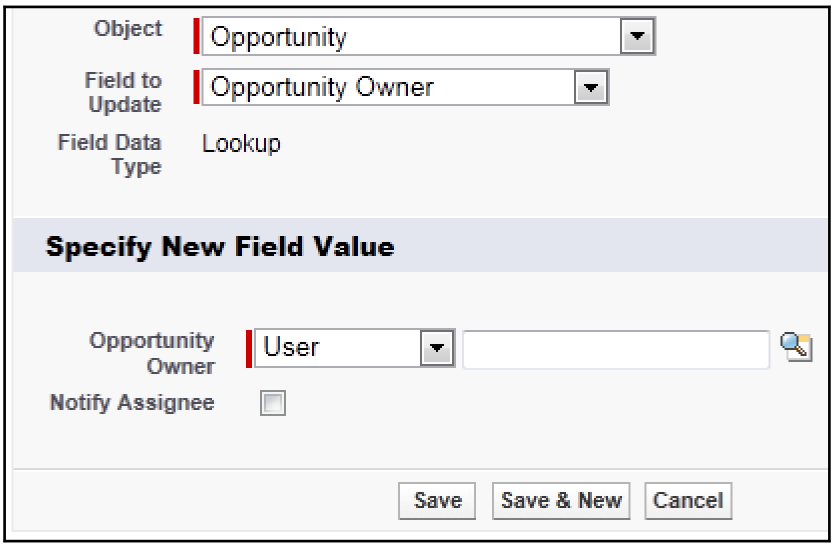
Thank you,
salesforce.com

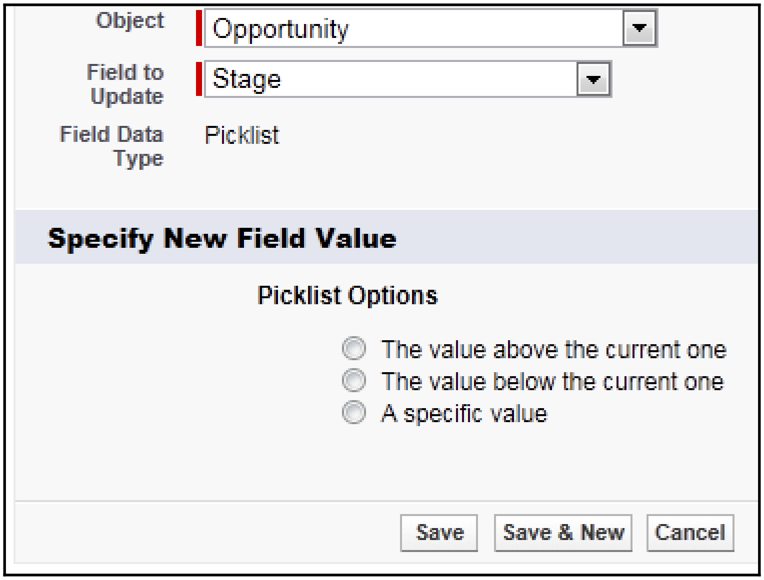


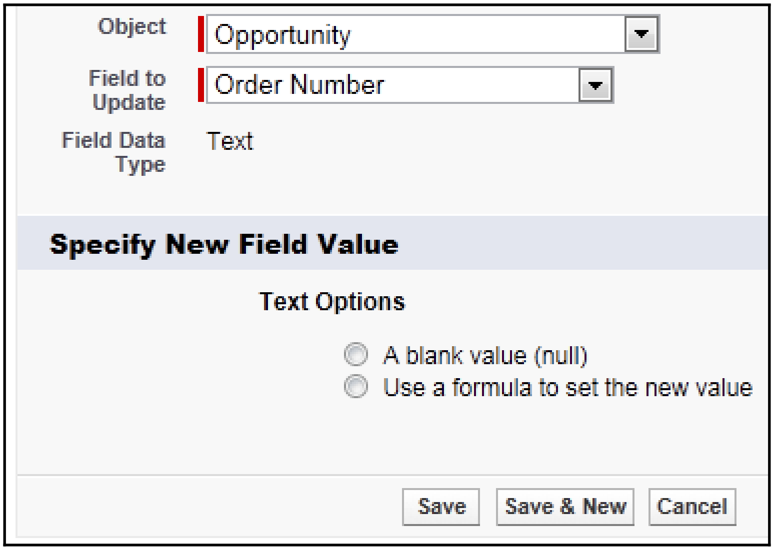

Step 2 : Configure Task
Step 2 of 2
Previous
Save
Cancel
Create a task to associate with one or more workflow rules, approval processes, or entitlement processes. When changing a task, any modifications will apply to all rules, approvals, or entitlement processes associated with it.
Edit Task
= Required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

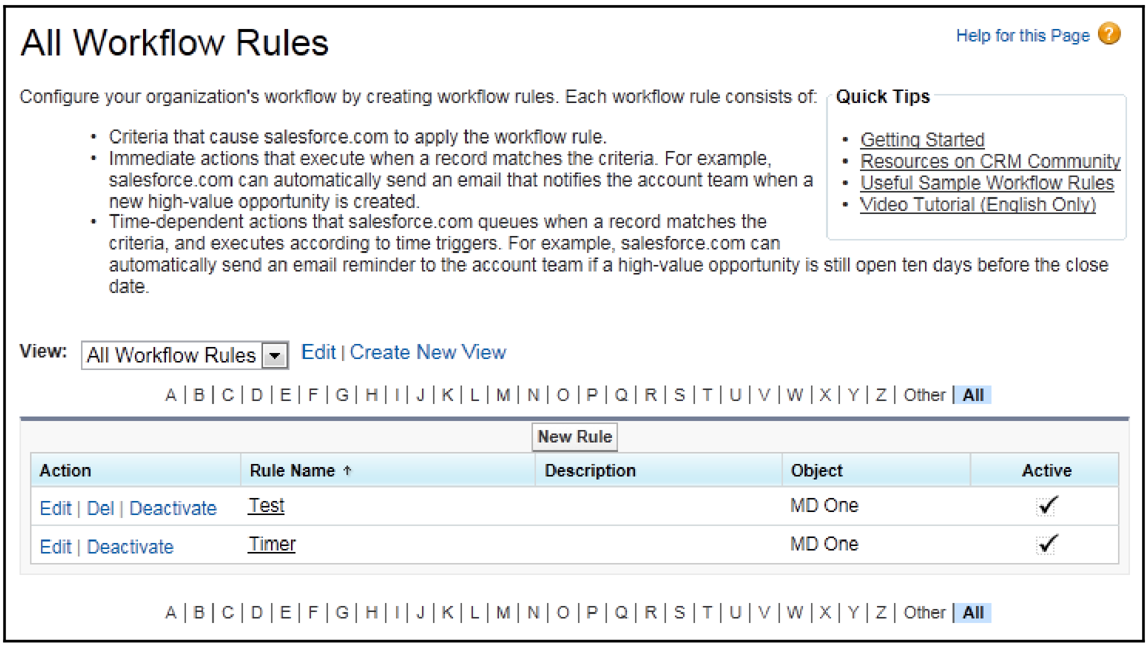

Field Update Edit
Save
Save & New
Cancel
Identification
= Required Information
Name
New Deal Close Date
Unique Name
New_Deal_Close_Date
Description
This automatically sets the Close date to be 60 days in advance for new opportunities
Object
Opportunity
Field to Update
Close Date
Field Data Type
Date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

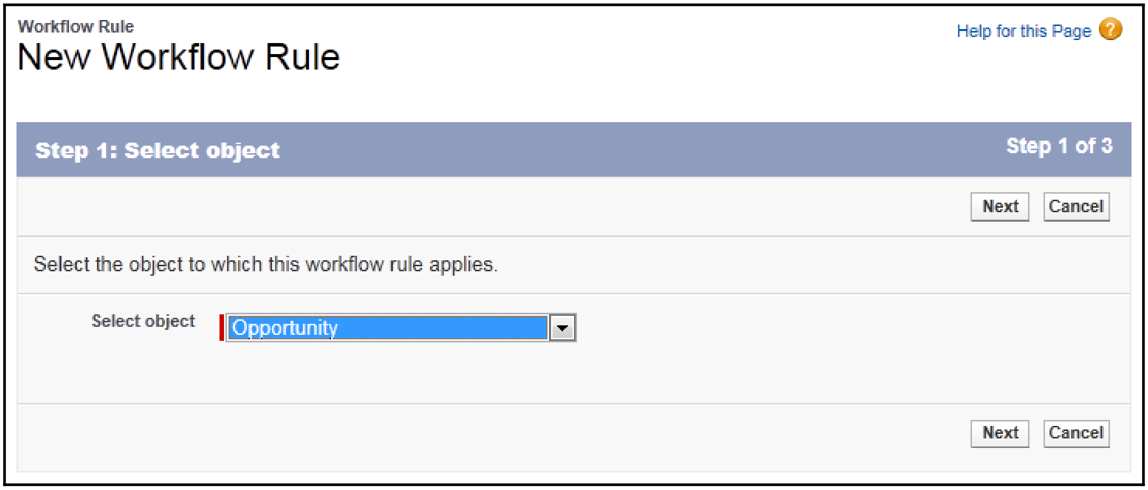

Object
Speaker
Field to Update
Publish to Web?
Field Data Type
Checkbox
Specify New Field Value
Checkbox Options
True
False
Save
Save & New
Cancel

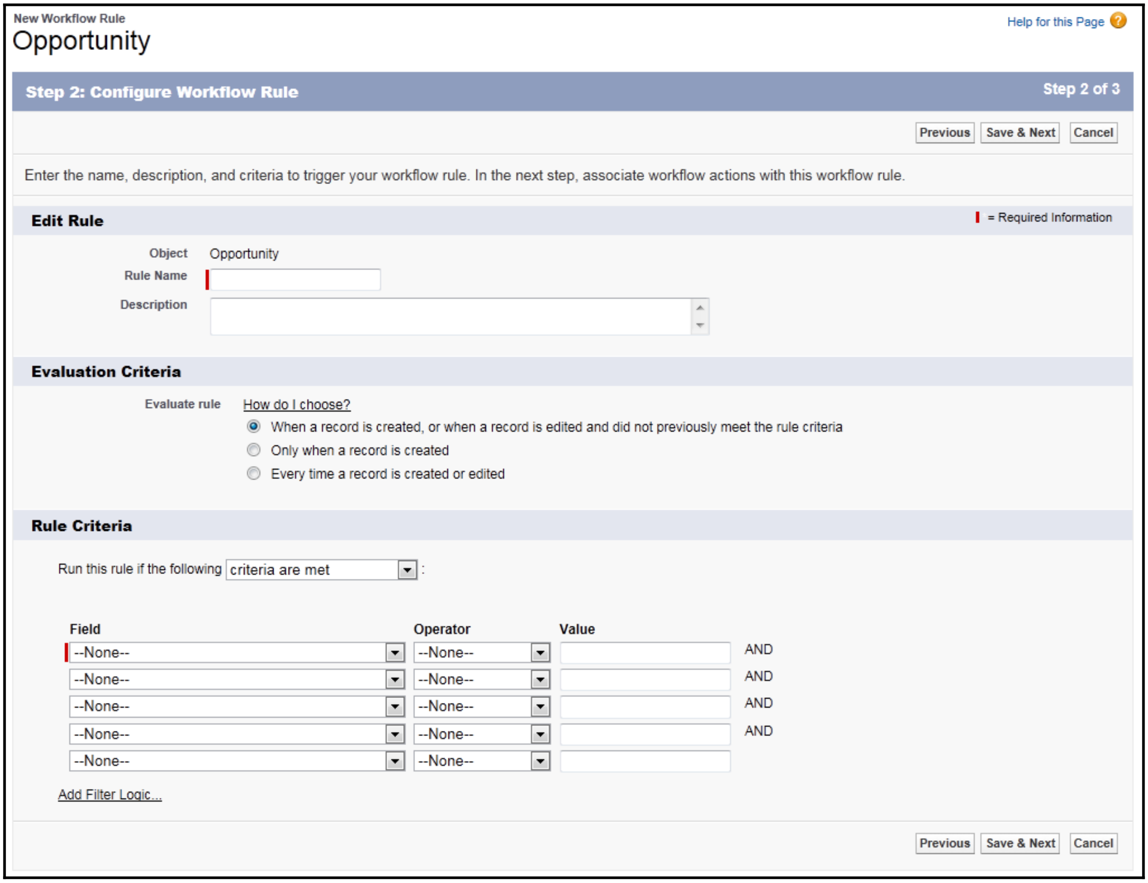

Object
Opportunity
Field to Update
Opportunity Owner
Field Data Type
Lookup
Specify New Field Value
Opportunity Owner
User
Notify Assignee
Save
Save & New
Cancel

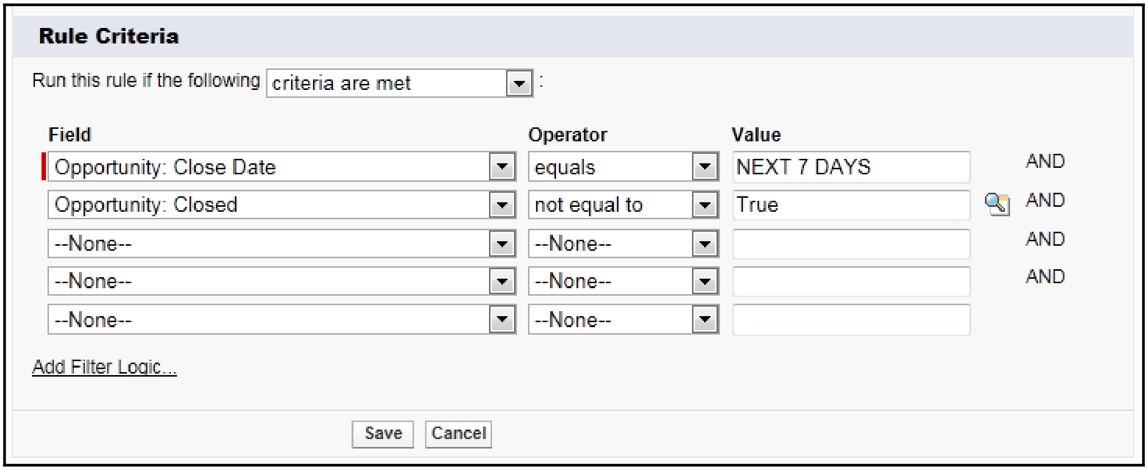

Object
Opportunity
Field to Update
Stage
Field Data Type
Picklist
Specify New Field Value
Picklist Options
The value above the current one
The value below the current one
A specific value
Save
Save & New
Cancel

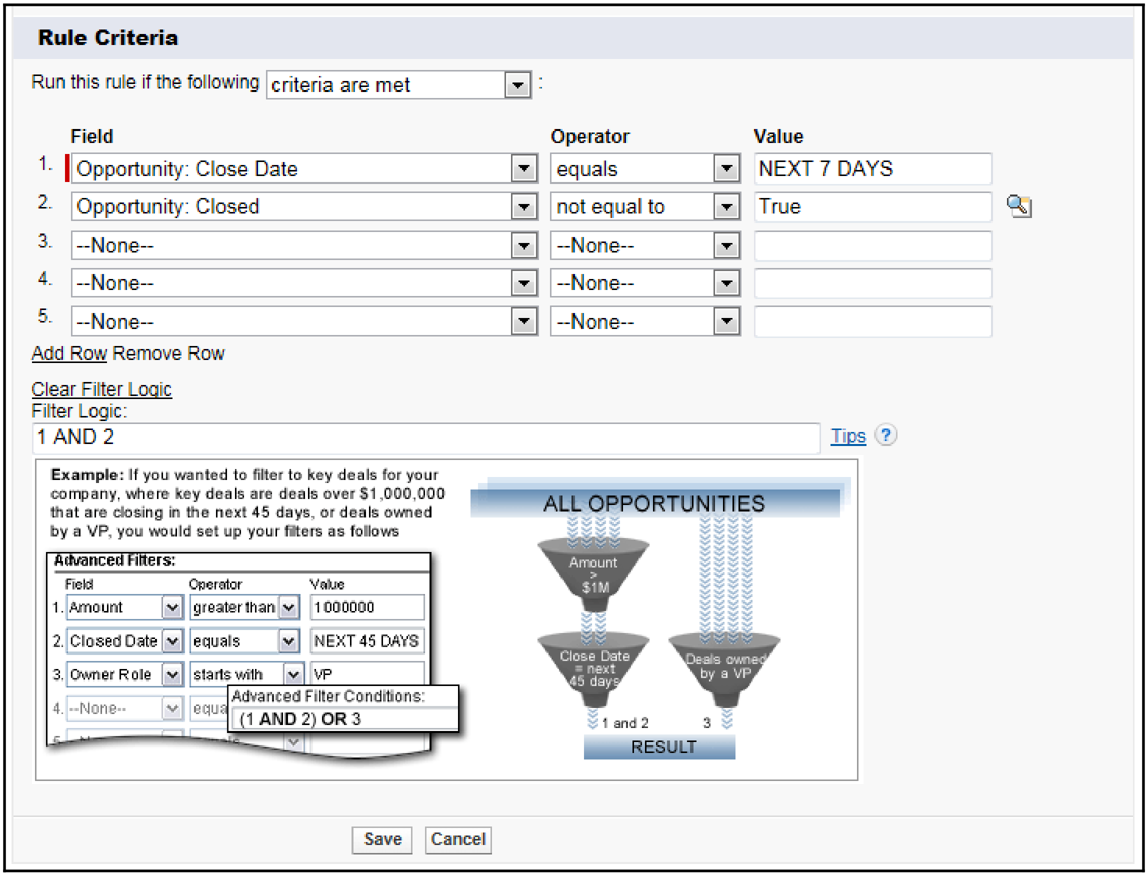

Object
Opportunity
Field to Update
Order Number
Field Data Type
Text
Specify New Field Value
Text Options
A blank value (null)
Use a formula to set the new value
Save
Save & New
Cancel

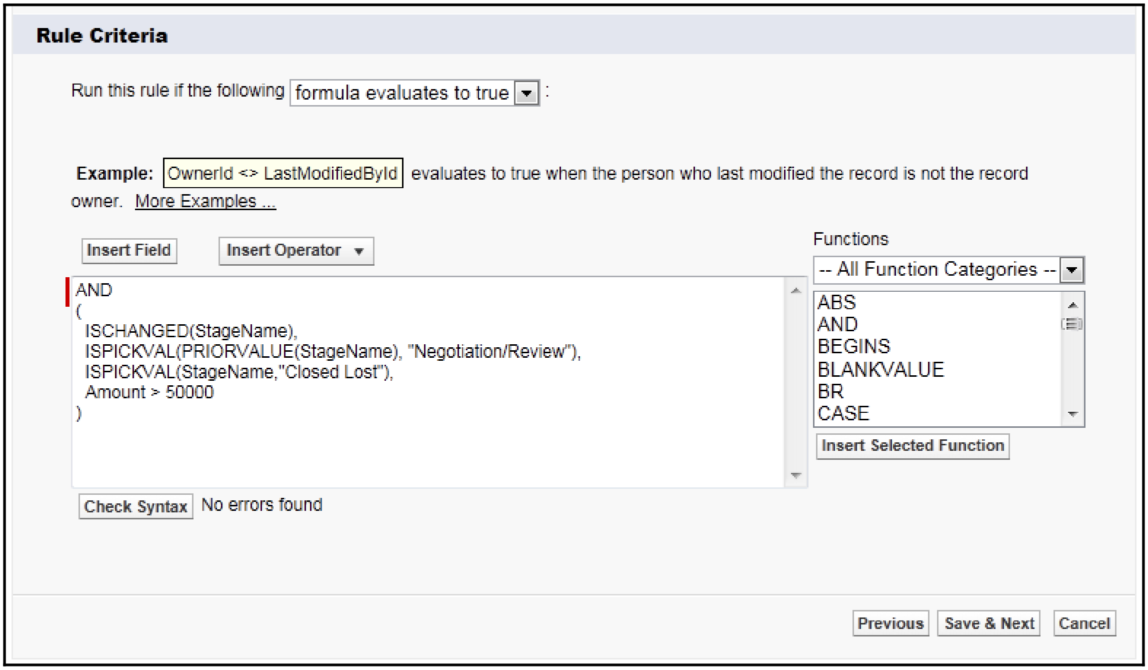

All Workflow Rules
Help for this Page
Configure your organization's workflow by creating workflow rules. Each workflow rule consists of:
• Criteria that cause salesforce.com to apply the workflow rule.
• Immediate actions that execute when a record matches the criteria. For example, salesforce.com can automatically send an email that notifies the account team when a new high-value opportunity is created.
• Time-dependent actions that salesforce.com queues when a record matches the criteria, and executes according to time triggers. For example, salesforce.com can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.
Quick Tips
• Getting Started
• Resources on CRM Community
• Useful Sample Workflow Rules
• Video Tutorial (English Only)
View: All Workflow Rules
Edit | Create New View
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
New Rule
Action
Rule Name ↑
Description
Object
Active
Edit | Del | Deactivate
Test
MD One
✓
Edit | Deactivate
Timer
MD One
✓
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

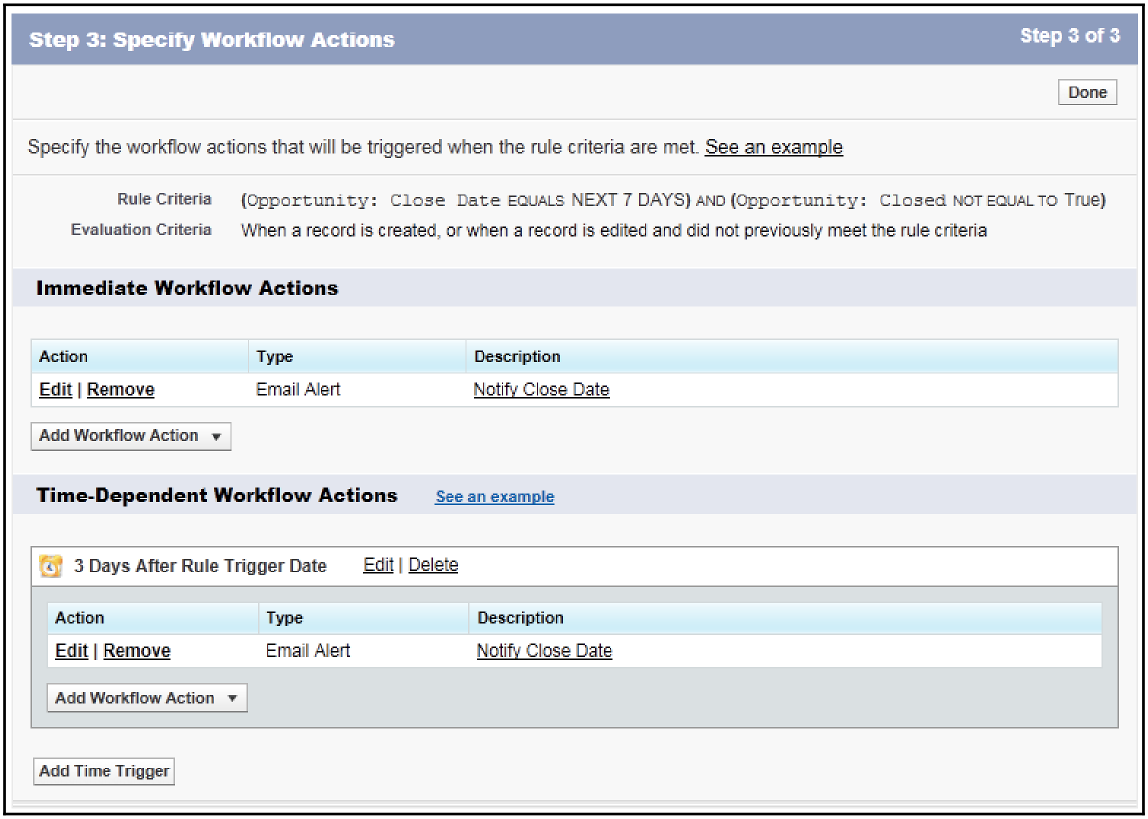

Workflow Rule
New Workflow Rule
Help for this Page
Step 1: Select object
Step 1 of 3
Next
Cancel
Select the object to which this workflow rule applies.
Select object
Opportunity
Next
Cancel

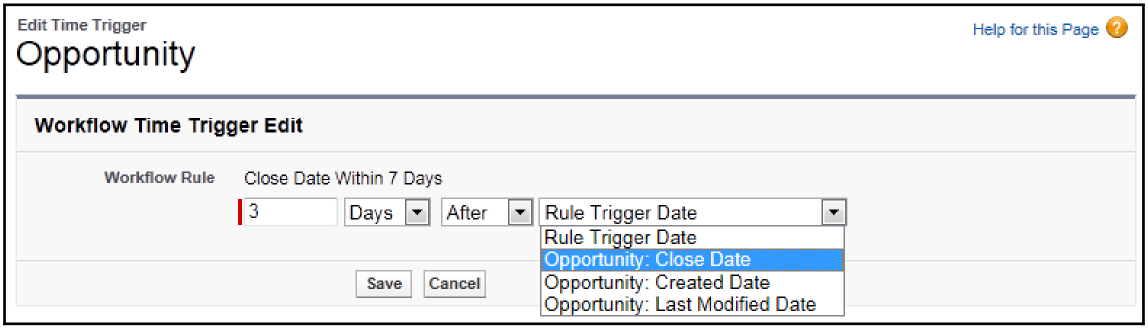

New Workflow Rule
Opportunity
Help for this Page
Step 2: Configure Workflow Rule
Step 2 of 3
Previous
Save & Next
Cancel
Enter the name, description, and criteria to trigger your workflow rule. In the next step, associate workflow actions with this workflow rule.
Edit Rule
= Required Information
Object
Opportunity
Rule Name
Description
Evaluation Criteria
Evaluate 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
criteria are met
Field
Operator
Value
--None--
--None--
AND
--None--
--None--
AND
--None--
--None--
AND
--None--
--None--
AND
--None--
--None--
Add Filter Logic...
Previous
Save & Next
Cancel


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

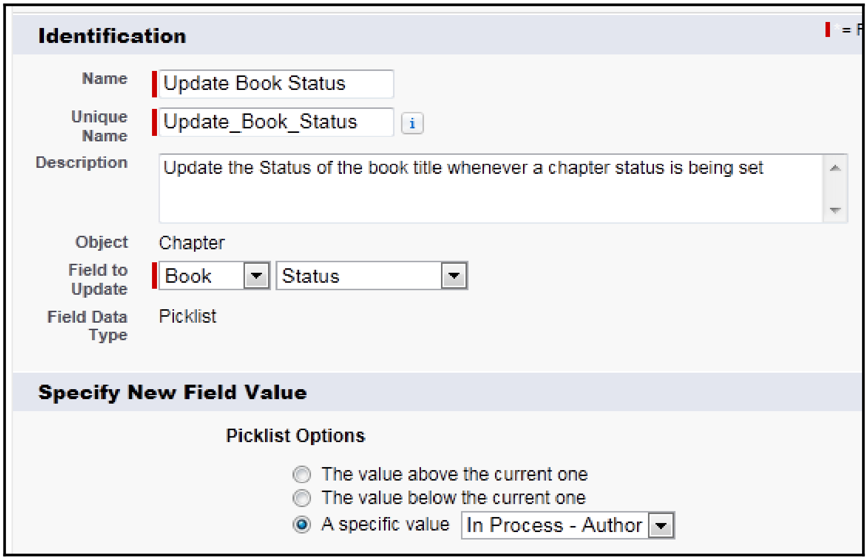

Rule Criteria
Run this rule if the following criteria are met :
Field
Operator
Value
1. Opportunity: Close Date
equals
NEXT 7 DAYS
2. Opportunity: Closed
not equal to
True
3. --None--
--None--
4. --None--
--None--
5. --None--
--None--
Add Row Remove Row
Clear Filter Logic
Filter Logic:
1 AND 2
Tips
Example: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

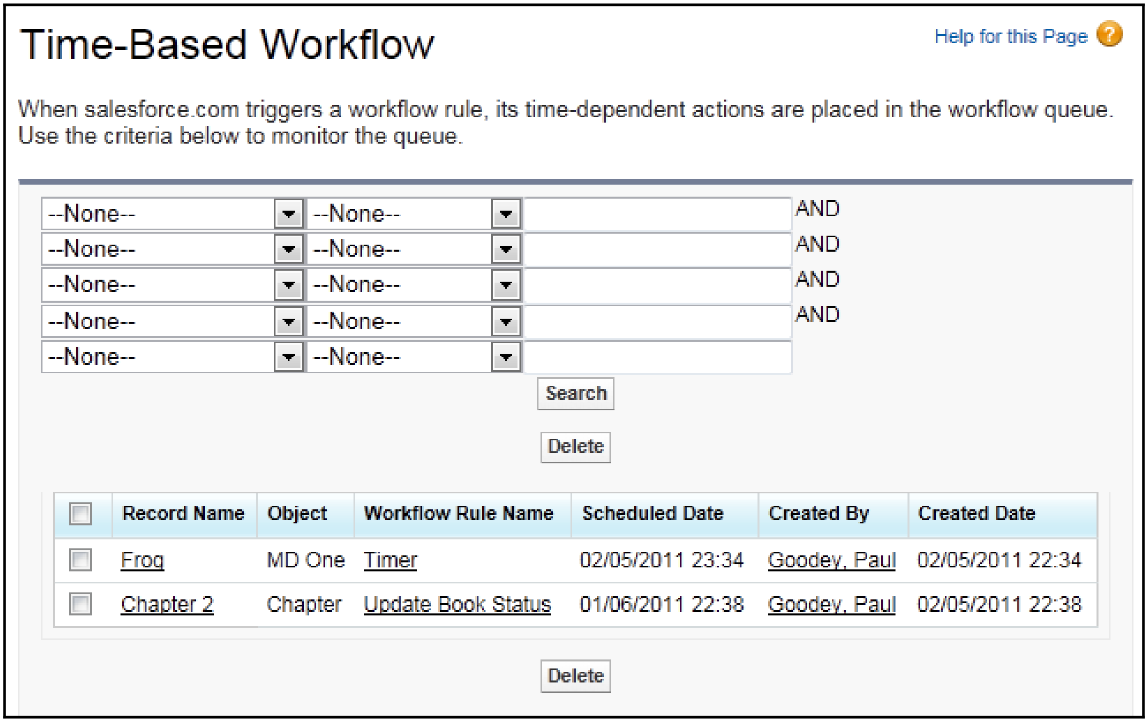

Rule Criteria
Run this rule if the following formula evaluates to true :
Example: OwnerId <> LastModifiedById evaluates to true when the person who last modified the record is not the record owner. More Examples ...
Insert Field
Insert Operator
AND
(
ISCHANGED(StageName),
ISPICKVAL(PRIORVALUE(StageName),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


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

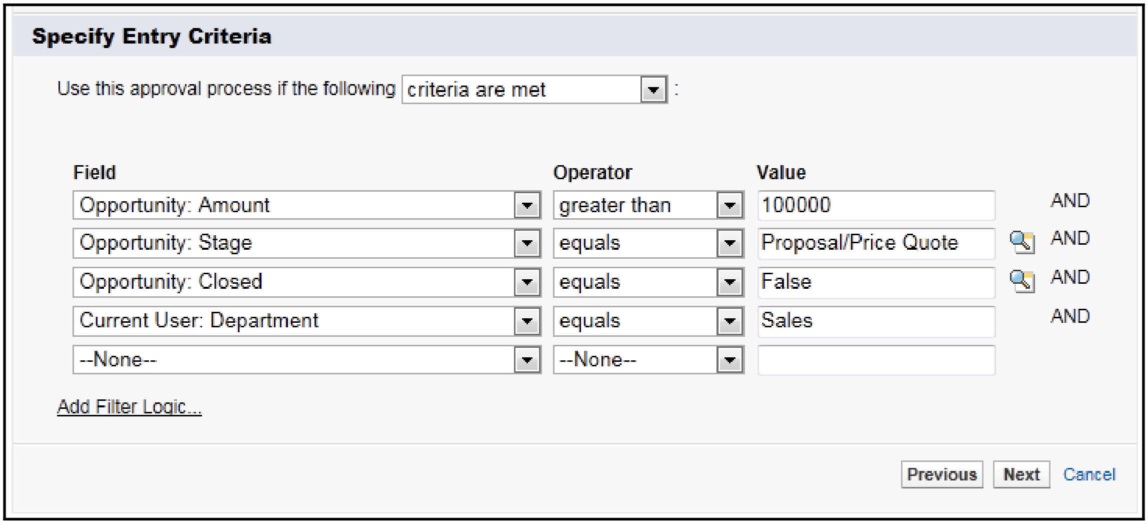

Edit Time Trigger
Opportunity
Help for this Page
Workflow Time Trigger Edit
Workflow Rule
Close Date Within 7 Days
3
Days
After
Rule Trigger Date
Rule Trigger Date
Opportunity: Close Date
Opportunity: Created Date
Opportunity: Last Modified Date
Save
Cancel

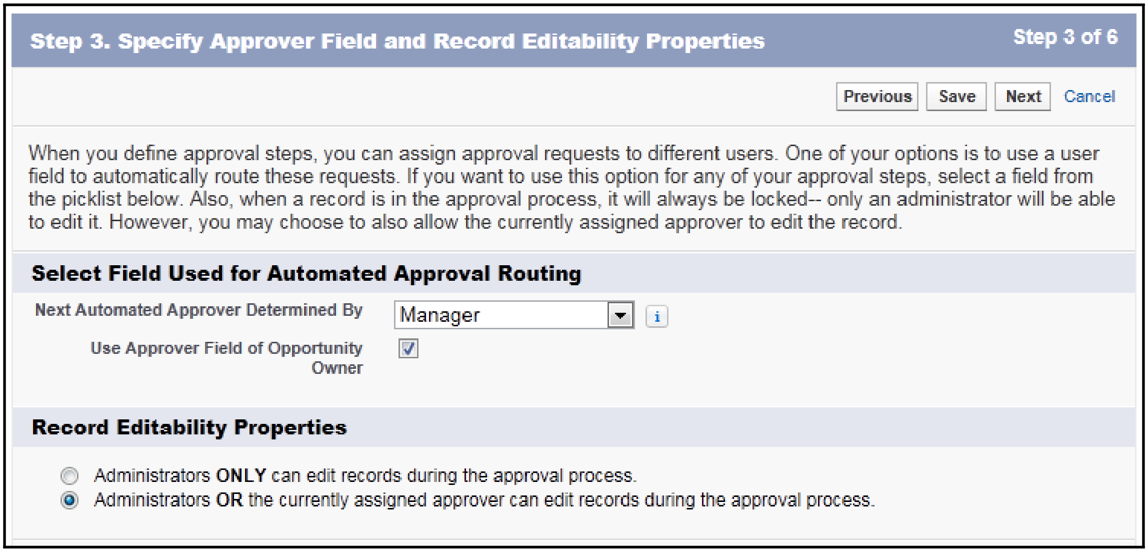

View:
All Workflow Rules
Edit | Create New View
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
New Rule
Action
Rule Name
Description
Object
Active
Edit | Del | Activate
Close Date Within 7 Days
Any Open Opportunities are due to be closed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


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


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


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


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



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

Previous | Save | Next | Cancel

When you define approval steps, you can assign approval requests to different users. One of your options is to use a user field to automatically route these requests. If you want to use this option for any of your approval steps, select a field from the picklist below. Also, when a record is in the approval process, it will always be locked-- only an administrator will be able to edit it. However, you may choose to also allow the currently assigned approver to edit the record.

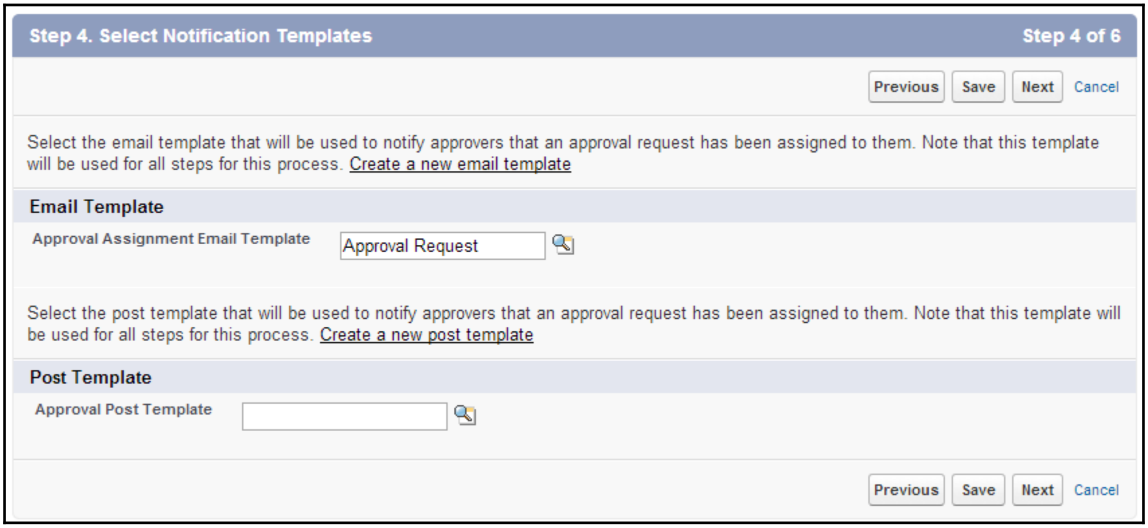
Select Field Used for Automated Approval Routing

Next Automated Approver Determined By: Manager

Use Approver Field of Opportunity Owner: ☑

Record Editability Properties

○ Administrators **ONLY** can edit records during the approval process.
◉ Administrators **OR** the currently assigned approver can edit records during the approval process.



Step 4. Select Notification Templates Step 4 of 6

Previous | Save | Next | Cancel

Select the email template that will be used to notify approvers that an approval request has been assigned to them. Note that this template will be used for all steps for this process. Create a new email template

Email Template

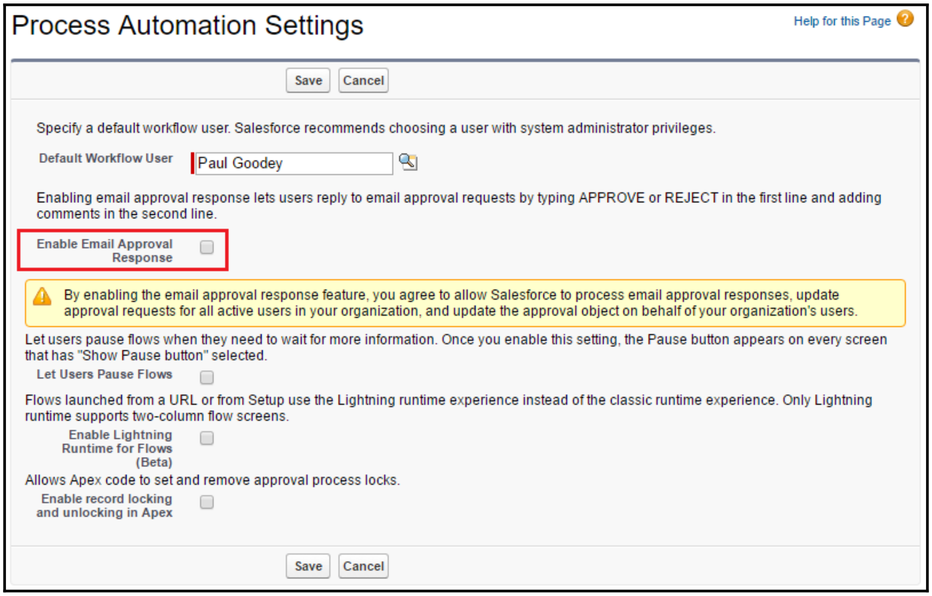
Approval Assignment Email Template: Approval Request

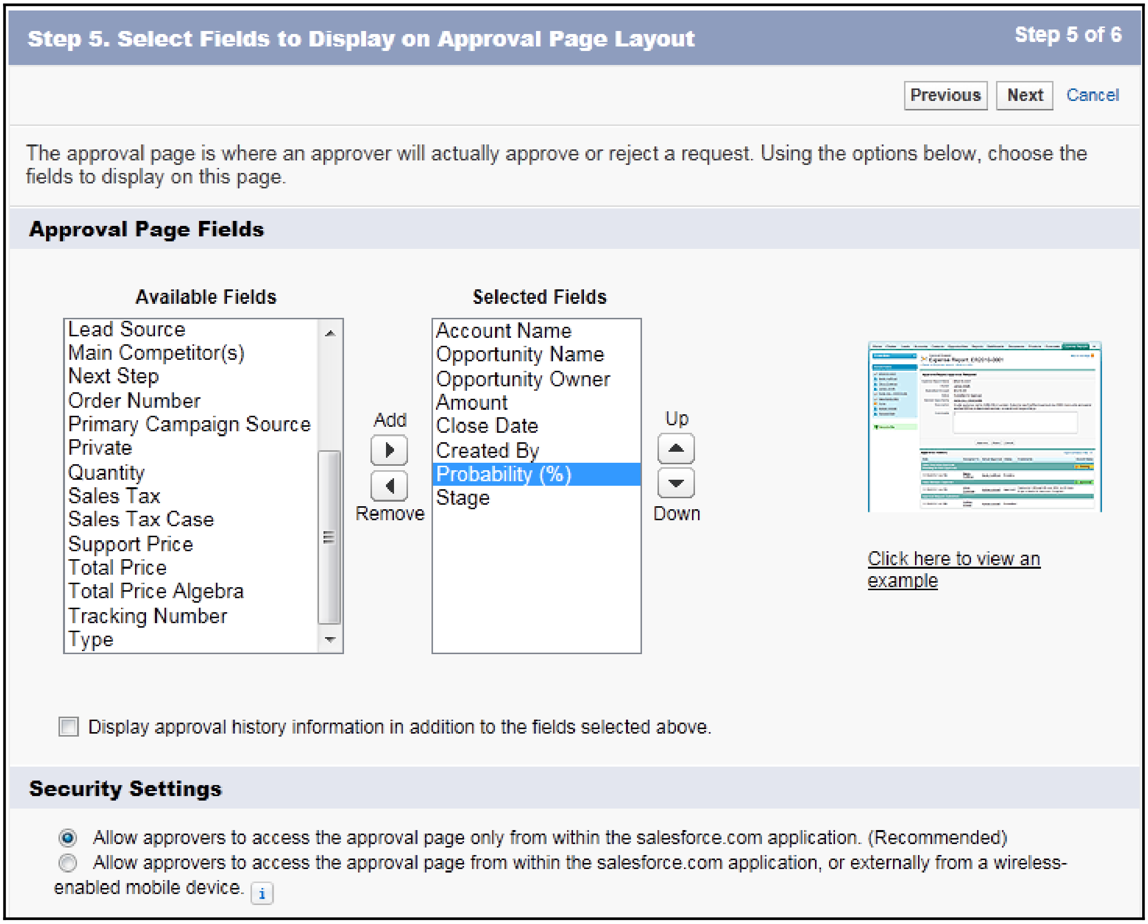
Select the post template that will be used to notify approvers that an approval request has been assigned to them. Note that this template will be used for all steps for this process. Create a new post template

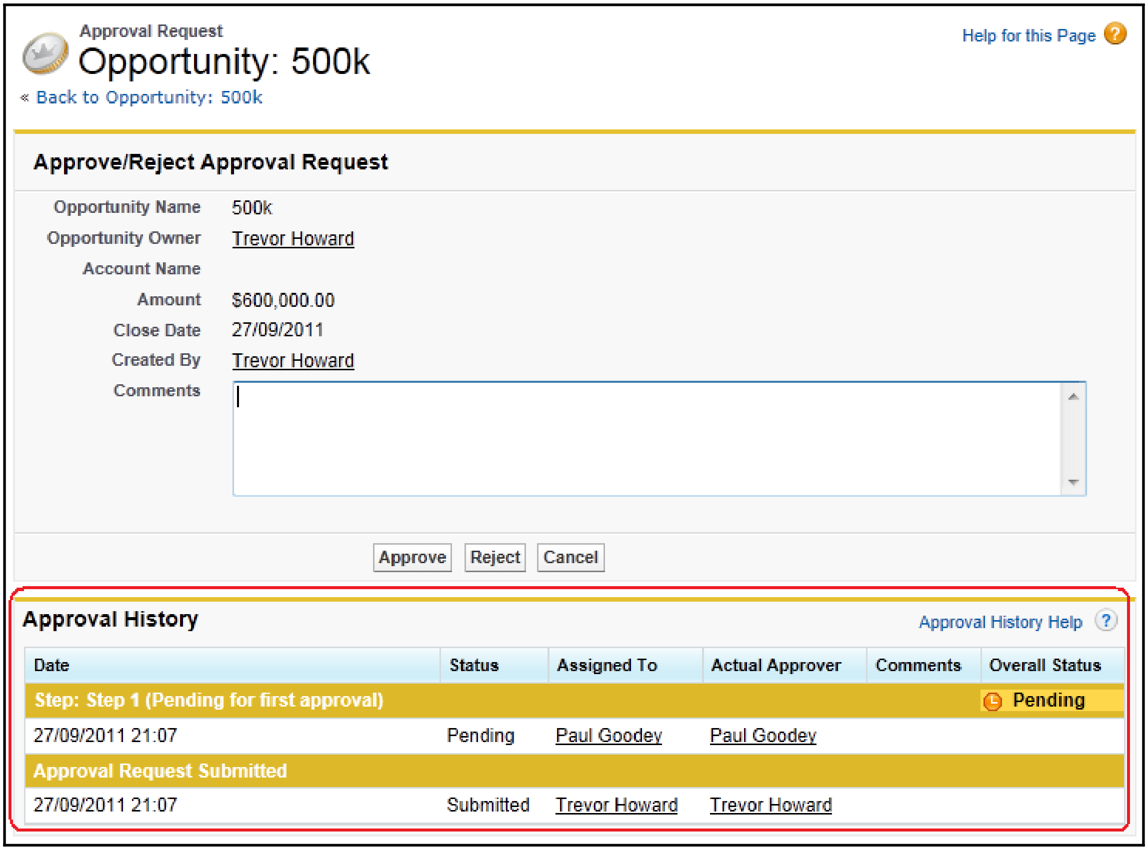
Post Template

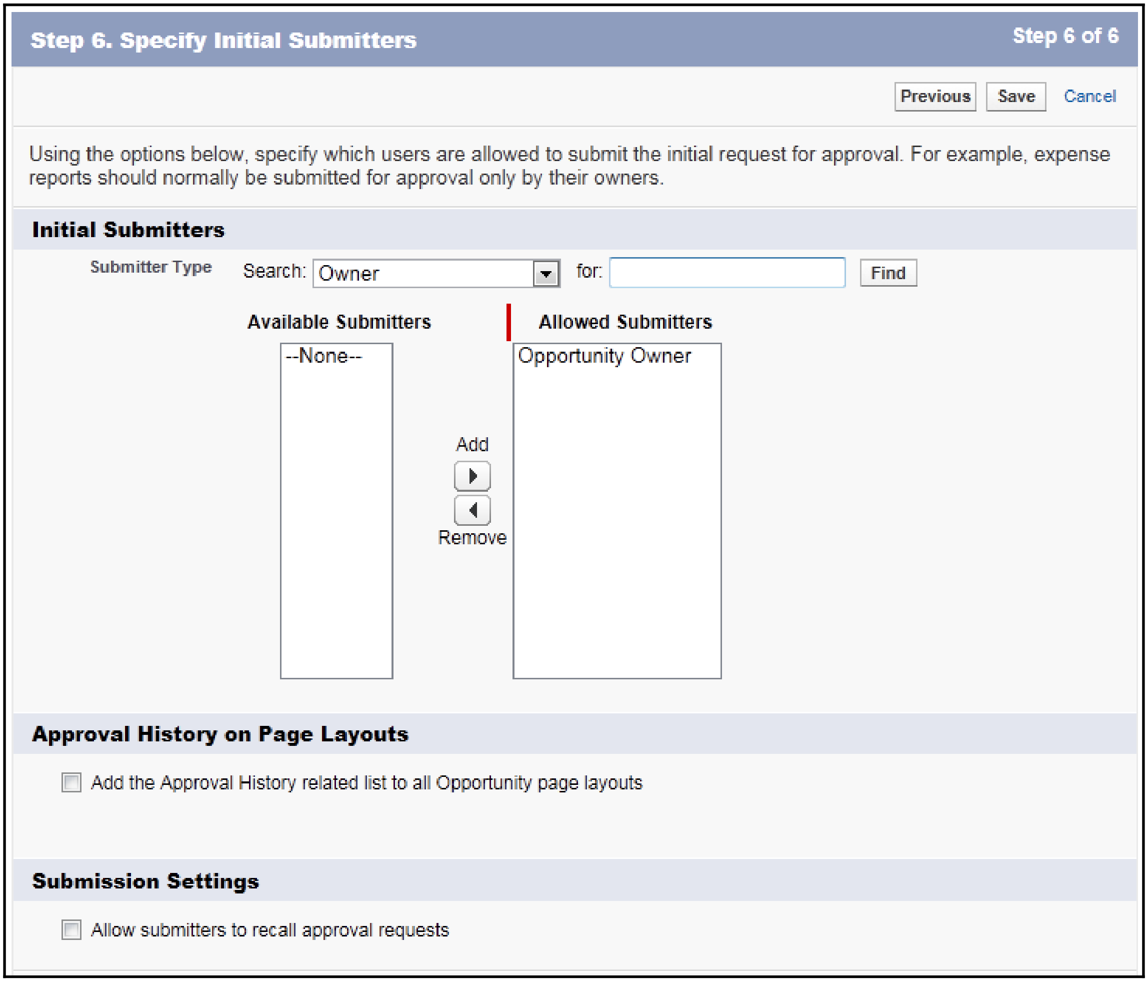
Approval Post Template:

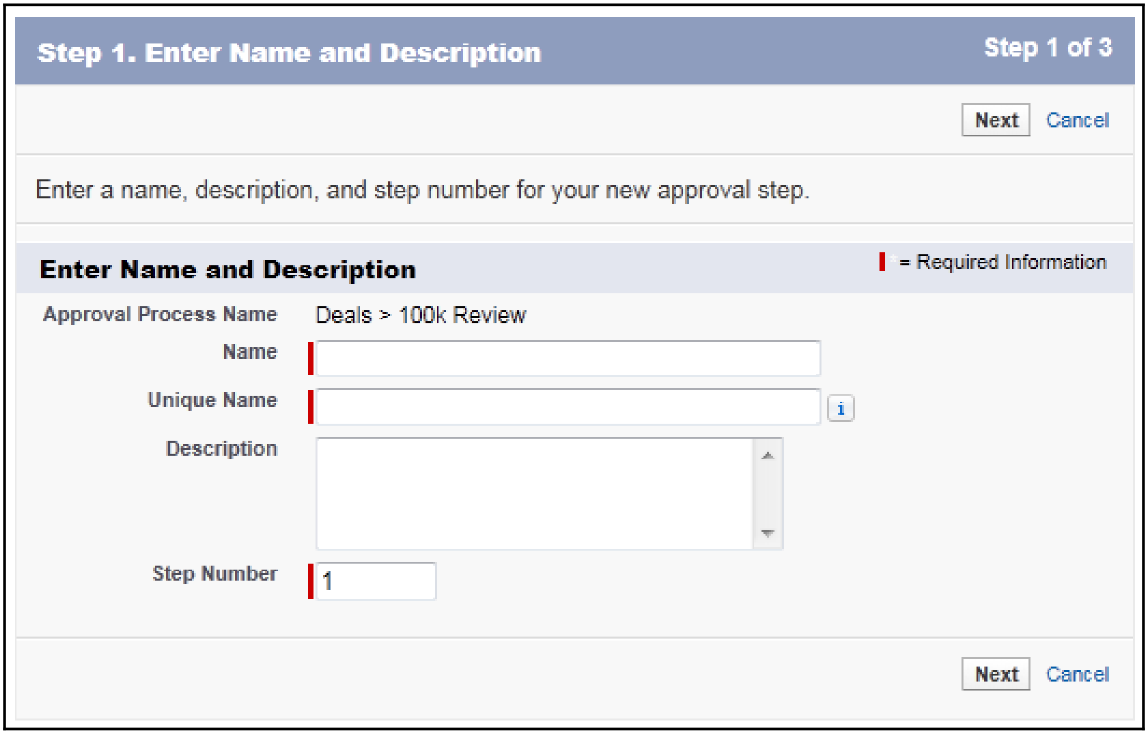
Previous | Save | Next | Cancel

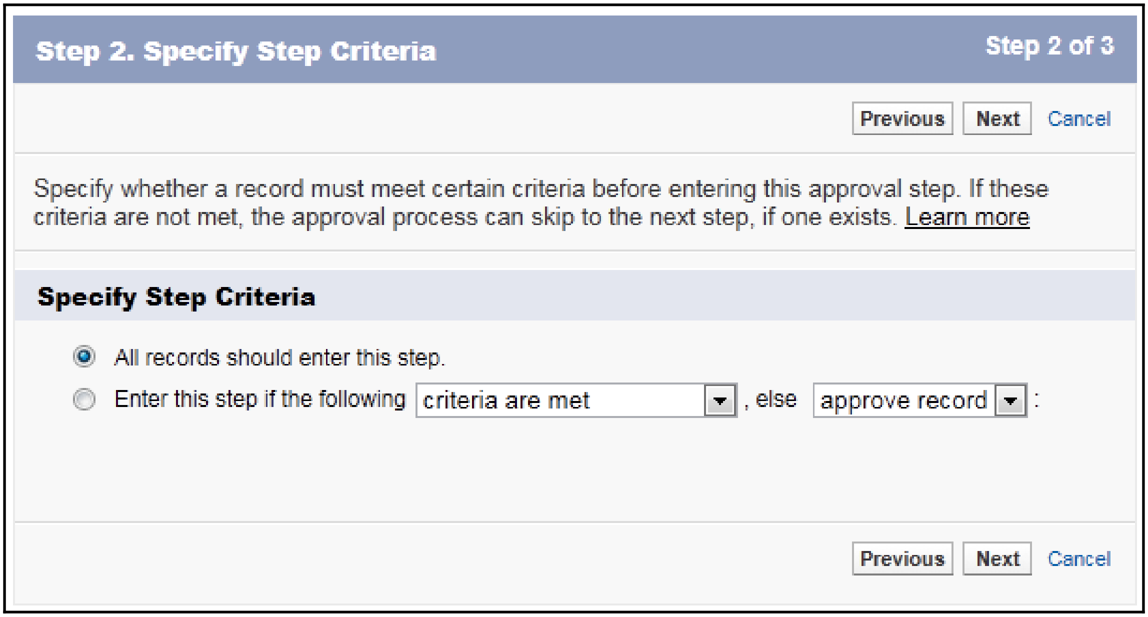

Process Automation Settings
Help for this Page
Save
Cancel
Specify a default workflow user. Salesforce recommends choosing a user with system administrator privileges.
Default Workflow User
Paul Goodey
Enabling email approval response lets users reply to email approval requests by typing APPROVE or REJECT in the first line and adding comments in the second line.
Enable Email Approval Response
By enabling the email approval response feature, you agree to allow Salesforce 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

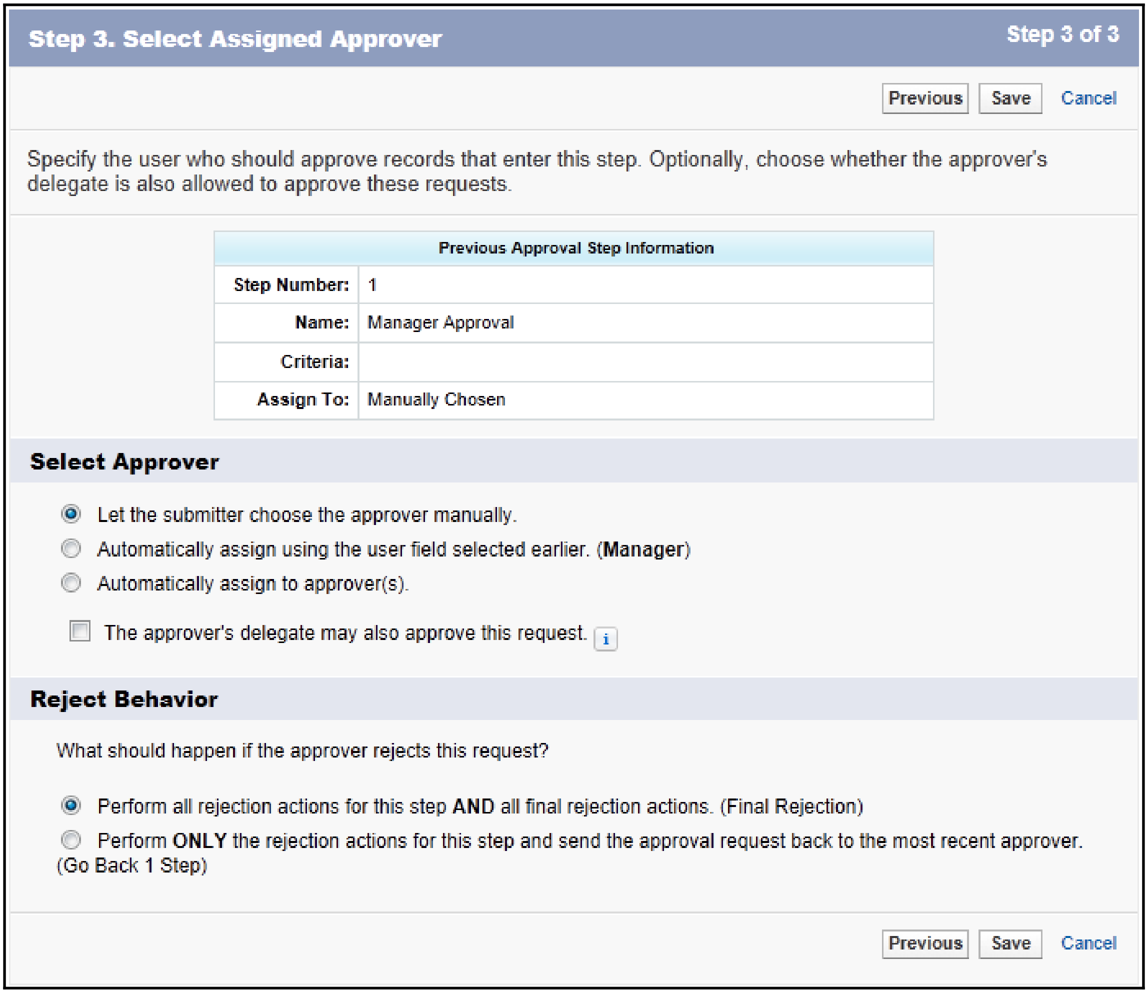

Step 5. Select Fields to Display on Approval Page Layout
Step 5 of 6
Previous
Next
Cancel
The approval page is where an approver will actually approve or reject a request. Using the options below, choose the fields to display on this page.
Approval Page Fields
Available Fields
Lead Source
Main Competitor(s)
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.


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


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


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


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



Step 3. Select Assigned Approver Step 3 of 3

Previous | Save | Cancel

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

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

Select Approver

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

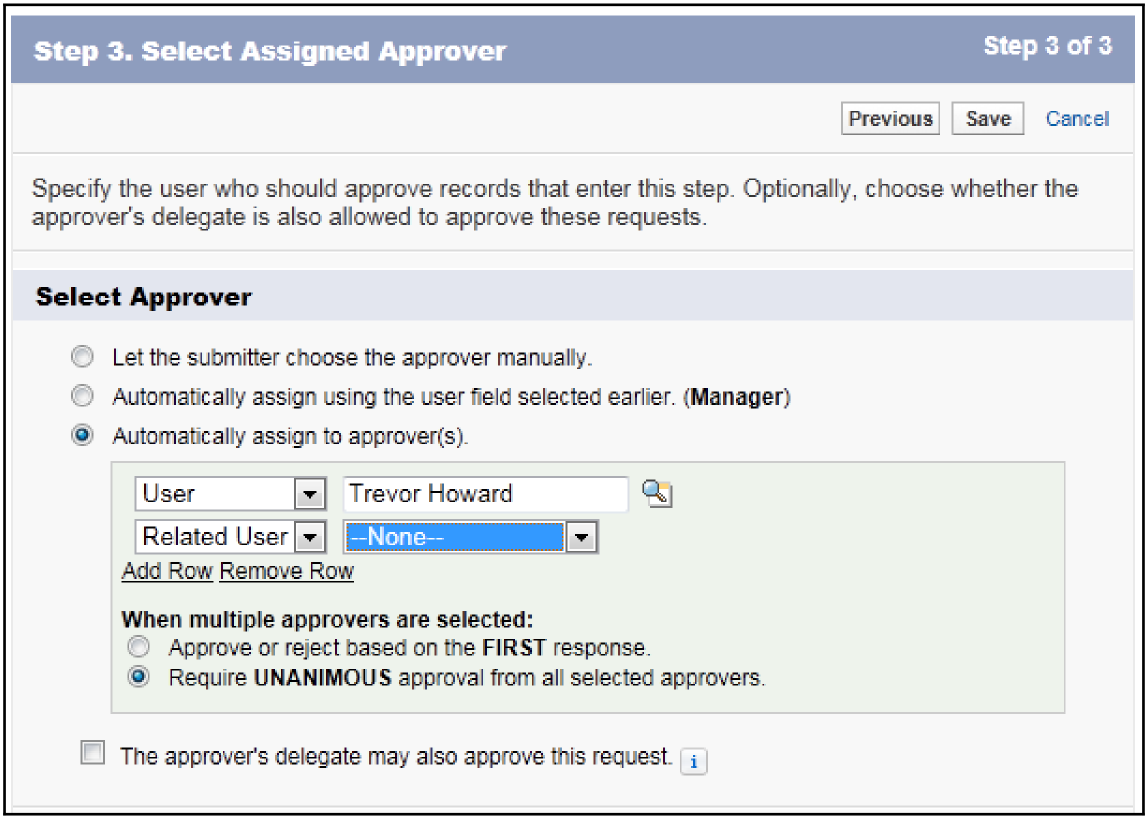
[ ] The approver's delegate may also approve this request.

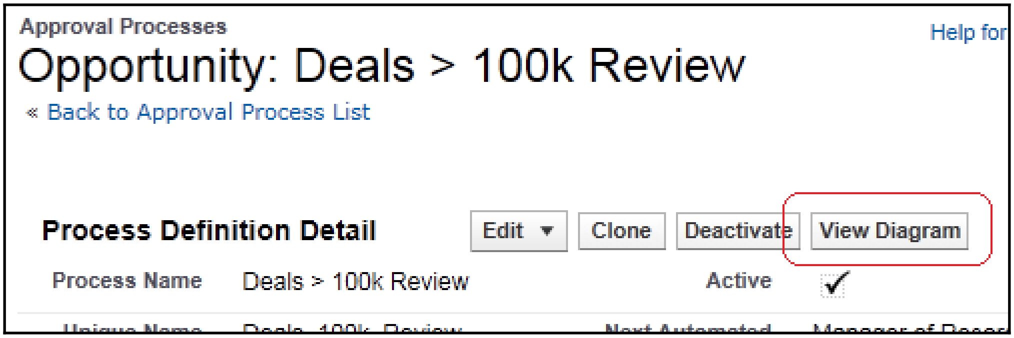
Reject Behavior

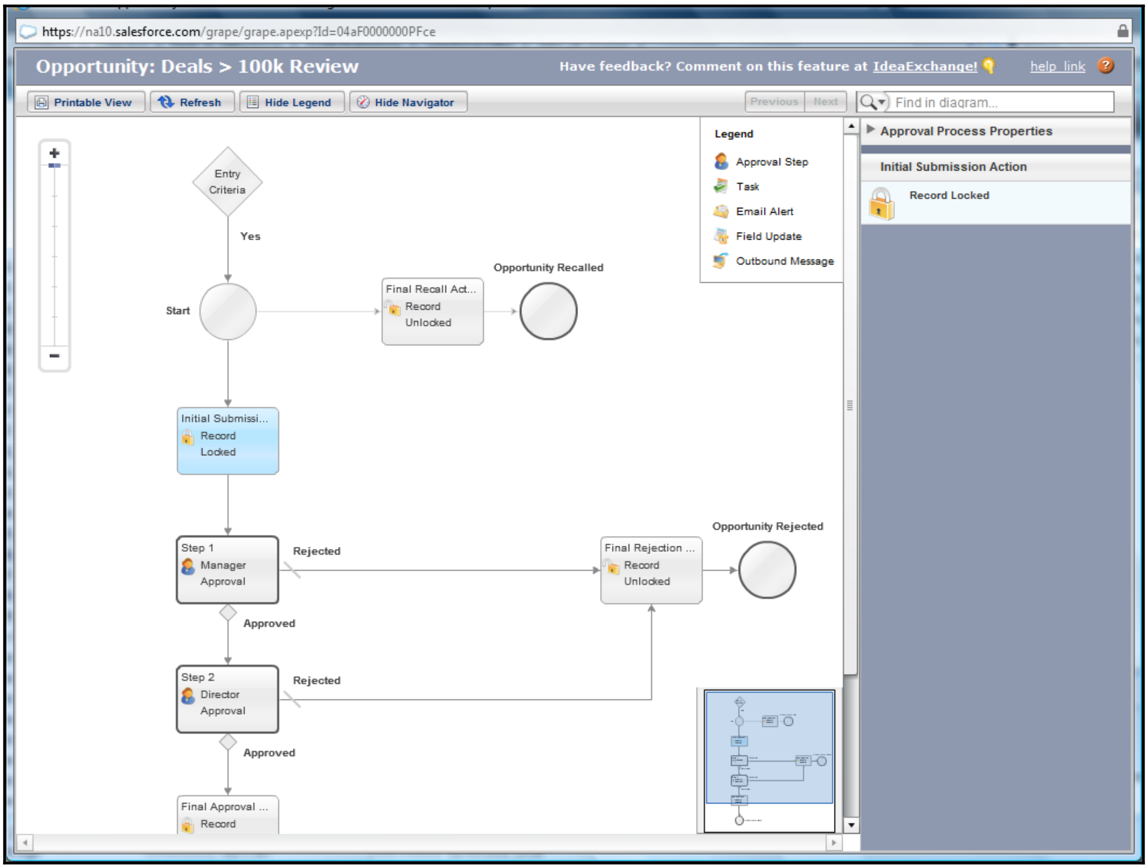
What should happen if the approver rejects this request?

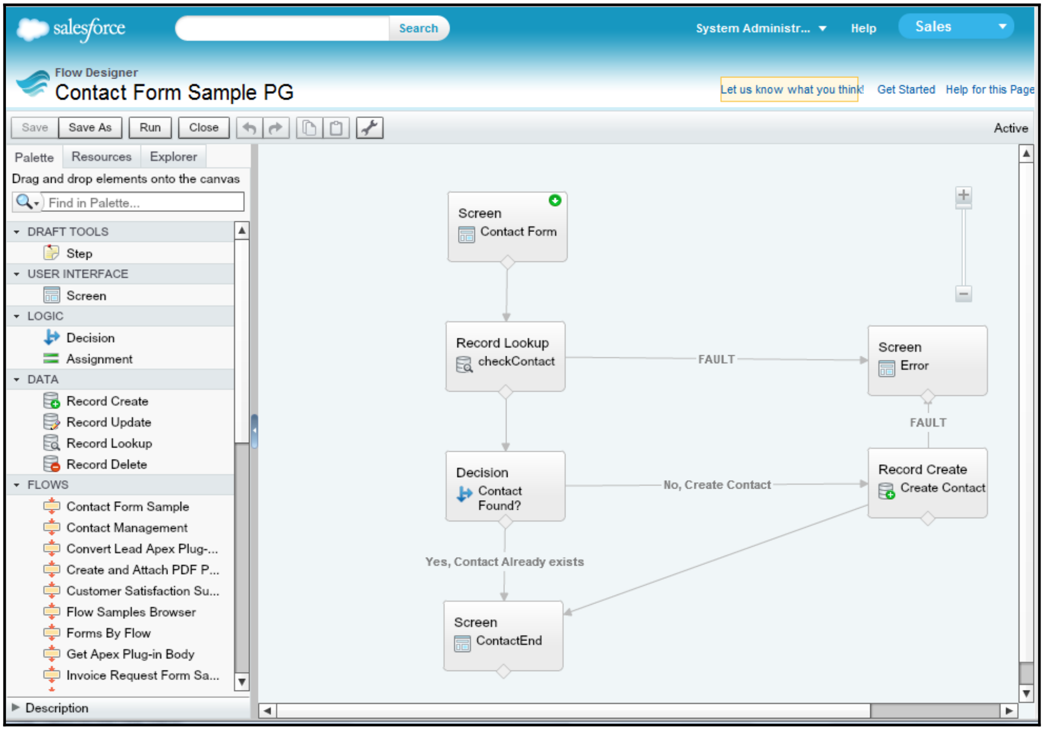
- (•) Perform all rejection actions for this step **AND** all final rejection actions. (Final Rejection)
- ( ) Perform **ONLY** the rejection actions for this step and send the approval request back to the most recent approver. (Go Back 1 Step)

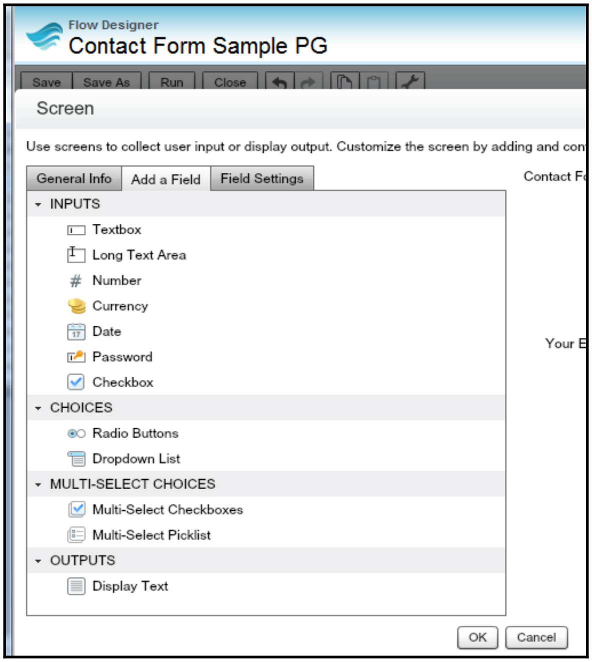
Previous | Save | Cancel

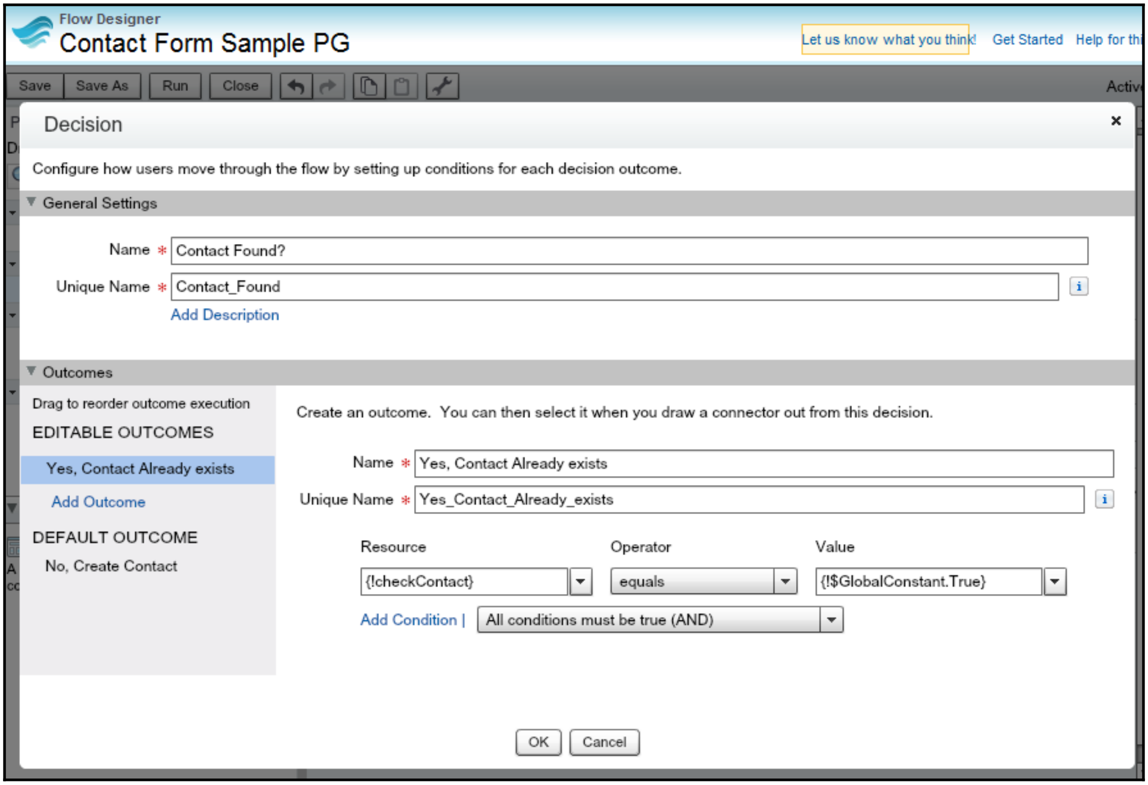

Step 3. Select Assigned Approver
Step 3 of 3
Previous
Save
Cancel
Specify the user who should approve records that enter this step. Optionally, choose whether the approver's delegate is also allowed to approve these requests.
Select Approver
Let the submitter choose the approver manually.
Automatically 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

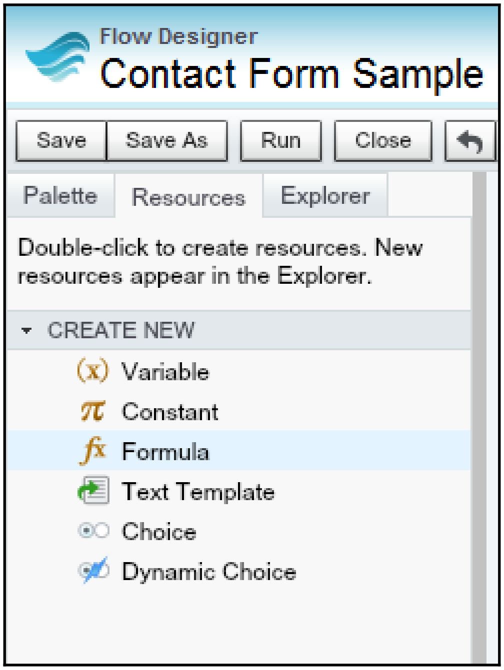

Approval Processes
Opportunity: Deals > 100k Review
« Back to Approval Process List
Help for
Process Definition Detail
Edit
Clone
Deactivate
View Diagram
Process Name
Deals > 100k Review
Active

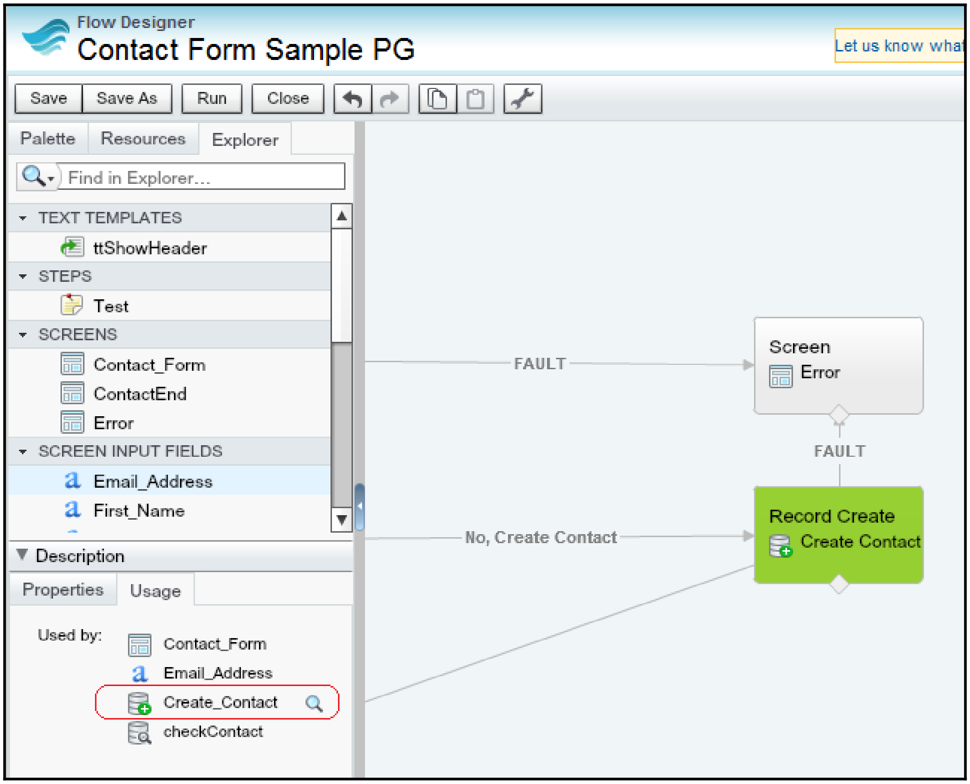

https://na10.salesforce.com/grape/grape.apexp?Id=04aF0000000PFce
Opportunity: Deals > 100k Review
Have feedback? Comment on this feature at IdeaExchange!
help link
Printable View
Refresh
Hide Legend
Hide Navigator
Previous
Next
Find in diagram...
Entry Criteria
Yes
Start
Final Recall Act...
Record Unlocked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

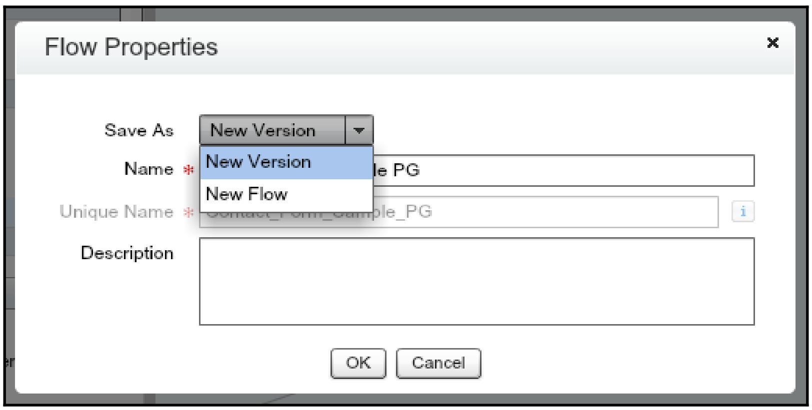

salesforce
Search
System Administr...
Help
Sales
Flow Designer
Contact Form Sample PG
Let us know what you think!
Get Started
Help for this Page
Save
Save As
Run
Close
Active
Palette
Resources
Explorer
Drag and drop elements onto the canvas
Find in Palette...
DRAFT TOOLS
Step
USER INTERFACE
Screen
LOGIC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


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

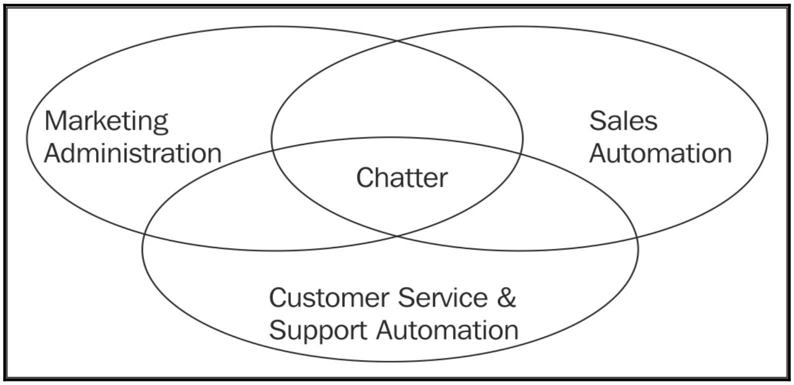

Flow Designer
Contact Form Sample PG
Let us know what you think!
Get Started
Save
Save As
Run
Close
Decision
Configure how users move through the flow by setting up conditions for each decision outcome.
General Settings
Name
Contact Found?
Unique Name
Contact_Found
Add Description
Outcomes
Drag to reorder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

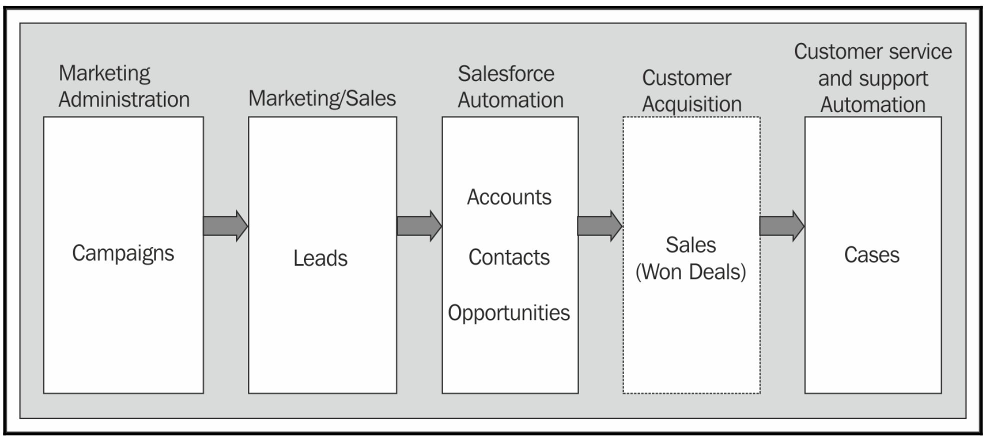

Flow Designer
Contact Form Sample
Save
Save As
Run
Close
Palette
Resources
Explorer
Double-click to create resources. New resources appear in the Explorer.
CREATE NEW
Variable
Constant
Formula
Text Template
Choice
Dynamic Choice

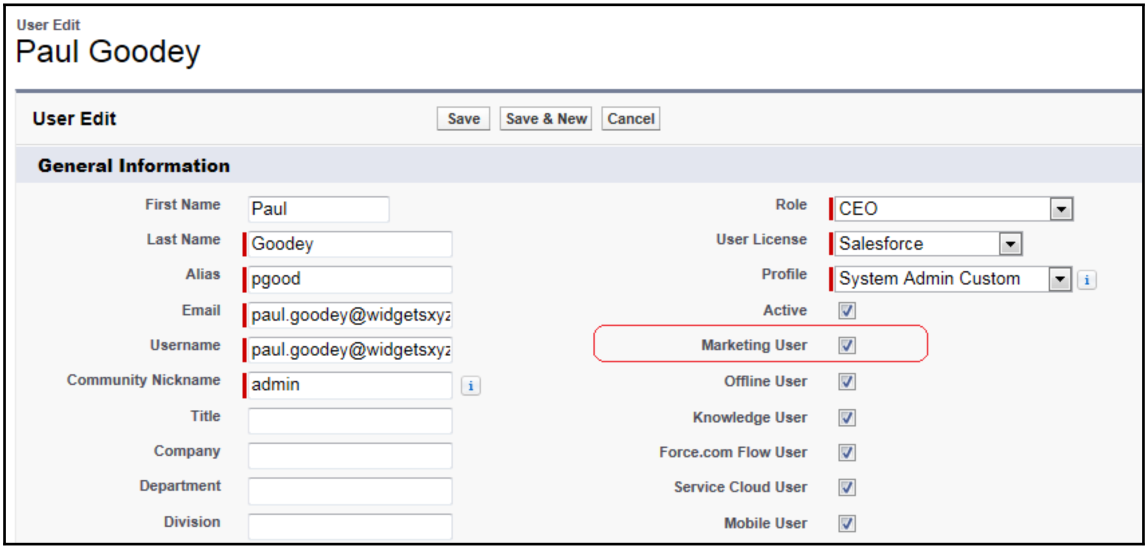

Flow Designer
Contact Form Sample PG
Save
Save As
Run
Close
Palette
Resources
Explorer
Find in Explorer...
TEXT TEMPLATES
ttShowHeader
STEPS
Test
SCREENS
Contact_Form
ContactEnd
Error
SCREEN INPUT FIELDS
Email_Address
First_Name
Description
Properties
Usage
Used by:
Contact_Form
Email_Address
Create_Contact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

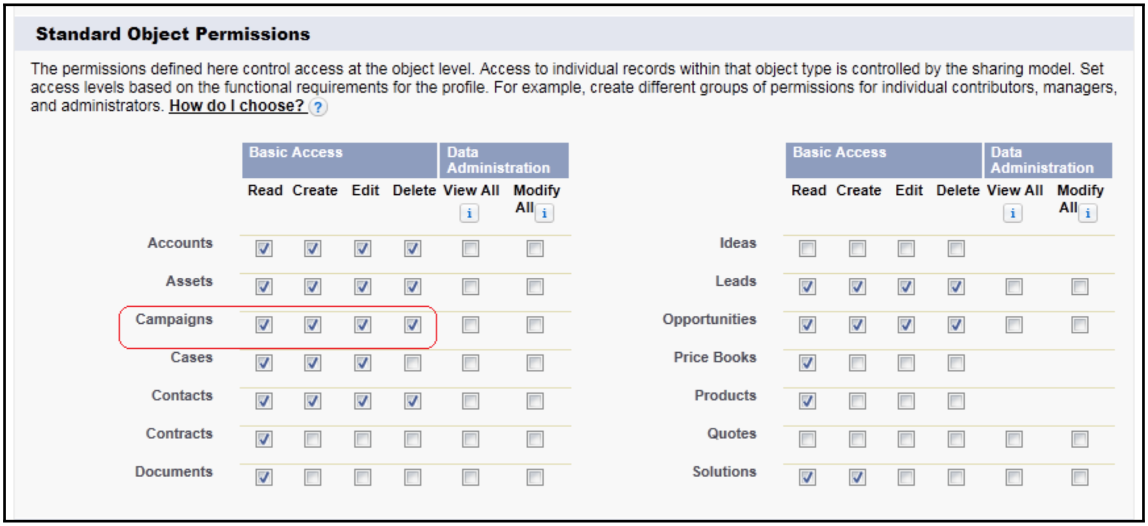

Flow Properties
Save As
New Version
New Version
New Flow
Name
le PG
Unique Name
Description
OK
Cancel

Chapter 8: Introducing Sales Cloud, Service Cloud, and the Collaborative Features of Salesforce CRM






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



Standard Object Permissions

The permissions defined here control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators. How do I choose?

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	☑	☑	☑	☑	☐	☐
Assets	☑	☑	☑	☑	☐	☐
Campaigns	☑	☑	☑	☑	☐	☐
Cases	☑	☑	☑	☐	☐	☐
Contacts	☑	☑	☑	☑	☐	☐
Contracts	☑	☐	☐	☐	☐	☐
Documents	☑	☐	☐	☐	☐	☐

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Ideas	☐	☐	☐	☐		
Leads	☑	☑	☑	☑	☐	☐
Opportunities	☑	☑	☑	☑	☐	☐
Price Books	☑	☐	☐	☐		
Products	☑	☐	☐	☐		
Quotes	☐	☐	☐	☐	☐	☐
Solutions	☑	☑	☐	☐	☐	☐

Campaign Fields

Help for this Page

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

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

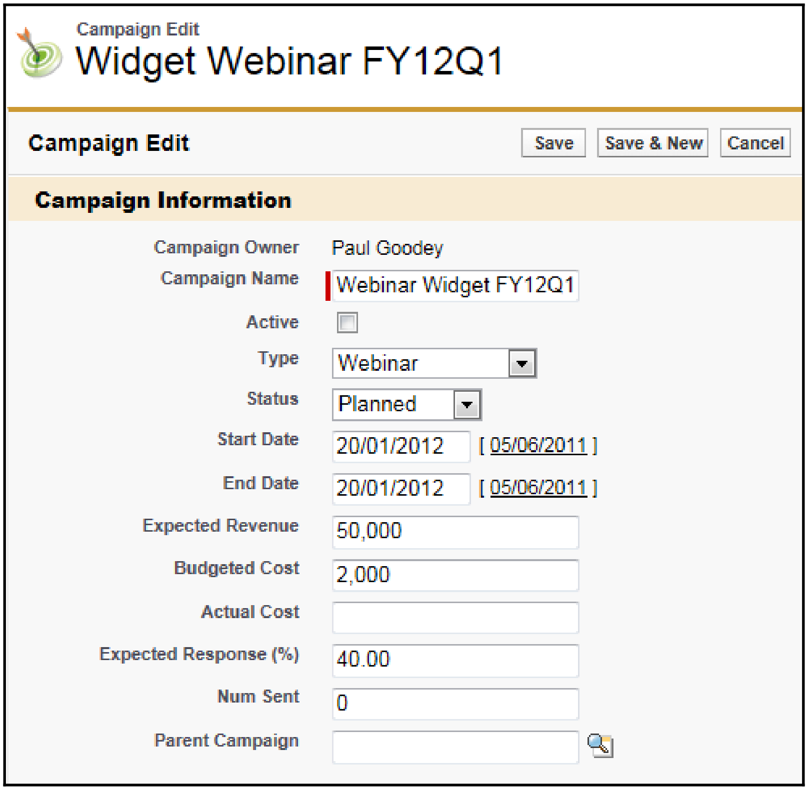
Campaign Standard Fields

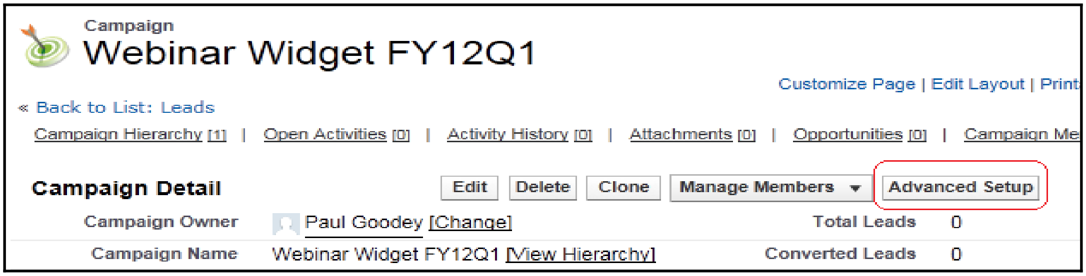
Campaign Standard Fields Help

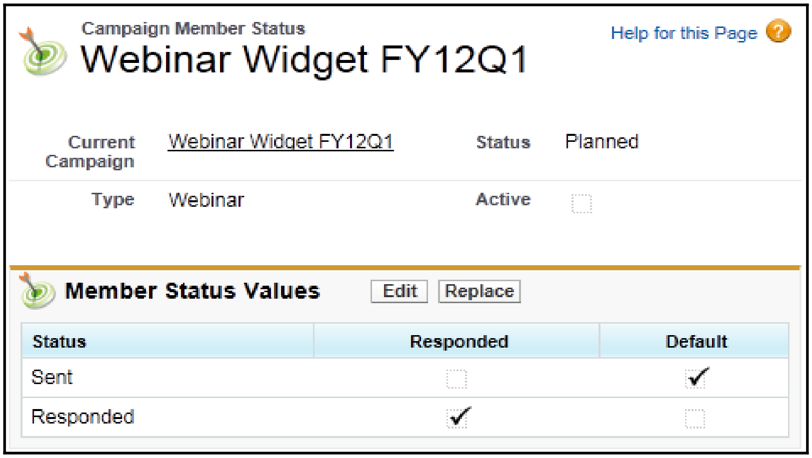
Action	Field Label	Field Name	Data Type	Controlling Field
Edit	Active	IsActive	Checkbox	
Edit	Actual Cost	ActualCost	Currency(18, 0)	
Edit	Budgeted Cost	BudgetedCost	Currency(18, 0)	
Edit	Campaign Member Type	CampaignMemberRecordType	Lookup(Record Type)	
Edit	Campaign Name	Name	Text(80)	
Edit	Campaign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

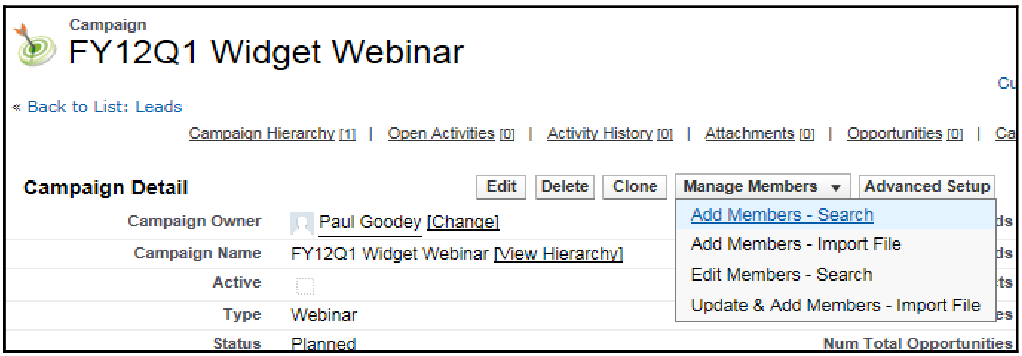
Campaign Member Standard Fields Campaign Member Standard Fields Help

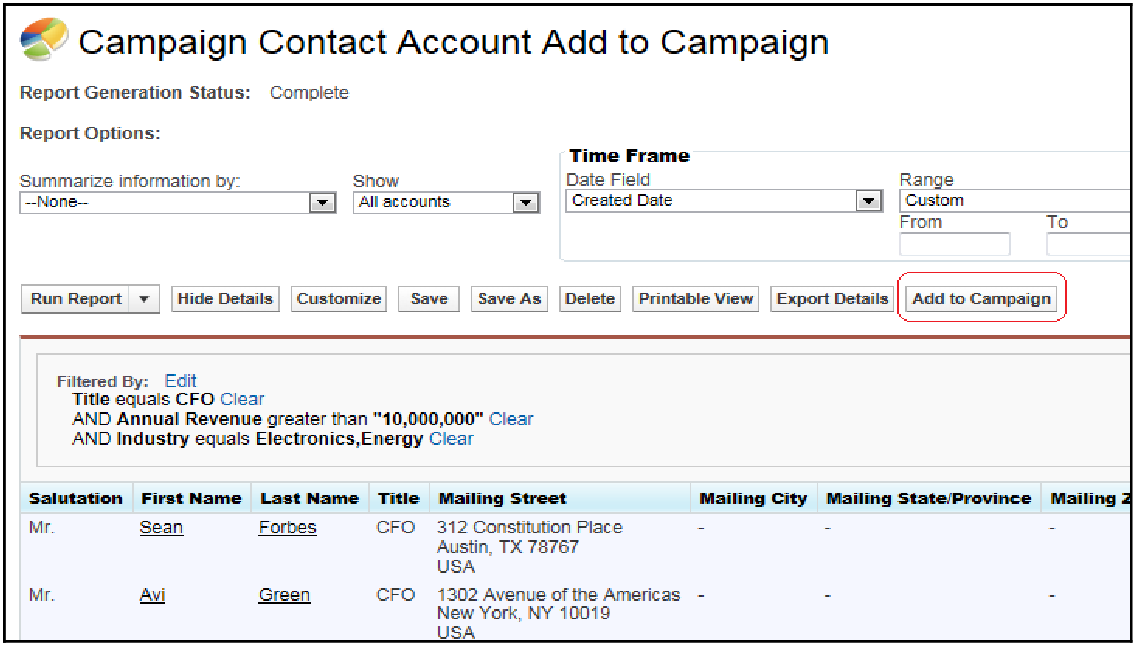
Action	Field Label	Field Name	Data Type	Controlling Field
Edit	Campaign	Campaign	Lookup(Campaign)	
Edit	City	City	Text(40)	
Edit	Company (Account)	CompanyOrAccount	Text(255)	
Edit	Contact	Contact	Lookup(Contact)	
Edit	Country	Country	Text(80)	
	Created By	CreatedBy	Lookup(User)	
	Created Date	CreatedDate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

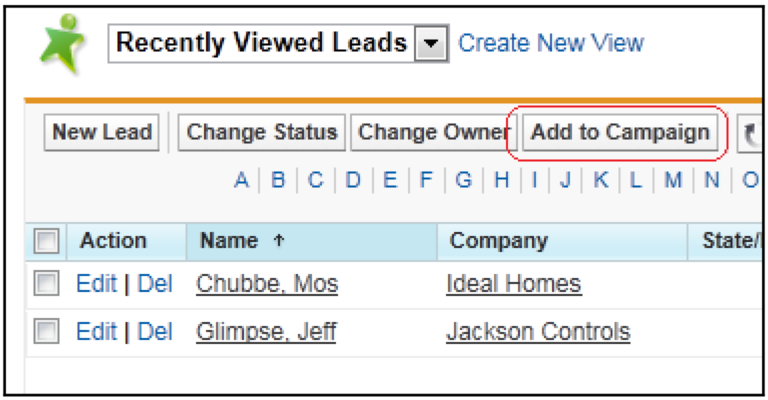

Campaign Edit
Widget Webinar FY12Q1
Campaign Edit
Save
Save & New
Cancel
Campaign Information
Campaign Owner
Paul Goodey
Campaign Name
Webinar Widget FY12Q1
Active
Type
Webinar
Status
Planned
Start Date
20/01/2012
[05/06/2011]
End Date
20/01/2012
[05/06/2011]
Expected Revenue
50,000
Budgeted Cost
2,000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

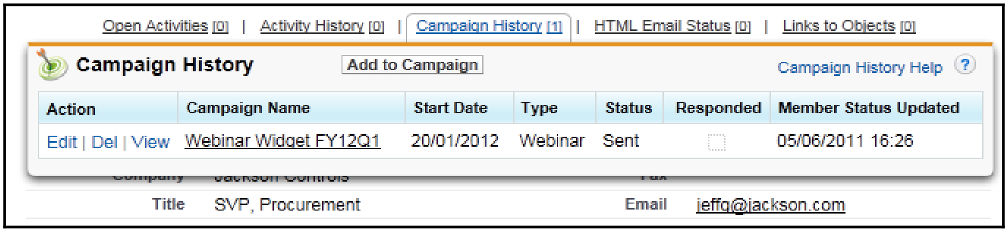

Campaign
Webinar Widget FY12Q1
Customize Page | Edit Layout | Print
« Back to List: Leads
Campaign Hierarchy [1] | Open Activities [0] | Activity History [0] | Attachments [0] | Opportunities [0] | Campaign Me
Campaign Detail
Edit
Delete
Clone
Manage Members
Advanced Setup
Campaign Owner
Paul Goodey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

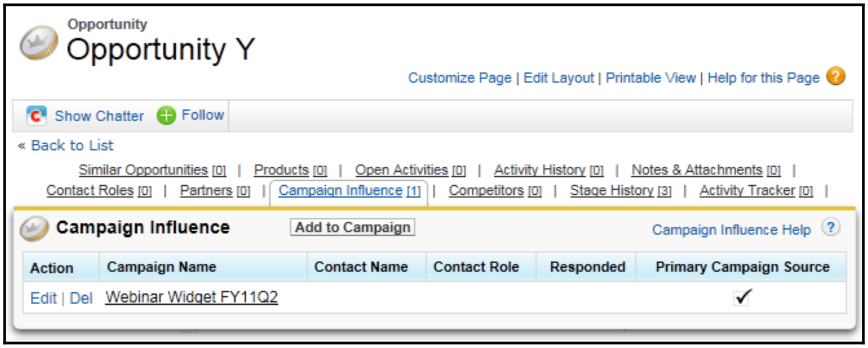

Campaign Member Status
Webinar Widget FY12Q1
Help for this Page
Current Campaign
Webinar Widget FY12Q1
Status
Planned
Type
Webinar
Active
Member Status Values
Edit
Replace
Status
Responded
Default
Sent
Responded

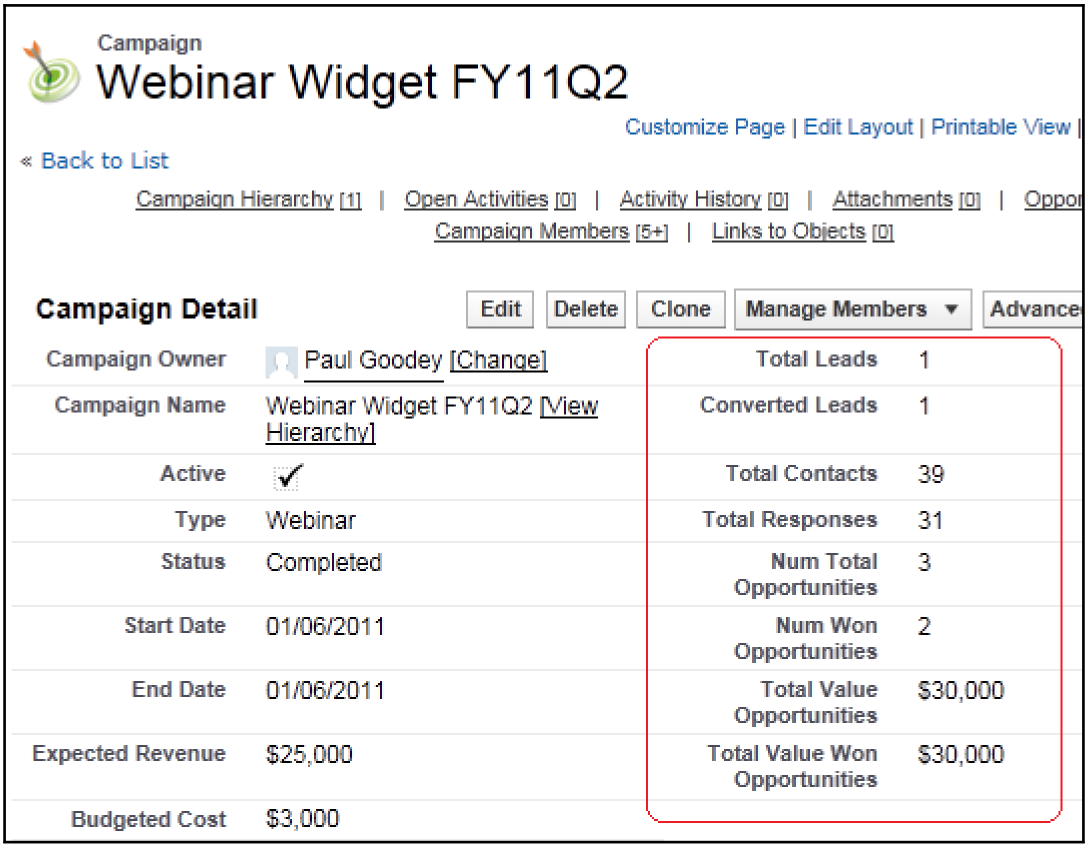

Campaign
FY12Q1 Widget Webinar
« Back to List: Leads
Campaign Hierarchy [1] | Open Activities [0] | Activity History [0] | Attachments [0] | Opportunities [0] |
Campaign Detail
Edit
Delete
Clone
Manage Members
Advanced Setup
Campaign Owner
Paul Goodey [Change]
Campaign Name
FY12Q1 Widget Webinar [View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

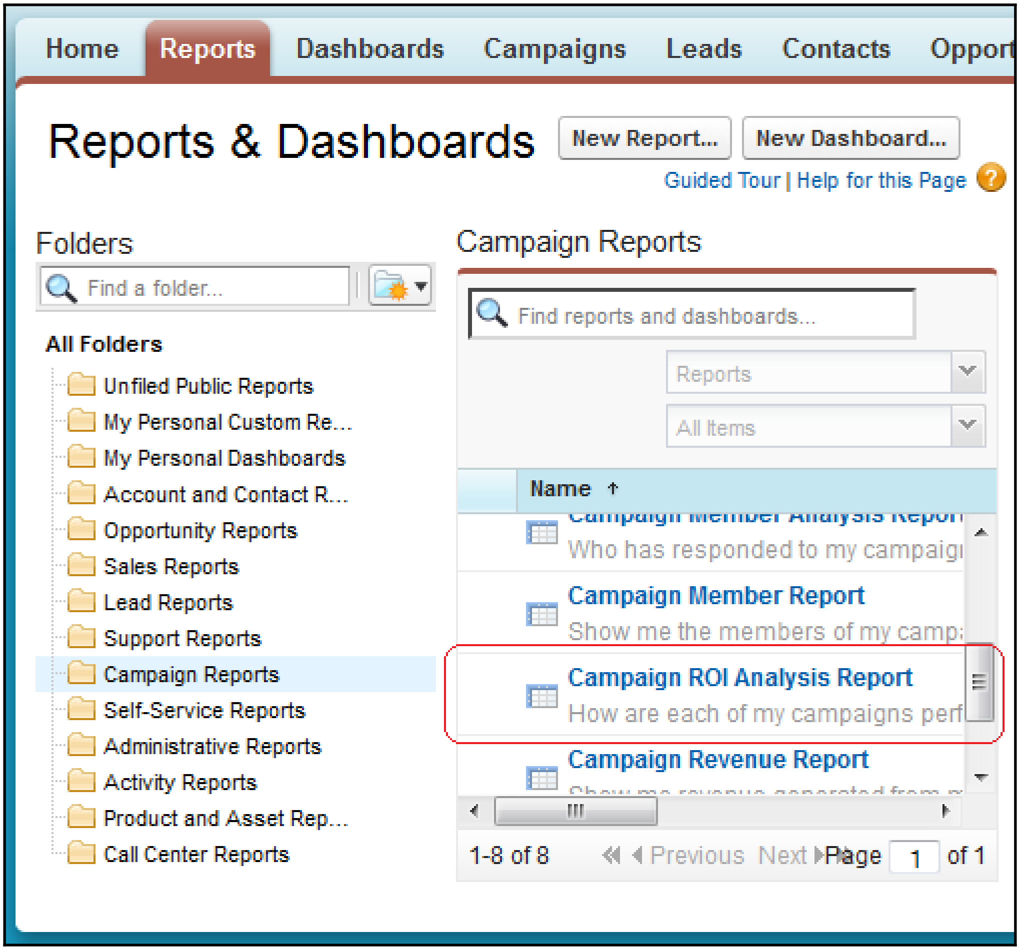

Campaign Contact Account Add to Campaign
Report Generation Status: Complete
Report Options:
Summarize information by: --None--
Show All accounts
Time Frame
Date Field Created Date
Range Custom
From To
Run Report
Hide Details
Customize
Save
Save As
Delete
Printable View
Export Details
Add to Campaign
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
Mr. Sean Forbes CFO 312 Constitution Place Austin, TX 78767 USA - - -
Mr. Avi Green CFO 1302 Avenue of the Americas New York, NY 10019 USA - - -

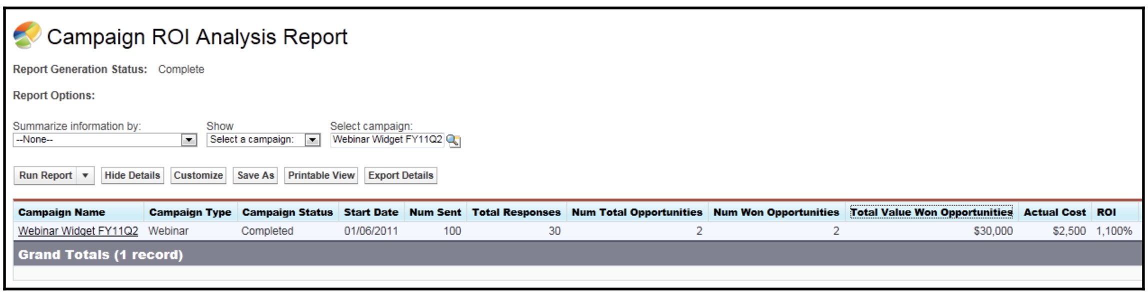

Recently Viewed Leads
Create New View
New Lead
Change Status
Change Owner
Add to Campaign
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O
Action
Name ↑
Company
Edit | Del Chubbe, Mos Ideal Homes
Edit | Del Glimpse, Jeff Jackson Controls


Open Activities [0] | Activity History [0] | Campaign History [1] | HTML Email Status [0] | Links to Objects [0]
Campaign History
Add to Campaign
Campaign History Help
Action
Campaign Name
Start Date
Type
Status
Responded
Member Status Updated
Edit | Del | View
Webinar Widget FY12Q1
20/01/2012
Webinar
Sent
05/06/2011 16:26
Title
SVP, Procurement
Email
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

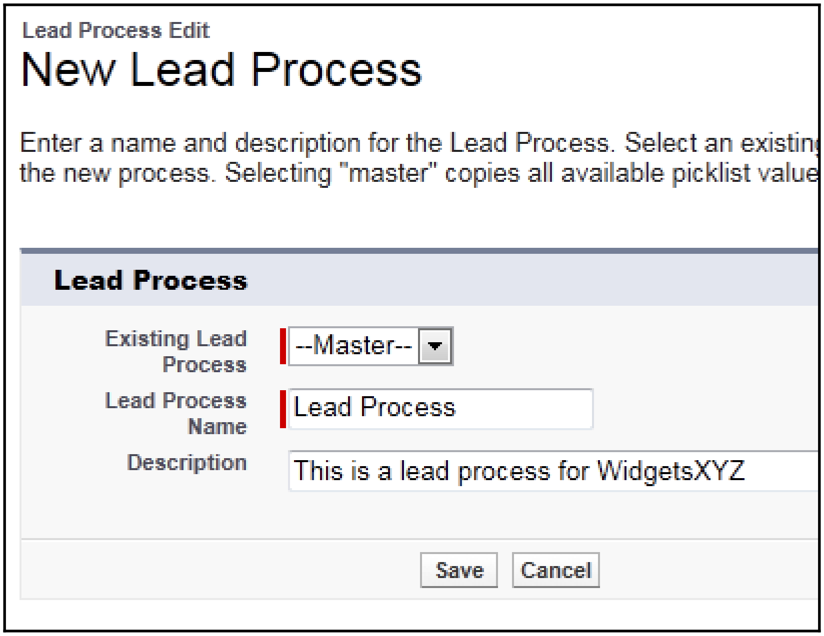

Campaign
Webinar Widget FY11Q2
Customize Page | Edit Layout | Printable View |
« Back to List
Campaign Hierarchy [1] | Open Activities [0] | Activity History [0] | Attachments [0] |
Campaign Members [5+] | Links to Objects [0]
Campaign Detail
Edit
Delete
Clone
Manage Members
Campaign Owner
Paul Goodey [Change]
Total Leads
1
Campaign Name
Webinar Widget FY11Q2 [View Hierarchy]
Converted Leads
1
Active
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

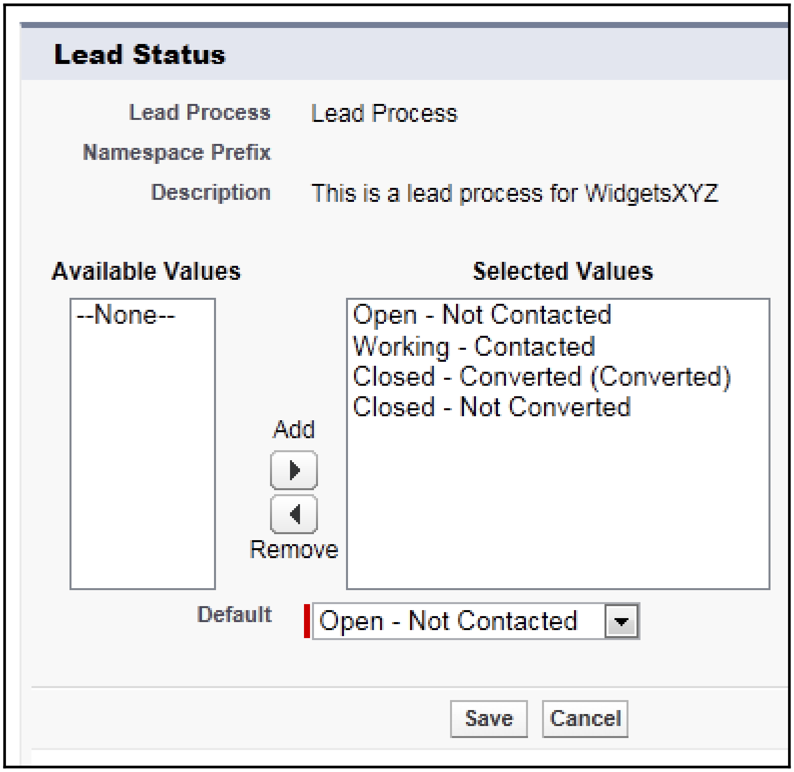

Home
Reports
Dashboards
Campaigns
Leads
Contacts
Opport
Reports & Dashboards
New Report...
New Dashboard...
Guided Tour | Help for this Page
Folders
Find a folder...
All Folders
Unfiled Public Reports
My Personal Custom Re...
My Personal Dashboards
Account and Contact R...
Opportunity Reports
Sales Reports
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
Who has responded to my campaig
Campaign Member Report
Show me the members of my camp
Campaign ROI Analysis Report
How are each of my campaigns perf
Campaign Revenue Report
1-8 of 8
Previous Next
Page 1 of 1

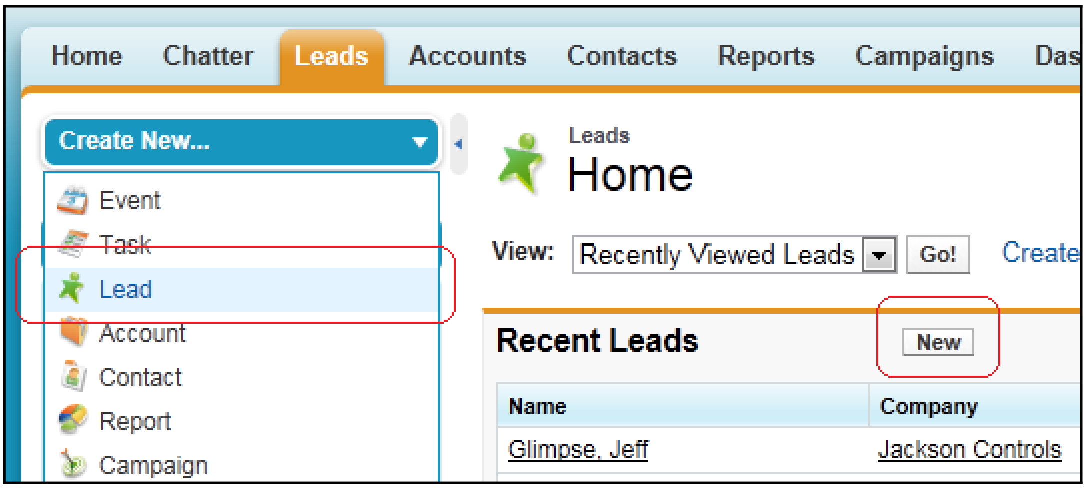

Campaign ROI Analysis Report
Report Generation Status: Complete
Report Options:
Summarize information by: --None--
Show Select a campaign:
Select campaign: Webinar Widget FY11Q2
Run Report
Hide Details
Customize
Save As
Printable View
Export Details
Campaign Name | Campaign Type | Campaign Status | Start 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)

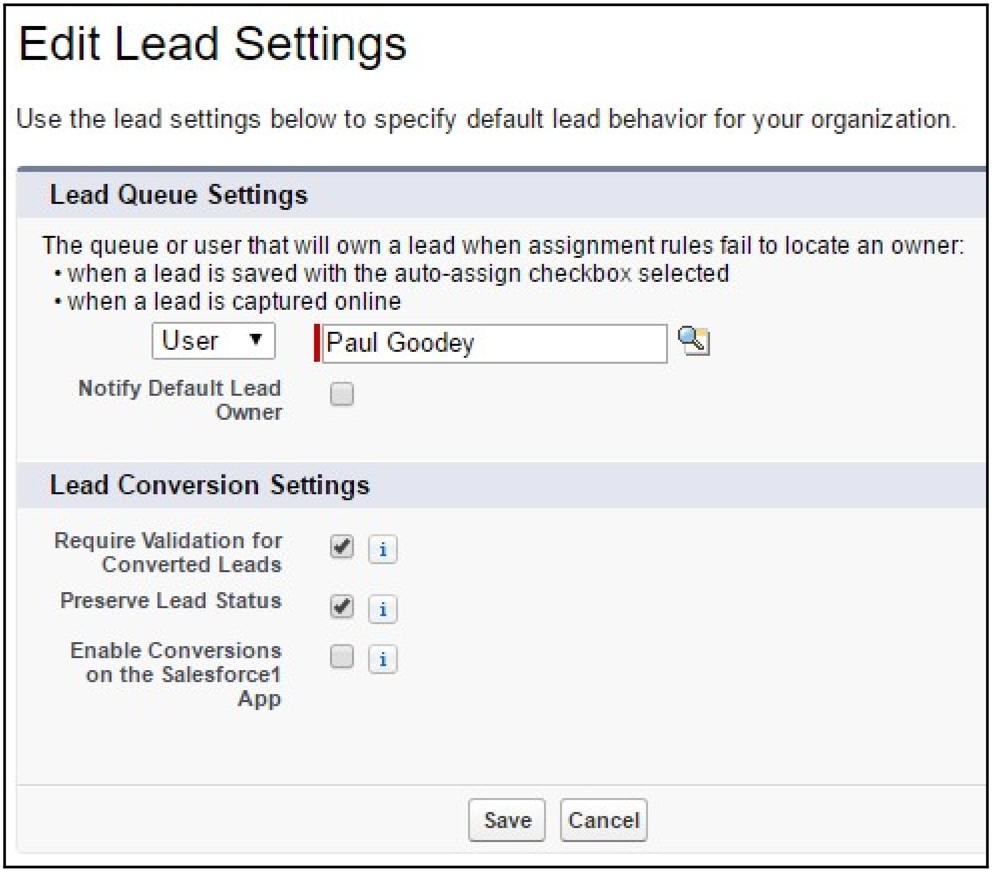
Lead Standard Fields

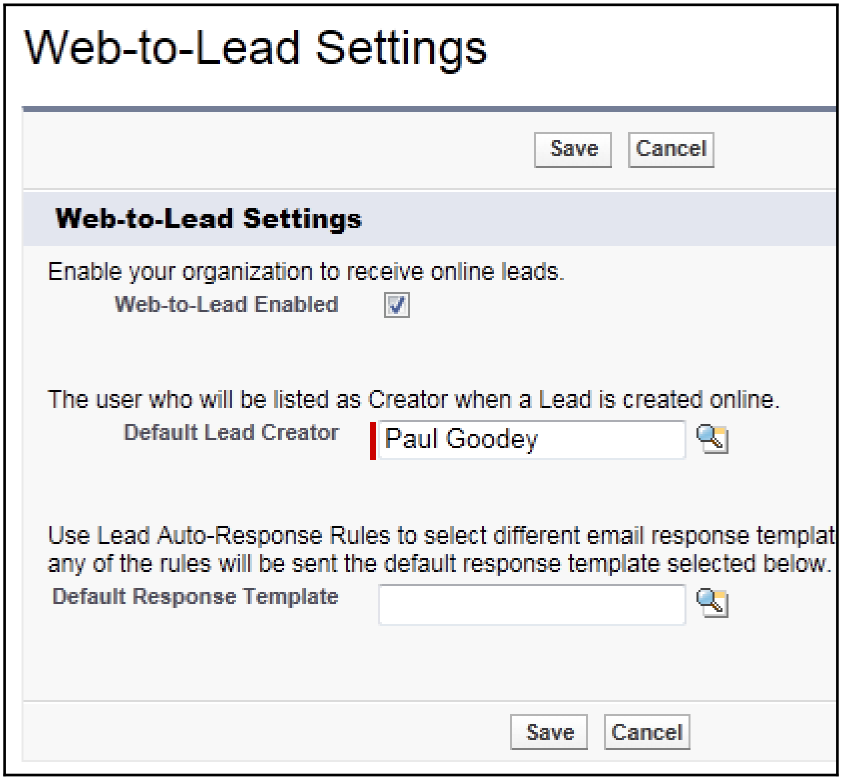
Action	Field Label	Field Name	Data Type
	Address	Address	Address
Edit	Annual Revenue	AnnualRevenue	Currency(18, 0)
Edit	Campaign	Campaign	Lookup(Campaign)
Edit	Company	Company	Text(255)
	Created By	CreatedBy	Lookup(User)
Edit	Description	Description	Long Text Area(32000)
Edit	Do Not Call	DoNotCall	Checkbox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

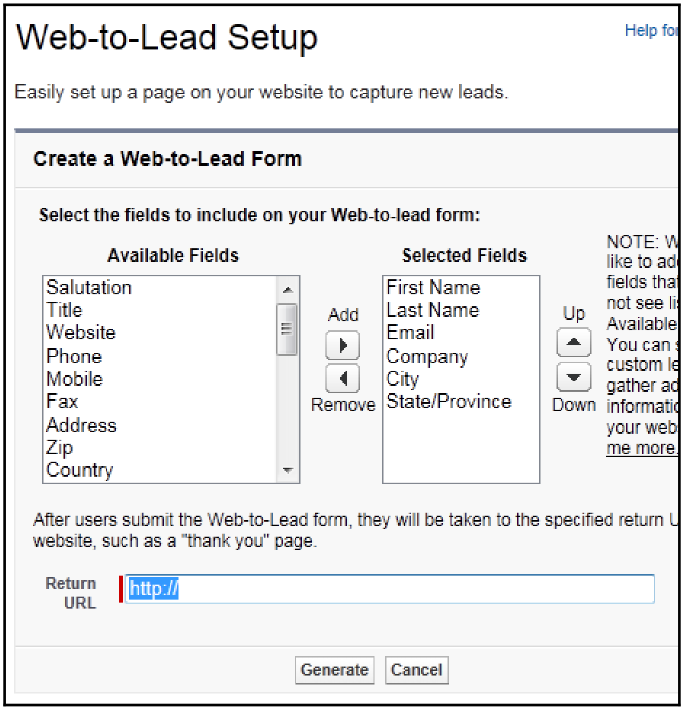

Lead Process Edit
New Lead Process
Enter a name and description for the Lead Process. Select an existin
the new process. Selecting "master" copies all available picklist value
Lead Process
Existing Lead Process
--Master--
Lead Process Name
Lead Process
Description
This is a lead process for WidgetsXYZ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

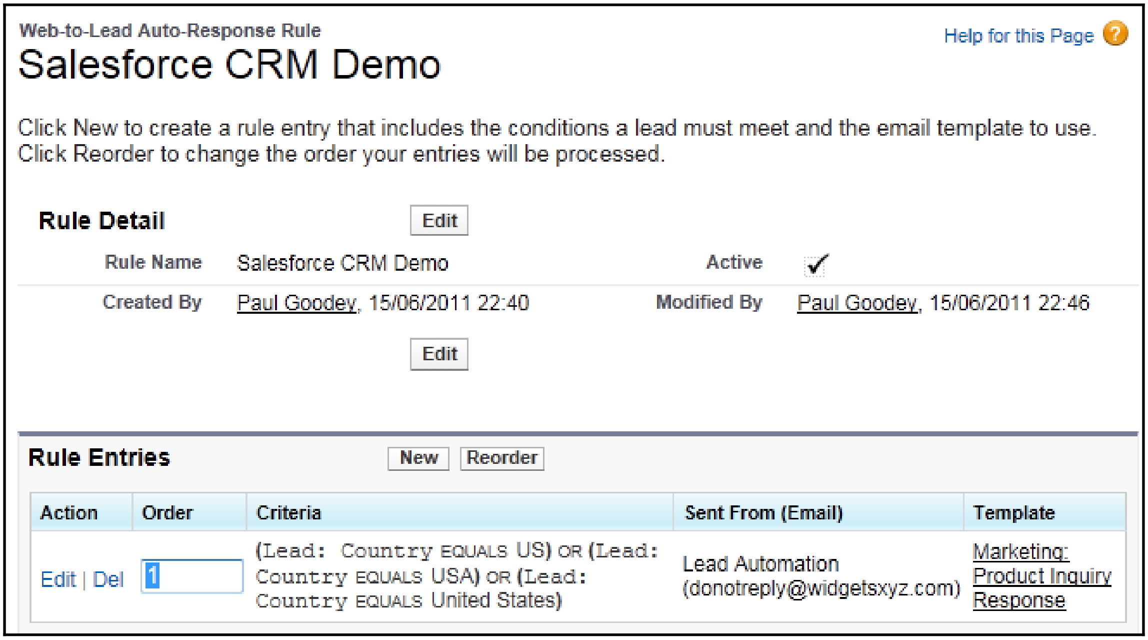

Lead Status
Lead Process
Lead Process
Namespace Prefix
Description
This is a lead process for WidgetsXYZ
Available Values
Selected Values
--None--
Open - Not Contacted
Working - Contacted
Closed - Converted (Converted)
Closed - Not Converted
Add
Remove
Default
Open - Not Contacted
Save
Cancel

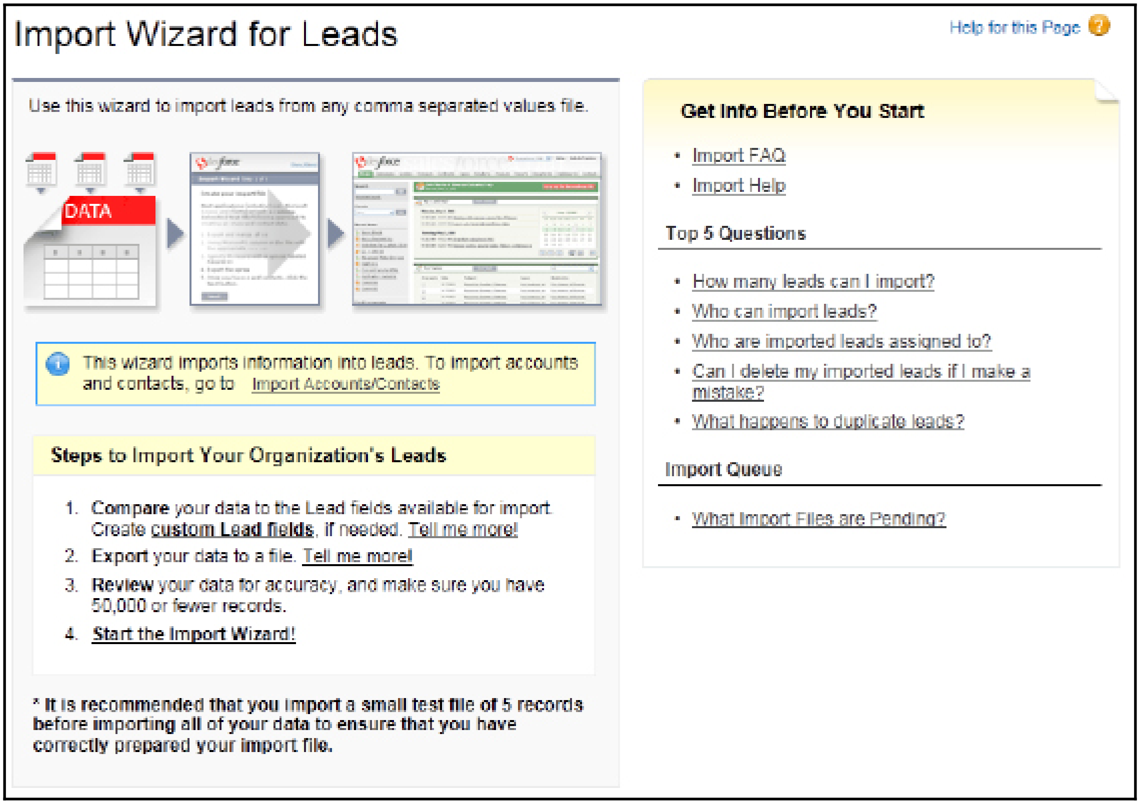

Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Create New...
Event
Task
Lead
Account
Contact
Report
Campaign
Leads
Home
View:
Recently Viewed Leads
Go!
Recent Leads
New
Name
Company
Glimpse, Jeff
Jackson Controls

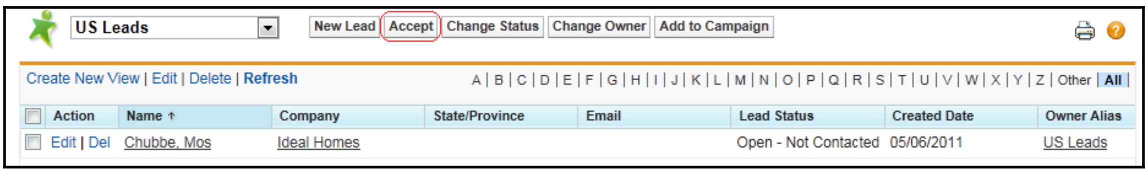

Edit Lead Settings
Use the lead settings below to specify default lead behavior for your organization.
Lead Queue Settings
The queue or user that will own a lead when assignment rules fail to locate an owner:
• when a lead is saved with the auto-assign checkbox selected
• when a lead is captured online
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

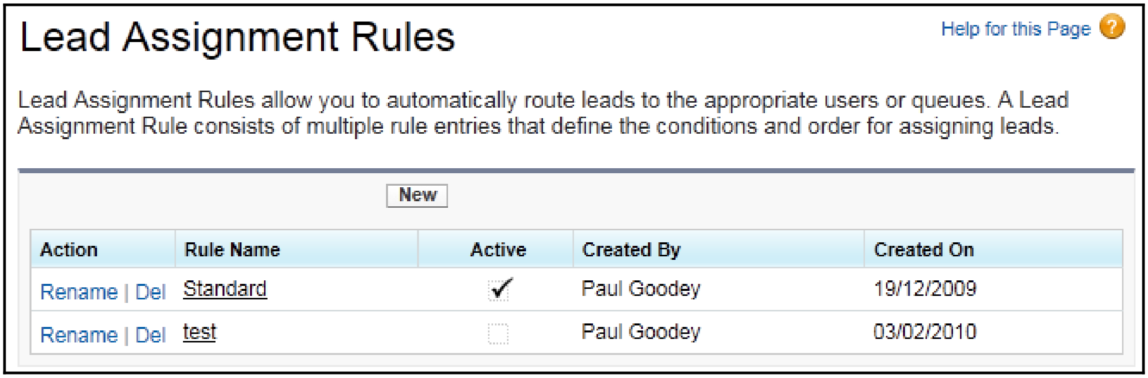

Web-to-Lead Settings
Save
Cancel
Web-to-Lead Settings
Enable your organization to receive online leads.
Web-to-Lead Enabled
The user who will be listed as Creator when a Lead is created online.
Default Lead Creator
Paul Goodey
Use Lead Auto-Response Rules to select different email response templat
any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


Web-to-Lead Setup
Help fo
Easily set up a page on your website to capture new leads.
Create a Web-to-Lead Form
Select the fields to include on your Web-to-lead form:
Available Fields
Salutation
Title
Website
Phone
Mobile
Fax
Address
Zip
Country
Add
Remove
Selected Fields
First Name
Last Name
Email
Company
City
State/Province
Up
Down
NOTE: W
like to ad
fields tha
not see li
Available
You can
custom le
gather ad
informati
your web
me more.
After users submit the Web-to-Lead form, they will be taken to the specified return U
website, such as a "thank you" page.
Return URL
http://
Generate
Cancel

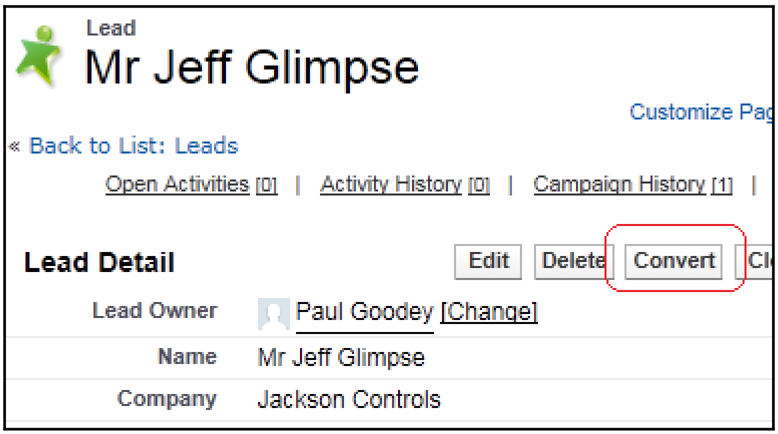

Web-to-Lead Auto-Response Rule
Salesforce CRM Demo
Help for this Page
Click New to create a rule entry that includes the conditions a lead must meet and the email template to use.
Click Reorder to change the order your entries will be processed.
Rule Detail
Edit
Rule Name
Salesforce CRM Demo
Active
Created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

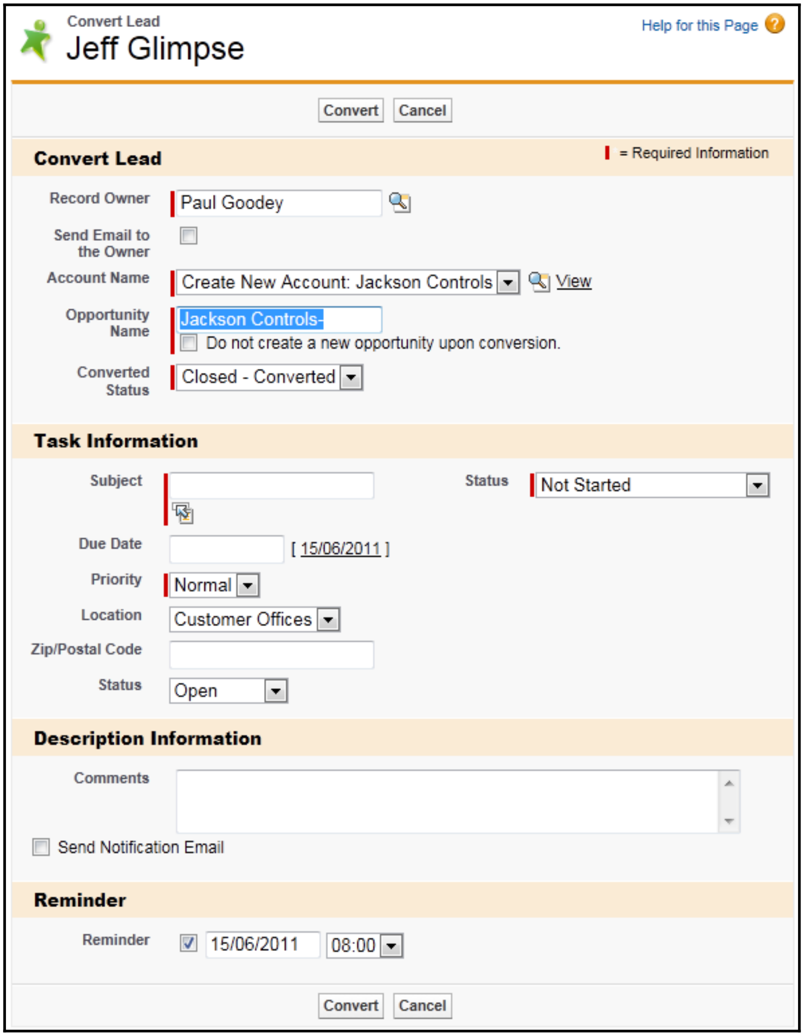

Import Wizard for Leads
Help for this Page
Use this wizard to import leads from any comma separated values file.
DATA
This wizard imports information into leads. To import accounts and contacts, go to Import Accounts/Contacts
Steps to Import Your Organization's Leads
1. Compare your data to the Lead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

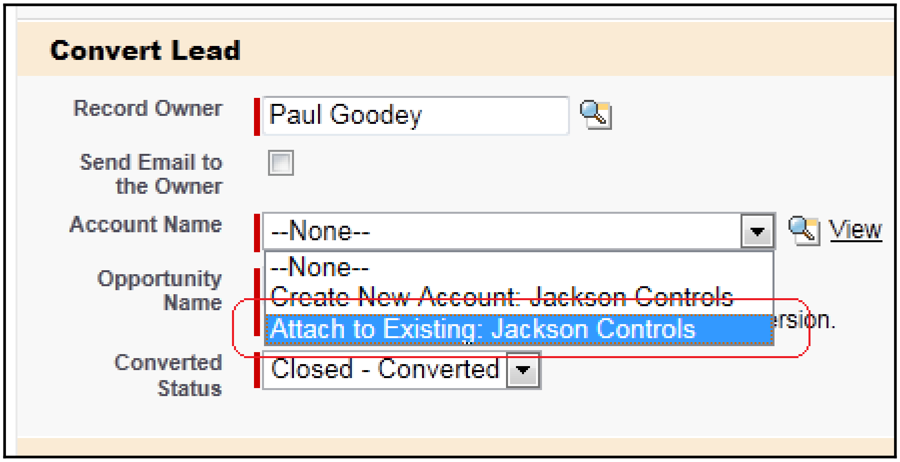

US Leads
New Lead
Accept
Change Status
Change Owner
Add to Campaign
Create New View | Edit | Delete | Refresh
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All |
Action
Name ↑
Company
State/Province
Email
Lead Status
Created Date
Owner Alias
Edit | Del
Chubbe, Mos
Ideal Homes
Open - Not Contacted
05/06/2011
US Leads

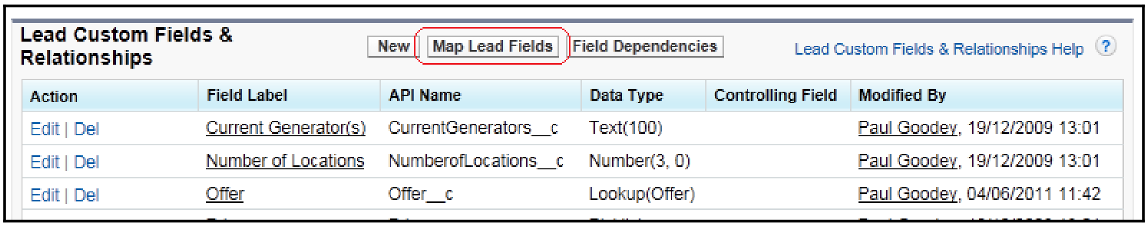

Lead Assignment Rules
Help for this Page
Lead Assignment Rules allow you to automatically route leads to the appropriate users or queues. A Lead Assignment Rule consists of multiple rule entries that define the conditions and order for assigning leads.
New
Action
Rule Name
Active
Created By
Created On
Rename | Del
Standard
Paul Goodey
19/12/2009
Rename | Del
test
Paul Goodey
03/02/2010

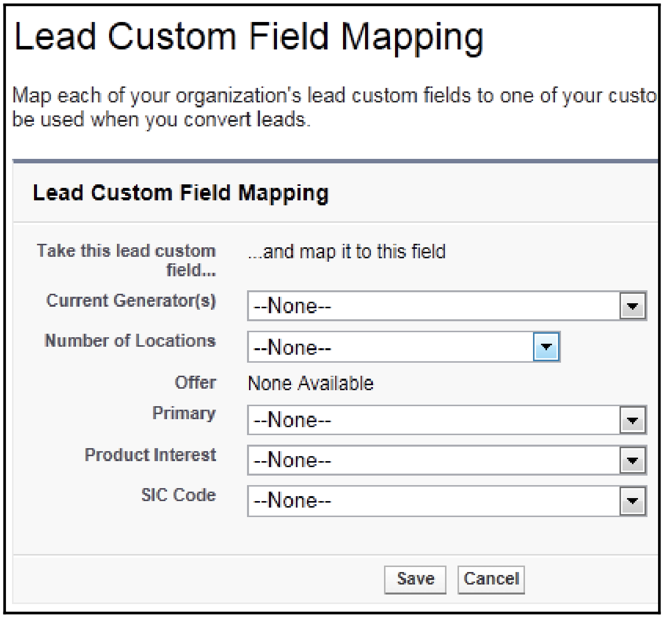

Lead Assignment Rule
Standard
Help for this Page
Create the rule entries to automatically assign leads to users or queues based on the criteria specified in the rule entries. You can reorder the entries from this page after creating them.
Rule Detail
Edit
Rule Name
Standard
Active
Created By
Paul Goodey, 19/12/2009 13:01
Modified By
Paul Goodey, 15/06/2011 20:45
Edit
Rule Entries
New
Reorder
Action
Order
Criteria
Assign To
Email
Edit | Del
1
Lead: Country EQUALS US,USA,United States,United States of America
Paul Goodey
Edit | Del
2
Lead: Country NOT EQUAL TO US,USA,United States,United States of America
Trevor Howard


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


Convert Lead
Jeff Glimpse
Help for this Page
Convert
Cancel
Convert Lead
= Required Information
Record Owner
Paul Goodey
Send Email to the Owner
Account Name
Create New Account: Jackson Controls
View
Opportunity Name
Jackson Controls-
Do not create a new opportunity upon conversion.
Converted Status
Closed - Converted
Task Information
Subject
Status
Not Started
Due Date
[15/06/2011]
Priority
Normal
Location
Customer Offices
Zip/Postal Code
Status
Open
Description Information
Comments
Send Notification Email
Reminder
Reminder
15/06/2011
08:00
Convert
Cancel


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
rsion.
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

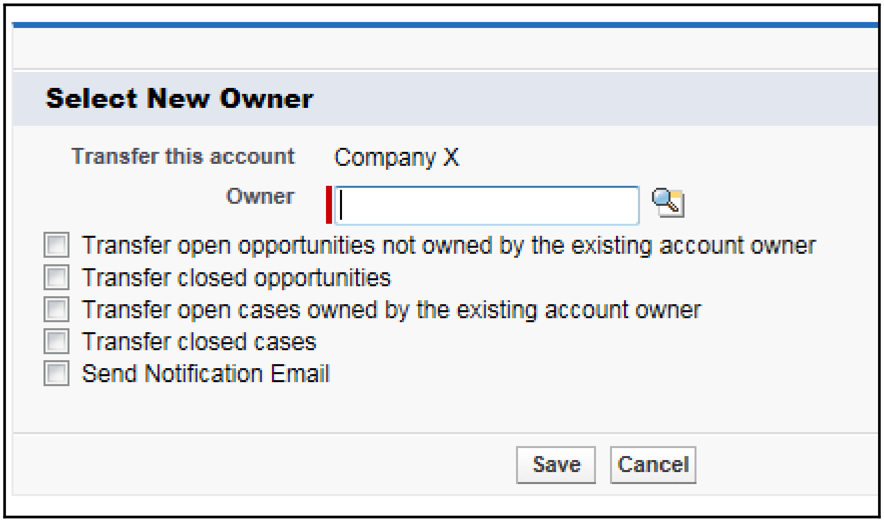

Lead Custom Field Mapping

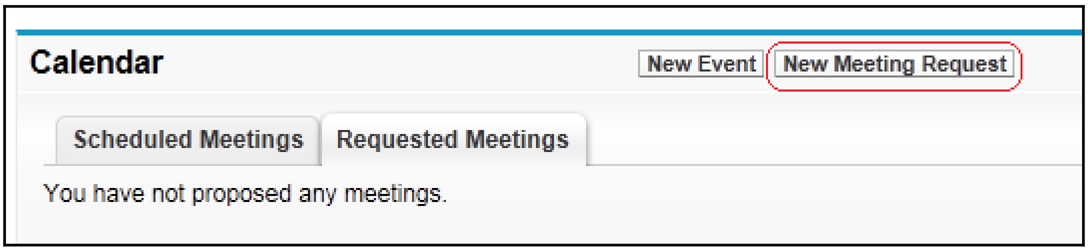
Map each of your organization's lead custom fields to one of your custo
be used when you convert leads.

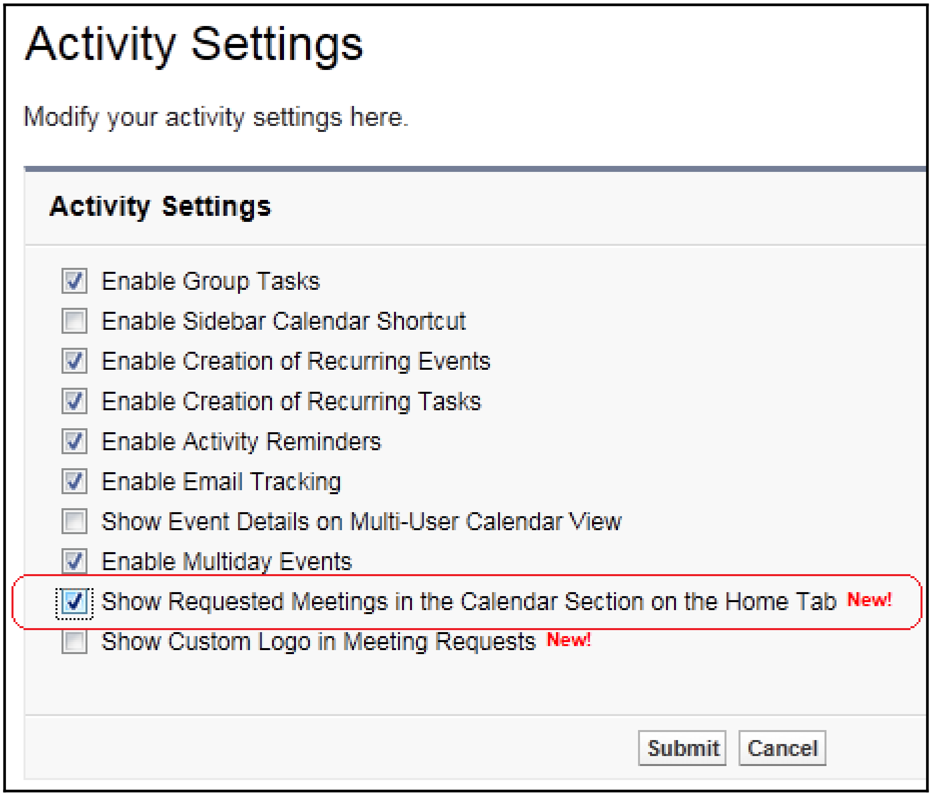
Lead Custom Field Mapping

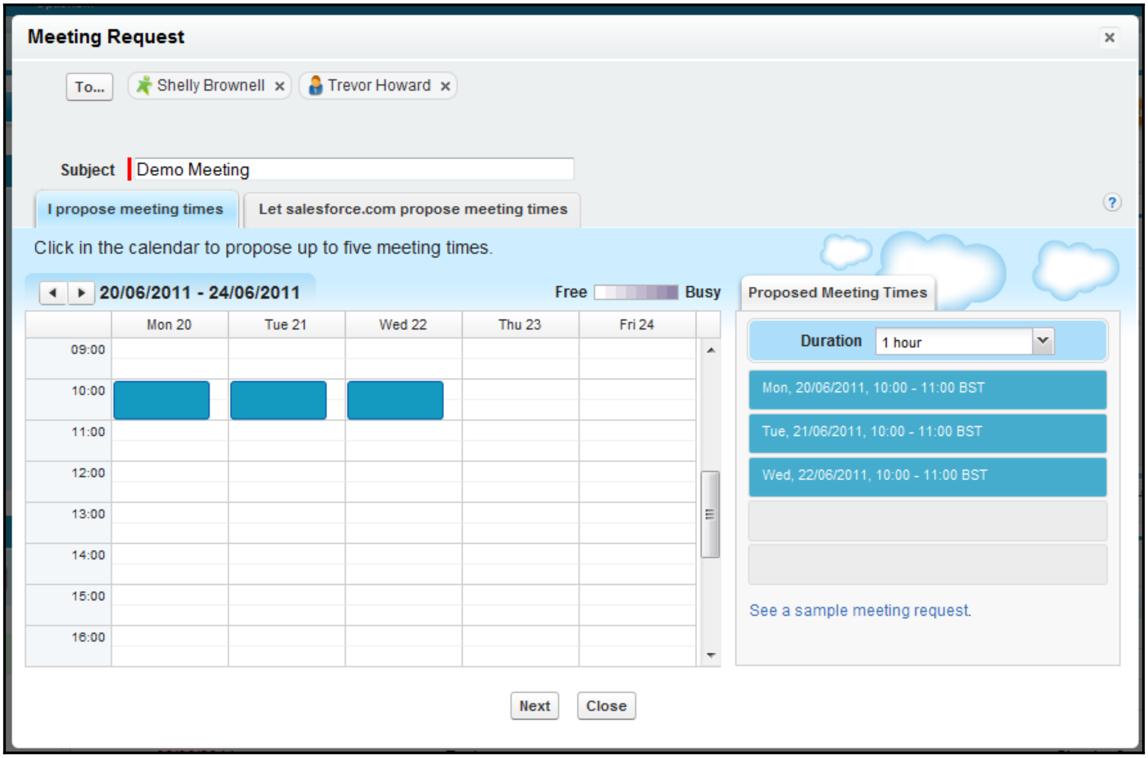
Take this lead custom field...	...and map it to this field
Current Generator(s)	--None--
Number of Locations	--None--
Offer	None Available
Primary	--None--
Product Interest	--None--
SIC Code	--None--

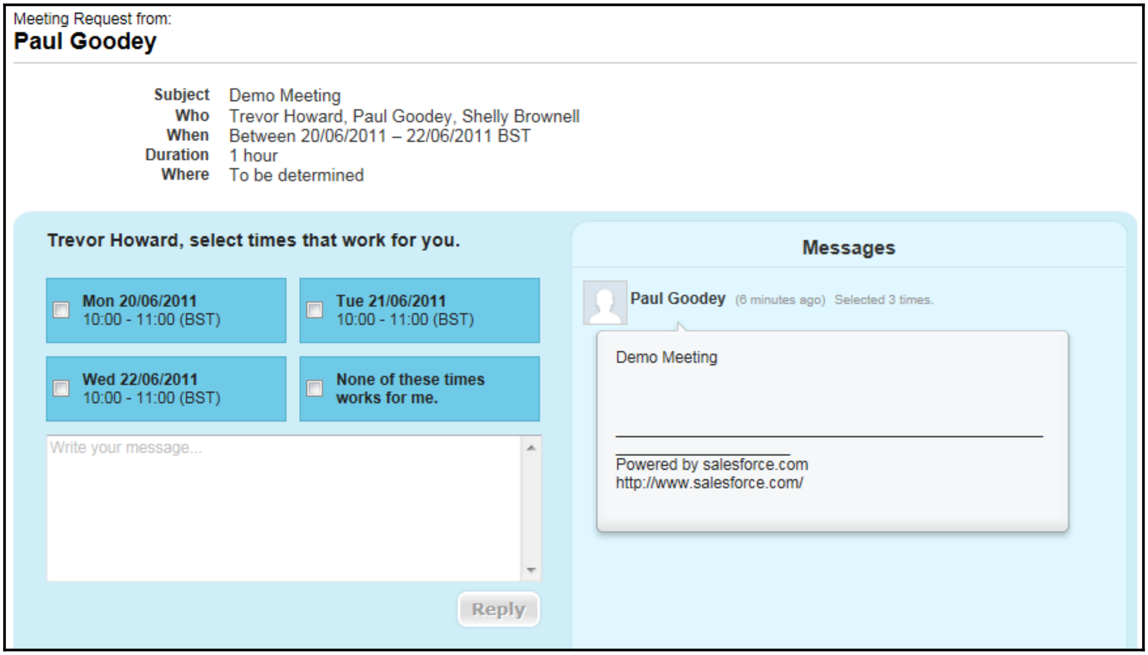
Save Cancel

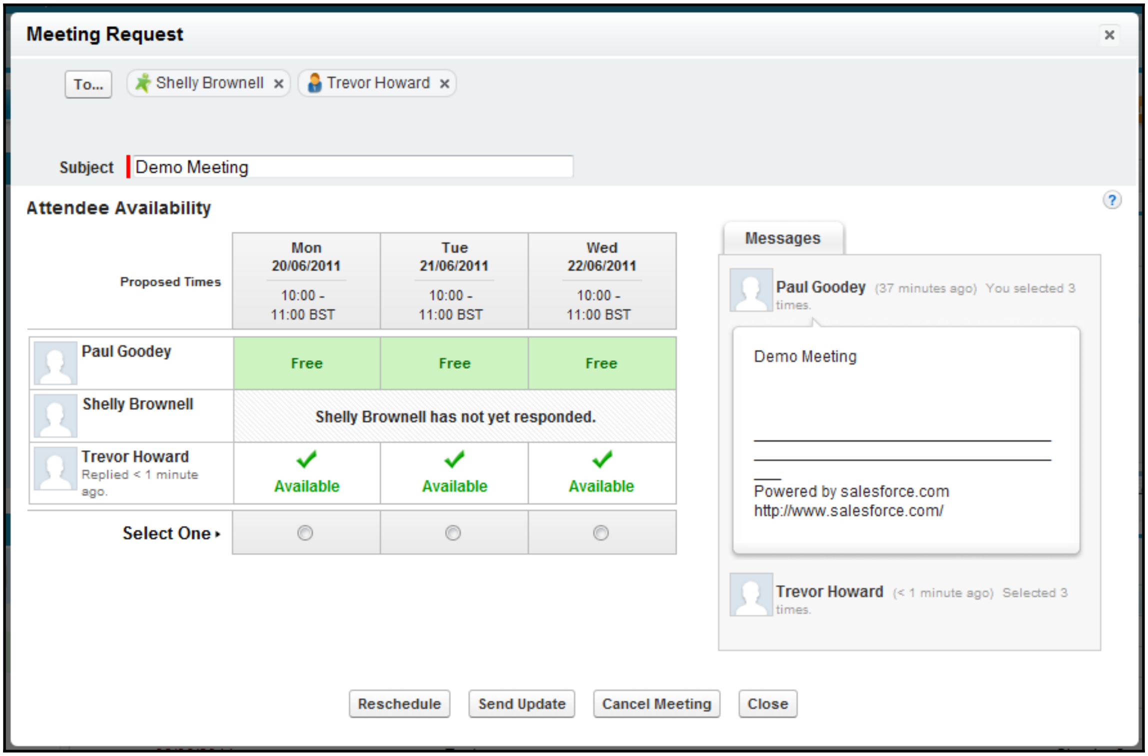

Select New Owner
Transfer this account
Company X
Owner
Transfer open opportunities not owned by the existing account owner
Transfer closed opportunities
Transfer open cases owned by the existing account owner
Transfer closed cases
Send Notification Email
Save
Cancel

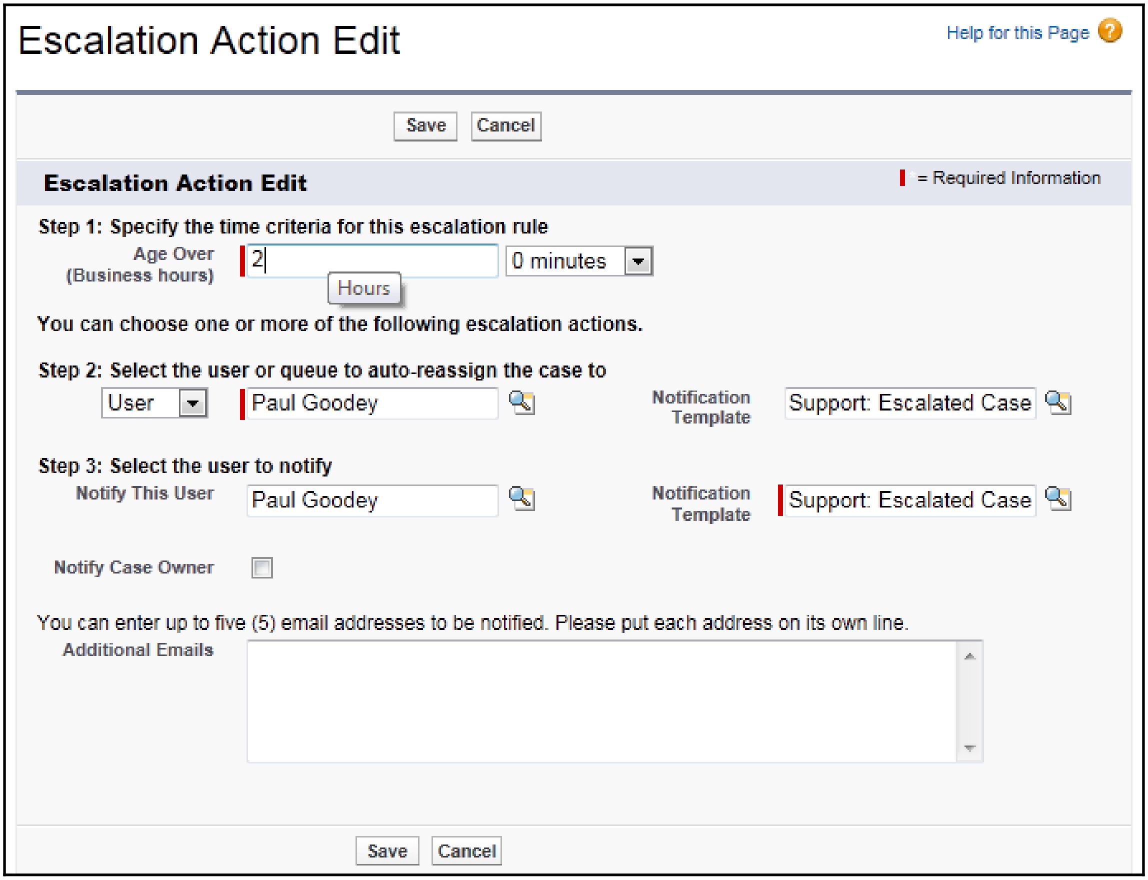

Calendar
New Event
New Meeting Request
Scheduled Meetings
Requested Meetings
You have not proposed any meetings.

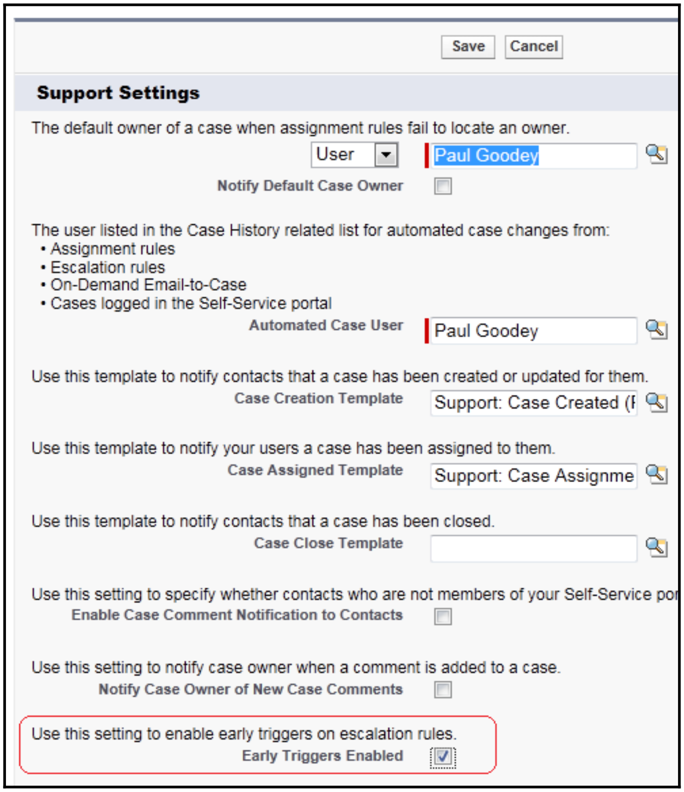

Activity Settings
Modify your activity settings here.
Activity Settings
Enable Group Tasks
Enable Sidebar Calendar Shortcut
Enable Creation of Recurring Events
Enable Creation of Recurring Tasks
Enable Activity Reminders
Enable Email Tracking
Show Event Details on Multi-User Calendar View
Enable Multiday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

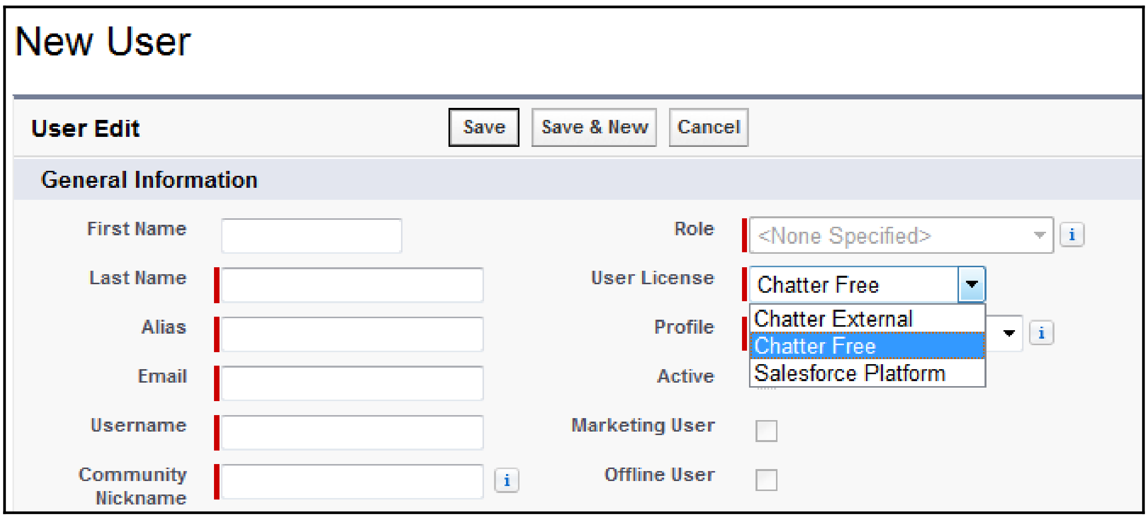

Meeting Request
To...
Shelly Brownell
Trevor Howard
Subject
Demo Meeting
I propose meeting times
Let salesforce.com propose meeting times
Click in the calendar to propose up to five meeting times.
20/06/2011 - 24/06/2011
Free
Busy
Proposed Meeting Times
Mon 20
Tue 21
Wed 22
Thu 23
Fri 24
09:00
10:00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

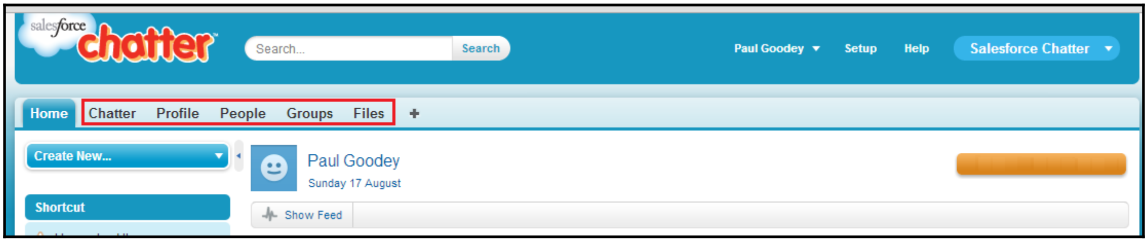

Meeting Request from:
Paul Goodey
Subject Demo Meeting
Who Trevor Howard, Paul Goodey, Shelly Brownell
When Between 20/06/2011 – 22/06/2011 BST
Duration 1 hour
Where To be determined
Trevor Howard, select times that work for you.
Mon 20/06/2011 10:00 - 11:00 (BST)
Tue 21/06/2011 10:00 - 11:00 (BST)
Wed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

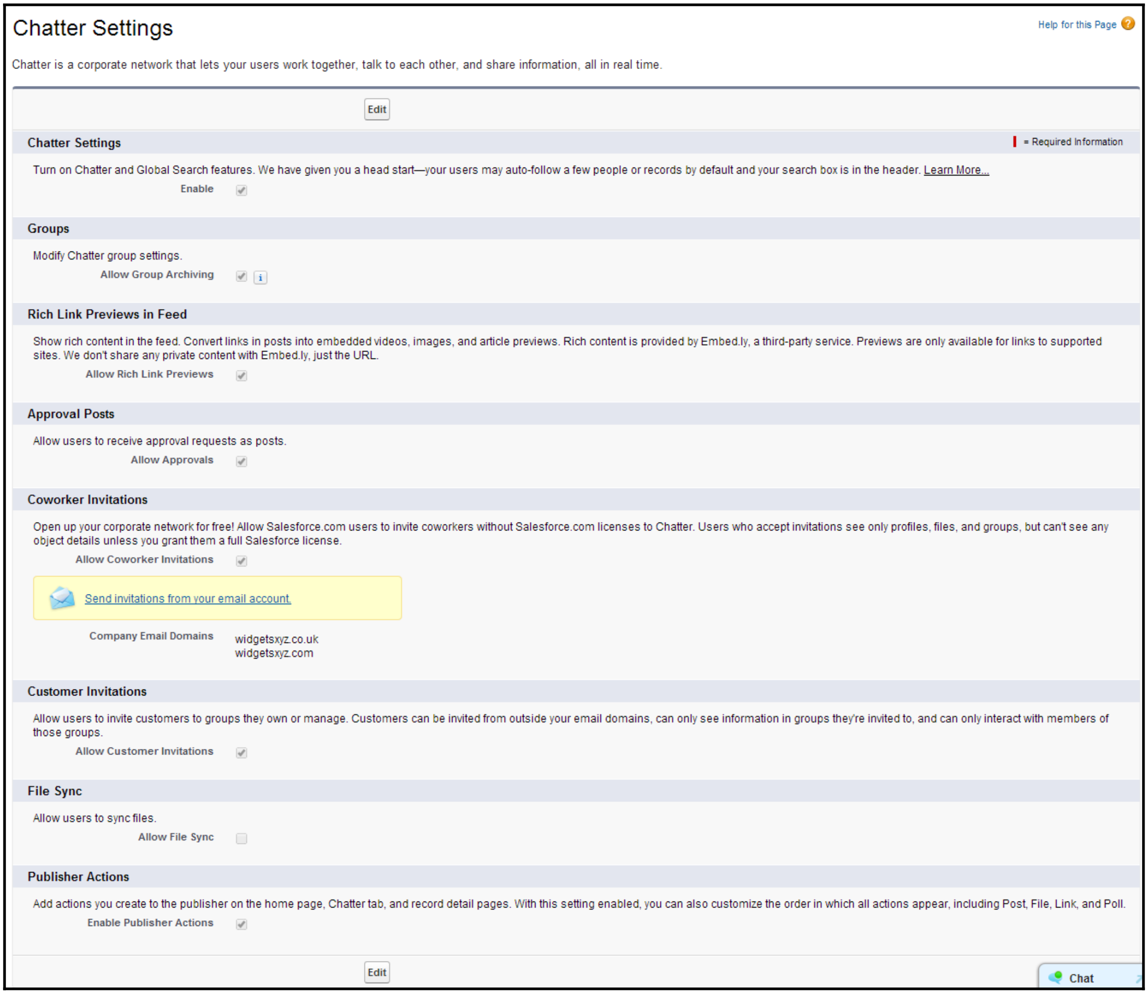

Meeting Request
To...
Shelly Brownell
Trevor Howard
Subject
Demo Meeting
Attendee Availability
Proposed Times
Mon 20/06/2011 10:00 - 11:00 BST
Tue 21/06/2011 10:00 - 11:00 BST
Wed 22/06/2011 10:00 - 11:00 BST
Paul Goodey
Free
Free
Free
Shelly Brownell
Shelly Brownell has not yet responded.
Trevor Howard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

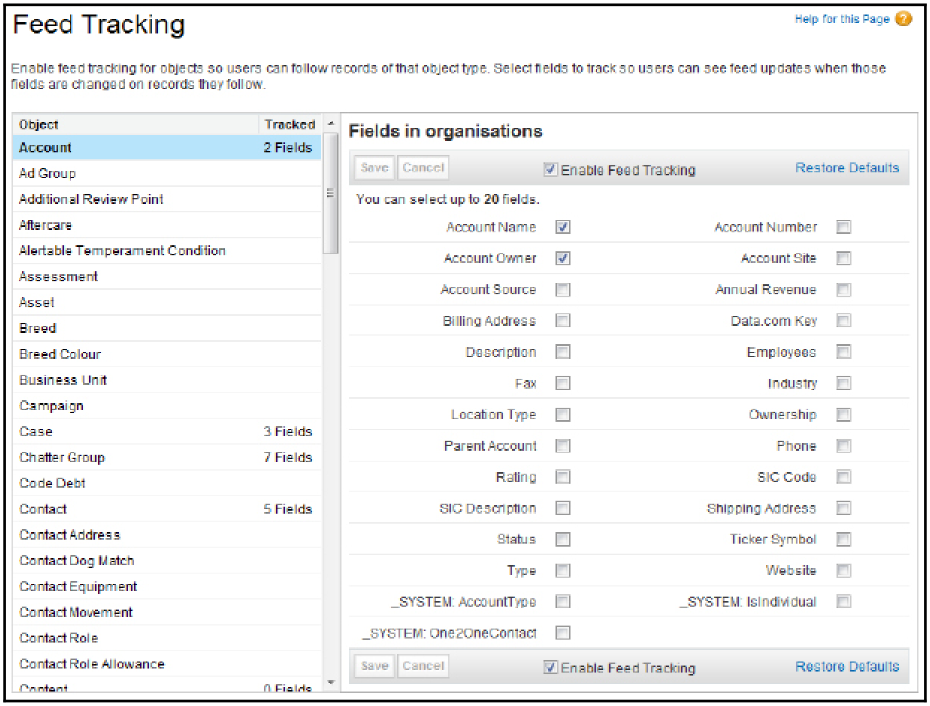

Escalation Action Edit
Help for this Page
Save
Cancel
Escalation Action Edit
= Required Information
Step 1: Specify the time criteria for this escalation rule
Age Over (Business hours)
2
0 minutes
Hours
You can choose one or more of the following escalation actions.
Step 2: Select the user or queue to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

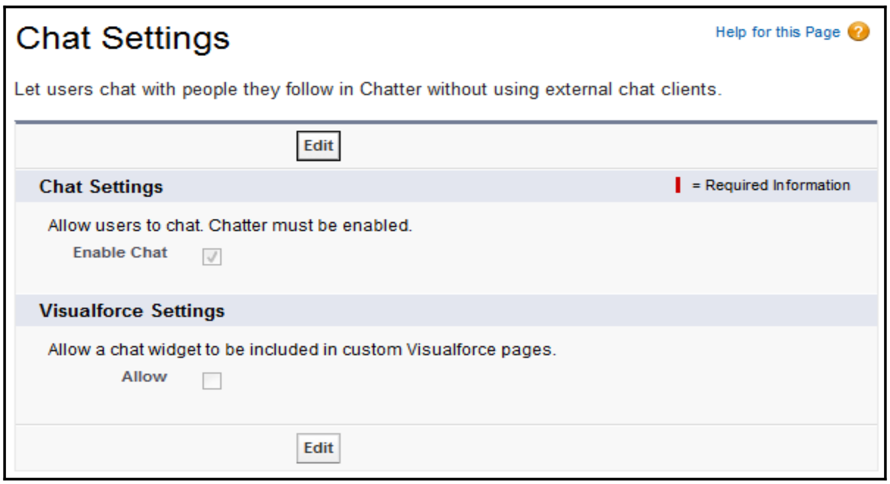

Save
Cancel
Support Settings
The default owner of a case when assignment rules fail to locate an owner.
User
Paul Goodey
Notify Default Case Owner
The user listed in the Case History related list for automated case changes from:
• Assignment rules
• Escalation rules
• On-Demand Email-to-Case
• Cases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

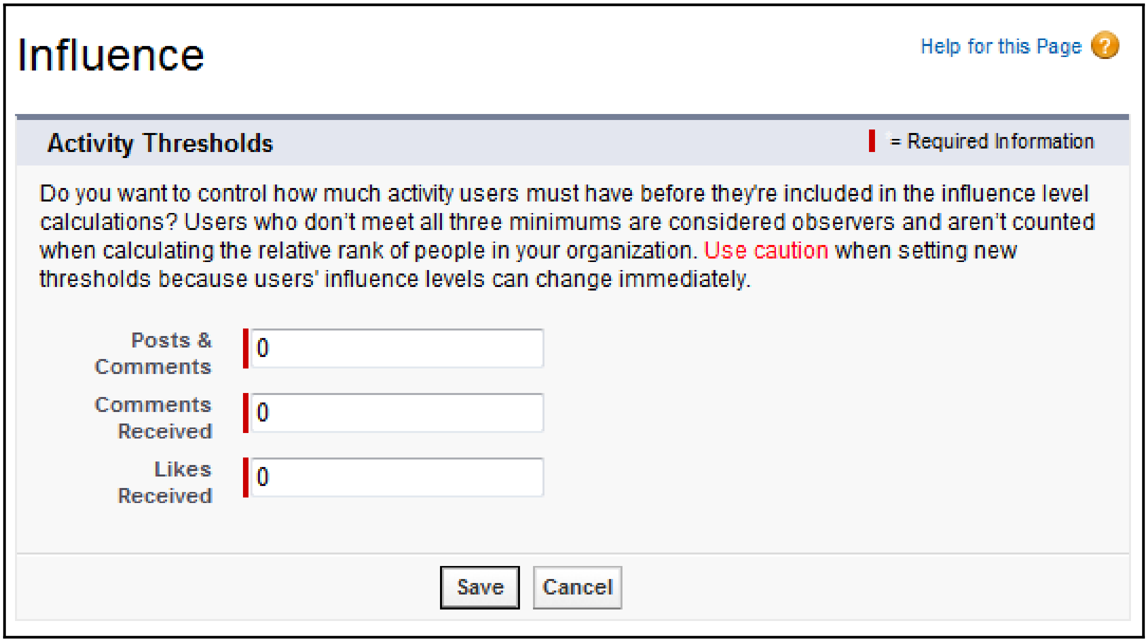

New User
User Edit
Save
Save & New
Cancel
General Information
First Name
Last Name
Alias
Email
Username
Community Nickname
Role
<None Specified>
User License
Chatter Free
Profile
Active
Chatter External
Chatter Free
Salesforce Platform
Marketing User
Offline User

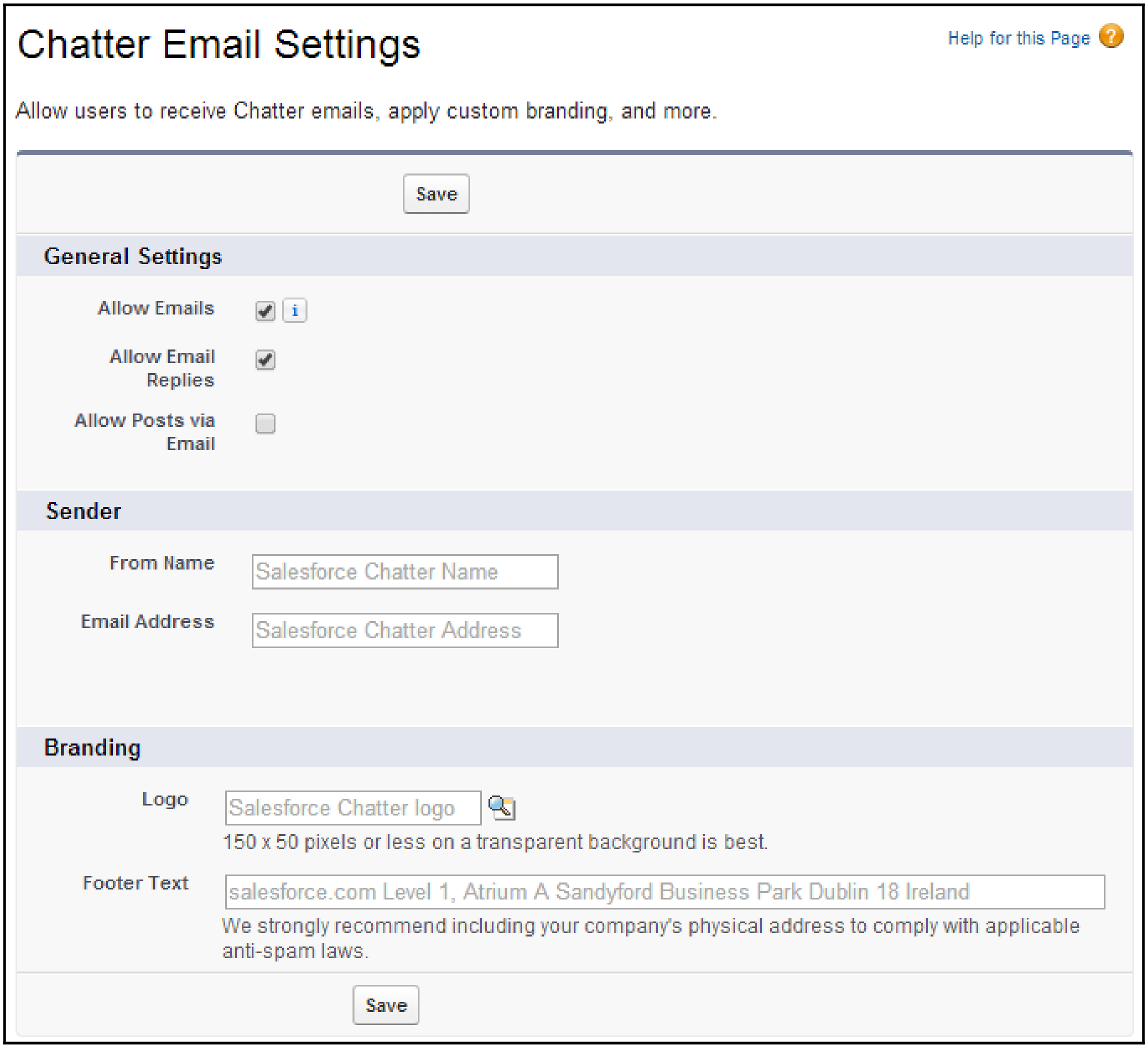

salesforce chatter
Search...
Search
Paul Goodey
Setup
Help
Salesforce Chatter
Home
Chatter
Profile
People
Groups
Files
Create New...
Shortcut
Paul Goodey
Sunday 17 August
Show Feed


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

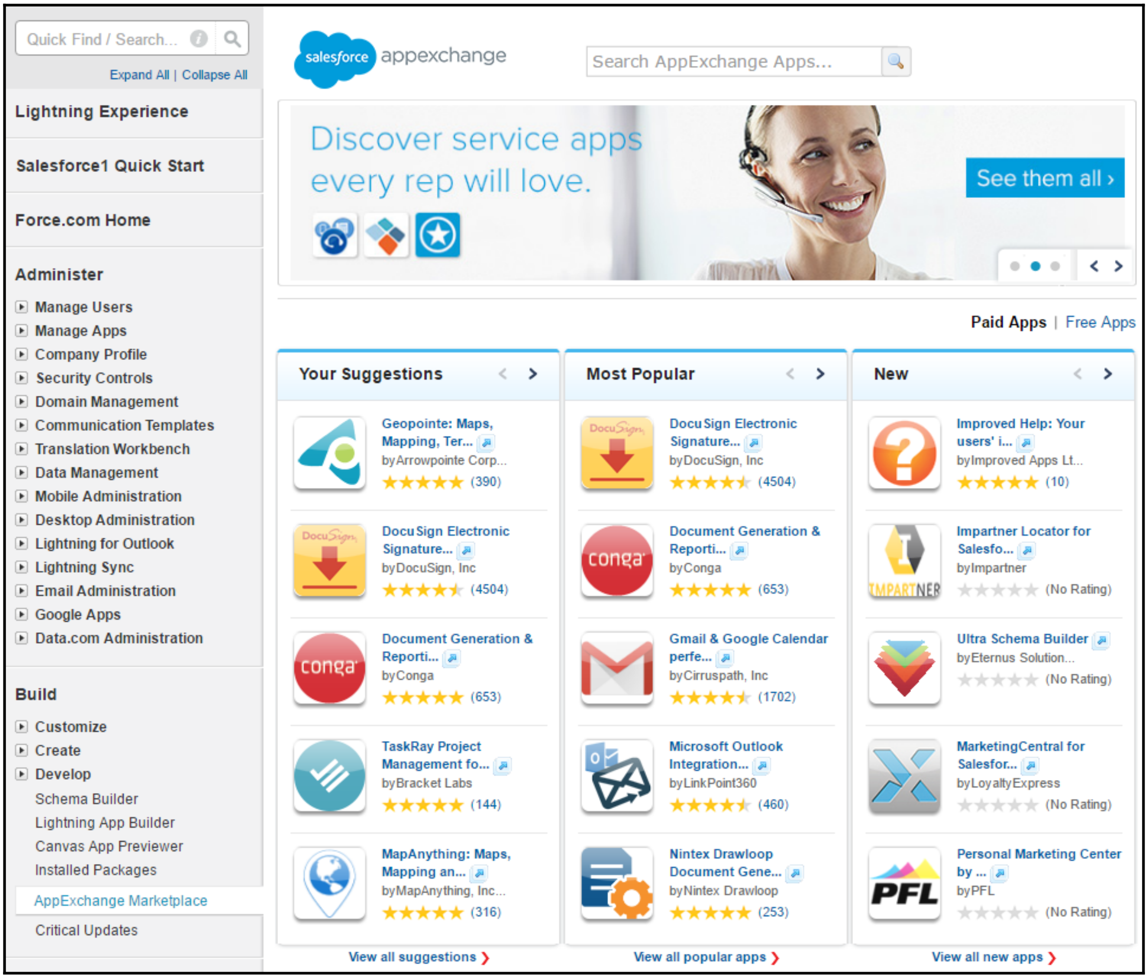

Feed Tracking
Help for this Page
Enable feed tracking for objects so users can follow records of that object type. Select fields to track so users can see feed updates when those fields are changed on records they follow.
Object
Tracked
Account
2 Fields
Ad Group
Additional Review Point
Aftercare
Alertable 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
Fields in organisations
Save
Cancel
Enable Feed Tracking
Restore Defaults
You can select up to 20 fields.
Account Name
Account Number
Account Owner
Account Site
Account Source
Annual Revenue
Billing Address
Data.com Key
Description
Employees
Fax
Industry
Location Type
Ownership
Parent Account
Phone
Rating
SIC Code
SIC Description
Shipping Address
Status
Ticker Symbol
Type
Website
_SYSTEM: AccountType
_SYSTEM: IsIndividual
_SYSTEM: One2OneContact
Save
Cancel
Enable Feed Tracking
Restore Defaults

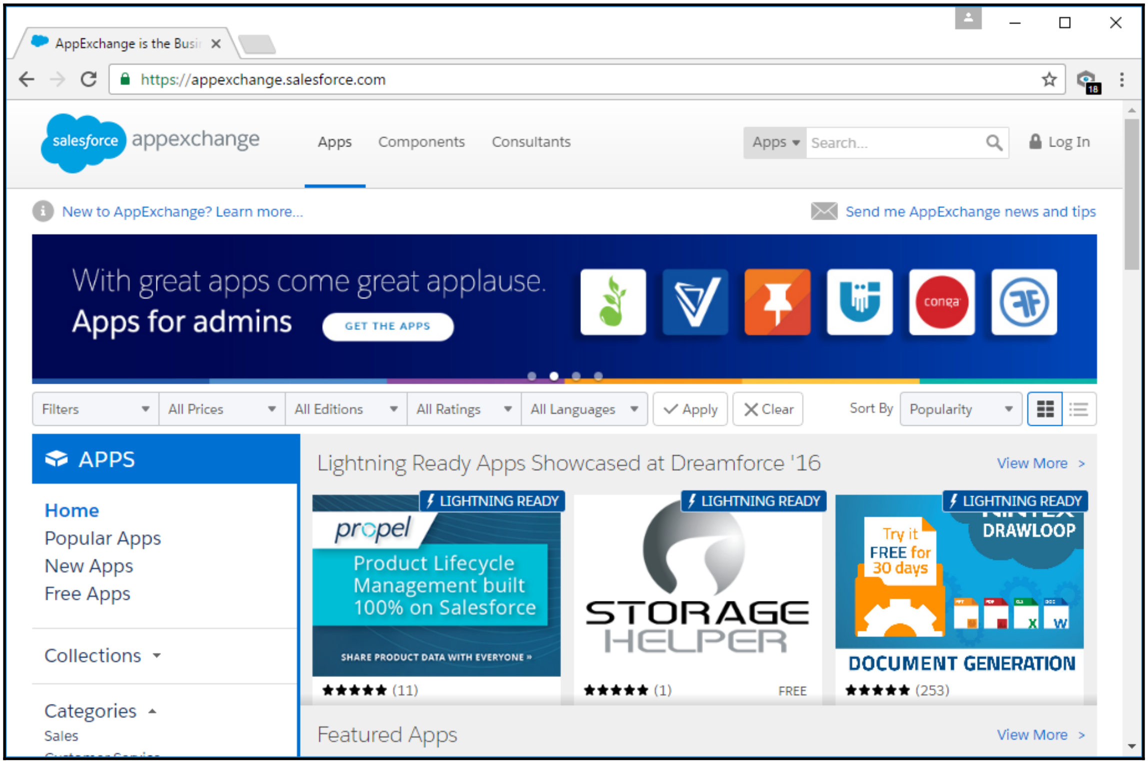

Chat Settings
Help for this Page
Let users chat with people they follow in Chatter without using external chat clients.
Edit
Chat Settings
= Required Information
Allow users to chat. Chatter must be enabled.
Enable Chat
Visualforce Settings
Allow a chat widget to be included in custom Visualforce pages.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

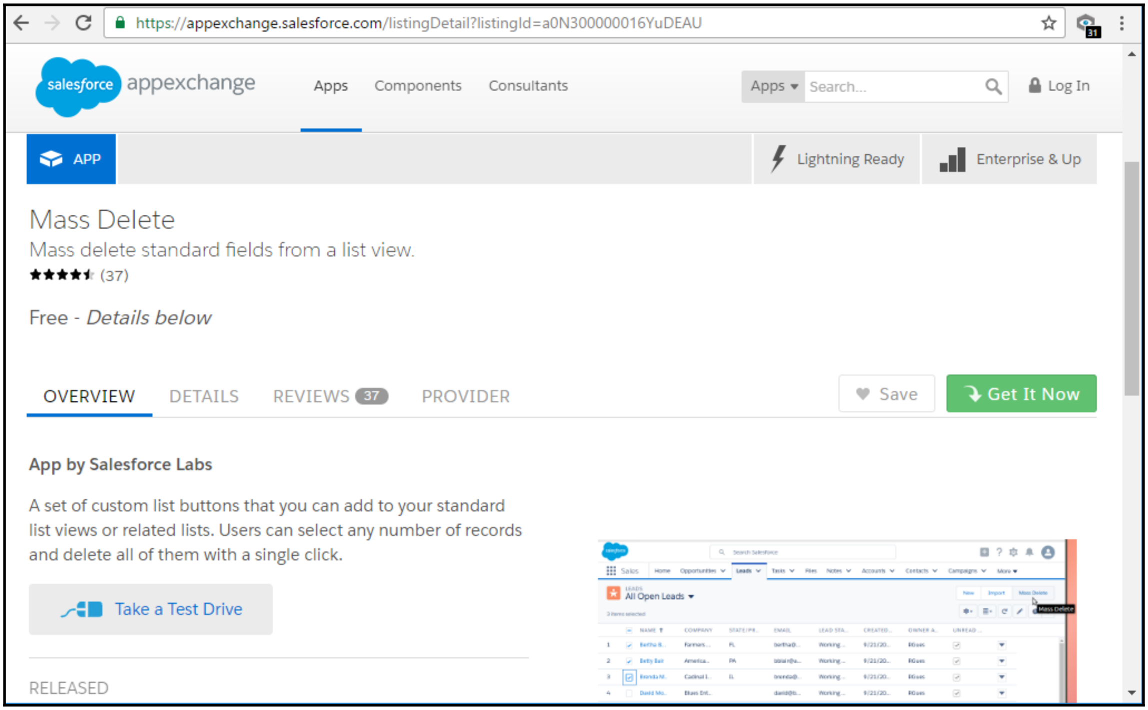

Influence
Help for this Page
Activity Thresholds
= Required Information
Do you want to control how much activity users must have before they're included in the influence level calculations? Users who don't meet all three minimums are considered observers and aren't counted when calculating the relative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

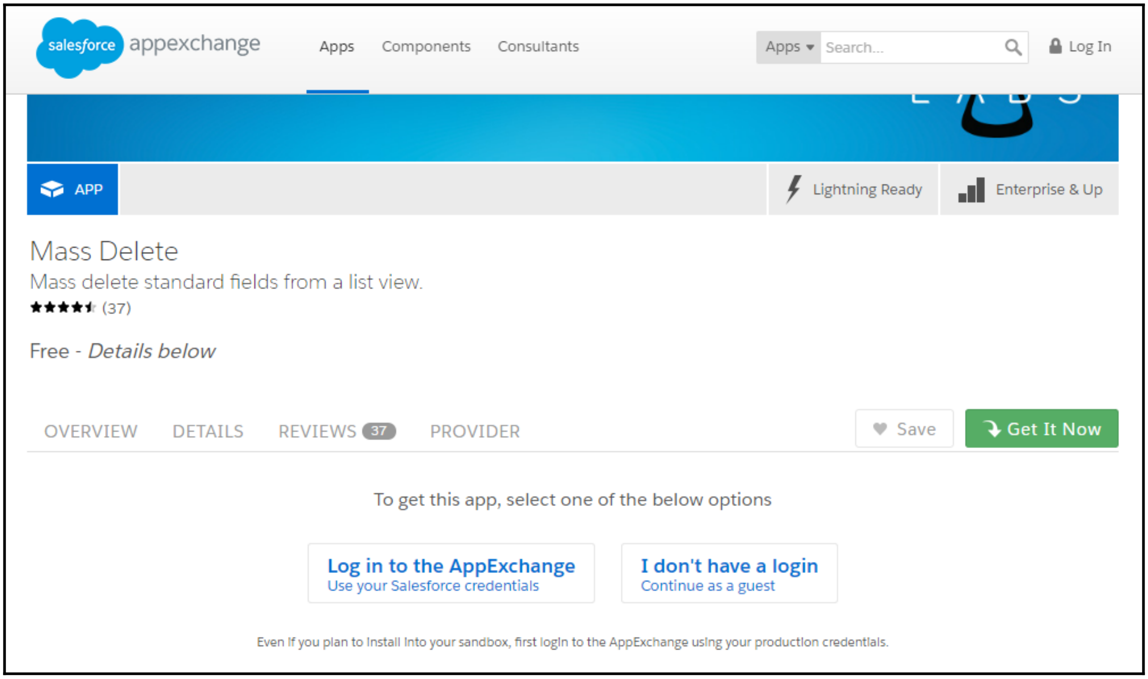

Chatter Email Settings
Help for this Page
Allow users to receive Chatter emails, apply custom branding, and more.
Save
General Settings
Allow Emails
Allow Email Replies
Allow Posts via Email
Sender
From Name
Salesforce Chatter Name
Email Address
Salesforce Chatter Address
Branding
Logo
Salesforce Chatter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

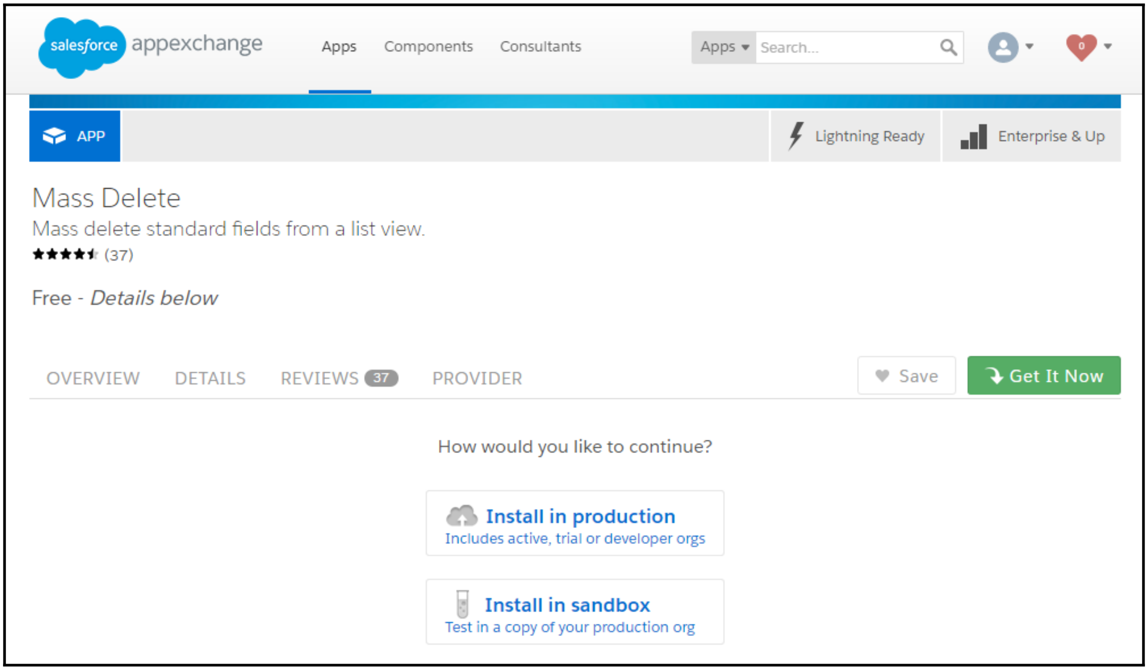
Chapter 9: Extending and Enhancing Salesforce CRM

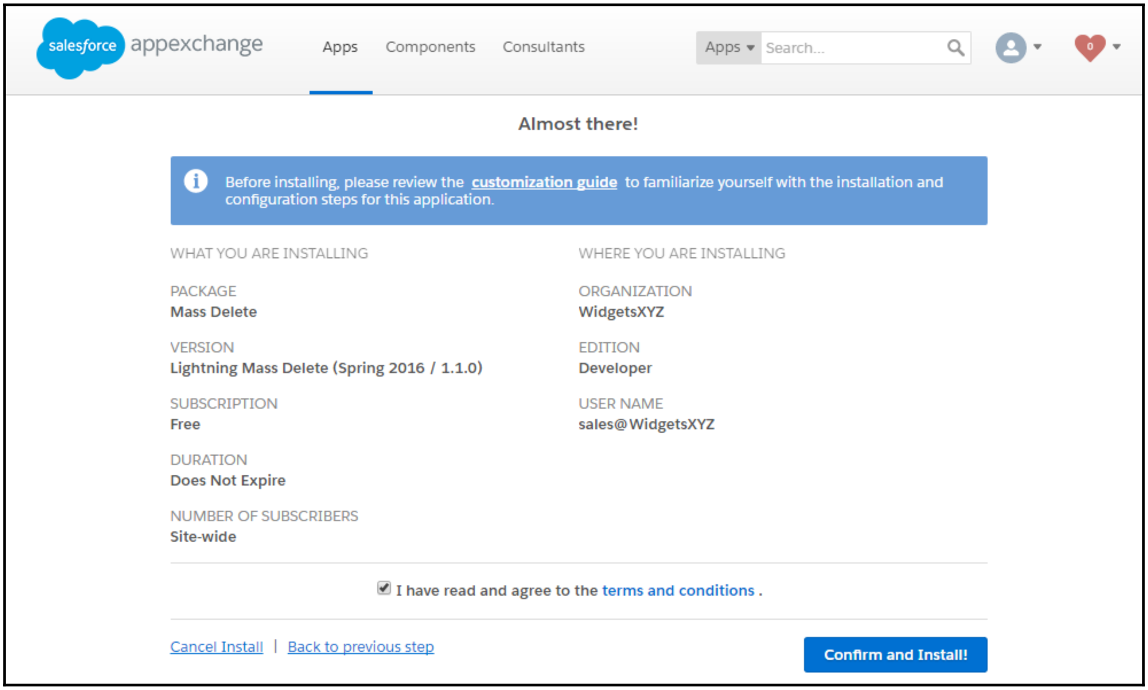


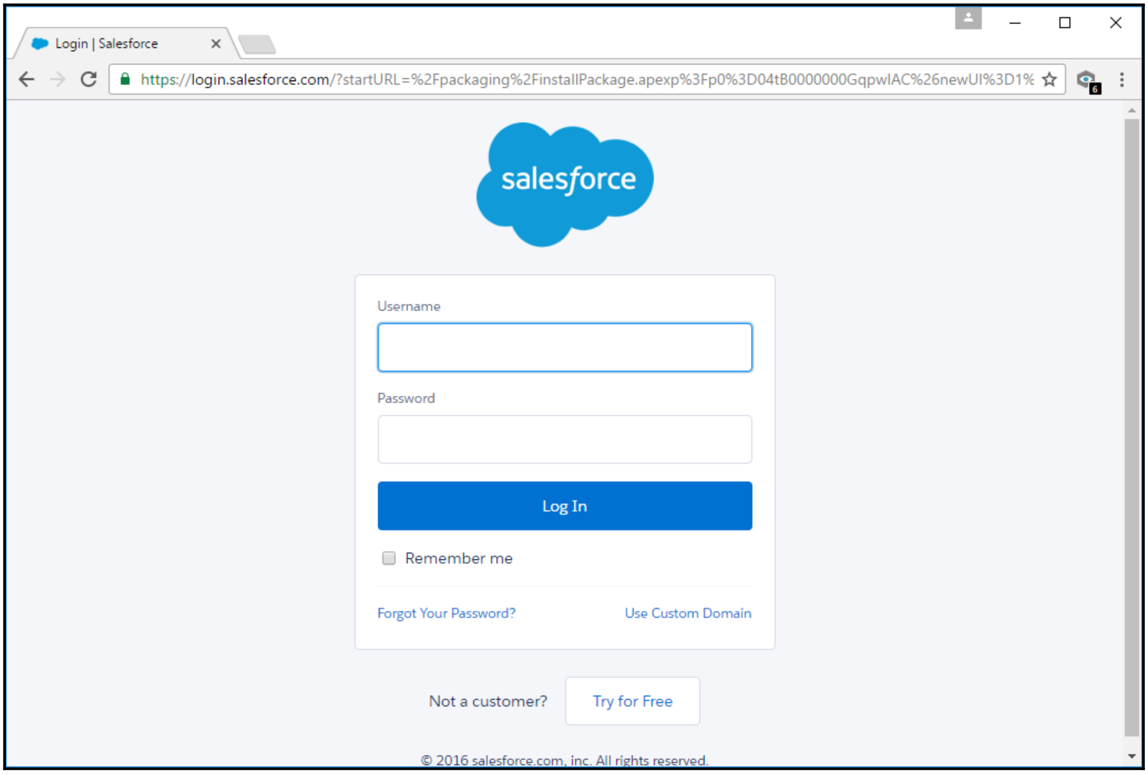

AppExchange is the Busi
https://appexchange.salesforce.com
salesforce appexchange
Apps
Components
Consultants
Apps
Search...
Log In
New to AppExchange? Learn more...
Send me AppExchange news and tips
With great apps come great applause.
Apps for admins
GET THE APPS
Filters
All Prices
All Editions
All Ratings
All Languages
Apply
Clear
Sort By
Popularity
APPS
Home
Popular Apps
New Apps
Free Apps
Collections
Categories
Sales
Lightning Ready Apps Showcased at Dreamforce '16
View More >
LIGHTNING READY
propel
Product Lifecycle Management built 100% on Salesforce
SHARE PRODUCT DATA WITH EVERYONE »
(11)
STORAGE HELPER
(1)
FREE
Try it FREE for 30 days
DRAWLOOP
DOCUMENT GENERATION
(253)
Featured Apps
View More >

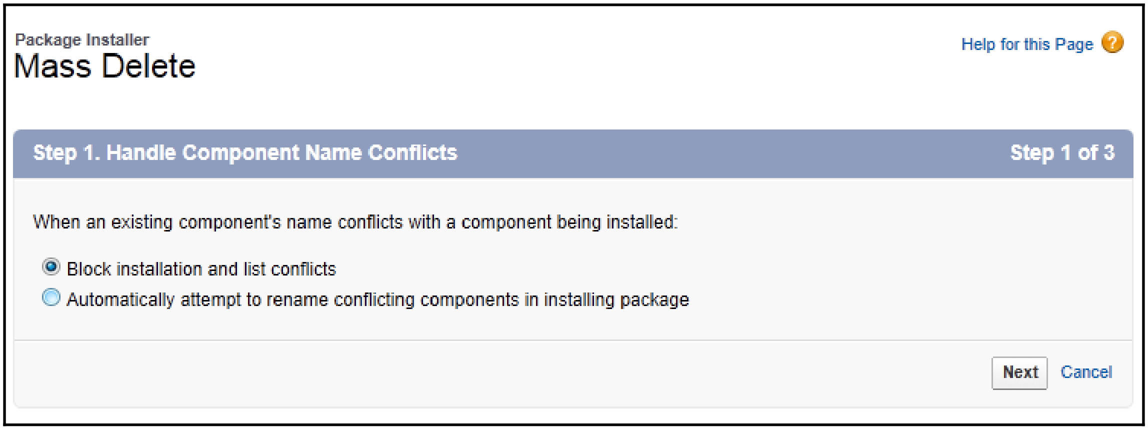

https://appexchange.salesforce.com/listingDetail?listingId=a0N300000016YuDEAU
salesforce appexchange
Apps
Components
Consultants
Apps
Search...
Log In
APP
Lightning Ready
Enterprise & Up
Mass Delete
Mass delete standard fields from a list view.
(37)
Free - Details below
OVERVIEW
DETAILS
REVIEWS 37
PROVIDER
Save
Get It Now
App by Salesforce Labs
A set of custom list buttons that you can add to your standard list views or related lists. Users can select any number of records and delete all of them with a single click.
Take a Test Drive
RELEASED
All Open Leads

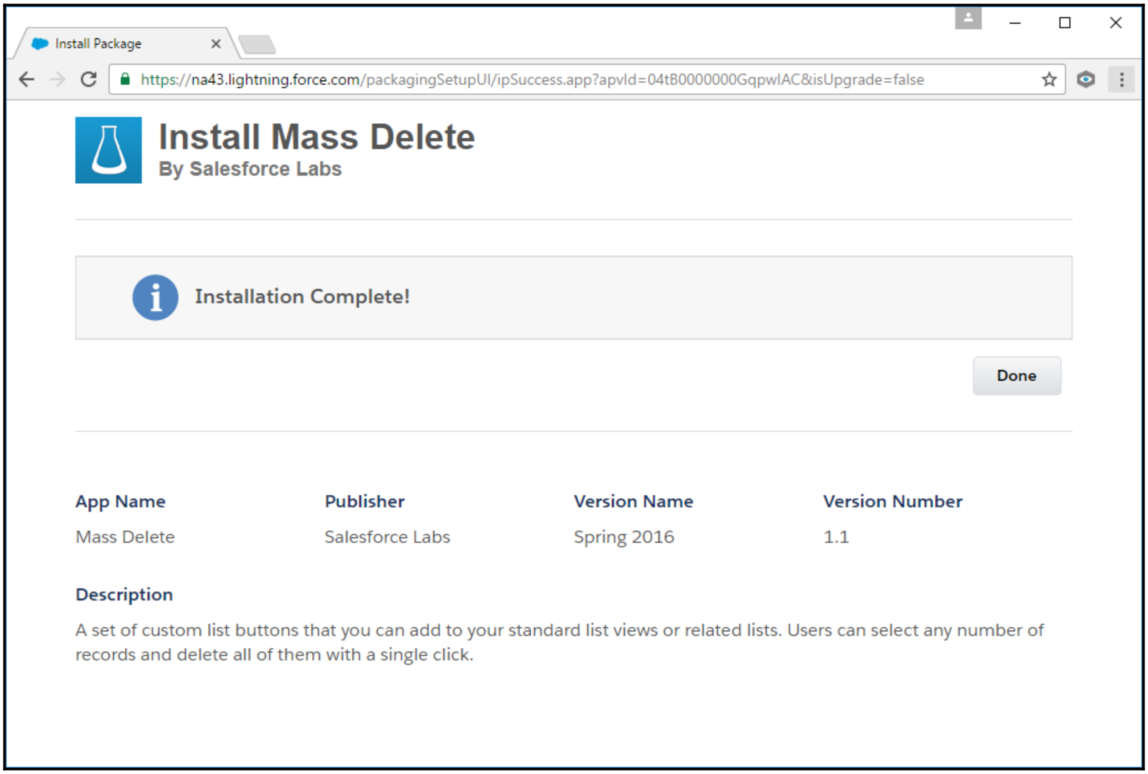

salesforce appexchange
Apps
Components
Consultants
Apps
Search...
Log In
APP
Lightning Ready
Enterprise & Up
Mass Delete
Mass delete standard fields from a list view.
(37)
Free - Details below
OVERVIEW
DETAILS
REVIEWS 37
PROVIDER
Save
Get It Now
To get this app, select one of the below options
Log in to the AppExchange
Use your Salesforce credentials
I don't have a login
Continue as a guest
Even if you plan to install into your sandbox, first login to the AppExchange using your production credentials.

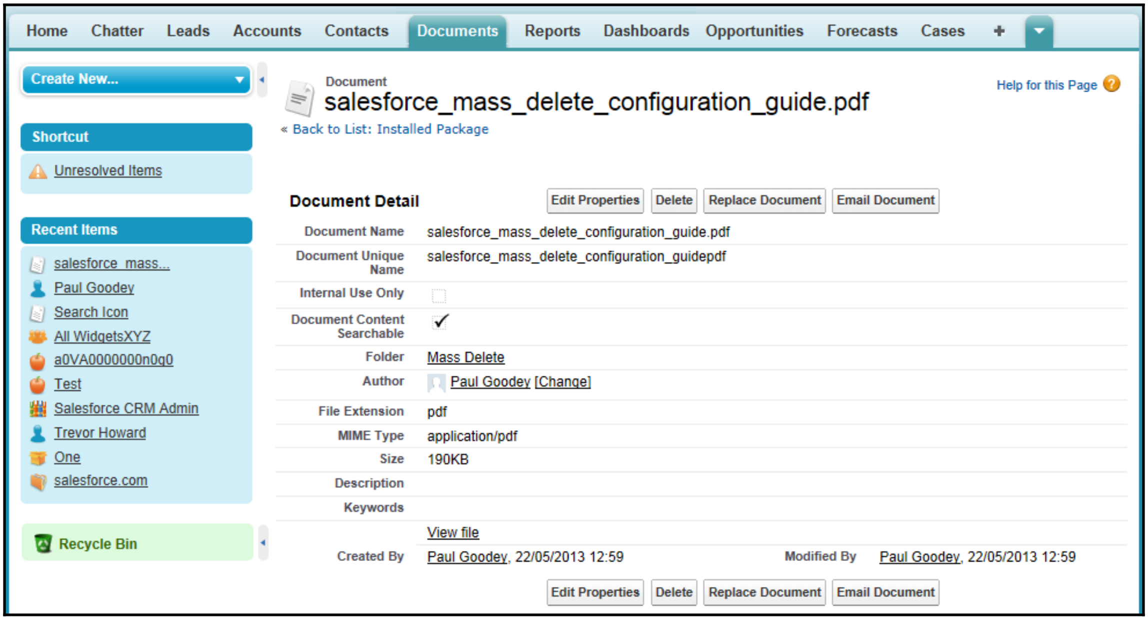

salesforce appexchange
Apps
Components
Consultants
Apps
Search...
APP
Lightning Ready
Enterprise & Up
Mass Delete
Mass delete standard fields from a list view.
(37)
Free - Details below
OVERVIEW
DETAILS
REVIEWS 37
PROVIDER
Save
Get It Now
How would you like to continue?
Install in production
Includes active, trial or developer orgs
Install in sandbox
Test in a copy of your production org


salesforce
appexchange
Apps
Components
Consultants
Apps
Search...
0
Almost there!
Before installing, please review the customization guide to familiarize yourself with the installation and configuration steps for this application.
WHAT YOU ARE INSTALLING
PACKAGE
Mass Delete
VERSION
Lightning Mass Delete (Spring 2016 / 1.1.0)
SUBSCRIPTION
Free
DURATION
Does Not Expire
NUMBER OF SUBSCRIBERS
Site-wide
WHERE YOU ARE INSTALLING
ORGANIZATION
WidgetsXYZ
EDITION
Developer
USER NAME
sales@WidgetsXYZ
I have read and agree to the terms and conditions .
Cancel Install | Back to previous step
Confirm and Install!


Login | Salesforce
https://login.salesforce.com/?startURL=%2Fpackaging%2FinstallPackage.apexp%3Fp0%3D04tB0000000GqpwIAC%26newUI%3D1%
salesforce
Username
Password
Log In
Remember me
Forgot Your Password?
Use Custom Domain
Not a customer?
Try for Free
© 2016 salesforce.com, inc. All rights reserved.


Package Installer
Mass Delete
Help for this Page
Step 1. Handle Component Name Conflicts
Step 1 of 3
When an existing component's name conflicts with a component being installed:
Block installation and list conflicts
Automatically attempt to rename conflicting components in installing package
Next
Cancel


Install Package
https://na43.lightning.force.com/packagingSetupUI/ipSuccess.app?apvId=04tB0000000GqpwIAC&isUpgrade=false
Install Mass Delete
By Salesforce Labs
Installation Complete!
Done
App Name
Mass Delete
Publisher
Salesforce Labs
Version Name
Spring 2016
Version Number
1.1
Description
A set of custom list buttons that you can add to your standard list views or related lists. Users can select any number of records and delete all of them with a single click.


Home
Chatter
Leads
Accounts
Contacts
Documents
Reports
Dashboards
Opportunities
Forecasts
Cases
Create New...
Shortcut
Unresolved Items
Recent Items
salesforce_mass...
Paul Goodey
Search Icon
All WidgetsXYZ
a0VA0000000n0q0
Test
Salesforce CRM Admin
Trevor Howard
One
salesforce.com
Recycle Bin
Document
salesforce_mass_delete_configuration_guide.pdf
« Back to List: Installed Package
Help for this Page
Document Detail
Edit Properties
Delete
Replace Document
Email Document
Document Name salesforce_mass_delete_configuration_guide.pdf
Document Unique Name salesforce_mass_delete_configuration_guidepdf
Internal Use Only
Document Content Searchable
Folder Mass Delete
Author Paul Goodey [Change]
File Extension pdf
MIME Type application/pdf
Size 190KB
Description
Keywords
View file
Created By Paul Goodey, 22/05/2013 12:59
Modified By Paul Goodey, 22/05/2013 12:59
Edit Properties
Delete
Replace Document
Email Document

salesforce.com

Success On Demand.

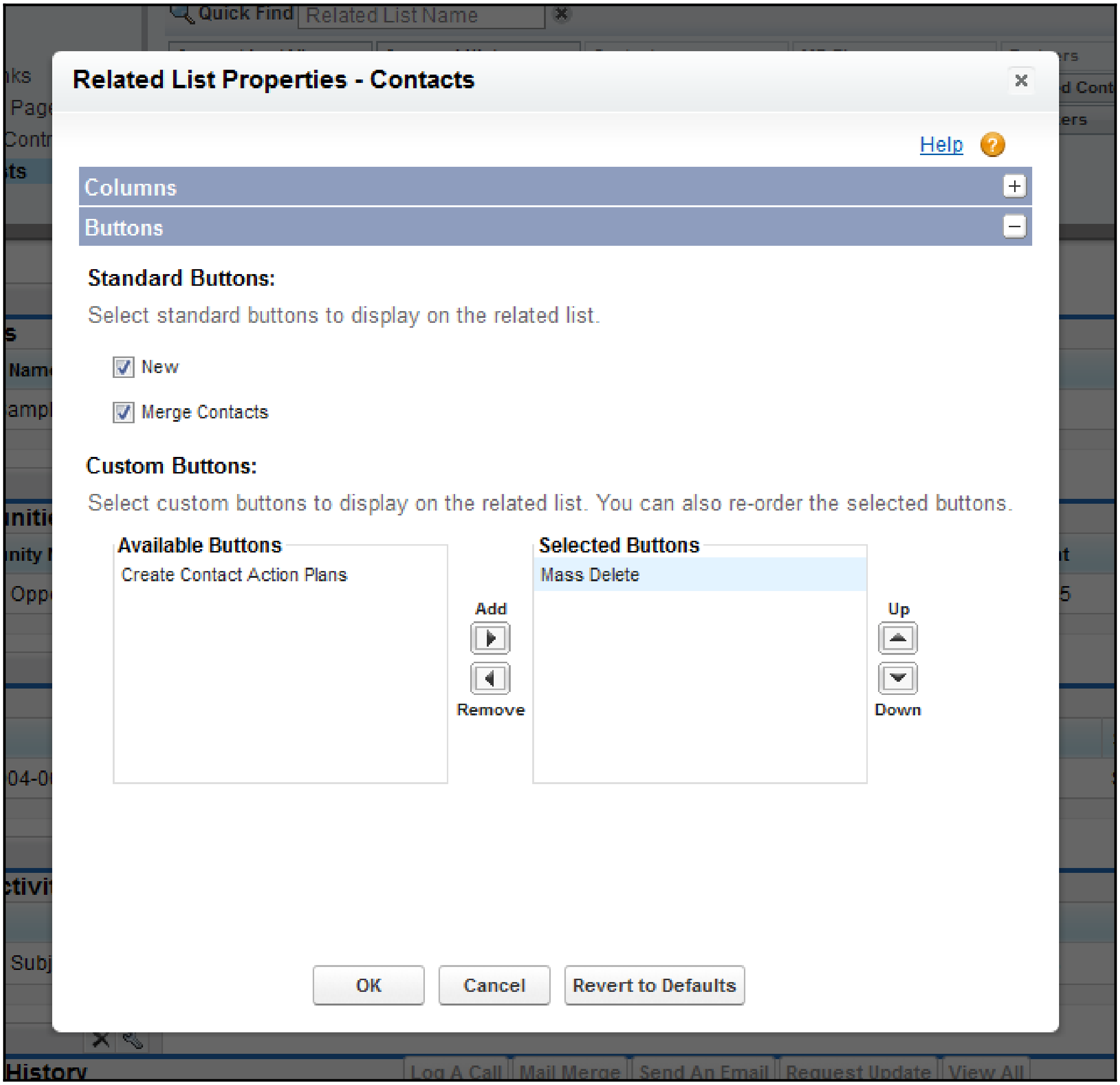
About Mass Delete Custom Buttons

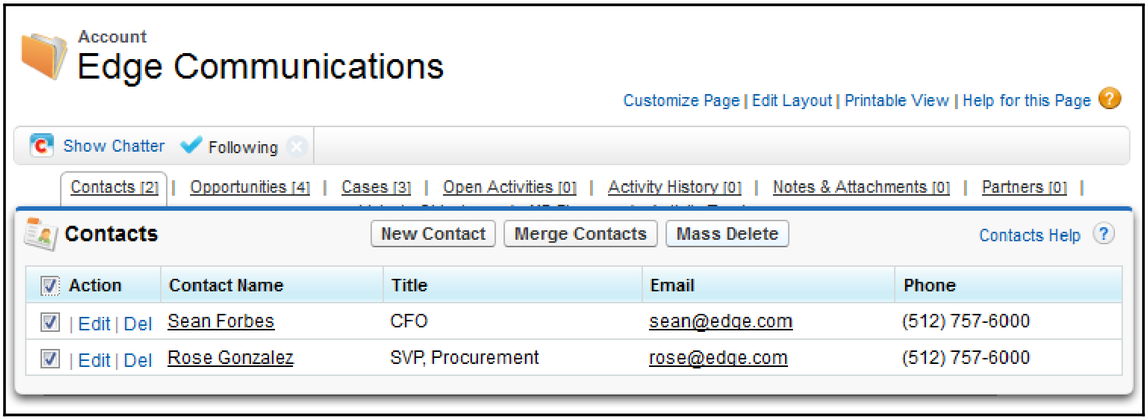
The Mass Delete buttons included in this package are custom list buttons designed to save you time when deleting multiple records in a list view or related list. Each custom button is specifically designed to delete multiple records in a list for a particular standard object such as contacts or cases.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

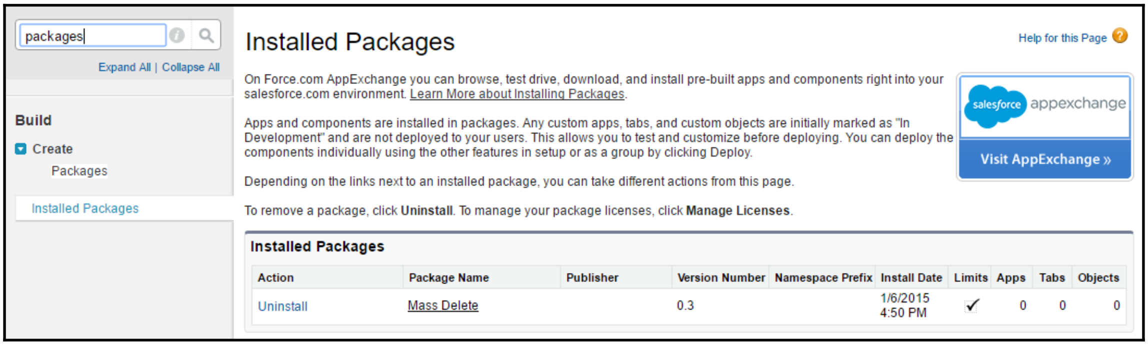
After installing, add the appropriate buttons to your list views and related lists. Each button was created as a list button, making it available on list views and related lists and designed to delete a single type of record. For example, to make the contact mass delete list button available to your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

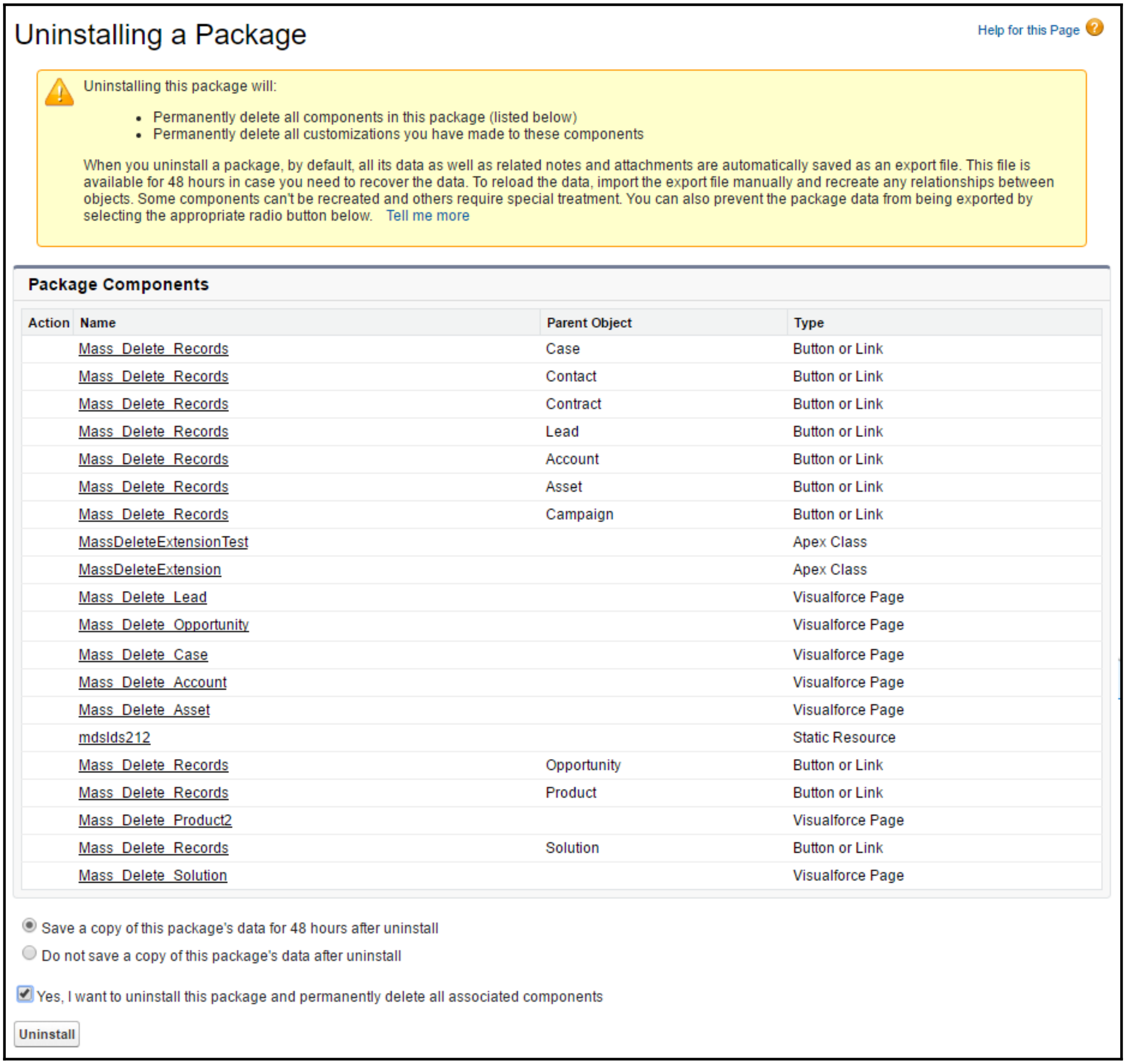
Adding List Buttons to Related Lists

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


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


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


packages
Expand All | Collapse All
Build
Create
Packages
Installed Packages
Installed Packages
Help for this Page
On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. Learn More about Installing Packages.
Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.
Depending on the links next to an installed package, you can take different actions from this page.
To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.
salesforce
appexchange
Visit AppExchange »
Installed Packages
Action
Package Name
Publisher
Version Number
Namespace Prefix
Install Date
Limits
Apps
Tabs
Objects
Uninstall
Mass Delete
0.3
1/6/2015 4:50 PM
0
0
0



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

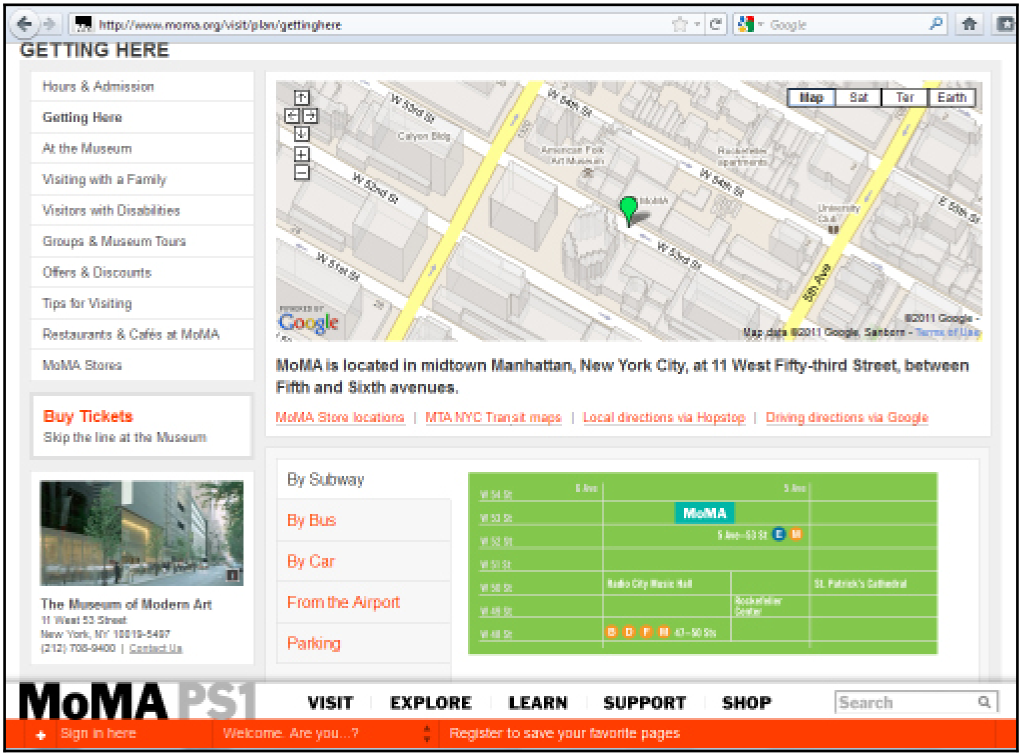
Action	Name	Parent Object	Type
	Mass_Delete_Records	Case	Button or Link
	Mass_Delete_Records	Contact	Button or Link
	Mass_Delete_Records	Contract	Button or Link
	Mass_Delete_Records	Lead	Button or Link
	Mass_Delete_Records	Account	Button or Link
	Mass_Delete_Records	Asset	Button or Link
	Mass_Delete_Records	Campaign	Button or Link
	MassDeleteExtensionTest		Apex Class
	MassDeleteExtension		Apex Class
	Mass_Delete_Lead		Visualforce Page
	Mass_Delete_Opportunity		Visualforce Page
	Mass_Delete_Case		Visualforce Page
	Mass_Delete_Account		Visualforce Page
	Mass_Delete_Asset		Visualforce Page
	mdslds212		Static Resource
	Mass_Delete_Records	Opportunity	Button or Link
	Mass_Delete_Records	Product	Button or Link
	Mass_Delete_Product2		Visualforce Page
	Mass_Delete_Records	Solution	Button or Link
	Mass_Delete_Solution		Visualforce Page

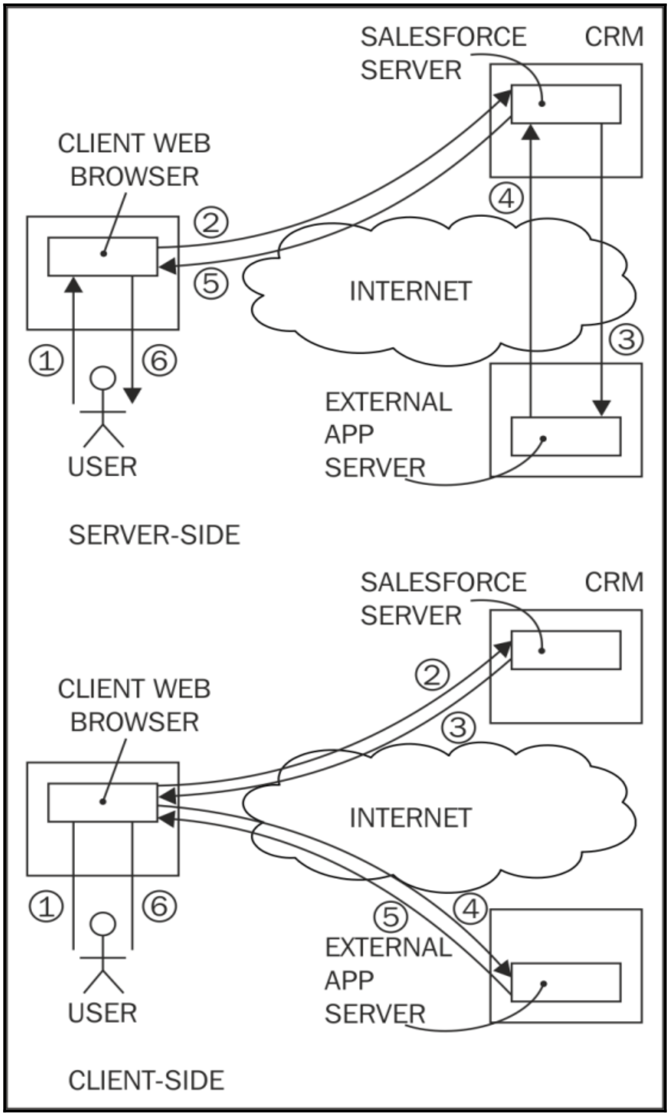
Save a copy of this package's data for 48 hours after uninstall

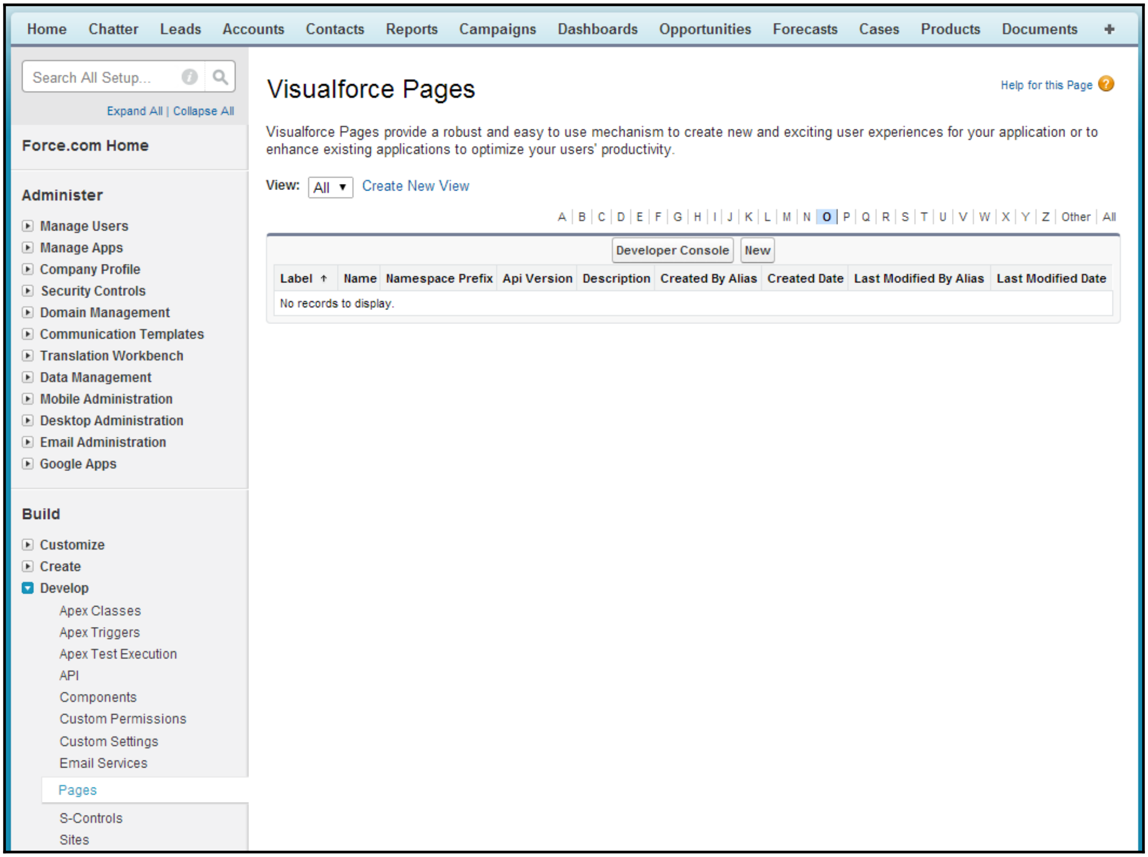
Do not save a copy of this package's data after uninstall

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

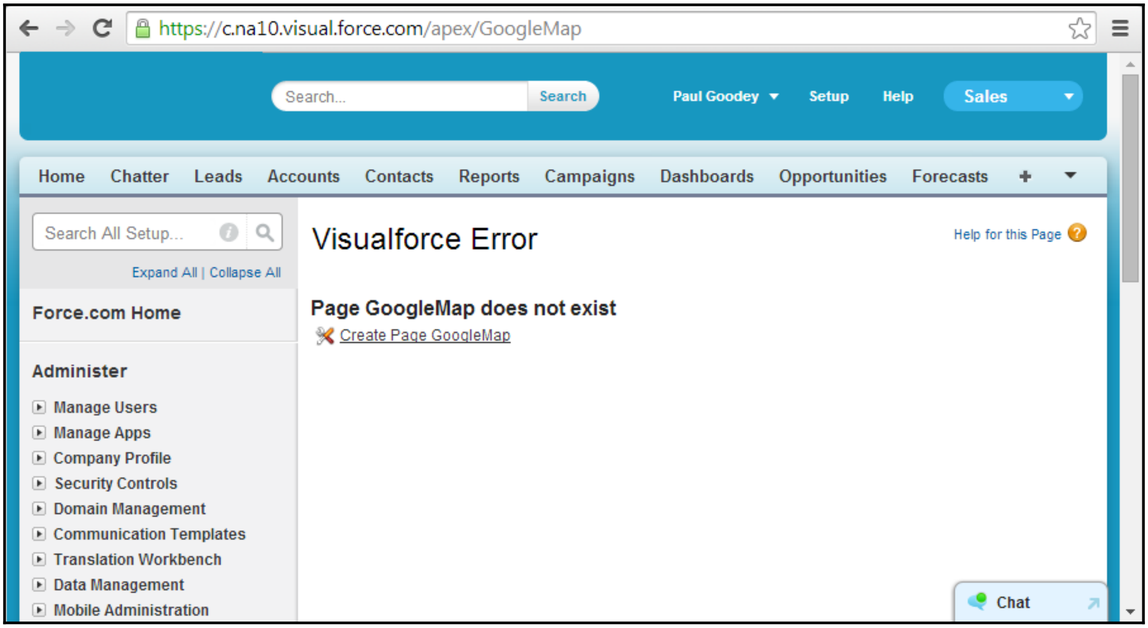
Uninstall

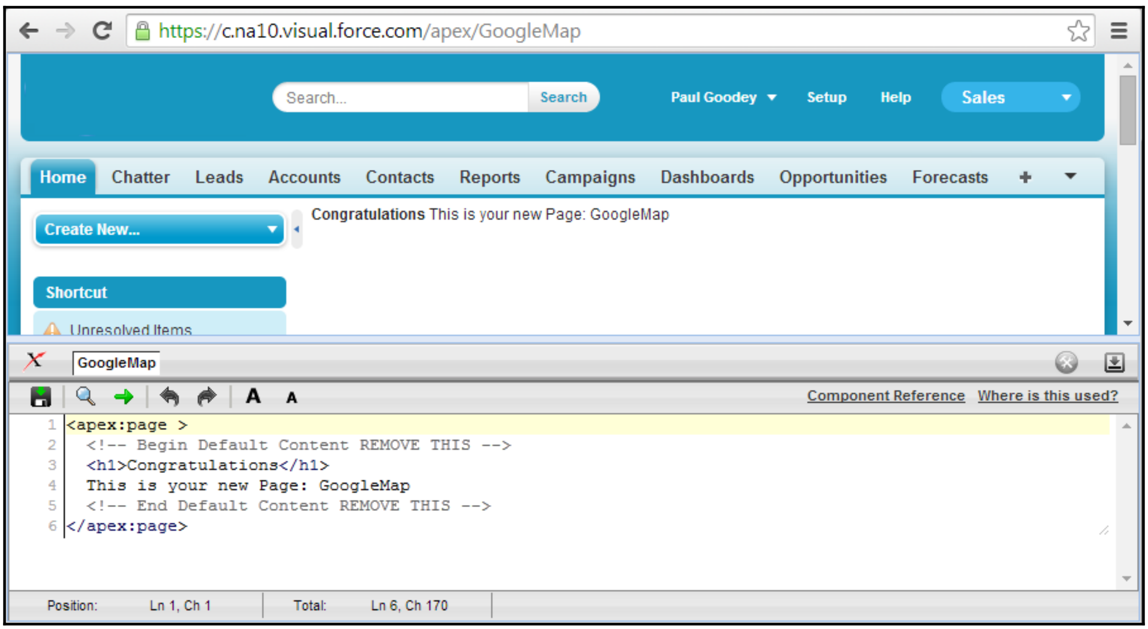

http://www.moma.org/visit/plan/gettinghere
GETTING HERE
Hours & Admission
Getting Here
At the Museum
Visiting with a Family
Visitors with Disabilities
Groups & Museum Tours
Offers & Discounts
Tips for Visiting
Restaurants & Cafés at MoMA
MoMA Stores
Buy Tickets
Skip the line at the Museum
The Museum of Modern Art
11 West 53 Street
New York, NY 10019-5497
(212) 708-9400 | Contact Us
Map
Sat
Ter
Earth
W 53rd St
W 54th St
W 52nd St
W 51st St
W 54th St
W 53rd St
5th Ave
E 55th St
Google
Map data ©2011 Google, Sanborn - Terms of Use
MoMA is located in midtown Manhattan, New York City, at 11 West Fifty-third Street, between Fifth and Sixth avenues.
MoMA Store locations | MTA NYC Transit maps | Local directions via Hopstop | Driving directions via Google
By Subway
By Bus
By Car
From the Airport
Parking
MoMA
Radio City Music Hall
St. Patrick's Cathedral
Rockefeller Center
MoMA PS1
VISIT
EXPLORE
LEARN
SUPPORT
SHOP
Search
Sign in here
Welcome. Are you...?
Register to save your favorite pages

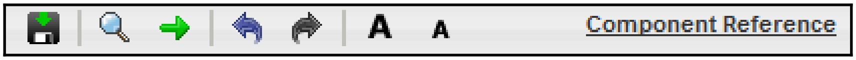

SALESFORCE SERVER
CRM
CLIENT WEB BROWSER
②
④
⑤
INTERNET
③
①
⑥
EXTERNAL APP SERVER
USER
SERVER-SIDE
SALESFORCE SERVER
CRM
②
CLIENT WEB BROWSER
③
INTERNET
①
⑥
⑤
④
EXTERNAL APP SERVER
USER
CLIENT-SIDE

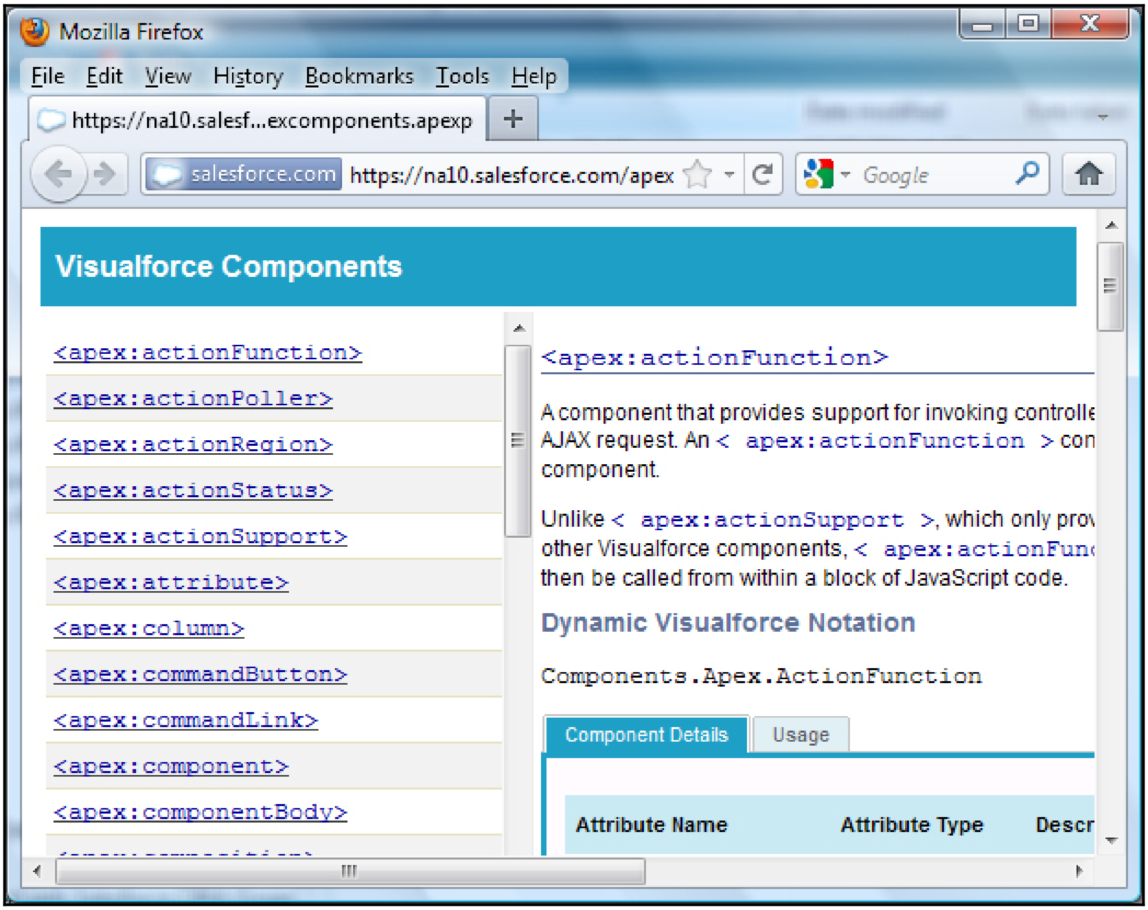

Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Dashboards
Opportunities
Forecasts
Cases
Products
Documents
Search All Setup...
Expand All | Collapse All
Force.com Home
Administer
Manage Users
Manage Apps
Company Profile
Security Controls
Domain Management
Communication Templates
Translation Workbench
Data Management
Mobile Administration
Desktop Administration
Email Administration
Google Apps
Build
Customize
Create
Develop
Apex Classes
Apex Triggers
Apex Test Execution
API
Components
Custom Permissions
Custom Settings
Email Services
Pages
S-Controls
Sites
Visualforce Pages
Help for this Page
Visualforce Pages provide a robust and easy to use mechanism to create new and exciting user experiences for your application or to enhance existing applications to optimize your users' productivity.
View: All
Create New View
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
Developer Console
New
Label
Name
Namespace Prefix
Api Version
Description
Created By Alias
Created Date
Last Modified By Alias
Last Modified Date
No records to display.

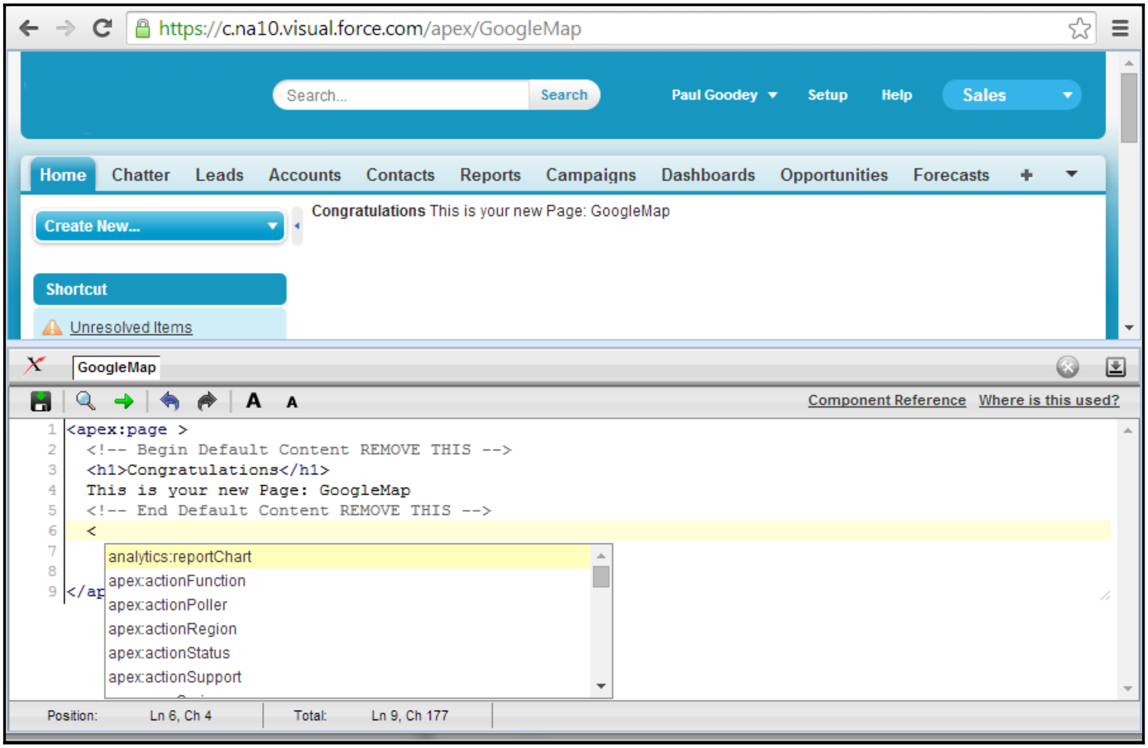

Development Mode

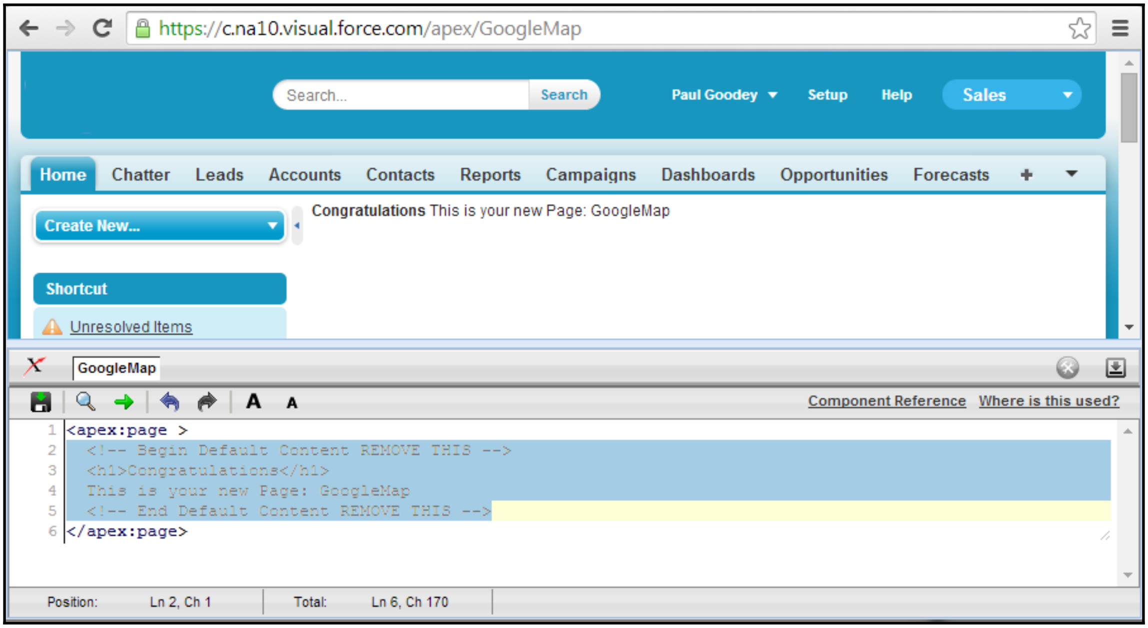

https://c.na10.visual.force.com/apex/GoogleMap
Search...
Search
Paul Goodey
Setup
Help
Sales
Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Dashboards
Opportunities
Forecasts
Search All Setup...
Expand All | Collapse All
Force.com Home
Administer
Manage Users
Manage Apps
Company Profile
Security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

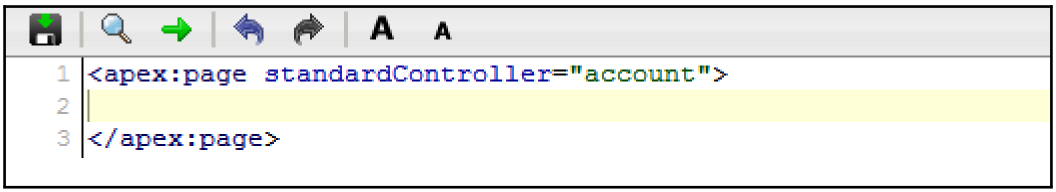

https://c.na10.visual.force.com/apex/GoogleMap
Search...
Search
Paul Goodey
Setup
Help
Sales
Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Dashboards
Opportunities
Forecasts
Create New...
Shortcut
Unresolved Items
Congratulations This is your new Page: GoogleMap
GoogleMap
Component Reference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

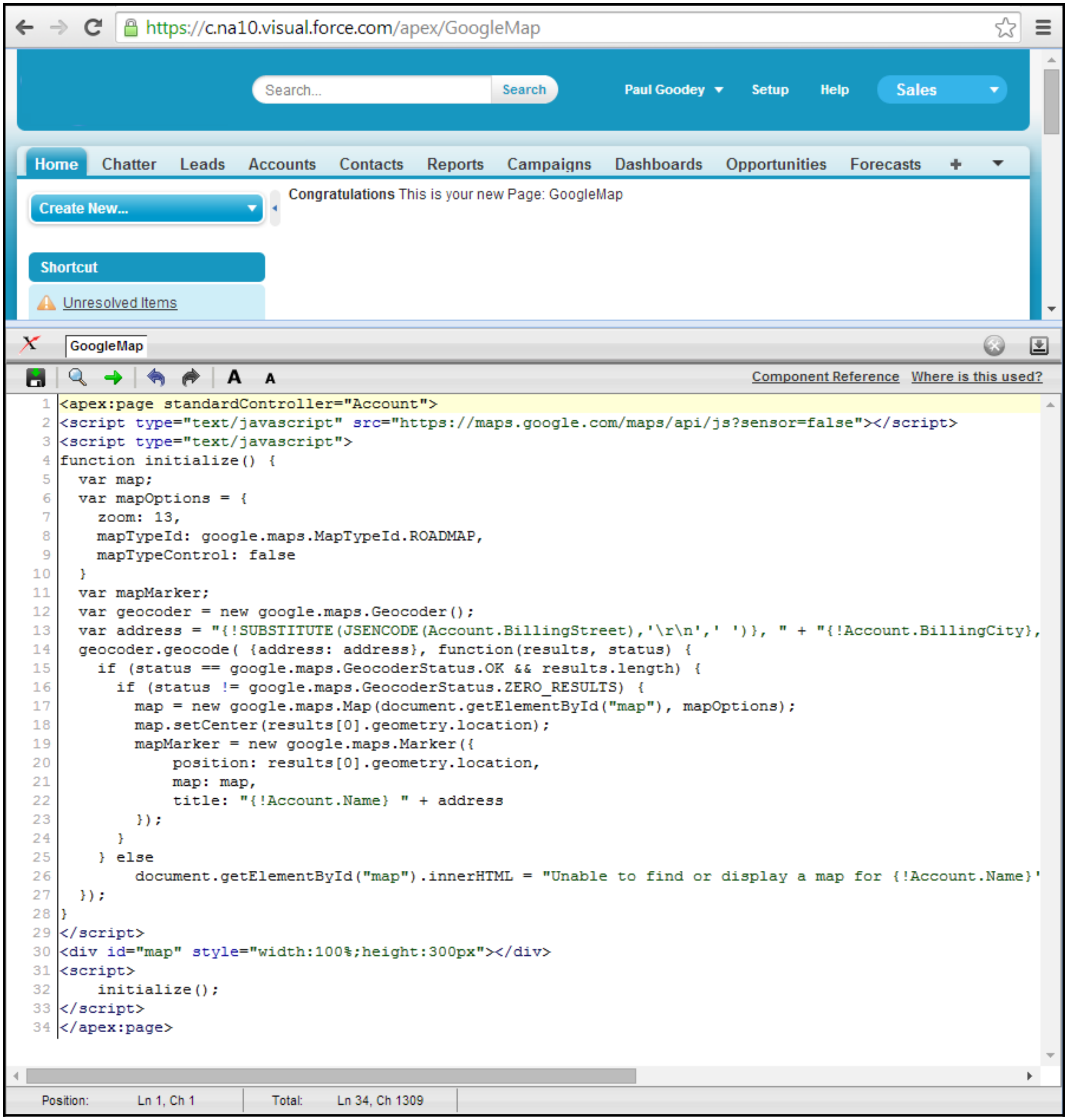

Component Reference

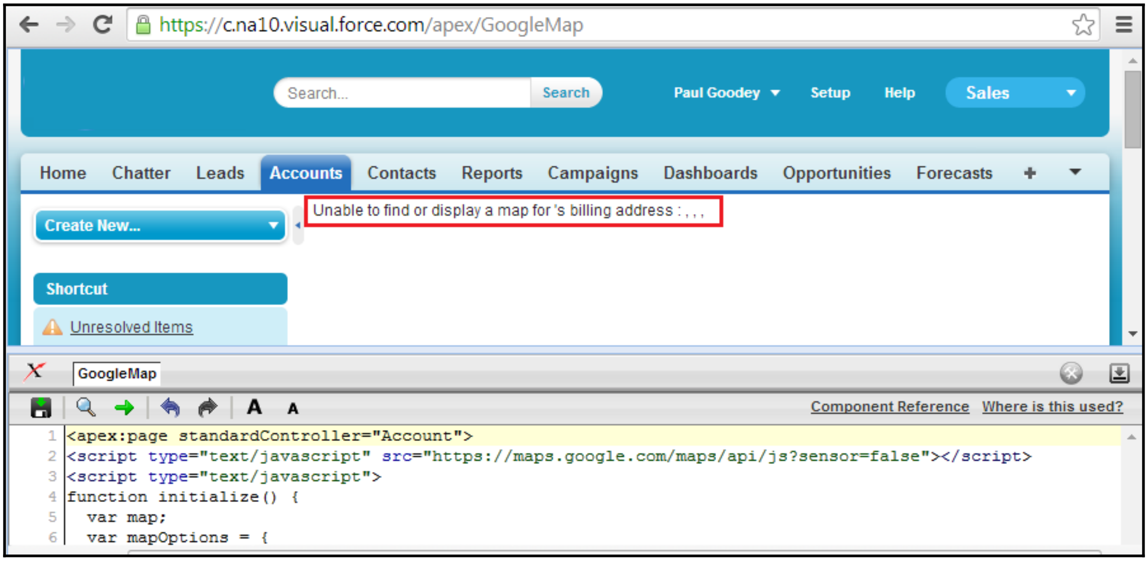

Mozilla Firefox
File Edit View History Bookmarks Tools Help
https://na10.salesf...excomponents.apexp
salesforce.com https://na10.salesforce.com/apex
Google
Visualforce Components
<apex:actionFunction>
<apex:actionPoller>
<apex:actionRegion>
<apex:actionStatus>
<apex:actionSupport>
<apex:attribute>
<apex:column>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

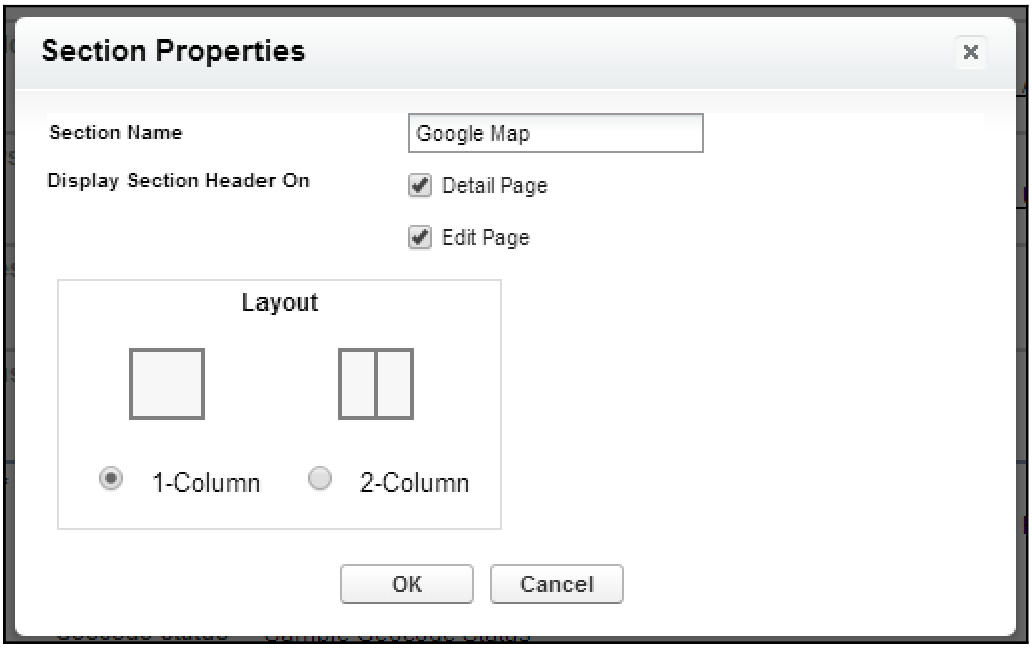

https://c.na10.visual.force.com/apex/GoogleMap
Search...
Search
Paul Goodey
Setup
Help
Sales
Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Dashboards
Opportunities
Forecasts
Create New...
Congratulations This is your new Page: GoogleMap
Shortcut
Unresolved Items
GoogleMap
Component Reference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

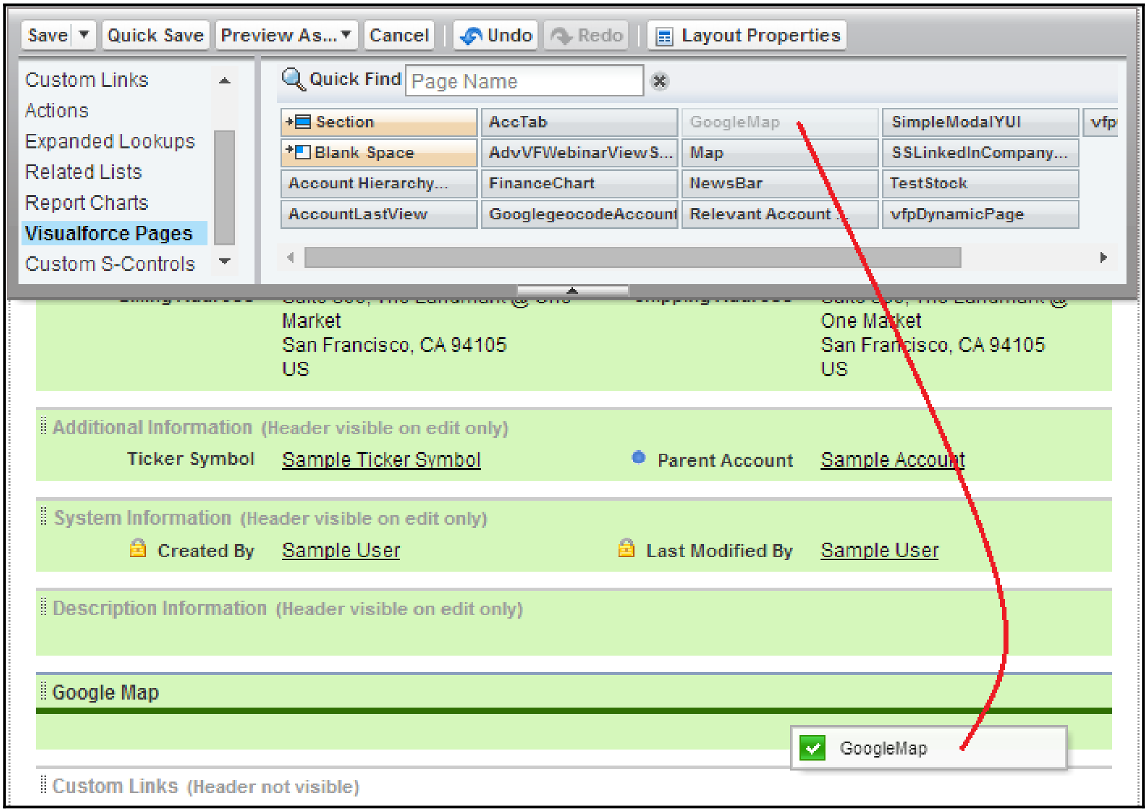

https://c.na10.visual.force.com/apex/GoogleMap
Search...
Search
Paul Goodey
Setup
Help
Sales
Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Dashboards
Opportunities
Forecasts
Create New...
Congratulations This is your new Page: GoogleMap
Shortcut
Unresolved Items
GoogleMap
Component Reference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

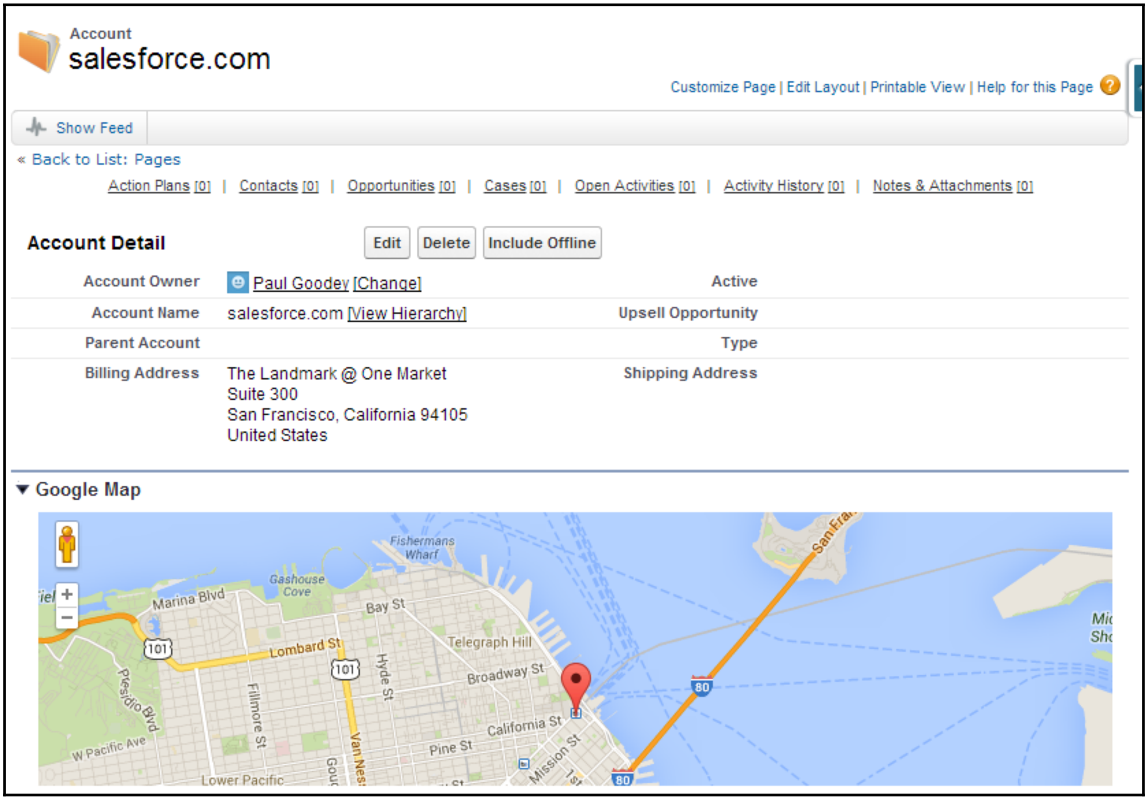

<apex:page standardController="account">
</apex:page>

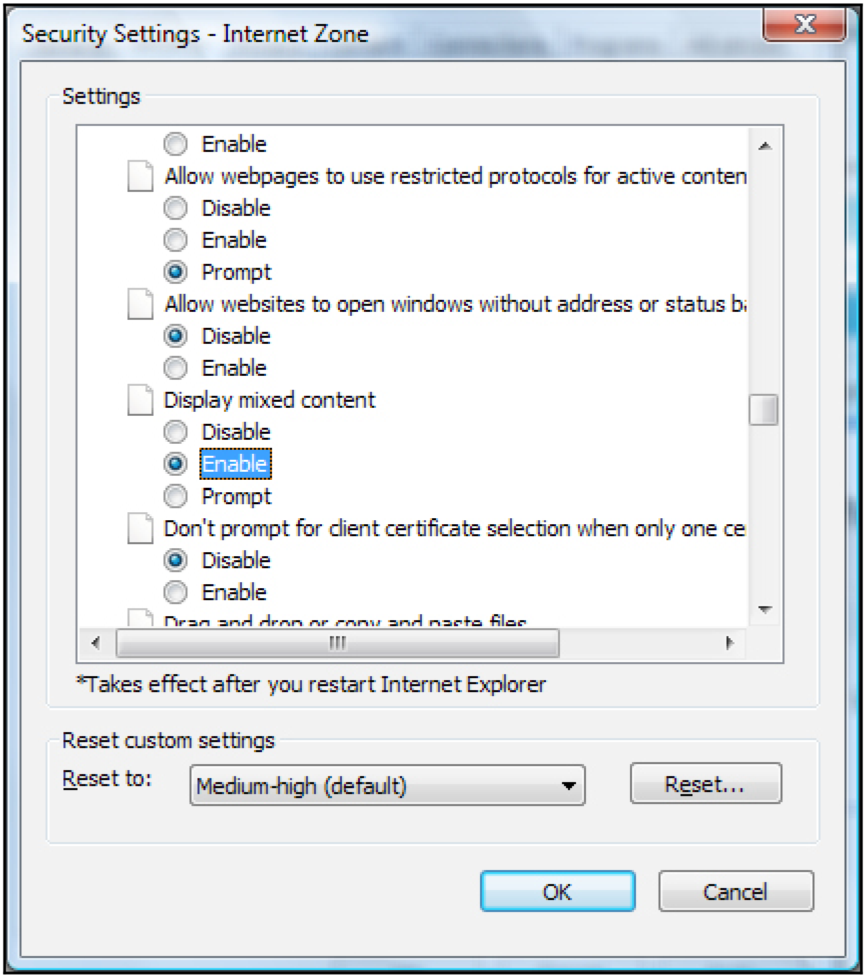

https://c.na10.visual.force.com/apex/GoogleMap
Search...
Search
Paul Goodey
Setup
Help
Sales
Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Dashboards
Opportunities
Forecasts
Create New...
Congratulations This is your new Page: GoogleMap
Shortcut
Unresolved Items
GoogleMap
Component Reference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

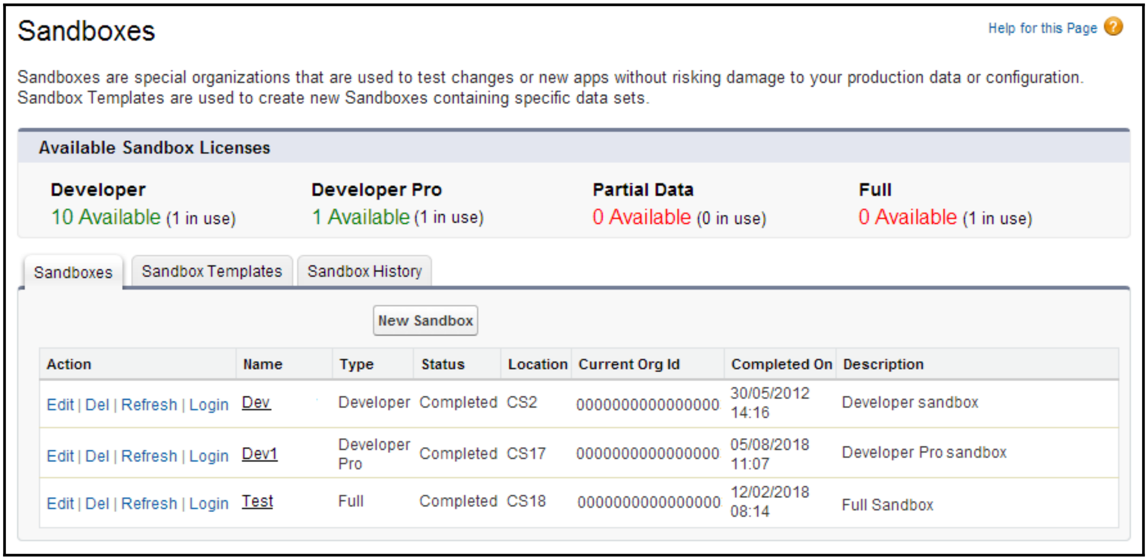

https://c.na10.visual.force.com/apex/GoogleMap
Search...
Search
Paul Goodey
Setup
Help
Sales
Home
Chatter
Leads
Accounts
Contacts
Reports
Campaigns
Dashboards
Opportunities
Forecasts
Unable to find or display a map for 's billing address : , , ,
Create New...
Shortcut
Unresolved Items
GoogleMap
Component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

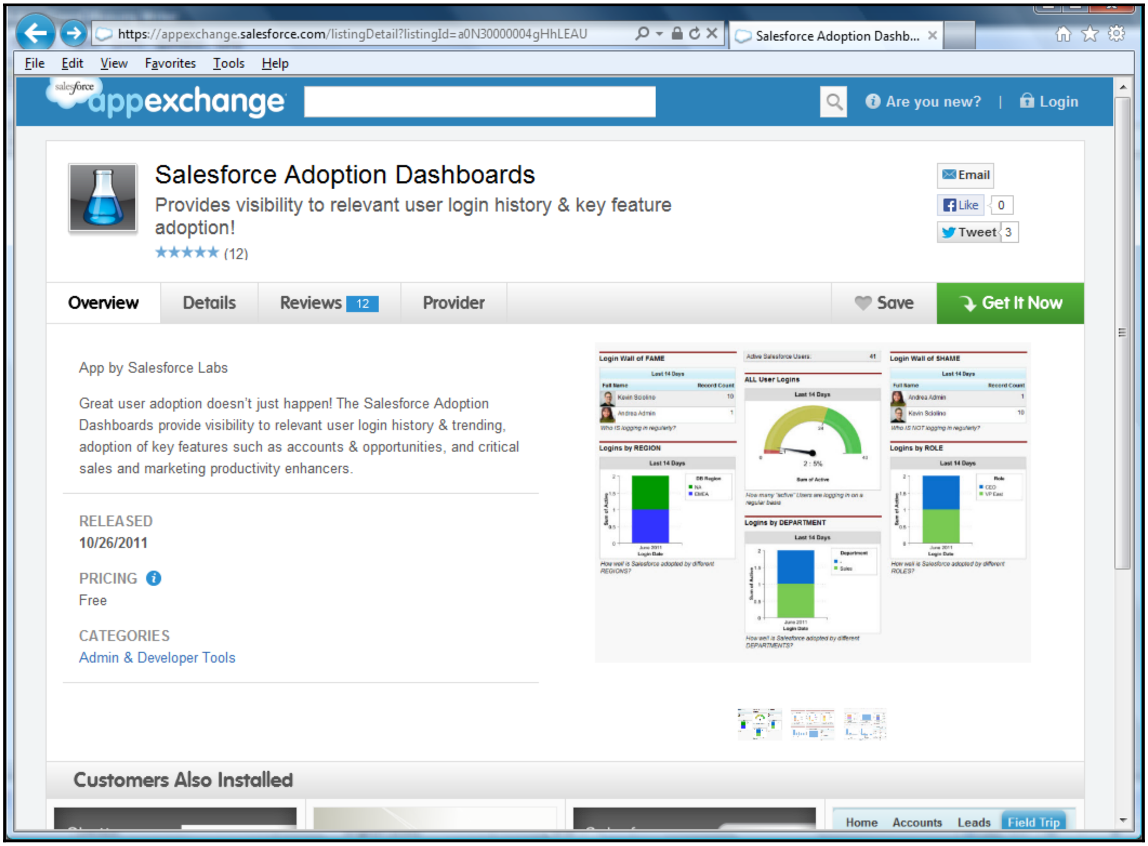

Section Properties
Section Name
Google Map
Display Section Header On
Detail Page
Edit Page
Layout
1-Column
2-Column
OK
Cancel


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


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


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


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

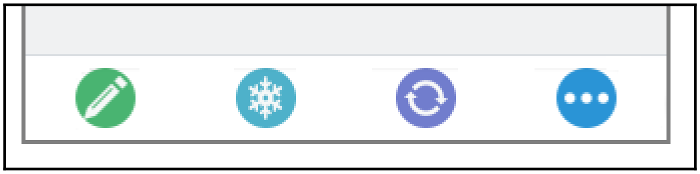

https://appexchange.salesforce.com/listingDetail?listingId=a0N30000004gHhLEAU
Salesforce Adoption Dashb...
File Edit View Favorites Tools Help
salesforce appexchange
Are you new? | Login
Salesforce Adoption Dashboards
Provides visibility to relevant user login history & key feature adoption!
(12)
Email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

Chapter 10: Administrating the Mobile Features of Salesforce CRM

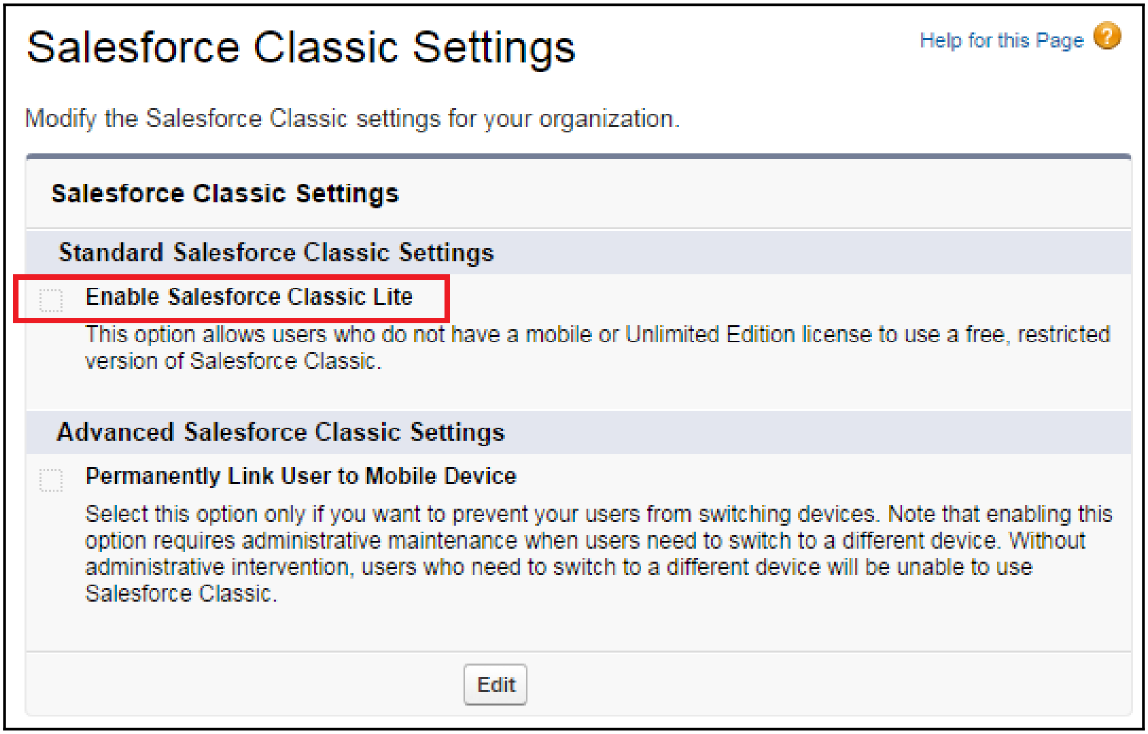
The available action icons depend on the user and organization. To open the action menu with all available actions for the current user, tap the More Actions icon.

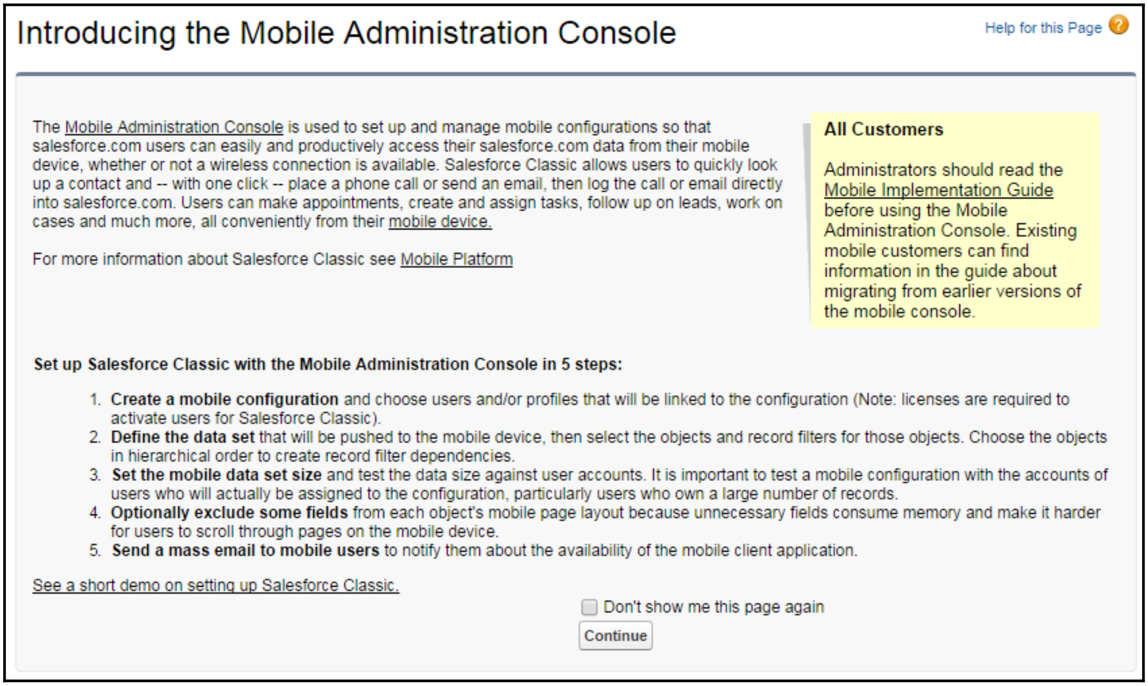
The icons represent the following actions.

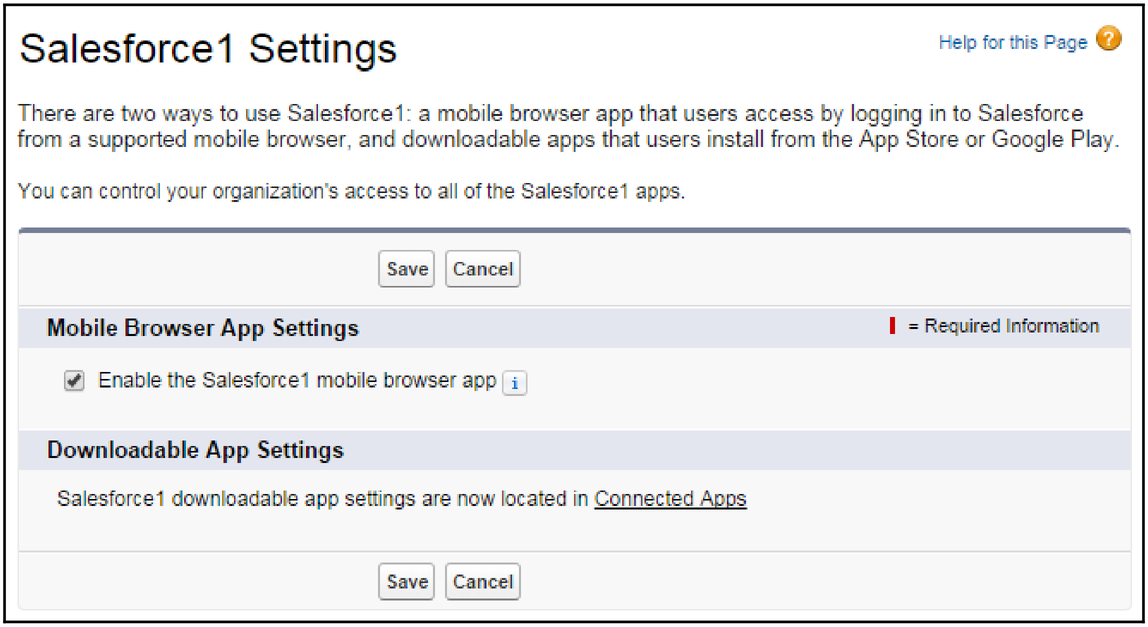
Action Icon	Action
	Edit the user record
	Freeze or unfreeze the user account
	Reset the user's password
	Deactivate or activate the user account
	Assign permission sets to the user
	Email the user
	Call the user or log a call made outside of the SalesforceA app.




Salesforce Classic User


Salesforce Classic Settings
Help for this Page
Modify the Salesforce Classic settings for your organization.
Salesforce Classic Settings
Standard Salesforce Classic Settings
Enable Salesforce Classic Lite
This option allows users who do not have a mobile or Unlimited Edition license to use a free, restricted version of Salesforce Classic.
Advanced Salesforce Classic Settings
Permanently Link User to Mobile Device
Select this option only if you want to prevent your users from switching devices. Note that enabling this option requires administrative maintenance when users need to switch to a different device. Without administrative intervention, users who need to switch to a different device will be unable to use Salesforce Classic.
Edit


Introducing the Mobile Administration Console
Help for this Page
The Mobile Administration Console is used to set up and manage mobile configurations so that salesforce.com users can easily and productively access their salesforce.com data from their mobile device, whether or not a wireless connection is available. Salesforce Classic allows users to quickly look up a contact and -- with one click -- place a phone call or send an email, then log the call or email directly into salesforce.com. Users can make appointments, create and assign tasks, follow up on leads, work on cases and much more, all conveniently from their mobile device.
For more information about Salesforce Classic see Mobile Platform
All Customers
Administrators should read the Mobile Implementation Guide before using the Mobile Administration Console. Existing mobile customers can find information in the guide about migrating from earlier versions of the mobile console.
Set up Salesforce Classic with the Mobile Administration Console in 5 steps:
1. Create a mobile configuration and choose users and/or profiles that will be linked to the configuration (Note: licenses are required to activate users for Salesforce Classic).
2. Define the data set that will be pushed to the mobile device, then select the objects and record filters for those objects. Choose the objects in hierarchical order to create record filter dependencies.
3. Set the mobile data set size and test the data size against user accounts. It is important to test a mobile configuration with the accounts of users who will actually be assigned to the configuration, particularly users who own a large number of records.
4. Optionally exclude some fields from each object's mobile page layout because unnecessary fields consume memory and make it harder for users to scroll through pages on the mobile device.
5. Send a mass email to mobile users to notify them about the availability of the mobile client application.
See a short demo on setting up Salesforce Classic.
Don't show me this page again
Continue


Salesforce1 Settings
Help for this Page
There are two ways to use Salesforce1: a mobile browser app that users access by logging in to Salesforce from a supported mobile browser, and downloadable apps that users install from the App Store or Google Play.
You can control your organization's access to all of the Salesforce1 apps.
Save
Cancel
Mobile Browser App Settings
= Required Information
Enable the Salesforce1 mobile browser app
i
Downloadable App Settings
Salesforce1 downloadable app settings are now located in Connected Apps
Save
Cancel

Connected Apps

Help for this Page

Manage the apps that connect to your Salesforce organization.

App Access Settings Edit

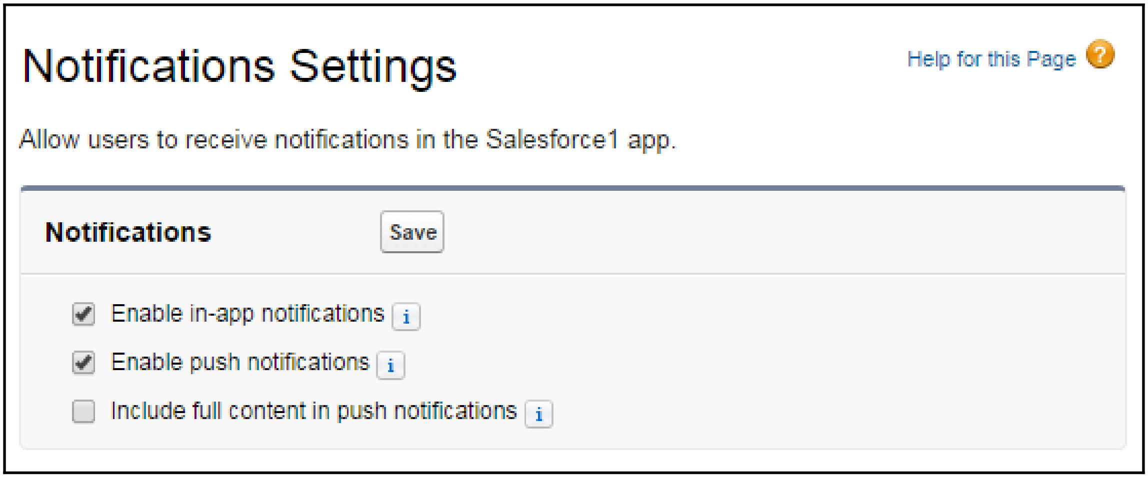
Allow users to install canvas personal apps

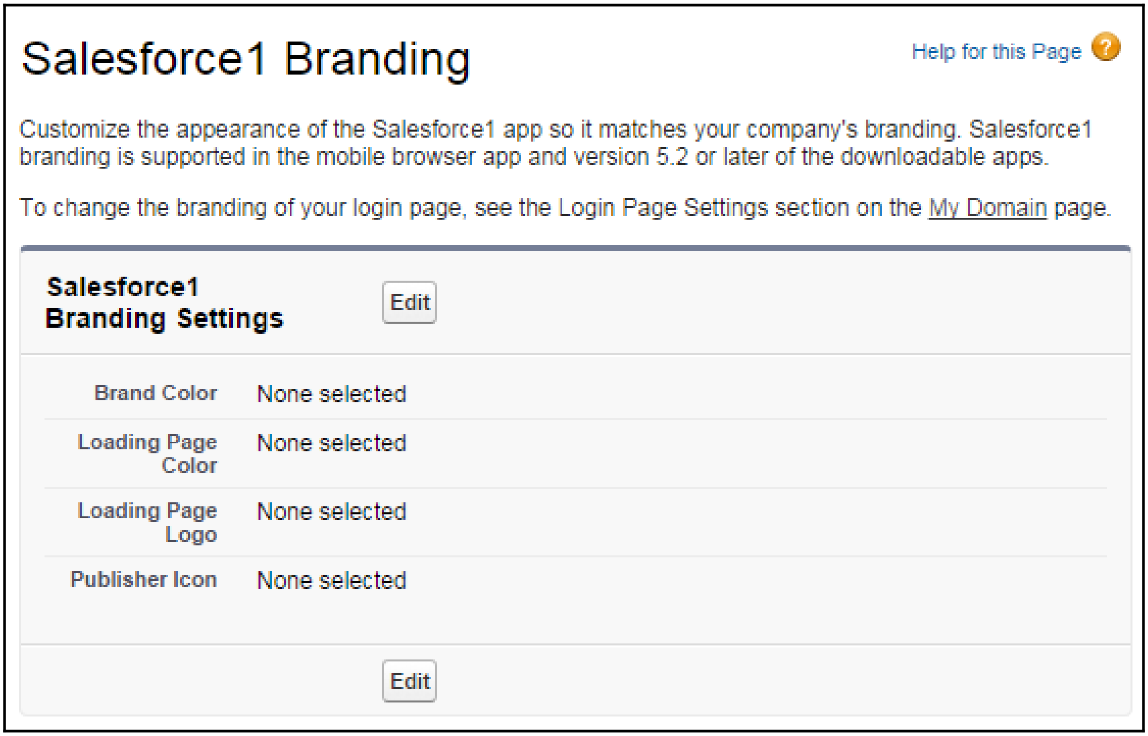
View: All ▾ Create New View

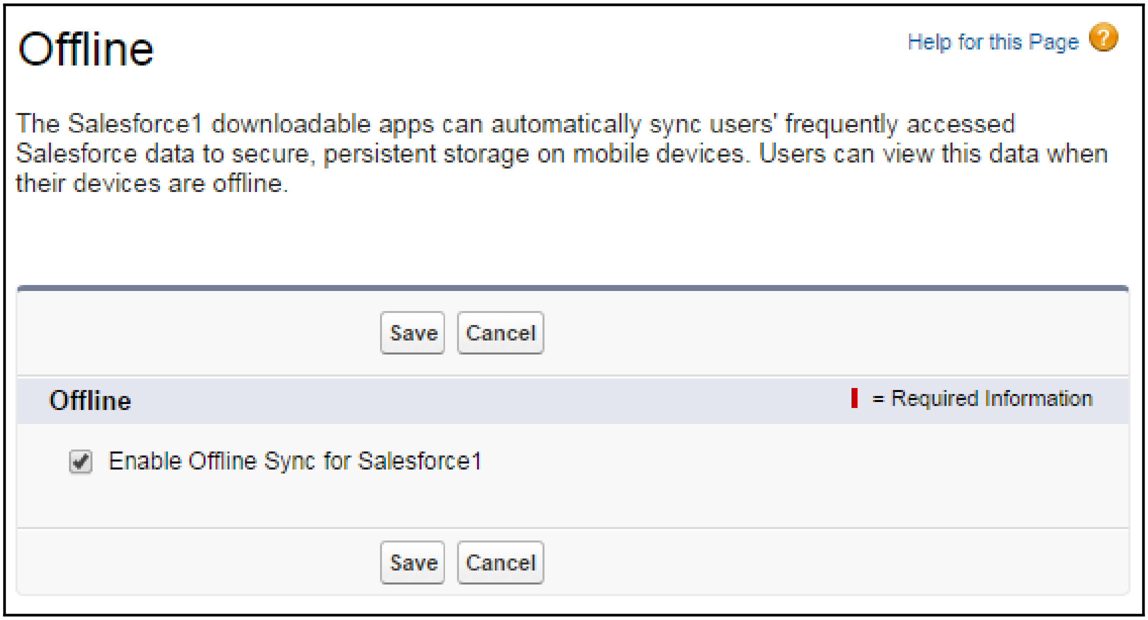
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

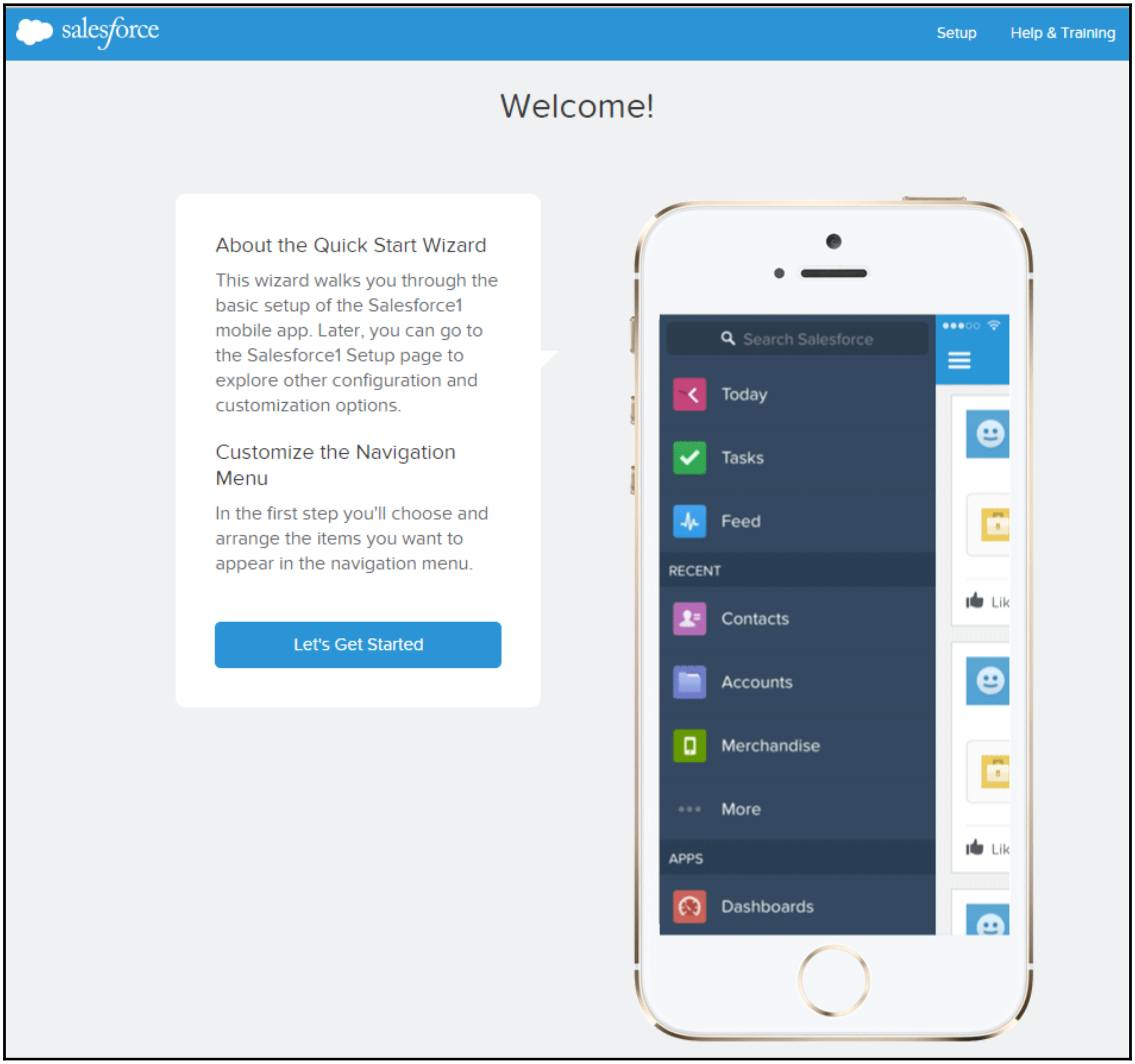
Action	Master Label ↑	Application Version	Permitted Users
Edit	Ant Migration Tool	4.0	All users may self-authorize
Edit	Chatter Desktop	7.0	All users may self-authorize
Edit	Chatter Mobile for BlackBerry	7.0	All users may self-authorize
Edit	Dataloader Bulk	6.0	All users may self-authorize
Edit	Dataloader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

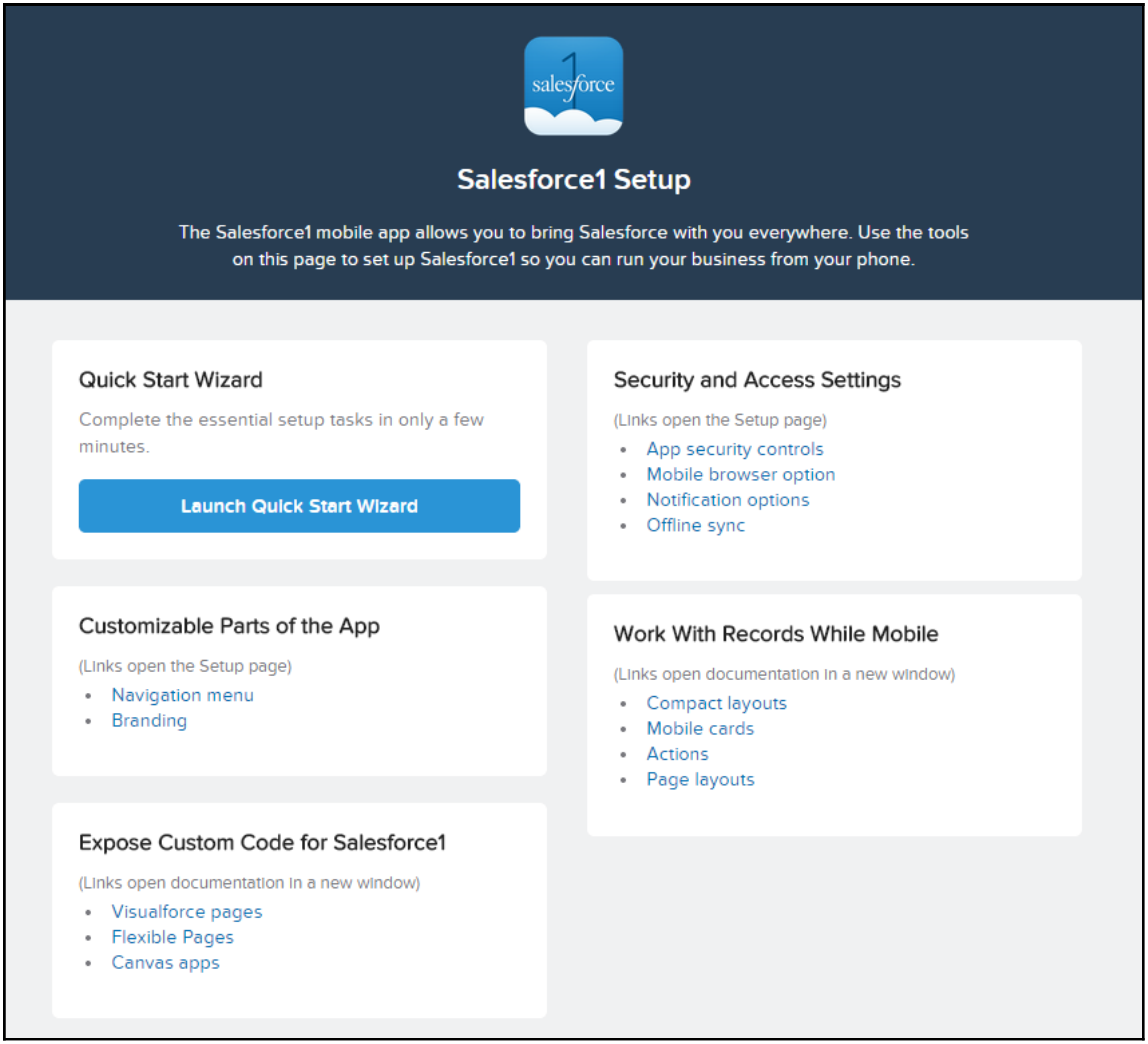
Show me fewer ▲ records per list page

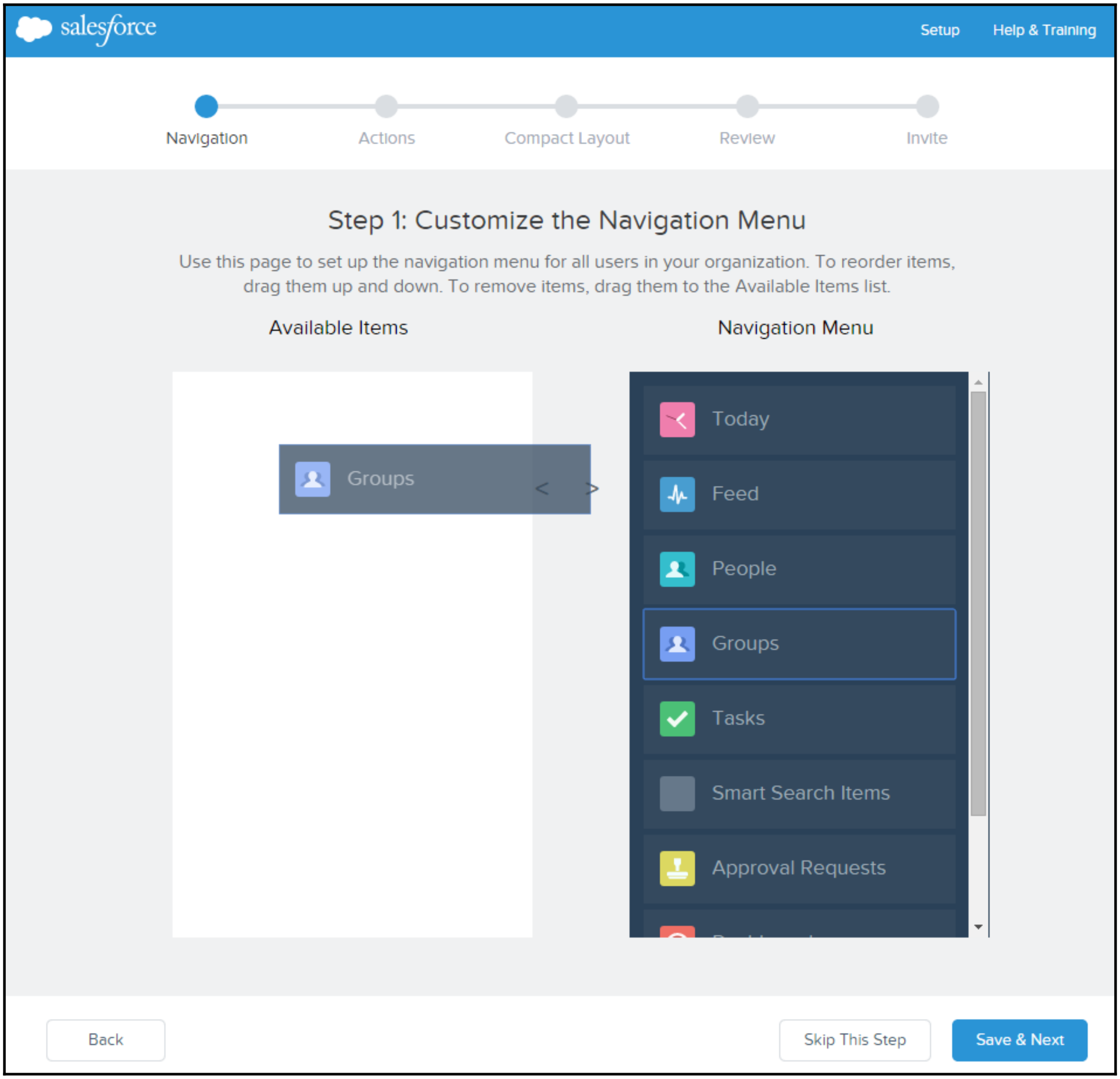

Notifications Settings
Help for this Page
Allow users to receive notifications in the Salesforce1 app.
Notifications
Save
Enable in-app notifications
Enable push notifications
Include full content in push notifications

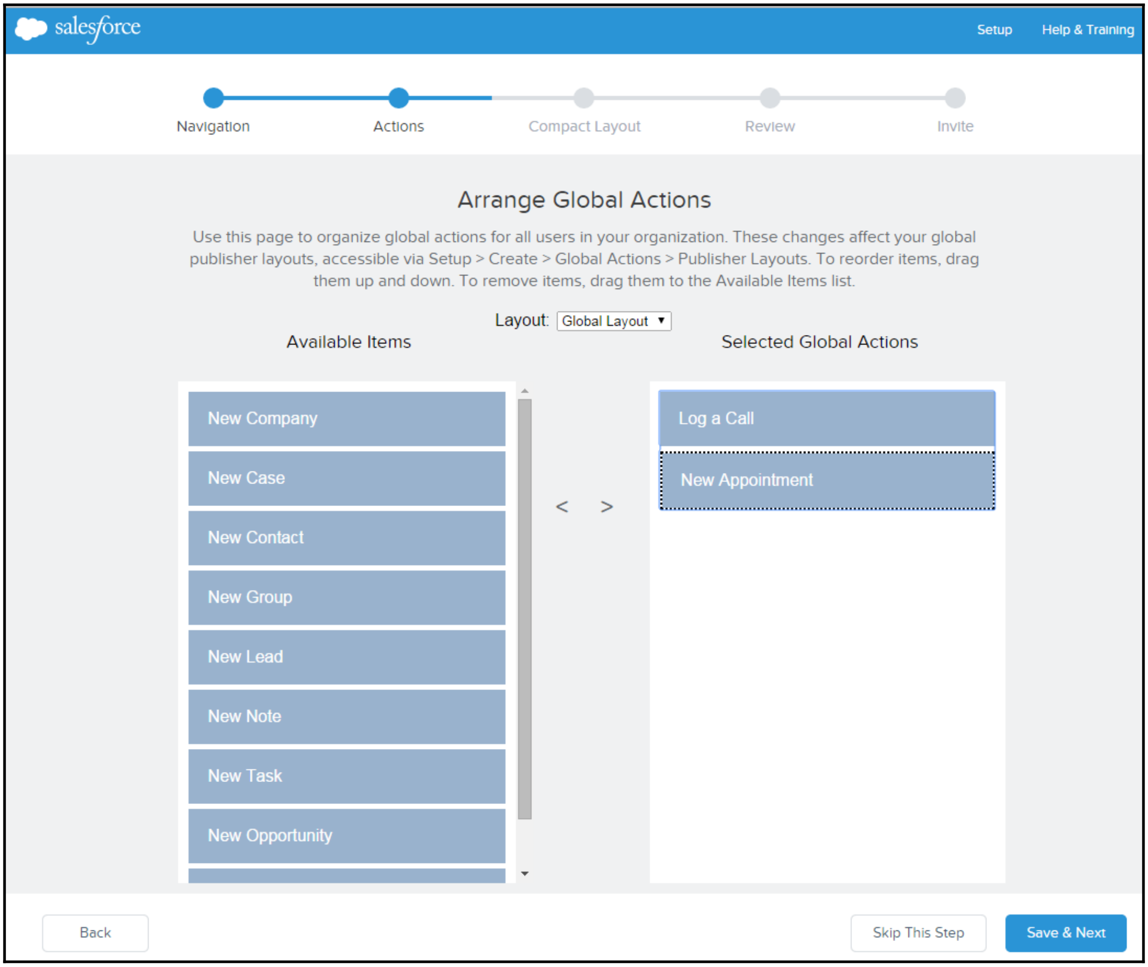

Salesforce1 Branding
Help for this Page
Customize the appearance of the Salesforce1 app so it matches your company's branding. Salesforce1 branding is supported in the mobile browser app and version 5.2 or later of the downloadable apps.
To change the branding of your login page, see the Login Page Settings section on the My Domain page.
Salesforce1 Branding Settings
Edit
Brand Color
None selected
Loading Page Color
None selected
Loading Page Logo
None selected
Publisher Icon
None selected
Edit

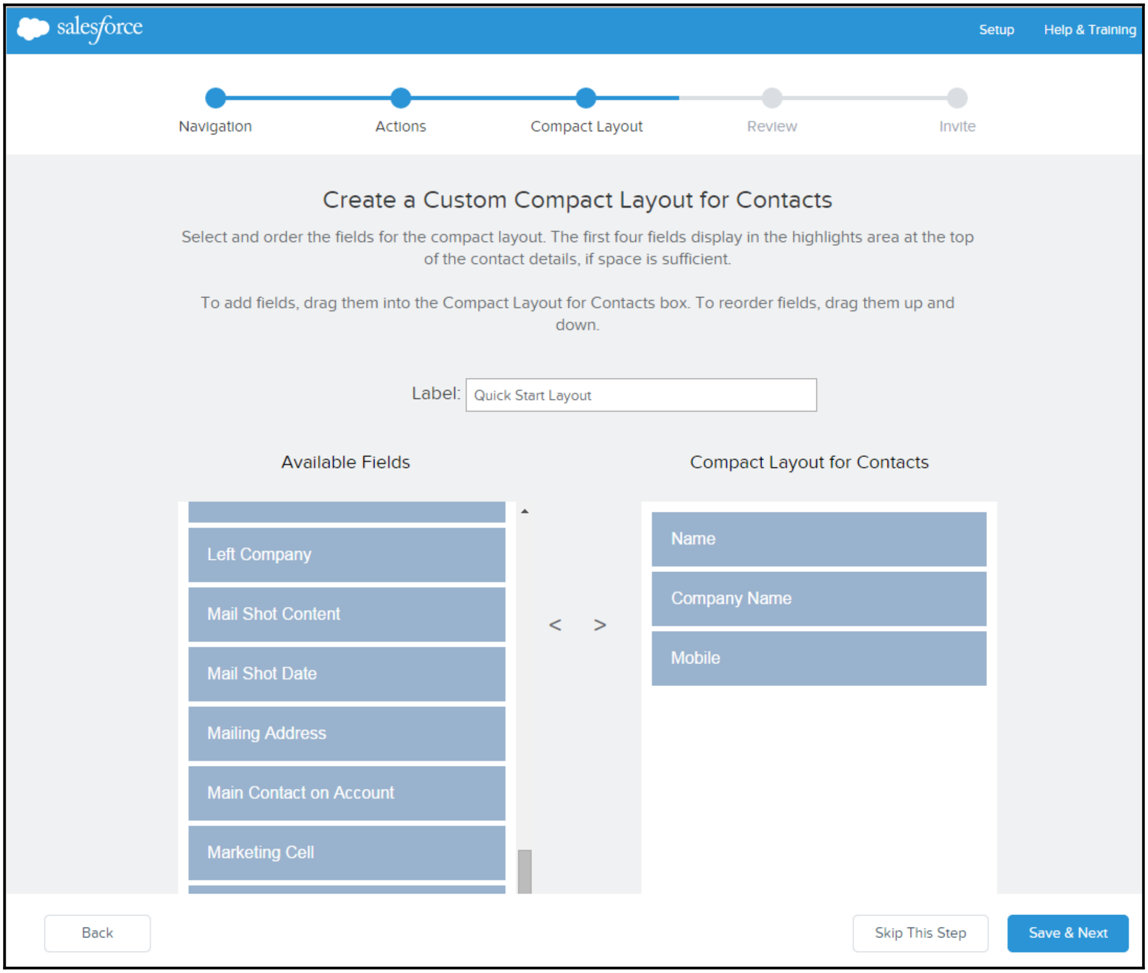

Offline
Help for this Page
The Salesforce1 downloadable apps can automatically sync users' frequently accessed Salesforce data to secure, persistent storage on mobile devices. Users can view this data when their devices are offline.
Save
Cancel
Offline
= Required Information
Enable Offline Sync for Salesforce1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

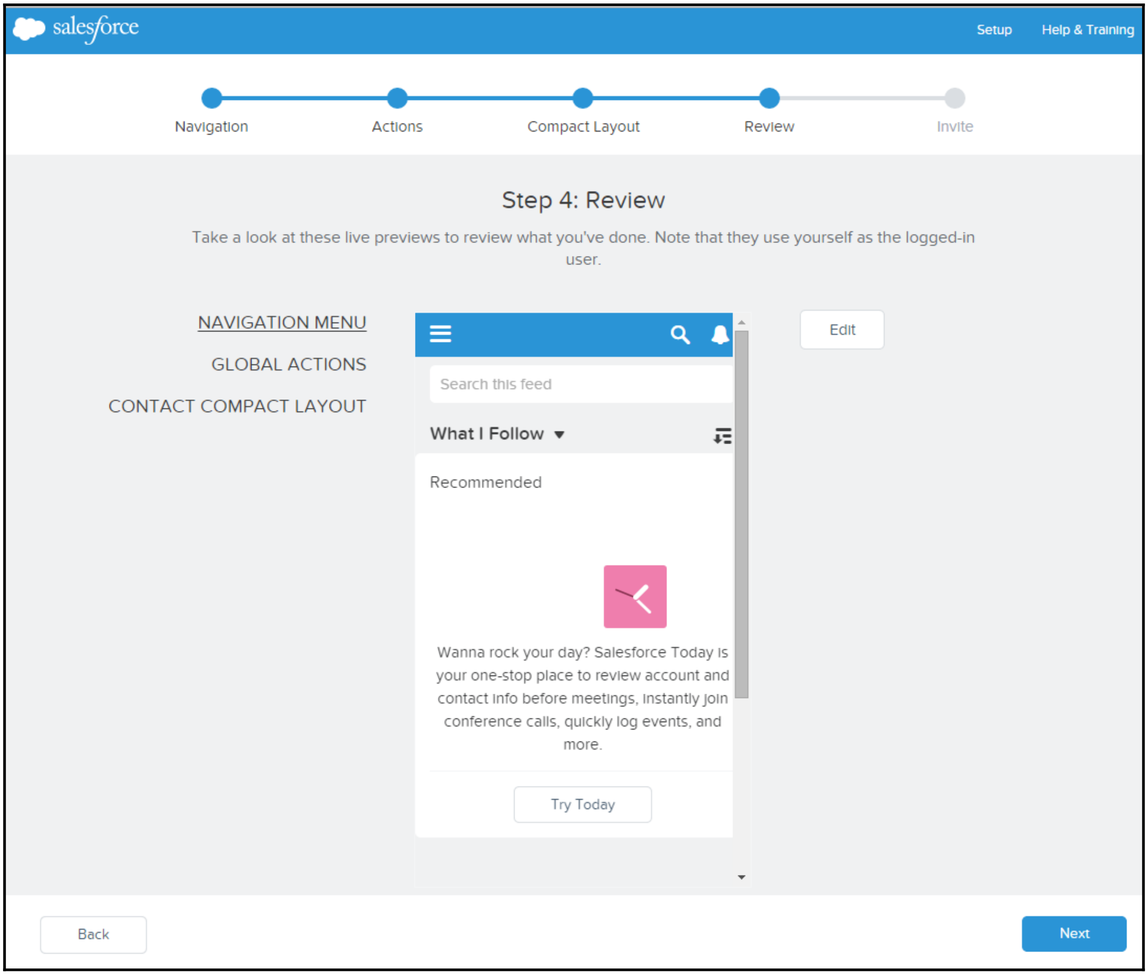

salesforce
Setup
Help & Training
Welcome!
About the Quick Start Wizard
This wizard walks you through the basic setup of the Salesforce1 mobile app. Later, you can go to the Salesforce1 Setup page to explore other configuration and customization options.
Customize the Navigation Menu
In the first step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

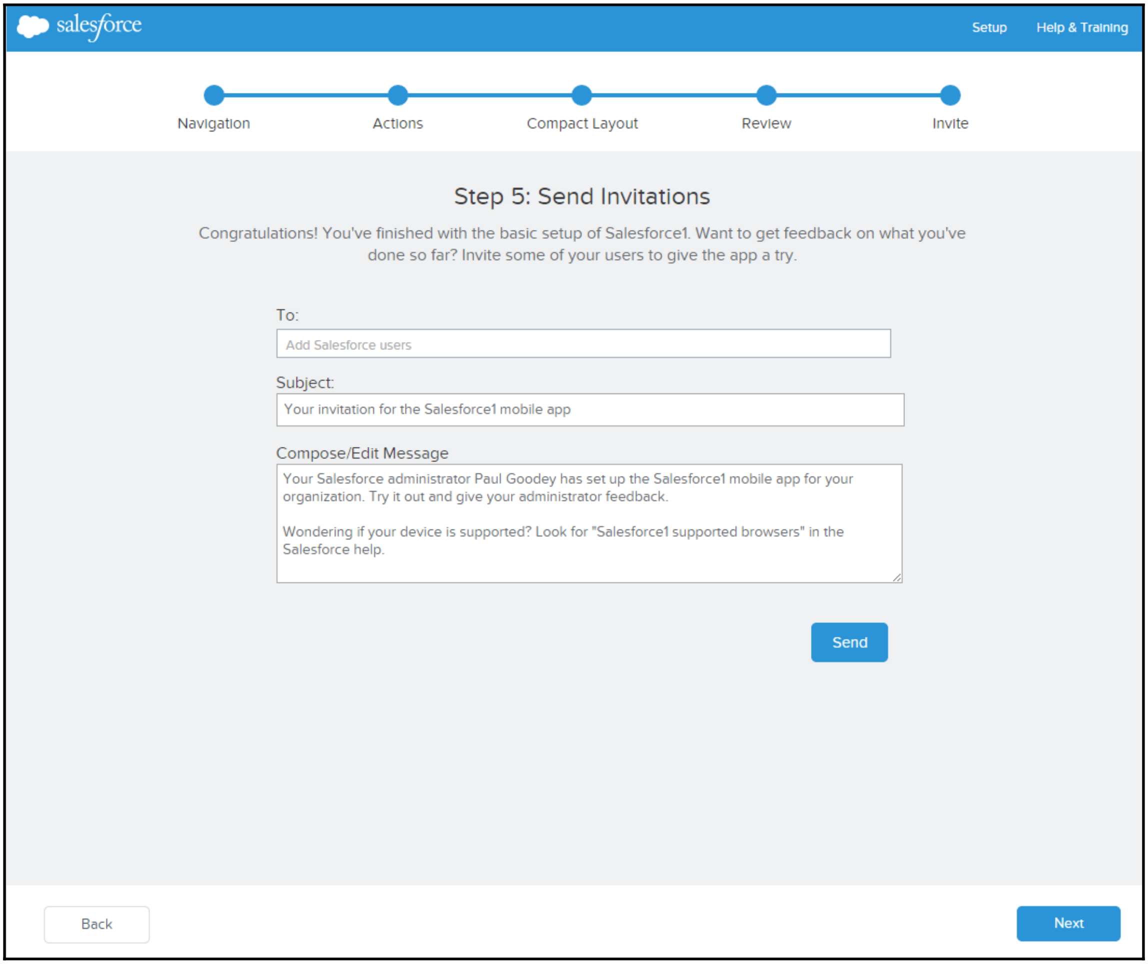

Salesforce1 Setup
The Salesforce1 mobile app allows you to bring Salesforce with you everywhere. Use the tools on this page to set up Salesforce1 so you can run your business from your phone.
Quick Start Wizard
Complete the essential setup tasks in only a few minutes.
Launch Quick Start Wizard
Customizable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

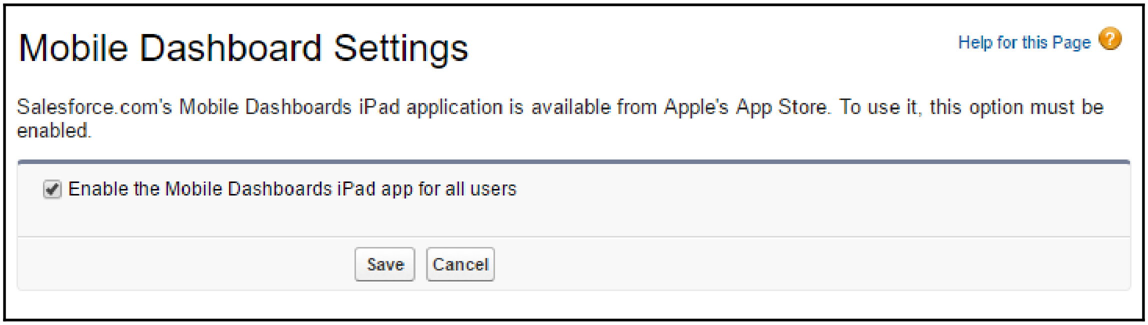

salesforce
Setup
Help & Training
Navigation
Actions
Compact Layout
Review
Invite
Step 1: Customize the Navigation Menu
Use this page to set up the navigation menu for all users in your organization. To reorder items, drag them up and down. To remove items, drag them to the Available Items list.
Available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

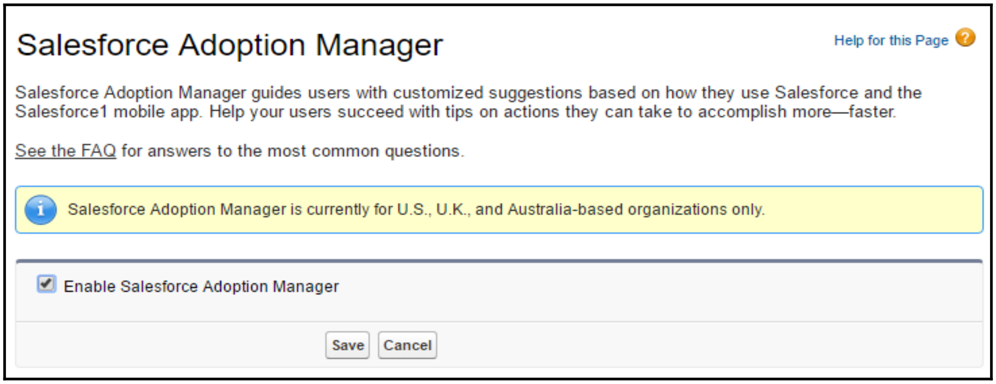

salesforce
Setup
Help & Training
Navigation
Actions
Compact Layout
Review
Invite
Arrange Global Actions
Use this page to organize global actions for all users in your organization. These changes affect your global publisher layouts, accessible via Setup > Create > Global Actions > Publisher Layouts.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


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


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


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


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


Salesforce Adoption Manager
Help for this Page
Salesforce Adoption Manager guides users with customized suggestions based on how they use Salesforce and the Salesforce1 mobile app. Help your users succeed with tips on actions they can take to accomplish more—faster.
See the FAQ for answers to the most common questions.
Salesforce Adoption Manager is currently for U.S., U.K., and Australia-based organizations only.
Enable Salesforce Adoption Manager
Save
Cancel