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# Learn Salesforce Basics

Salesforce, Summer '16





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# SALESFORCE BASICS

Welcome to Salesforce, the award-winning cloud computing service designed to help you manage your customer relationships, integrate with other systems, and build your own applications! Here are some key concepts to help you understand the Salesforce products and editions and guide you through setting yourself up as a user. You'll also find information about common tasks you'll perform in Salesforce—like using basic Chatter features, running reports, or searching Salesforce for the information or records you need.

## EDITIONS

Available in: Salesforce Classic

Available in all editions

### [What is Salesforce?](#)

Salesforce helps you manage your customer relationships, integrate with other systems, and build your own applications.

### [Get Started as a New User](#)

New to Salesforce? Set yourself up as a new user so you can start using the application right away.

### [Get Set Up For the Way You Work](#)

Use your setup options to personalize your Salesforce experience. Set your display the way you like it, protect your information, and let others know you're here.

### [Work on Mobile Devices](#)

Salesforce provides several mobile apps to keep you connected and productive, no matter where you are.

### [Manage Relationships and Data With Records](#)

Much of your Salesforce data is stored in individual *records*, and organized within objects. For example, the Account object presents all of your account records. If the Acme company is one of your accounts, you'll have an account record for Acme.

### [Find Information with Search](#)

Salesforce search gives you the power to find information faster. Search is available via the Salesforce site, a Salesforce1 mobile app, or a custom search implementation built on the Salesforce platform.

### [Run a Report](#)

To run a report, find it on the Reports tab and click the report name. Most reports run automatically when you click the name. If you're already viewing a report, click **Run Report** to run it immediately or schedule a future run. In Lightning Experience, the **Run Report** button only appears after you save a report.

### [Your Access to UI Elements, Records, and Fields](#)

Your Salesforce admin can customize many different areas to secure your company's data. Users in Professional, Enterprise, Performance, Unlimited, and Developer Edition orgs can control other users' access to their data by sharing records individually with colleagues.

# What is Salesforce?

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Salesforce helps you manage your customer relationships, integrate with other systems, and build your own applications.

Salesforce includes the following products and services.

## Salesforce Applications

Salesforce includes prebuilt applications (or “apps”) for customer relationship management (CRM) ranging from sales force automation to partner relationship management, marketing, and customer service.

## Force.com Platform

The Force.com platform is the first platform as a service (PaaS), enabling developers to create and deliver any kind of business application entirely on demand and without software. The platform also includes easy to use point-and-click customization tools to help you create solutions for your unique business requirements, without any programming experience.

## AppExchange

AppExchange is a marketplace featuring hundreds of cloud applications created by Salesforce customers, developers, and partners. Many of the applications are free and all of them are pre-integrated with Salesforce, enabling you to easily and efficiently add functionality.

## Salesforce.com Community

Salesforce provides training, support, consulting, events, best practices, and discussion boards to help you be successful. Visit [Salesforce.com Community](#).

## Key Concepts and Terms

As you’re getting up to speed with Salesforce, it’s helpful to learn some key concepts and terms. They’ll come up frequently as you interact with the product, our documentation, and our service professionals. The concepts here will help you understand how Salesforce works. And the terms will help you understand some of its main components.

## Salesforce Editions

Salesforce offers several bundles of its products and services, each geared toward a different set of business needs.

## Other Salesforce Editions

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

## Database.com Feature List

The list of Salesforce features also available in Database.com. Use this list in combination with the feature Edition tables to find topics in the Salesforce help that also apply to Database.com.

## Supported Browsers

Supported browsers for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience.

## Read-Only Mode

At Salesforce, we recognize that you may want to access your data at a moment’s notice—even during our planned maintenance windows. To minimize interruption to your business, Salesforce gives users read-only access during splits, instance migrations, instance switches, pre-scripts, and certain other maintenance events.

## What’s New in Salesforce?

## Tip Sheets and Implementation Guides

## EDITIONS

Available in: Salesforce Classic

Your Salesforce edition determines which features and functionality you can access.

## Key Concepts and Terms

As you're getting up to speed with Salesforce, it's helpful to learn some key concepts and terms. They'll come up frequently as you interact with the product, our documentation, and our service professionals. The concepts here will help you understand how Salesforce works. And the terms will help you understand some of its main components.

### EDITIONS

Available in: **Salesforce Classic**

Available in: **All Editions**

## Concepts

Concept	Definition
Cloud	A Salesforce name for a loose federation of features that help you accomplish certain types activities, such as selling products, supporting your customers, or collaborating with your coworkers. Two common examples you'll come across are <i>Service Cloud</i> and <i>Sales Cloud</i> .
Cloud Computing	Technology that enables Internet-based services that let you sign up and log in through a browser. Salesforce delivers its service in the cloud. Other familiar cloud computing services include Google Apps and Amazon.com.
Software as a Service (SaaS)	Software delivered not by traditional means (such as on disk) but in the cloud, as a service. There's nothing to download or install, and updates are automatic.
Trust	<p>A Salesforce term for its company-wide commitment to building and delivering the most secure, fast, and reliable cloud-based service available.</p> <p>Created to enhance customer success, <code>trust.salesforce.com</code> is a systems status website giving Salesforce customers and the community access to real-time and historical system performance information and updates, incident reports and maintenance schedules across all its key system components.</p> <p><code>trust.salesforce.com</code> is free to all members of the Salesforce community.</p>

## Terms

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

Term	Definition
Record	A collection of fields that store information about a specific item of a specific type (represented by an object), such as a contact, an account, or an opportunity. For example, you might have a contact record to store information about Joe Smith, and a case record store information about his training inquiry.
Release	Salesforce releases new products and features three times per year, and releases are identified by season—Winter, Spring, and Summer—along with the calendar year. <i>Example:</i> Winter '15.  For every Salesforce release, the Salesforce release notes include new features and products that are generally available or in beta release, plus all changes to existing features and products. You can find the release notes when you search for “Release Notes” in the Salesforce Help.
Salesforce	The name of the Salesforce cloud computing CRM service.
Salesforce	The company name.

## Salesforce Editions

Salesforce offers several bundles of its products and services, each geared toward a different set of business needs.

These bundles, called *editions*, share a look and feel but vary by feature, functionality, and pricing. For example, Enterprise Territory Management is available in Enterprise and Unlimited Edition orgs with the Sales Cloud, but not in Professional Edition orgs. Some customers start with a basic edition and upgrade as they grow their businesses.

The Salesforce Help describes all generally available features, including those that aren't available in all editions. To find out whether a feature is available in your edition, search for the feature in the Salesforce Help, and then read the “Available in:” table at the top of any topic about the feature.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

### Professional Edition

This edition is designed for businesses who need full-featured CRM functionality. Professional Edition includes straightforward and easy-to-use customization, integration, and administration tools to facilitate any small to midsize deployment.

### Enterprise Edition


This edition is designed to meet the needs of large and complex businesses. Enterprise Edition orgs get advanced customization and administration tools, in addition to all the functionality available in Professional Edition, that can support large-scale deployments. Enterprise Edition also includes access to the web services API, so you can easily integrate with back-office systems.

### Unlimited Edition

This edition is Salesforce's solution for maximizing your success and extending that success across the entire enterprise through the Force.com platform. Unlimited Edition customers benefit from new levels of platform flexibility for managing and sharing all their information on demand. Unlimited Edition includes all Enterprise Edition functionality plus Premier Support, full mobile access, unlimited custom apps, increased storage limits, and more.

### Developer Edition

This edition provides access to the Force.com platform and API. A Developer Edition org allows developers to extend the Salesforce system, integrate with other applications, and develop new tools and applications. Developer Edition provides access to many of the features available in Enterprise Edition orgs.

 **Note:** Salesforce doesn't provide technical support for Developer Edition orgs. You can solicit help from the developer community message boards available to registered users via the Force.com developer website: [developer.salesforce.com](https://developer.salesforce.com). Documentation for Developer Edition is available from the [Technical Library](#).



For a comparison chart of editions and their features, see the [Salesforce Pricing and Editions page](#).

SEE ALSO:

[Salesforce Mobile Product Comparison](#)

## Other Salesforce Editions

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

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

### Contact Manager Edition

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

### Group Edition

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

### Personal Edition

This edition is a CRM solution designed for an individual sales representative or other single user. Personal Edition provides access to key contact management features such as accounts, contacts, and synchronization with Microsoft Outlook®. It also provides sales representatives with sales tools such as opportunities.

 **Note:** Personal Edition orgs purchased after June 2009 don't have access to opportunities.

### Performance Edition

This edition is designed for customers who need to drive amazing growth, achieve new levels of customer satisfaction, and maximize sales and service success in the social and mobile world. Performance Edition orgs include all Unlimited Edition functionality plus clean, targeted lead and customer data from Data.com, coaching and feedback tools from Work.com, trusted identity services from Identity, and more. For customers in Japan, Singapore, and South Korea, we offer Performance Edition Limited, which includes all Performance Edition functionality except Data.com.

### Database.com

Database.com is a multitenant cloud database service that's designed to store data for mobile, social enterprise applications. You can use Database.com as the back-end database for applications that are written in any language and run on any platform or mobile device. Database.com's built-in social computing infrastructure and native support for building sophisticated REST-based APIs enable you to create employee-facing, native mobile and social apps.

As a Salesforce user, you already use Database.com when you perform tasks such as creating custom objects, managing security, or importing data with the Force.com platform and API. A stand-alone version of Database.com is available for developers who want to create applications that leverage other languages, platforms, and devices.

Database.com-specific documentation isn't provided. Use the Salesforce documentation and the [list of features](#) that Database.com supports. This list identifies the Salesforce documentation subjects that apply to Database.com. Also, every feature's Edition Table

#### EDITIONS

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

includes Database.com if the feature is available in Database.com. Use the Salesforce Help, release notes, workbooks, and developer guides for APIs, Apex, SOQL, and SOSL.

SEE ALSO:

[Salesforce Editions](#)

## Database.com Feature List

The list of Salesforce features also available in Database.com. Use this list in combination with the feature Edition tables to find topics in the Salesforce help that also apply to Database.com.

The Salesforce features listed here are those that are also available in Database.com. The features are organized by general product area. Some features are only available through the API. These are noted where they appear.

### Administration

- Audit Trail
- Company Information
- Delegated Administrator and Login As
- Enhanced Profile Management
- Field-Level Security
- Login History
- Mass Transfers
- New Profile UI
- Permission Sets
- Profiles

**Apex** (Libraries are available only for features supported in Database.com.)

### API

- API Clients
- Bulk API
- Data Loader
- Metadata API
- Chatter REST API
- Web Services API Data Replication
- Web Services API Reads
- Web Services API Writes

### Application Lifecycle Management

- Change Sets

### Chatter

- Ability to stop following records that you own in Chatter
- At Mentions (API only)
- Chatter Activity and Influence

### EDITIONS

Available in: **Salesforce Classic**

Available in: **Database.com Edition**

- Customize Chatter settings
- Feed Tracking
- Feeds
- Files (API only)
- Group Layouts
- Group Trigger and Group Member Triggers
- Groups
- Hashtags and Topics
- Quick Actions
- Rich Link Previews in Feed
- Triggers for Feed Comments and Feed Items

**Content****Custom Settings****Customer Domains****Data**

- Ability to mass transfer records of custom objects
- Data Loader

**Declarative App Builder and Custom Schema****Custom Objects and Fields**

- Force.com
- Formula Fields
- Rich Text Area
- Roll-up Summary Fields
- Validation Rules

**Developer Tools**

- Force.com IDE

**Divisions****Enhanced Profile User Interface**

- Enabling
- Field Level Security
- Field/Object Perms
- Object and Tab settings – Objects only
- Search
- System Perms
- Viewing and editing app perms
- Viewing and editing Login Hours
- Viewing and editing Login IP Ranges
- Viewing and editing Service Provider Access
- Viewing Profile Lists

**Field Accessibility** (for custom objects)

### **Field Dependency Matrix**

#### **Fileforce**

#### **Localization and Globalization**

- Multi-Currency
- Timezones

#### **My Personal Information**

- Change My Password
- Editing personal information
- Granting Login Access (Send Activation Link button)

#### **Offline**

- Force.com Flex Desktop applications
- Force.com Flex Web applications

#### **Permission Sets**

- Ability to search permissions
- Viewing, Editing, and Creating

#### **Profile List Views**

- Creating
- Editing

#### **Restricting Logins**

- Hours and IP Ranges on Profiles

#### **Sandbox**

- Developer Sandbox (for an additional fee)
- Full Copy Sandbox (for an additional fee)
- Setup Only Sandbox (for an additional fee)

#### **Search**

- Personal Tags
- Public Tags

#### **Security**

- Connected Apps (OAuth)
- Encrypted Custom Fields
- General Security
- Identity Feature
- Inbound Single Sign-On
- Password and Login Policies
- Retrieving forgotten passwords

#### **Single Sign-On**

#### **Sharing**

- Apex Managed Sharing
- Criteria Based Sharing Rules
- High Volume Portal User
- Ownership Based Sharing Rules
- Public Groups
- Queues
- Role Hierarchy
- Sharing Model and Manual Sharing

### Topics

- Topic and TopicAssignment Triggers

### User Setup

- Creating and editing Personal and Public Groups
- Send Activation Link

### Users

- Expiring Passwords
- Manage Users
- Managing Roles
- Monitoring User Events (logins and training)
- Resetting Passwords
- Role Fields
- Role List page
- Set Up Password Expiration
- Setting Login Restrictions

### Viewing the Public Group Related List

### Weekly Export

### Workflow

- Outbound messages (as both immediate and time-dependent actions)
- Time-Based Workflow (Workflow Queue)
- Workflow Field Updates and Outbound Messages
- Workflow rules

## Supported Browsers

Supported browsers for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience.

### [Supported Browsers for Salesforce Classic](#)

Salesforce Classic is supported with Microsoft® Internet Explorer® versions 9, 10, and 11, Apple® Safari® version 8.x on Mac OS X, and Microsoft® Edge for Windows® 10. The most recent stable versions of Mozilla® Firefox® and Google Chrome™ are also supported.

There are some limitations.

### [Supported Browsers for Lightning Experience](#)

Lightning Experience is supported with Apple® Safari® version 8.x and 9.x on Mac OS X and Microsoft® Edge for Windows® 10. The most recent stable versions of Mozilla® Firefox® and Google Chrome™ are also supported. If you're using Microsoft® Internet Explorer® versions 9–11, you're redirected to Salesforce Classic. There are some limitations.

### [Getting Plug-ins for Viewing Documentation and Online Training Courses](#)

Download the plug-ins you need to view Salesforce PDF documentation and online training courses.

### [Learning Keyboard Shortcuts](#)

Use keyboard shortcuts to work efficiently in Salesforce.

### [Keyboard Shortcuts for Lightning Experience Composer Windows](#)

Use keyboard shortcuts to work efficiently in Lightning Experience composer windows. Open a composer window to create tasks, jot down notes, log a call, and more. Keyboard shortcuts make it easy to cycle through the fields inside a composer and work your way through multiple composer windows that are open at the same time.

### [Configuring Internet Explorer](#)

If you use Internet Explorer, we recommend using the latest version that Salesforce supports. Apply all Microsoft software updates.

### [Configuring Firefox](#)

To ensure Salesforce works optimally with Firefox, you'll need to do a few configurations to the browser.

## Supported Browsers for Salesforce Classic

Salesforce Classic is supported with Microsoft® Internet Explorer® versions 9, 10, and 11, Apple® Safari® version 8.x on Mac OS X, and Microsoft® Edge for Windows® 10. The most recent stable versions of Mozilla® Firefox® and Google Chrome™ are also supported. There are some limitations.



**Note:** Using Salesforce Classic in a mobile browser isn't supported. Instead, we recommend using the Salesforce1 app when you're working on a mobile device. To see the mobile browsers that are supported for Salesforce1, check out [Requirements for the Salesforce1 Mobile App](#) on page 92.

### Microsoft Edge

Salesforce supports Microsoft Edge on Windows 10 for Salesforce Classic. Note these restrictions.

- The HTML solution editor in Microsoft Edge isn't supported in Salesforce Knowledge.
- Microsoft Edge isn't supported for the Developer Console.
- Microsoft Edge isn't supported for Salesforce CRM Call Center built with CTI Toolkit version 4.0 or higher.

### Microsoft Internet Explorer versions 9, 10, and 11

If you use Internet Explorer, we recommend using the latest version that Salesforce supports. Apply all Microsoft software updates. Note these restrictions.

- The full Salesforce site is supported in Internet Explorer 9, 10, and 11 on Windows 8 and 8.1 for touch-enabled laptops with standard keyboard and mouse inputs only. There is no support for mobile devices or tablets where touch is the primary means of interaction. Use the Salesforce1 mobile browser app instead.
- The HTML solution editor in Internet Explorer 11 is not supported in Salesforce Knowledge.
- Both Compatibility Mode and the Compatibility View in Internet Explorer aren't supported.
- The Metro version of Internet Explorer 10 isn't supported.
- Internet Explorer 11 isn't supported for the Developer Console.
- Internet Explorer 11 isn't supported for Salesforce CRM Call Center built with CTI Toolkit version 4.0 or higher.

### EDITIONS

Salesforce Classic available in: **All Editions**

- Community Templates for Self-Service supports Internet Explorer 9 and above for desktop users and Internet Explorer 11 and above for mobile users.
- Internet Explorer 9 isn't supported for Salesforce Wave Analytics.
- Internet Explorer 9 and 10 aren't supported for the Lightning App Builder.
- Internet Explorer 9 users don't have browser-based spell check.
- Drag and drop of files into feed comments isn't supported in Internet Explorer.

For configuration recommendations, see [Configuring Internet Explorer](#) on page 14.



**Note:** Salesforce Classic support for Microsoft® Internet Explorer® versions 7 and 8 is discontinued as of Summer '15.

### Mozilla Firefox, most recent stable version

Salesforce makes every effort to test and support the most recent version of Firefox.

- Mozilla Firefox is supported for desktop users only for Community Templates for Self-Service.

For configuration recommendations, see [Configuring Firefox](#) on page 15.

### Google Chrome, most recent stable version

Chrome applies updates automatically. Salesforce makes every effort to test and support the most recent version. There are no configuration recommendations for Chrome.

Chrome isn't supported for:

- The Console tab (The Salesforce console is supported.)

### Apple Safari versions 8.x on Mac OS X

There are no configuration recommendations for Safari. Apple Safari on iOS isn't supported for the full Salesforce site.

Safari isn't supported for:

- The Salesforce console
- Salesforce CRM Call Center built with CTI Toolkit versions below 4.0
- Salesforce Wave Analytics

## Wave Analytics Supported Browsers

Browser support is available for Microsoft Internet Explorer versions 10 and 11 and the most recent stable versions of Mozilla Firefox and Google Chrome.

## Recommendations and Requirements for All Browsers

- For all browsers, enable JavaScript, cookies, and TLS 1.2. If TLS 1.2 isn't available, enable TLS 1.1. Browsers that don't support TLS 1.1 or TLS 1.2 won't be able to access Salesforce after we deactivate TLS 1.0. Deactivation is scheduled, but not guaranteed, for June 2016 for sandbox orgs and early 2017 for production orgs.
- The minimum screen resolution required to support all Salesforce features is 1024 x 768. Lower screen resolutions don't always properly display Salesforce features such as Report Builder and Page Layout Editor.
- For Mac OS users on Apple Safari or Chrome, make sure the system setting `Show scroll bars` is set to **Always**.
- Some third-party Web browser plug-ins and extensions can interfere with the functionality of Chatter. If you experience malfunctions or inconsistent behavior with Chatter, disable the Web browser's plug-ins and extensions and try again.


Some features in Salesforce—and some desktop clients, toolkits, and adapters—have their own browser requirements. For example:

- Internet Explorer is the only supported browser for:

- Standard mail merge
  - Installing Salesforce Classic Mobile on a Windows Mobile device
  - Connect Offline
- For the best experience with the enhanced page layout editor, use Firefox.
  - For the best experience on machines with 8 GB of RAM in the Salesforce console, use Chrome.
  - Browser requirements also apply for uploading multiple files on Chatter.

## Supported Browsers for Lightning Experience

Lightning Experience is supported with Apple® Safari® version 8.x and 9.x on Mac OS X and Microsoft® Edge for Windows® 10. The most recent stable versions of Mozilla® Firefox® and Google Chrome™ are also supported. If you're using Microsoft® Internet Explorer® versions 9–11, you're redirected to Salesforce Classic. There are some limitations.

-  **Note:** You can't access Lightning Experience in a mobile browser. Instead, we recommend using the Salesforce1 app when you're working on a mobile device. For a list of supported mobile browsers on Salesforce1, see [Requirements for the Salesforce1 Mobile App](#) on page 92.

### EDITIONS


Lightning Experience available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### Microsoft Edge

Salesforce supports Microsoft Edge on Windows 10 for Lightning Experience. Note these restrictions.

- The HTML solution editor in Microsoft Edge isn't supported in Salesforce Knowledge.
- Microsoft Edge isn't supported for the Developer Console.
- Microsoft Edge isn't supported for Salesforce CRM Call Center built with CTI Toolkit version 4.0 or higher.

### Microsoft Internet Explorer version 11

 **Important:** Support for Internet Explorer 11 to access Lightning Experience is retiring beginning in Summer '16.

- Users of existing orgs can continue to use IE11 to access Lightning Experience until December 16, 2017.
- Users of new orgs created after Summer '16 can't use IE11 to access Lightning Experience. Instead, IE11 users are automatically redirected to Salesforce Classic.

For more details about this change, see [Retirement of Support for Accessing Lightning Experience and Salesforce1 Using Internet Explorer 11](#).

If you use Internet Explorer, we recommend using the latest version that Salesforce supports. Apply all Microsoft software updates. Note these restrictions.

- The full Salesforce site is supported in Internet Explorer 11 on Windows 8 and 8.1 for touch-enabled laptops with standard keyboard and mouse inputs only. There is no support for mobile devices or tablets where touch is the primary means of interaction. Use the Salesforce1 mobile browser app instead.
- The HTML solution editor in Internet Explorer 11 is not supported in Salesforce Knowledge.
- The Compatibility View feature in Internet Explorer isn't supported.
- Changing the compatibility parsing mode of the browser, for example, by using the `X-UA-Compatibility` header, isn't supported.
- Internet Explorer 11 isn't supported for the Developer Console.
- Internet Explorer 11 isn't supported for Salesforce CRM Call Center built with CTI Toolkit version 4.0 or higher.
- Drag and drop of files into feed comments isn't supported in Internet Explorer.



For configuration recommendations, see [Configuring Internet Explorer](#) on page 14.

### Mozilla® Firefox®, most recent stable version

Salesforce makes every effort to test and support the most recent version of Firefox. For configuration recommendations, see [Configuring Firefox](#) on page 15.

### Google Chrome™, most recent stable version

Chrome applies updates automatically. Salesforce makes every effort to test and support the most recent version. There are no configuration recommendations for Chrome.

 **Note:** The latest stable version of Google Chromium™ is supported.

### Apple® Safari® version 8.x and 9.x on Mac OS X

There are no configuration recommendations for Safari.

Safari isn't supported for:

- Salesforce CRM Call Center built with CTI Toolkit versions earlier than 4.0
- Salesforce Wave Analytics

## Wave Analytics Supported Browsers

Browser support is available for Microsoft Internet Explorer version 11 and the most recent stable versions of Mozilla Firefox and Google Chrome.

## Recommendations and Requirements for All Browsers

- For all browsers, enable JavaScript, cookies, and TLS 1.2. If TLS 1.2 isn't available, enable TLS 1.1. Browsers that don't support TLS 1.1 or TLS 1.2 won't be able to access Salesforce after we deactivate TLS 1.0. Deactivation is scheduled, but not guaranteed, for June 2016 for sandbox orgs and early 2017 for production orgs.
- The minimum screen resolution required to support all Salesforce features is 1024 x 768. Lower screen resolutions don't always properly display Salesforce features such as Report Builder and Page Layout Editor.
- For Mac OS users on Apple Safari or Google Chrome, make sure that the system setting `Show scroll bars` is set to **Always**.
- Some third-party Web browser plug-ins and extensions can interfere with the functionality of Chatter. If you experience malfunctions or inconsistent behavior with Chatter, disable the Web browser's plug-ins and extensions and try again.

## Getting Plug-ins for Viewing Documentation and Online Training Courses

Download the plug-ins you need to view Salesforce PDF documentation and online training courses.

- **Adobe Reader**—For viewing PDF documentation. Go to the [Adobe Reader download page](#) to download a free copy.
- **Macromedia Flash Player**—For taking online training courses. Go to the [Adobe Flash Player download page](#) to download a free copy.

### EDITIONS

Available in: Salesforce Classic

Available in: **All Editions** except **Database.com**

## Learning Keyboard Shortcuts

Use keyboard shortcuts to work efficiently in Salesforce.

In addition to the standard keyboard shortcuts available with your Web browser, Salesforce supports these keyboard shortcuts.

- Press ALT plus any number between 0 and 9 to highlight an item in the Recent Items list in the sidebar. For example, press ALT+1 to highlight the first item in the list, ALT+2 to highlight the second item, and so on. Pressing ALT+0 highlights the tenth item in the list.
  - 📌 **Note:** If you're using Mozilla® Firefox®, press SHIFT+ALT plus a number to automatically display the item you highlighted. If you're using Mozilla Firefox on a Mac, press CTRL plus a number. If you're using Microsoft® Internet Explorer®, press ALT plus a number and then press Enter to display the highlighted item.
- If your organization has enabled the collapsible sidebar, press ALT+S to open or close the sidebar. Opening the sidebar using ALT+S automatically places your cursor in the Search box.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions** except **Database.com**

## Keyboard Shortcuts for Lightning Experience Composer Windows

Use keyboard shortcuts to work efficiently in Lightning Experience composer windows. Open a composer window to create tasks, jot down notes, log a call, and more. Keyboard shortcuts make it easy to cycle through the fields inside a composer and work your way through multiple composer windows that are open at the same time.

In addition to the standard keyboard shortcuts available with your Web browser, Lightning Experience supports these handy shortcuts when using the composer windows.

- Alt+1: opens the overflow menu from anywhere on the page
- Up and Down Arrow keys: moves through the list of open composer windows in the overflow menu
- Left and Right Arrow keys: moves between open composer windows
- Enter (from a composer window's header): moves focus to inside the composer window
- Tab key: cycles through the fields inside the composer window
- Esc key: moves focus from a composer window to the window's header

### EDITIONS

Available in Lightning Experience

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

## Configuring Internet Explorer

If you use Internet Explorer, we recommend using the latest version that Salesforce supports. Apply all Microsoft software updates.

To maximize the performance of Internet Explorer, set the following in the Internet Options dialog box via your browser's settings:

### General Tab

1. From the General tab, click **Settings** under Browsing History.
2. For the *Check for newer versions of stored pages* option, select **Automatically**.
3. For the *Disk space to use* option, enter at least 50 MB.

### Security Tab

1. From the Security tab, click **Custom Level** under Internet and scroll to the Scripting section.

### EDITIONS

Available in: Salesforce Classic

Available in all editions

2. Make sure the `Active Scripting` option is enabled. JavaScript depends on this setting being enabled.

### Privacy Tab

1. From the Privacy tab, click **Advanced**.
2. Select the **Override automatic cookie handling** option.
3. Select the **Always allow session cookies** option.
4. For the **Third-party Cookies** option, select **Accept**.

### Advanced Tab

From the Advanced tab, scroll to the Security section and do the following:

- Do not select the `Do not save encrypted pages to disk` option.
- Select `Use TLS 1.0`, `Use TLS 1.1`, and `Use TLS 1.2`. Make sure to *deselect* `Use SSL 2.0` and `Use SSL 3.0`. SSL is no longer supported by Salesforce. TLS 1.0 won't be supported after we deactivate it, currently scheduled for June 2016 for sandbox orgs and early 2017 for production orgs.



**Tip:** The `Empty Temporary Internet Files folder when browser is closed` option causes the cache to clear when Internet Explorer is shut down. This increases privacy, but sometimes decrease performance.

SEE ALSO:

[Supported Browsers](#)

## Configuring Firefox

To ensure Salesforce works optimally with Firefox, you'll need to do a few configurations to the browser.

Salesforce makes every effort to test and support the most recent version of Firefox.

### Required Settings

Make sure Firefox can accept cookies.

1. Click **Tools > Options** (or on a Mac, click **Firefox > Preferences**).
2. Go to the Privacy panel.
3. For the `Firefox will` option, select **Use custom settings for history**
4. Select the **Accept cookies from sites** option.
5. Select the **Accept third-party cookies** option.
6. For the `Keep until` option, select **they expire**.
7. Click **OK**.

### Advanced Settings

Optionally, configure advanced caching preferences to maximize performance.

1. Type `about:config` in the browser's location bar, and then press Enter.
2. If a warning displays, click **I'll be careful, I promise!**
3. Search for the following preferences and set them to the recommended value by double-clicking the preference name. Changes take effect immediately.


### EDITIONS

Available in: Salesforce Classic

Available in all editions

4. Change how the browser retains common resources across requests by setting the following caching preferences.

Preference	Recommended Value	Default Value
browser.cache.check_doc_frequency	3	3
browser.cache.disk.capacity	50,000 or more; increase to use more hard disk space	50,000
browser.cache.disk.enable	True	True
browser.cache.disk_cache_ssl	True	False
browser.cache.memory.enable	True	True
network.http.use-cache	True	True

 **Note:** You can set some of these preferences by clicking **Tools > Options** in the Firefox browser. Refer to [Firefox Help](#) for details.

 **Tip:** Setting `privacy.sanitize.sanitizeOnShutdown` to “True” causes the cache to clear when Firefox shuts down. This increases privacy, but may decrease performance.

To view the contents of your cache, type `about:cache` in the Firefox location bar and press Enter.

Refer to [MozillaZine Knowledge Base](#) and [Firefox Support Home Page](#) for more information on these and other preferences.

SEE ALSO:

[Supported Browsers](#)

## Read-Only Mode

At Salesforce, we recognize that you may want to access your data at a moment’s notice—even during our planned maintenance windows. To minimize interruption to your business, Salesforce gives users read-only access during splits, instance migrations, instance switches, pre-scripts, and certain other maintenance events.

EDITIONS


Available in: **All Editions**

## What to Expect in Read-Only Mode

When Salesforce is in read-only mode, you can navigate within the application and view and report on your business data.

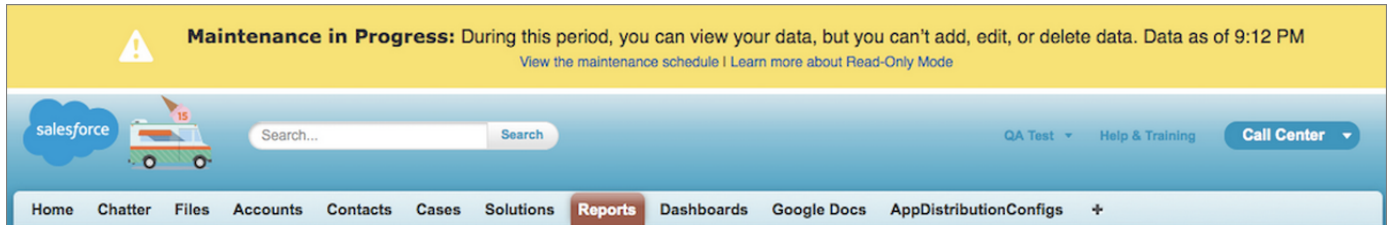
During read-only mode, you **can’t**:

- Add, edit, or delete data
- Perform any actions in Salesforce that modify your Salesforce data. For example:
  - Post on Chatter
  - Use LiveAgent
  - Refresh dashboards
  - Perform API write or edit actions
  - Perform bulk API read actions
  - Save new or edited reports

 **Note:** You can still run existing reports.

Activity reminders don't occur, and Recent Items lists don't update. Login history is still recorded for compliance purposes, but it isn't reflected in your organization until a few minutes after the organization exits read-only mode.

When your organization is in read-only mode, desktop and mobile browser users see a banner at the top of their browser window:



## When to Expect Read-Only Mode

The maintenance schedule posted on [trust.salesforce.com](http://trust.salesforce.com) indicates whether each upcoming maintenance window includes read-only access. Planned maintenance windows vary in length depending on the level of maintenance needed. In addition, when users are notified two weeks before a planned maintenance window, the notification specifies whether the maintenance includes read-only access.

If you'd like to see how your organization works in read-only mode, contact Salesforce to have the testing option enabled in your sandbox organization.

## What's New in Salesforce?

### Current Release

Learn about the newest features for sales, support, marketing, and Chatter users, as well as enhancements to the platform. You can also visit the [Summer '16 community page](#).

Our release notes include complete details about new features, as well as implementation tips and best practices.

- [Summer '16 Release Notes](#)
- [Salesforce for Outlook Release Notes](#)
- [Force.com Connect for Office Release Notes](#)
- [Force.com Connect Offline Release Notes](#)

### Past Releases

Our archive of release notes includes details about features we introduced in previous releases.

- [Spring '16 Release Notes](#)
- [Winter '16 Release Notes](#)
- [Summer '15 Release Notes](#)
- [Spring '15 Release Notes](#)
- [Winter '15 Release Notes](#)
- [Summer '14 Release Notes](#)

- [Spring '14 Release Notes](#)
- [Winter '14 Release Notes](#)
- [Summer '13 Release Notes](#)
- [Spring '13 Release Notes](#)
- [Winter '13 Release Notes](#)
- [Summer '12 Release Notes](#)
- [Spring '12 Release Notes](#)
- [Winter '12 Release Notes](#)
- [Summer '11 Release Notes](#)
- [Spring '11 Release Notes](#)
- [Winter '11 Release Notes](#)
- [Summer '10 Release Notes](#)
- [Spring '10 Release Notes](#)
- [Winter '10 Release Notes](#)
- [Summer '09 Release Notes](#)
- [Spring '09 Release Notes](#)
- [Winter '09 Release Notes](#)
- [Summer '08 Release Notes](#)
- [Spring '08 Release Notes](#)
- [Winter '08 Release Notes](#)
- [Summer '07 Release Notes](#)
- [Spring '07 Release Notes](#)
- [Force.com Mobile 7.0 for BlackBerry Release Notes](#)
- [Force.com Mobile 6.1 for Windows Mobile 5 Release Notes](#)
- [Winter '07 Release Notes](#)
- [Summer '06 Release Notes](#)
- [Winter '06 Release Notes](#)
- [Force.com Mobile 6.0 Release Notes](#)
- [Summer '05 Release Notes](#)
- [Winter '05 Release Notes](#)
- [Summer '04 Release Notes](#)
- [Spring '04 Release Notes](#)
- [Winter '04 Release Notes](#)

## Tip Sheets and Implementation Guides

In addition to online help, Salesforce publishes additional material to help you be successful with Salesforce. These documents include tip sheets, implementation guides, and other resources that describe the features and capabilities of Salesforce.

 **Note:** Adobe Reader® is required to open Adobe® PDF files. To download the latest version of Reader, go to [www.adobe.com/products/acrobat/readstep2.html](http://www.adobe.com/products/acrobat/readstep2.html).

- [For All Users](#)

- [For Sales Professionals](#)
- [For Support Professionals](#)
- [For Marketing Professionals](#)
- [For Analytics Cloud Professionals](#)
- [For Administrators](#)

### [Video Demos](#)

#### [Get More Done Faster with Walkthroughs](#)

Interactive walkthroughs guide you step-by-step through a task or feature. Salesforce creates walkthroughs to help you be successful with Salesforce.

#### SEE ALSO:

[Video Demos](#)

## For All Users

These documents are for all Salesforce users.

- [How to be Successful with Salesforce](#)
- [Tips & Hints for Custom Views](#)
- [Salesforce System Requirements](#)
- [Tips for Using Content Deliveries](#)
- [Using Salesforce Group Edition](#)
- [Chatter Plus Frequently Asked Questions](#)

## Reports and Dashboards

- [Getting Started with Salesforce Reports and Dashboards](#)
- [Analytics Workbook](#)
- [Reports Tab](#)
- [Using the Drag-and-Drop Report Builder](#)
- [Do your big reports take a long time to return data?](#)
- [Report Formula Summary Functions](#)
- [FAQ: Scheduling Reports](#)
- [Tips for Creating Dashboards](#)
- [One Dashboard For Many Viewers](#)
- [Taking Advantage of Dynamic Dashboards](#)
- [Sample CRM Dashboards](#)
- [What Are Joined Reports?](#)
- [Using Cross Filters in Reports](#)
- [Using Bucket Fields](#)

## For Sales Professionals

The following documents apply to sales professionals:

### Enterprise Territory Management

- [Enterprise Territory Management Implementation Guide](#)

### Account Management

- [Getting Microsoft® Outlook® and Salesforce in Sync](#)
- [Get Ready to Sync Contacts and Events with Exchange Sync \(Beta\)](#)
- [Tips & Hints for Sales Reps](#)
- [Importing Your Personal Accounts and Contacts](#)
- [Tips for Using Content Deliveries](#)
- [Tips for Using HTML Email Templates](#)
- [Using Force.com Connect for Office](#)
- [Salesforce Bulk Mail Merge Process](#)
- [Guidelines for Uploading Mail Merge Templates](#)
- [Sample Mail Merge Templates \(Zip file\)](#)
- [Getting Started with Force.com Connect Offline](#)
- [Tips & Hints for Working with Territories](#)

### Pipeline Management

- [Collaborative Forecasts Implementation Guide](#)—For administrators of Collaborative Forecasts.
- [Using Customizable Forecasts](#)—For users of Customizable Forecasting. For more information, search for “Customizable Forecasting Overview” in the Salesforce online help.
- [Tips & Hints for Products & Schedules](#)

### Pardot and Salesforce Integration

- [Syncing Between Pardot and Salesforce](#)

### Mobile

- [Using the Salesforce1 App](#)
- [Salesforce Classic Mobile User Guide for iPhone](#)
- [Salesforce Classic Mobile User Guide for Android](#)

## For Support Professionals

These documents are for support professionals.

- [Tips & Hints for Support Reps](#)
- [Getting Started with your SoftPhone](#)



- [Using the Console Tab](#)
- [Tips & Hints for Solutions](#)
- [Getting to Know Case Feed](#)
- [Live Agent for Support Agents](#)
- [Live Agent for Support Supervisors](#)

## For Marketing Professionals

The following documents apply to marketing professionals:

- [Getting the Most from Your Leads](#)
- [Five Steps for Managing Campaigns](#)
- [Tips for Using Content Deliveries](#)

## For Analytics Cloud Professionals

The following documents apply to Analytics Cloud users:

### Wave Analytics

- [Wave Analytics Setup Guide](#)  
Learn how to set up Analytics Cloud.
- [Wave Analytics Security Implementation Guide](#)  
Learn how to implement security on Salesforce data, apps, and datasets.
- [Wave Analytics Data Integration](#)
- [Getting Started with Wave Replication Tipsheet](#)
- [Wave Analytics External Data API Developer Guide](#)
- [Wave Analytics External Data Format Reference](#)
- [Wave Analytics SAQL Reference](#)
- [Wave Analytics Dashboard JSON Guide](#)
- [Wave Analytics Extended Metadata \(XMD\) Reference](#)

## For Administrators

The following documents apply to administrators:

### Mobile Administration

- [Salesforce1 Mobile App Admin Guide](#)
- [Salesforce Classic Mobile Implementation Guide](#)

### Sales Administration

- [Get Started with Sales Cloud](#)
- [Enhance Your Sales Cloud Implementation](#)

- [Enterprise Territory Management Implementation Guide](#)
- [Team Selling Implementation Guide](#)
- [Setting Up Shared Calendaring](#)
- [Implementing Person Accounts](#)
- [Collaborative Forecasts Implementation Guide](#)
- [Setting Up Customizable Forecasting](#)
- [Customizable Forecasting FAQ](#)
- [Salesforce CRM Content Implementation Guide](#)
- [Administering Salesforce Desktop Clients](#)
- [Helping Users Sync Contacts and Events with Lightning Sync](#)
- [Getting Started with Relationship Groups](#)
- [Getting Started with Assets](#)
- [Lightning Voice Implementation Guide](#)
- [Work.com Implementation Guide](#)
- [Deploying Territory Management \(This version of Territory Management precedes Enterprise Territory Management.\)](#)
- [Implementing Data.com Clean](#)

## Support Administration

- [Salesforce Console Implementation Guide](#)
- [Setting Up Customer Support](#)
- [Case Management Implementation Guide](#)
- [Complete Guide to Salesforce Knowledge](#)
- [Solutions Implementation Guide](#)
- [Getting Started with Setting Up Call Centers](#)
- [Getting the Most from Your Self-Service and Customer Portals](#)
- [Salesforce Customer Portal Implementation Guide](#)
- [Chatter Answers Implementation Guide](#)
- [Self-Service Portal Implementation Guide](#)
- [Salesforce CRM Content Implementation Guide](#)
- [Answers Implementation Guide](#)
- [The Admin's Guide to Entitlement Management](#)
- [Live Agent for Administrators](#)
- [Setting Up Case Feed](#)
- [Getting Started with the Ideas Base Theme](#)
- [Complete Guide to Social Customer Service](#)
- [Set Up Omni-Channel](#)
- [Set Up SOS Video Chat and Screen-Sharing](#)

## Marketing Administration

- [Tips for Lead Administrators](#)

- [Salesforce Lead Management Implementation Guide](#)
- [Campaign Management Implementation Guide](#)
- [Salesforce Ideas Implementation Guide](#)

## Communities and Collaboration Administration

- [Getting Started With Salesforce Communities](#)
- [Community Templates for Self-Service Implementation Guide](#)
- [Communities Managers Guide](#)
- [Migrating From Portals to Communities](#)
- [Quick Actions Implementation Guide](#)
- [Customizing Chatter Profile Pages](#)
- [Salesforce Files Sync Implementation Guide](#)
- [Salesforce Files Connect Implementation Guide](#)

## Salesforce Implementations

- [Salesforce Enterprise Edition Upgrade Guide](#)
- [Setting Up Salesforce Group Edition](#)
- [Salesforce Limits Quick Reference Guide](#)

## Platform and Apps

- [Tips & Hints for Record Types](#)
- [Building Custom Objects, Tabs, and Related Lists](#)
- [Implementing State and Country Picklists](#)
- [Formulas Quick Reference Guide](#)
- [Useful Formula Fields](#)
- [Tips for Reducing Formula Size](#)
- [Using Date and Date/Time in Formulas](#)
- [Useful Validation Rules](#)
- [Using Multiple Business Processes](#)
- [Useful Workflow Rules](#)
- [Useful Approval Processes](#)
- [Cloud Flow Designer Workbook](#)
- [Visual Workflow Guide](#)
- [Organization Sync Implementation Guide](#)

## Security and Data Management

- [Security Implementation Guide](#)
- [Managing Duplicate Records in Salesforce](#)
- [Single Sign-On Implementation Guide](#)

- [Platform Encryption Implementation Guide](#)
- [Understanding User Sharing](#)
- [Understanding Defer Sharing Calculations](#)
- [Managing Data Quality](#)
- [Importing Your Organization's Accounts and Contacts](#)
- [Using Mass Delete to Undo Imports](#)
- [Getting Started with Divisions](#)
- [Data Loader Guide](#)
- [Salesforce Field Reference Guide](#)
- [Resolving Data Conflicts and Errors in Force.com Flex Apps](#)
- [Salesforce Identity Implementation Guide](#)
- [Identity Connect Implementation Guide](#)

## Extending Salesforce

- [Developing Packages for Distribution](#)
- [Force.com Sites Implementation Guide](#)
- [OEM User License Comparison](#)
- [Custom Metadata Types Implementation Guide](#)

## Globalization

- [Setting Up the Translation Workbench](#)
- [International Organizations: Using Multiple Currencies](#)

## Health Cloud

Administration

- [Health Cloud Implementation Guide](#)
- [Health Cloud Object Reference Guide](#)

## Financial Services Cloud

Administration

- [Financial Services Cloud Implementation Guide](#)
- [Financial Services Cloud Object Reference Guide](#)

## Video Demos

Salesforce creates video demos to help you be successful with Salesforce. All videos are in English.

- [Salesforce Setup](#)
- [User Setup](#)
- [General Salesforce Functionality](#)
- [Community](#)

- [Sales](#)
- [Service](#)
- [Data.com](#)
- [Platform and Apps](#)
- [Security](#)
- [Salesforce Identity](#)
- [Data Import](#)
- [Wave Analytics, Reports, and Dashboards](#)

## Salesforce Setup

Video Title	For End Users	For Admins
<p><a href="#">Get Ready to Migrate to Lightning Experience</a></p> <p>Lightning Experience is the modern and intelligent Salesforce user interface that transforms the way sales reps get their work done. But before reps can get started, Salesforce administrators have to migrate from Salesforce Classic. This video demonstrates how the Migration Assistant is here to guide admins each step of the way.</p>		✓

## User Setup

Video Title	For End Users	For Admins
<p><a href="#">How to Change Your Personal Settings in Salesforce</a></p> <p>This short video walks you through changing your personal settings in Salesforce. You can change the tabs that appear at the top of the page, change the layout and elements that appear on individual pages, and fine-tune your Chatter email settings.</p>	✓	
<p><a href="#">Need Help Logging In?</a></p> <p>A quick video to help you in case you forgot your Salesforce password!</p>	✓	

## General Salesforce Functionality

Video Title	For End Users	For Admins
<p><a href="#">Search in Salesforce Classic</a></p> <p>This video walks you through searching in Salesforce, and within Chatter, so you can locate files, posts, records, and topics quickly.</p>	✓	
<p><a href="#">Search in Salesforce Lightning Experience</a></p> <p>This video guides you through searching in Salesforce Lightning Experience and navigating search results.</p>	✓	

Video Title	For End Users	For Admins
<p><a href="#">▶ How Does Search Work?</a></p> <p>Ever wonder how search finds information in your org? This video guides you through the search process, including how your search terms are broken up and matched against the search index.</p>	✓	✓
<p><a href="#">▶ How to Search In Help</a></p> <p>Our Help portal is extensive, with everything from documentation, to troubleshooting-type knowledge articles, videos, and more. Fine-tune your search settings and learn to use the filters so that you can find exactly what you need, every time.</p>	✓	
<p><a href="#">▶ Prospecting Insights in Lightning</a></p> <p>Engage customers and close deals with Data.com Prospecting Insights in Lightning Experience.</p>		

## Community

Video Title	For End Users	For Admins
<p><a href="#">▶ Tips for Rolling Out Chatter</a></p> <p>Not sure how to roll out Chatter in your organization or drive adoption among users? Watch this short video to see your options and come up with a plan unique to your business needs.</p>		✓
<p><a href="#">▶ Collaborate in Chatter Groups</a></p> <p>Chatter groups offer collaboration spaces with different degrees of privacy that allow group members to work as a team, share resources, and even invite customers. Watch this video to plan your organization's group strategy and make the most of out of the group feed, group search, files, announcements, and other powerful features.</p>	✓	✓
<p><a href="#">▶ Discover and Organize with Chatter Topics</a></p> <p>Use Chatter topics to see what people are talking about, organize the conversations you want to be a part of, and discover people and groups that are interested and knowledgeable in the same areas.</p>	✓	
<p><a href="#">▶ Getting the Most Out of Chatter Feeds</a></p> <p>Use Salesforce Chatter to create posts, polls, and bookmarks to collaborate effectively with your coworkers in Chatter. Learn how to post to your followers or a group, bookmark a post so you can find it later, and how to create a poll so you can gather results fast!</p>	✓	
<p><a href="#">▶ Enhancing Your Chatter Posts</a></p> <p>Learn how to use @mentions and hashtag topics to enhance your Chatter posts.</p>	✓	
<p><a href="#">▶ Get Started with Salesforce Files Sync</a></p>	✓	

Video Title	For End Users	For Admins
Learn how to sync files between your computer or mobile device and Salesforce so you always have the latest version of every file.		
<p><a href="#">▶ Setting Up Your Salesforce Community</a></p> <p>Learn how a Salesforce administrator uses Salesforce Communities to create a support community for her company.</p>		✓

## Sales

Video Title	For End Users	For Admins
<p><a href="#">▶ Lightning Experience: Take it for a Spin</a></p> <p>This video showcases the full Salesforce Lightning Experience. Learn how to find your personal settings, where to find items such as records and apps, and how to navigate records and find details and common actions.</p>	✓	
<p><a href="#">▶ Use Tasks in Lightning Experience to Boost Sales Productivity</a></p> <p>Learn three powerful ways to manage tasks in Lightning Experience.</p>	✓	
<p><a href="#">▶ Qualify and Convert Your Leads Efficiently</a></p> <p>The lead workspace in Lightning Experience is command central for working toward lead qualification. Log calls, create tasks, collaborate, and send email—all from your workspace.</p>	✓	
<p><a href="#">▶ Work Your Opportunities and Manage Your Pipeline</a></p> <p>This video show you how to work your deals and manage your pipeline in the Salesforce Lightning Experience.</p>	✓	
<p><a href="#">▶ Take Your Tasks from Desktop to Mobile</a></p> <p>See how our setup wizard helps you get started with Salesforce.</p>		✓
<p><a href="#">▶ Salesforce Basics for Helping Your Sales Teams Close Deals Faster</a></p> <p>Learn about the standard objects you use in Salesforce to store your data.</p>	✓	✓
<p><a href="#">▶ Take Your Tasks from Desktop to Mobile</a></p> <p>Stay on top of your tasks when you're on the go by using the Salesforce1 app for phones and tablets.</p>	✓	
<p><a href="#">▶ Accounts and Contacts on the Go</a></p> <p>Combine desktop and mobile data with the Salesforce1 app for phones and tablets.</p>	✓	
<p><a href="#">▶ Splitting Credit across Your Sales Team</a></p> <p>Learn how to add revenue and overlay splits to opportunities.</p>	✓	

Video Title	For End Users	For Admins
<p><a href="#">▶ Connecting Social Networks to Accounts, Contacts, and Leads</a></p> <p>Gain insights to your current and prospective customers by adding social data to your Salesforce accounts, contacts, and leads.</p>	✓	
<p><a href="#">▶ Editing Role-Based Category Group Visibility</a></p> <p>Allows certain roles to view information, such as questions in an answers community or articles in a knowledge base, according to specific data categories.</p>		✓
<p><a href="#">▶ Forecast Accurately With Collaborative Forecasts</a></p> <p>See how to maneuver around Collaborative Forecasts so that you can reach your sales goals.</p>	✓	
<p><a href="#">▶ Sending Mass Email</a></p> <p>This demo shows you how to leverage the mass email tool in Salesforce, so you can quickly contact your customers and track these emails within the Salesforce app.</p>	✓	
<p><a href="#">▶ Creating Quote Templates</a></p> <p>Quote templates let you design, preview, and activate templates for the quote PDFs that sales reps send to customers.</p>	✓	
<p><a href="#">▶ How to Merge Contacts in Salesforce</a></p> <p>Learn how you can merge duplicate contact records in Salesforce.</p>	✓	
<p><a href="#">▶ How to Use Notes</a></p> <p>Learn how to use Notes, the enhanced note-taking tool in Salesforce1.</p>	✓	
<p><a href="#">▶ How to Track Calls, Emails, and Meetings</a></p> <p>Learn how to track different events such as calls, emails, and meetings in Salesforce.</p>	✓	
<p><a href="#">▶ Merging Duplicate Accounts: Tips and Gotchas</a></p> <p>The Merge Accounts tool lets you merge multiple account records into one, and lets you choose which data to keep from each record. This video guides you through the process so you can get clean, useful data, quickly.</p>	✓	
<p><a href="#">▶ Relate a Single Contact to Multiple Accounts</a></p> <p>Learn how easy it is to track the relationships between people and the businesses they work with. When you relate a single contact record to multiple account records, you can view current and past relationships so you always know who you're talking to—or who you <i>should</i> be talking to.</p>	✓	
<p><a href="#">▶ Set Up Contacts to Multiple Accounts</a></p> <p>Let your sales reps easily track the relationships between the customers and businesses they work with. Contacts to Multiple Accounts is quick to set up and allows reps to relate a single contact record to multiple accounts.</p>		✓



Video Title	For End Users	For Admins
<b>Lightning Sync Videos</b>		
<p><a href="#">Salesforce Lightning Sync Setup in Office 365 via Point and Click</a></p> <p>This video walks you through how to configure Exchange using the point and click interface.</p>		✓
<p><a href="#">Salesforce Lightning Sync Setup in Exchange via the Command Line</a></p> <p>This video walks you through how to configure Exchange 2010, Exchange 2013, or Office 365 (Exchange Online) using the command-line interface.</p>		✓
<b>Salesforce for Outlook Videos</b>		
<p><a href="#">Getting Started with Salesforce for Outlook</a></p> <p>Salesforce for Outlook lets you sync contacts, events, and tasks between Microsoft® Outlook® and Salesforce. You can also associate Outlook emails, events, and tasks to Salesforce records, directly from Outlook. Learn how to download and install the product on your system.</p>	✓	
<p><a href="#">Learning about Sync Directions</a></p> <p>Learn how to view your sync direction settings in Salesforce for Outlook, and find out whether you have permissions to change them.</p>	✓	
<p><a href="#">Using the Salesforce Side Panel to Work with Records in Microsoft® Outlook®</a></p> <p>Learn how you can work with Salesforce records directly in Outlook. In addition, learn about adding Outlook emails and events to the Salesforce records of your choice.</p>	✓	
<b>Work.com Videos</b>		
<p><a href="#">Getting Started with Work.com</a></p> <p>This video introduces you to Work.com's performance management features. Use Work.com to recognize your coworkers, align your company using goals, create coaching relationships tied to definable metrics, give and request feedback, and roll out performance summaries.</p>		✓

## Service

Video Title	For End Users	For Admins
	✓	
<p><a href="#">Introducing the Salesforce Console</a></p> <p>The Salesforce console uses tabs to help you find and update records quickly.</p>	✓	
<p><a href="#">Prepare to Set Up a Salesforce Console</a></p> <p>How to set up a Service Cloud console for support agents.</p>		✓

Video Title	For End Users	For Admins
<p><a href="#">▶ Entitlement Management Setup</a></p> <p>Learn how to set up the Entitlement Management feature. Entitlement Management helps your support reps determine which customers are eligible for certain kinds of support. This video covers Entitlement Management Milestones, Entitlement Processes, Entitlements, and Service Contracts.</p>		✓
<p><a href="#">▶ Updating Entitlement Processes with Entitlement Versioning</a></p> <p>Learn how to create a new version of an entitlement process, edit the new version, and apply it to new and existing entitlements.</p>		✓
<p><a href="#">▶ Setting Up Data Categories</a></p> <p>Data categories let you classify your data based on your business needs.</p>		✓
<p><a href="#">▶ Support Your Customers on Their Social Networks</a></p> <p>Learn how to get started with Social Customer Service.</p>		✓
<p><a href="#">▶ Live Agent Configuration</a></p> <p>Set up Live Agent in your Salesforce console and get your agents chatting!</p>		✓

## Data.com

Video Title	For End Users	For Admins
<p><a href="#">▶ Select a Data.com Match for your Salesforce Account Record</a></p>		
<p><a href="#">▶ The Importance of High Quality Data</a> Rick Endrulat, President of Virtual Causeway, on data quality.</p>		✓
<p><a href="#">▶ Talk with Drew Alexander About High Quality Data</a> Watch Drew Alexander, WW Director of Sales Technology and Analytics for Commvault, talk about the power of high quality data.</p>		✓
<p><a href="#">▶ Talk With Drew Alexander About Data.com Clean</a> Watch Drew Alexander, WW Director of Sales Technology and Analytics for Commvault, talk about how Data.com Clean helps improve data quality.</p>		✓

## Platform and Apps (General)

Video Title	For End Users	For Admins
<p><a href="#">▶ How to Change the Look and Feel of Salesforce for Your Company</a></p> <p>Quick demo of how to customize the way Salesforce looks for your organization.</p>		✓
<p><a href="#">▶ Creating a Workflow Rule</a></p>		✓

Video Title	For End Users	For Admins
Quick demo of how to create a workflow rule in Salesforce.		
<p><a href="#">▶ Visual Workflow Cloud Flow Designer Overview</a></p> <p>This demo gives you an overview of Visual Workflow's Cloud Flow Designer, the tool for creating flows. With the Salesforce Cloud Flow Designer, you can configure screens and define branching logic for your flows, completely within Salesforce, without writing any code.</p>		✓
<p><a href="#">▶ Building a Simple Flow</a></p> <p>Follow along as we create a simple two-screen pledge flow using user input fields and choices. We collect users' information, ask them to choose a pledge level, then thank them for their donation.</p>		✓
<p><a href="#">▶ Troubleshooting Workflow</a></p> <p>Learn how to investigate and troubleshoot the most common issues that occasionally arise with Workflow.</p>		✓
<p><a href="#">▶ Avoid Unwanted Actions in Your Process</a></p> <p>This video shows you how to set options in the Process Builder so you can, for example, avoid sending a bunch of emails to the VP every time a high-value opportunity is updated.</p>		✓
<p><a href="#">▶ Accessing the Email Field from a Lookup Object</a></p> <p>Have you ever wanted to use a field from a lookup object on its child object? For example, accessing the email field on a lookup object in a workflow that is based on the child object? This video walks you through just such a scenario.</p>		✓
<p><a href="#">▶ Creating Custom Links and Buttons</a></p> <p>Learn how to create a link on the Account object that maps the company's address onto Yahoo Maps.</p>		✓
<p><a href="#">▶ Force.com Quick Access Menu</a></p> <p>As an admin have you ever wanted to view or create fields, or view or create record types in context, from an object tab, rather than having to go through the Setup menus? This video shows you how to use the Force.com Quick Access Menu.</p>		✓
<p><a href="#">▶ How Organization Sync Works</a></p> <p>Learn about Organization Sync, a high-availability feature that lets you set up a secondary, synced Salesforce organization which your users can access when the primary organization experiences downtime or maintenance.</p>		✓
<p><a href="#">▶ Who Sees What: Record Types</a></p> <p>Learn how to organize and gather data for the same object, in different ways, using record types.</p>		✓

## Custom Fields

Video Title	For End Users	For Admins
<p><a href="#">▶ How to Create a Custom Field in Salesforce</a></p> <p>Want to customize Salesforce so it captures all your business data? This short video walks you through how to create a custom picklist field, from choosing the correct field type to applying field level security.</p>		✓
<p><a href="#">▶ Custom Fields: Picklists</a></p> <p>This video walks you through creating a picklist field and adding new values to the field, and deleting old values. We even cover how to add your values to the correct page layouts, so your users see choices that are relevant to their work.</p>		✓
<p><a href="#">▶ Custom Fields: Tips and Gotchas</a></p> <p>Learn from the experts some best practices, details about deleting fields, field usage limits, field history tracking and more. We also provide some caveats when changing field types, and advice on choosing the appropriate type of text field.</p>		✓

## Formulas

Video Title	For End Users	For Admins
<p><a href="#">▶ Getting Started With Formulas</a></p> <p>This video gives a brief introduction to Salesforce formulas, accessing the formulas editor in the app, and how to use the editor tools to create formulas.</p>		✓
<p><a href="#">▶ How to Calculate the Number of Days a Case is Open</a></p> <p>This video walks you through constructing a formula that calculates the number of days it took to close a case, or if the case is still open, how many days have passed since it was first opened.</p>		✓
<p><a href="#">▶ How to Build an Image Formula</a></p> <p>This video explains how to create a quick and easy formula that adds graphics to the ratings field on a lead—five stars for hot, three stars for warm, and one star for cold—so that salespeople can see at a glance which leads are the most important.</p>		✓
<p><a href="#">▶ Formulas: Tips and Gotchas</a></p> <p>Formulas are a powerhouse and can be used in fields and reports. This video walks you through a few pro tips on how to get started, and how to avoid some common pitfalls.</p>		✓

## Security

Video Title	For End Users	For Admins
<p><a href="#">▶ Activating Your Computer</a></p> <p>Learn how to activate your computer so you can log in to Salesforce outside the office.</p>	✓	
<p><a href="#">▶ Creating a Criteria-Based Sharing Rule</a></p> <p>Learn how to create a sharing rule based on a field value in a record.</p>		✓
<p><a href="#">▶ Editing Role-Based Category Group Visibility</a></p> <p>Allows certain roles to view information, such as questions in an answers community or articles in a knowledge base, according to specific data categories.</p>		✓
<p><a href="#">▶ How to Grant Login Access</a></p> <p>To help you, your Salesforce administrator, or Salesforce Support, can log in to your Salesforce account. This video demonstrates how to let your Salesforce Admin or Salesforce Support access your account for a specified amount of time without distributing sensitive information like your password.</p>	✓	
<p><a href="#">▶ Letting Your Salesforce Administrator Access Your Account</a></p> <p>Learn how you can grant your administrator access to your Salesforce account without distributing your password.</p>	✓	
<p><a href="#">▶ Who Sees What: Overview</a></p> <p>Learn how you can control who sees what data in your organization.</p>		✓
<p><a href="#">▶ Who Sees What: Organization Access</a></p> <p>Learn how to restrict login through IP ranges and login hours.</p>		✓
<p><a href="#">▶ Who Sees What: Object Access</a></p> <p>Learn how you can grant users access to objects by using profiles.</p>		✓
<p><a href="#">▶ Who Sees What: Organization-Wide Defaults</a></p> <p>Learn how you can restrict access to records owned by other users.</p>		✓
<p><a href="#">▶ Who Sees What: Record Access via the Role Hierarchy</a></p> <p>Learn how you can open up access to records using the role hierarchy.</p>		✓
<p><a href="#">▶ Who Sees What: Record Access via Sharing Rules</a></p> <p>Learn how you can grant access to records using sharing rules.</p>		✓
<p><a href="#">▶ Who Sees What: Field-Level Security</a></p> <p>Learn how you can restrict access to specific fields on a profile by profile basis.</p>		✓
<p><a href="#">▶ Who Sees Whom: User Sharing</a></p>		✓

Video Title	For End Users	For Admins
Learn how you can control visibility among users in your organization.		
<p><a href="#">Who Sees What: Permission Sets</a></p> <p>Learn how to give users more permissions and access settings without changing profiles.</p>		✓
<p><a href="#">Who Sees What: Record Types</a></p> <p>Learn how to organize and gather data for the same object, in different ways, using record types.</p>		✓


## Salesforce Identity

Video Title	For End Users	For Admins
<p><a href="#">Enhancing Security with Two-Factor Authentication</a></p> <p>See a demonstration of Two-Factor Authentication for Salesforce, and when to use it.</p>		✓
<p><a href="#">Integrating Active Directory with Salesforce using Identity Connect</a></p> <p>Learn to integrate Active Directory with Salesforce using Salesforce Identity Connect, simply. This video shows how to set up Identity Connect so your users can authenticate, and you can keep Salesforce user synchronized with Active Directory users.</p>		✓
<p><a href="#">Salesforce as a Single Sign-On Provider</a></p> <p>Learn how simple it is to configure Salesforce Identity as a Single Sign-On provider to third-party applications. In this video, we quickly set up Salesforce as an Identity Provider for Google Apps.</p>		✓
<p><a href="#">Salesforce Identity Demo</a></p> <p>Take a quick tour of some of Salesforce Identity's amazing features. In this demo, we cover branding, single sign-on, access management, policies, reporting, and more.</p>		✓
<p><a href="#">Setting Up a My Domain</a></p> <p>Learn about the advantages of setting up a custom URL for your Salesforce org using "My Domain". My Domain greatly enhances your control over login services, providing for seamless single sign-on, or custom branding of the Salesforce login page.</p>		✓
<p><a href="#">Setting Up Single Sign-On</a></p> <p>This video demonstrates the Salesforce single-sign on "best practice" recommendations for employees, as well as partners and customers with Portals and Communities. It also covers critical debugging strategies.</p>		✓
<p><a href="#">Setting Up the App Launcher</a></p>		✓

Video Title	For End Users	For Admins
Set up, use, and manage the Salesforce App Launcher, which provides a single sign-on portal for your users to launch approved Salesforce apps and external applications from one interface.		
<p>▶ <a href="#">Single Sign-On and Access Management for Mobile Applications</a></p> <p>Learn how to enable connected apps for mobile users while maintaining control over authorization rules and policies using Salesforce Identity and OAuth. This video covers mobile-specific policies, like PIN protection, session timeout, single sign-on integration, auditing and reporting.</p>		✓
<p>▶ <a href="#">Social Sign-On</a></p> <p>Learn how to configure Social Sign-On. This feature allows your users to sign in to your Salesforce org via My Domain using their social network credentials.</p>		✓

## Data Import

Video Title	For End Users	For Admins
<p>▶ <a href="#">Best Practices for Importing Data</a></p> <p>Learn the top pain points experienced by our customers, so you can avoid them entirely! This video details how to delete a bad import, how to back up data before import, and more.</p>		✓
<p>▶ <a href="#">Choosing the Right Tool</a></p> <p>Learn Data Loader in depth, so you can decide whether it's right for your needs. We compare it to the Import Wizards and also list some other tools to consider.</p>		✓
<p>▶ <a href="#">Cleaning and Preparing Your Data Using Excel</a></p> <p>Excel offers many features and functions to make quick work of getting your data files ready for import. We show you some practical ways to use these features with your import data.</p>		✓
<p>▶ <a href="#">Cleaning Up Your Import File</a></p> <p>Learn how to clean up your import files and get Salesforce ready, and best practices for keeping data clean once it's been imported.</p>		✓
<p>▶ <a href="#">Importing Your Accounts and Contacts—Part 1: Exporting Your Data</a></p> <p>In this video, we walk you through how to import Account and Contact data using the Data Import Wizard. Once you have your data in a CSV file, you can use the wizard to import it and map fields.</p>		✓
<p>▶ <a href="#">Importing Your Accounts and Contacts—Part 2: Importing Your Data</a></p>		✓

Video Title	For End Users	For Admins
<p> <a href="#">Owner IDs and Parent IDs</a></p> <p>Learn, step by step, which objects you should import, and when. We cover how to make sure each child object, such as opportunities, has the correct owner and parent record, and we show you a demo in the user interface of how to do this using the Data Loader tool.</p>		✔

SEE ALSO:


[Tip Sheets and Implementation Guides](#)

## Get More Done Faster with Walkthroughs

Interactive walkthroughs guide you step-by-step through a task or feature. Salesforce creates walkthroughs to help you be successful with Salesforce.

Before you click a walkthrough link, make sure you have the correct user permissions and license associated with the feature so you can access the proper pages in Salesforce. Then, click the link to open the walkthrough. If you're not already logged in, you'll be prompted to log into your account.

The walkthrough guides you through a series of steps to help you complete a task or review a feature directly within your own Salesforce account.

 **Note:** Keep in mind that walkthroughs guide you through your own Salesforce account rather than a demo environment. So you're actually making changes to the data in your org as you follow along through the steps. If you're concerned about making these changes, follow the walkthrough in a sandbox account or other test environment first.

### EDITIONS

Available in: All Editions

## Get Started as a New User

New to Salesforce? Set yourself up as a new user so you can start using the application right away.

### 1. [Log In for the First Time](#)

When your administrator sets you up as a new user, you receive an email that includes your username and a link to your organization's Salesforce site.

### 2. [Get Around in Salesforce](#)

Learn to navigate basic areas of Salesforce to find your way around the app quickly.

### 3. [Set Up Your Chatter Profile](#)

Your Chatter profile communicates who you are to your coworkers and any customers you communicate with. It features your photo and basic information like your professional title and contact details.

### 4. [Personalize Your Salesforce Experience](#)

Salesforce includes personal settings options to help you personalize your experience. Depending on which experience of Salesforce you have enabled, these settings are located in different parts of the application.

### EDITIONS

Available in: Salesforce Classic

Available in: **All Editions**;  
Chatter available in: **Group, Professional, Enterprise, Performance, Unlimited, Contact Manager**, and **Developer** Editions



### 5. [Get to Know Your Salesforce Admin](#)

Your Salesforce administrator—or “admin” as you may choose to call them—is a Salesforce user with system administration duties and other super powers. Admins are responsible for setting up Salesforce for their organizations and making sure it runs smoothly. Admins have a special profile, which lets them add users and specify what they can see and do in Salesforce. Admins can make everyone more productive by creating custom Salesforce objects, workflows, validation rules, reports, and more. Admins are planners, problem-solvers, and heroes.

### 6. [Why Can't I See Some Features?](#)

Because Salesforce is highly customizable, you might not have access to all of the product features.

### 7. [Tips for New Users](#)

Learn the tips you need to be a fast, productive Salesforce user on day one.

## Log In for the First Time

When your administrator sets you up as a new user, you receive an email that includes your username and a link to your organization’s Salesforce site.

Here’s how to log in for the first time.

1. Check your email for your login information.
2. Click the link provided in the email.  
The link logs you in to the site automatically.
3. The site prompts you to set a password and choose a security question and answer to verify your identity in case you forget your password.

If you haven’t received your login information, contact the Salesforce administrator at your organization.

SEE ALSO:

[Troubleshoot Login Issues](#)

[Verify Your Identity](#)

### EDITIONS

Available in: Salesforce  
Classic and Lightning  
Experience

Available in all editions

## Get Around in Salesforce

Learn to navigate basic areas of Salesforce to find your way around the app quickly.

Salesforce is a valuable tool—learning the interface and where it stores your info will help you make the most of your experience.

1. [Understand how Salesforce organizes your info.](#)
2. [Understand Salesforce pages.](#)
3. [Understand your Home tab.](#)
4. [Navigate object home pages.](#)
5. [Find the setup menu.](#)

### EDITIONS

Available in: Salesforce  
Classic

Available in all editions

### [Understanding How Salesforce Organizes Your Information](#)

Salesforce groups your data into logical categories called objects. An object is a collection of fields named for the kind of information those fields capture. Commonly-used Salesforce objects include Contacts, Accounts, Cases, and Reports. For example, the Contacts object contains fields with information describing the people you do business with, such as their first names, last names, phone numbers, business titles, and the companies they work for.

### [Navigating Object Home Pages](#)

#### [Open a Different App](#)

Not finding the feature you need to use? Maybe it's in another app. Check out the drop-down menu to see all the apps available to you, and select the one you need.

#### [Find Setup](#)

How you find Setup depends on which Salesforce experience you're using and on your organization's user interface settings.

## Understanding How Salesforce Organizes Your Information

Salesforce groups your data into logical categories called objects. An object is a collection of fields named for the kind of information those fields capture. Commonly-used Salesforce objects include Contacts, Accounts, Cases, and Reports. For example, the Contacts object contains fields with information describing the people you do business with, such as their first names, last names, phone numbers, business titles, and the companies they work for.

There are two types of Salesforce objects.

- *Standard* objects are included with the Salesforce license your company purchases. These are the most commonly-used objects.
- *Custom* objects are created to meet your company's business needs.

Your organization's administrator can customize standard objects or create custom objects to support the type of work your company does or the industry you're in. For example, your organization may choose to create a custom object called "Bugs" to track their known product issues, or rename the standard object "Accounts" to "Clients" because this is how your organization refers to your customers.

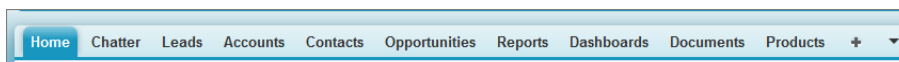
In the Salesforce interface, you generally work with objects from their tabs. For example, the Opportunity object has an Opportunities tab. If you learn about an object from the Salesforce documentation but can't find it in the user interface, contact your administrator to find out whether the object is available to you. If your edition features objects and related tabs that you can't find documentation for, it may be because the object is custom. Contact your administrator to learn how to use it.

SEE ALSO:

[Navigating Object Home Pages](#)

## Navigating Object Home Pages

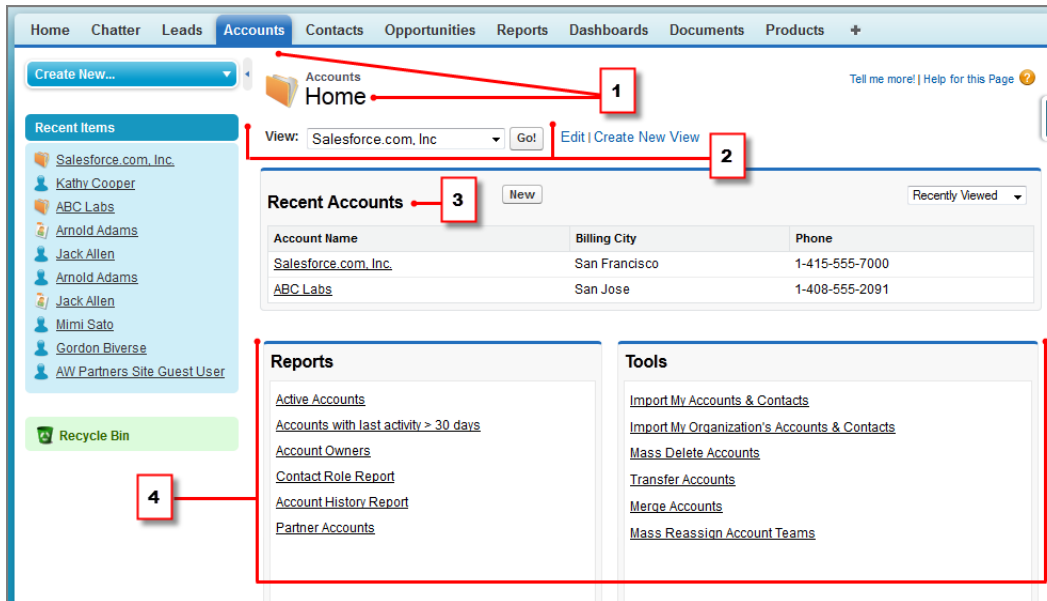
In the desktop application, commonly-used objects are found by clicking on their tabs, which appear at the top of your screen. Other Salesforce features, such as Home and Chatter, also have tabs.



To work with your data, click an object's tab. For instance, to access account information for the customers you work with, click the Accounts tab. Here you find:

1. The name of the object and type of data you are viewing. In this case, Accounts.

2. *List View* options. A list view narrows your accounts to a specific set (for example, you can choose to view All Accounts or just Recently Viewed Accounts).
3. A list of recently-accessed records. Here, Recent Accounts. This list is visible for every standard and custom object and can't be customized.
4. Links to other features you may want to use next.



## Open a Different App

Not finding the feature you need to use? Maybe it's in another app. Check out the drop-down menu to see all the apps available to you, and select the one you need.

To use features available in a different Salesforce app than the one you have open, you need to open the other app. Other apps include the Salesforce Marketing app, the Call Center app, and any custom apps for your organization.

Your organization may also use connected apps. Connected apps include productivity apps such as Gmail™ and Microsoft Office 365™, or other apps to help you get your work done. If your administrator has added these apps to your organization, they appear in the App Launcher.

### [Open a Different Salesforce App in Salesforce Classic](#)

It's easy to navigate between Salesforce apps, such as the Sales app and the Marketing app.

### [Open an App from the App Launcher in Salesforce Classic](#)

Navigate between your Salesforce apps and connected apps from a single menu.

### [Open a Different App in Lightning Experience](#)

Use Search or the App Launcher to navigate between all of your apps.


## EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: **All** editions except **Database.com**

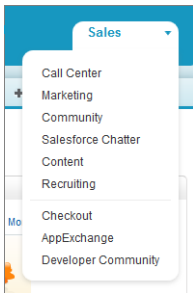
## Open a Different Salesforce App in Salesforce Classic

It's easy to navigate between Salesforce apps, such as the Sales app and the Marketing app.

 **Note:** These steps work in Salesforce Classic. If you see a row of tabs across the top of your screen, you're in Salesforce Classic. If you see a navigation bar on the left, you're in Lightning Experience.


To use features available in a different Salesforce app than the one you have open, you need to open the other app. You can have one app open at a time, and the app you have open will open the next time you log in to Salesforce.

To open an app: In the upper-right corner of any Salesforce page, select the app you want from drop-down app menu.



## Open an App from the App Launcher in Salesforce Classic

Navigate between your Salesforce apps and connected apps from a single menu.

 **Note:** These steps work in Salesforce Classic. If you see a row of tabs across the top of your screen, you're in Salesforce Classic. If you see a navigation bar on the left, you're in Lightning Experience.

You must have access to a Salesforce app or connected app to see and open it from the App Launcher.

To open the App Launcher: select the App Launcher on any Salesforce page from the Force.com App Menu.

### EDITIONS

Available in: Salesforce Classic

Available in: **All** editions except **Database.com**

### USER PERMISSIONS

To use an app:

- Access to that app as specified in your user profile or permission set.

### EDITIONS

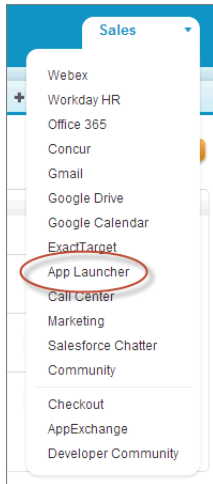
Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

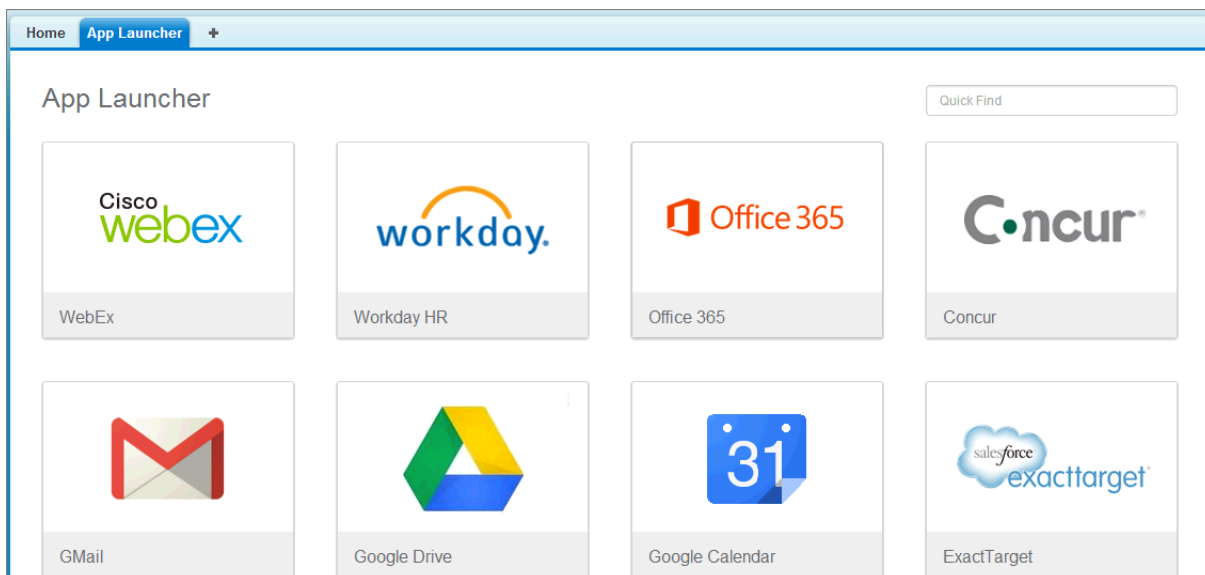
### USER PERMISSIONS

To see the App Launcher:

- "Use Identity Features"




In the App Launcher, click an installed app icon to launch the app.



## Open a Different App in Lightning Experience

Use Search or the App Launcher to navigate between all of your apps.

-  **Note:** These steps work in Lightning Experience. If you see a navigation bar on the left side of your screen, you're in Lightning Experience. If you see a row of tabs across the top of the screen, you're in Salesforce Classic.

To open an app, you have 2 options.

- Use the `Search Salesforce` box at the top of any Salesforce page. Start typing the name of the app, such as "Marketing," and click the result as it appears. This search works for custom apps and connected apps, too. The search doesn't allow wildcard character searches for apps. However, partial words do generate app search results as you type (such as "Mark").

### EDITIONS

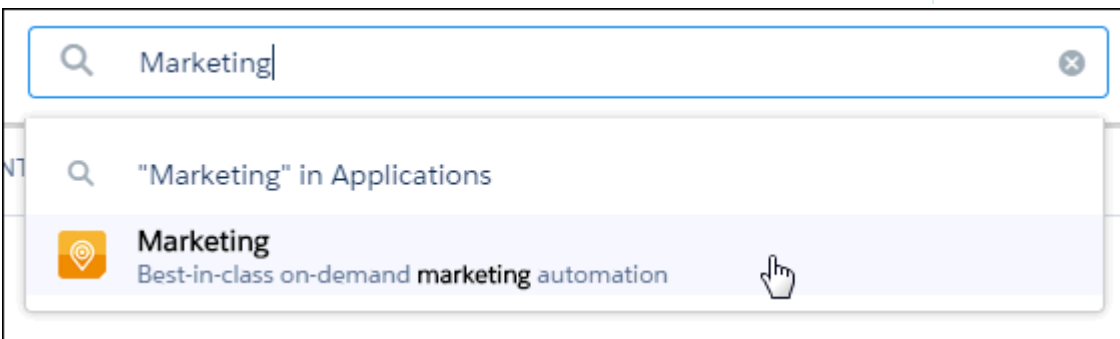
Available in: Lightning Experience

Available in: **All** editions except **Database.com**

### USER PERMISSIONS

To use an app:

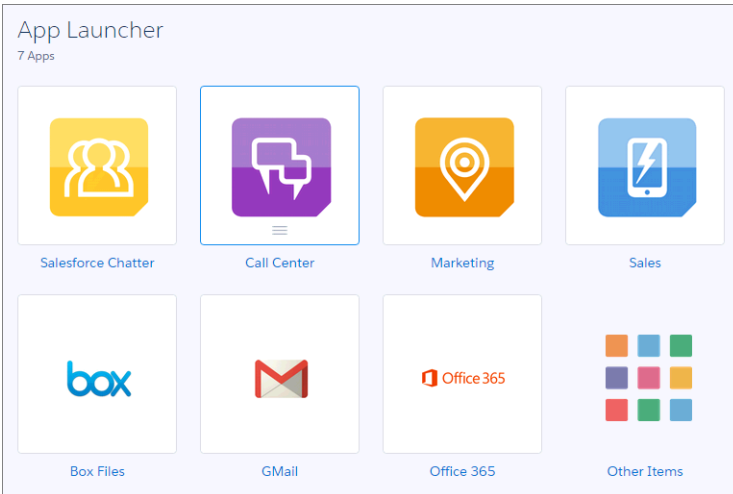
- Access to that app as specified in your user profile or permission set.



- In the upper-right corner of any Salesforce page, click the App Launcher icon.



The App Launcher displays all of your available Salesforce apps, and any connected apps your administrator has installed.



You can have one Salesforce app open at a time, and the app you have open will open the next time you log on to Salesforce.

You can open multiple connected apps simultaneously. Connected apps are apps your administrator installs to help you get your work done, such as Gmail™ and Microsoft Office 365™. Each connected app opens in a new window, so set your pop-up blocker to allow pop-ups from here, or the connected app doesn't open.


Drag an app icon from one position to another, and sort them by the apps you use most.


Don't see what you want? Click **Other Items** to see more apps, objects, and items. Or, ask your administrator if more apps are available.

## Find Setup

How you find Setup depends on which Salesforce experience you're using and on your organization's user interface settings.

Salesforce includes many options for setting up, maintaining, and customizing your organization. Some organizations also have options for building, packaging, and distributing their own apps. These options are all available from the Setup menu. If you're a Salesforce administrator or developer, you use the Setup menu frequently. Your organization's user interface settings determine how everyone in your organization accesses this menu.

1. Look at the top of any Salesforce page.
  - If you're using Lightning Experience, click , then select **Setup Home**.
  - If you're using Salesforce Classic and you see **Setup** in the user interface header, click it.
  - If you're using Salesforce Classic and you don't see **Setup** in the header, click your name, then select **Setup**.
2. Enter the name of the page that you want in the **Quick Find** box, then select the appropriate page from the menu.

 **Tip:** Type the first few characters of a page's name in the **Quick Find** box. As you type, pages that match your search terms appear in the menu. For example, to find the Language Settings page, type *Lang* in the **Quick Find** box, then select **Language Settings**.

SEE ALSO:

[Find Your Personal Settings in Salesforce Classic](#)

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **All** editions except **Database.com**.


## Set Up Your Chatter Profile


Your Chatter profile communicates who you are to your coworkers and any customers you communicate with. It features your photo and basic information like your professional title and contact details.


Set up your Chatter profile soon after you begin using Salesforce, and update it often.

 **Note:** If your organization doesn't use Chatter, you can still [add and edit personal information](#).

1. Click the **Chatter** tab and find the placeholder profile image on the left side of the page. Click *Your Name* next to the placeholder image.
2. To update your profile photo, hover over the placeholder image and click **Add Photo**.

 **Tip:** Use a photo of you and not a group of people or a pet. Chatter is a business tool, so choose a photo you don't mind showing to your boss and CEO.

3. To update your contact information, click  under your profile photo. In the **Edit Profile** box, complete the fields on the Contact tab and the About tab.

 **Tip:** Complete your profile with details about the department you work in, your past experience, or projects you are currently working on.

4. Click **Save All**.

SEE ALSO:

[Edit Your Personal Information](#)

## Personalize Your Salesforce Experience

Salesforce includes personal settings options to help you personalize your experience. Depending on which experience of Salesforce you have enabled, these settings are located in different parts of the application.

[Access Your Personal Settings in Lightning Experience](#)

If you use Lightning Experience, your personal settings are located either in Personal Setup or My Settings.

[Find Your Personal Settings in Salesforce Classic](#)

If you use Salesforce Classic, your personal settings are located either in Personal Setup or My Settings.

## Access Your Personal Settings in Lightning Experience

If you use Lightning Experience, your personal settings are located either in Personal Setup or My Settings.

1. At the top of any Salesforce page, click your image.
2. Click **Settings**.
3. On the left side of the page, click a menu item to display its submenu, then click the item you want.

### EDITIONS

Available in: Salesforce Classic

Available in: **Group, Professional, Enterprise, Performance, Unlimited, Contact Manager,** and **Developer** Editions

### EDITIONS

Available in: Lightning Experience

Available in: **All** editions except **Database.com**.



**Tip:** To quickly find a page, type the first few characters of its name in the **Quick Find** box. As you type, pages that match your search terms appear in the menu. For example, to find the Personal Information page, type *pers* in the **Quick Find** box.

**Note:** If you receive an error message regarding insufficient privileges when trying to access your personal settings, ask your Salesforce admin to enable the Improved Setup User Interface option. If you're an admin, from Setup, enter *User Interface* in the **Quick Find** box, then select **User Interface**. Select **Improved Setup User Interface**, and click **Save**.

## Find Your Personal Settings in Salesforce Classic

If you use Salesforce Classic, your personal settings are located either in Personal Setup or My Settings.

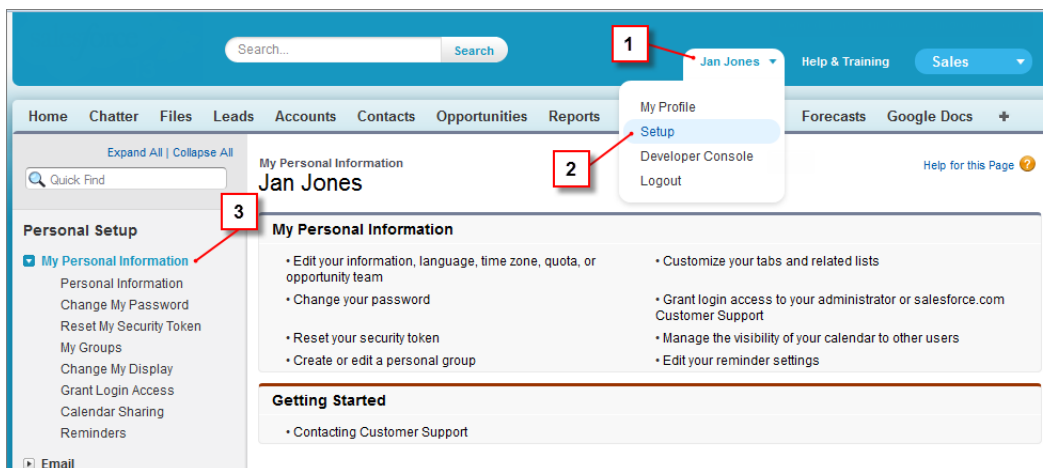
- At the top of any Salesforce page, click the down arrow next to your name.
 

Depending on your organization's user interface settings, you should see either **Setup** or **My Settings** in the menu.
- From the menu under your name, click **Setup** or **My Settings**.
- Do one of the following:
  - If you clicked **Setup**, look on the left side of the page and click a menu item to display its sub-menu, then click the item you want.

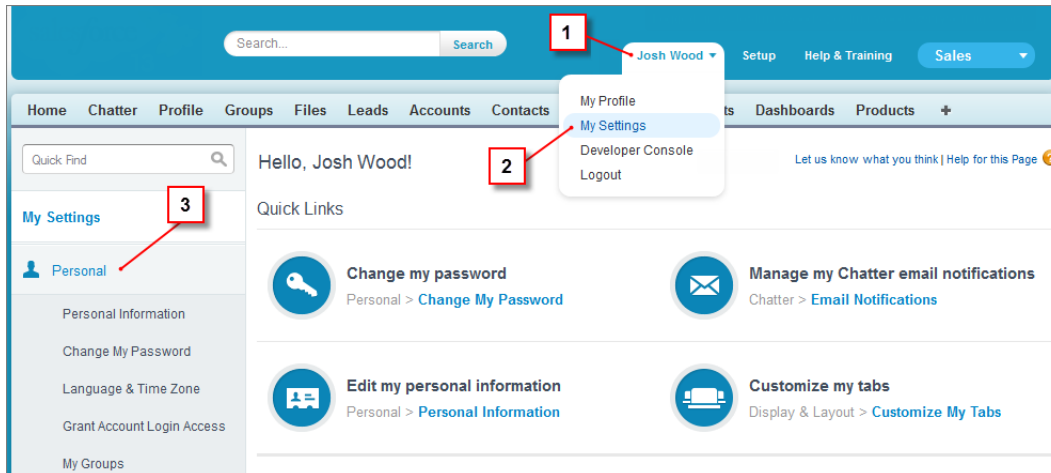
### EDITIONS

Available in: Salesforce Classic

Available in: **All** editions except **Database.com**.



- If you clicked **My Settings**, look on the left side of the page and click a menu item under My Settings to display its sub-menu, then click the item you want.



**Tip:** To quickly find a page, type the first few characters of its name in the **Quick Find** box. As you type, pages that match your search terms appear in the menu. For example, to find the Personal Information page, type *pers* in the **Quick Find** box.

SEE ALSO:

[Find Setup](#)

## Get to Know Your Salesforce Admin

Your Salesforce administrator—or “admin” as you may choose to call them—is a Salesforce user with system administration duties and other super powers. Admins are responsible for setting up Salesforce for their organizations and making sure it runs smoothly. Admins have a special profile, which lets them add users and specify what they can see and do in Salesforce. Admins can make everyone more productive by creating custom Salesforce objects, workflows, validation rules, reports, and more. Admins are planners, problem-solvers, and heroes.

All Salesforce organizations have at least one administrator, but larger ones may have more. Your administrator’s role can be as simple or as complex as your company’s size and structure. In smaller organizations, the admin might be someone who also uses Salesforce the way other users do: to sell products or provide customer service, for example. Many hats, one big brain.

Salesforce offers lots of features and items (such as those detailed in the *Learn Salesforce Basics* guide) that you can set up and configure yourself. It’s quite satisfying! For some things, though, you should partner with your trusty admin. They’ll help you get the best of what Salesforce has to offer and make sure you have a successful and productive experience.

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

- Find or use an object, field, or feature you heard about during training.
- Create a custom workflow to find out when a case is closed.
- Create a custom approval process to sign off on employee expenses.
- Create a custom report for your sales region.
- Give you a user permission that’s not granted as part of your user profile.
- Answer questions about your own or others’ access to records.
- Address those cursed error messages that ask you to contact your administrator for help or more information.

How you contact your administrator, and when and why, depends on your company's internal business policies and practices. Need to find out exactly what those are? Ask your administrator!

SEE ALSO:

[Why Can't I See Some Features?](#)

[Grant Login Access](#)

## Why Can't I See Some Features?

Because Salesforce is highly customizable, you might not have access to all of the product features.

You might learn about new Salesforce features in our help documentation and training videos. However, sometimes you'll find you can't access these through your interface. This might happen for several reasons.

- You may need to adjust your custom page views or install external apps to enable the feature.
- Your permissions and access settings for some features are limited.
- Your company customized Salesforce so that some standard objects and fields have different names, or created their own custom objects and fields.
- The feature you're looking for isn't offered in the Salesforce edition or the Salesforce experience that your company uses.

SEE ALSO:

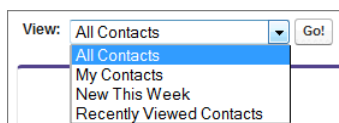
[Get to Know Your Salesforce Admin](#)

## Tips for New Users

Learn the tips you need to be a fast, productive Salesforce user on day one.

New users should keep these tips in mind:

- When you click on an object to find your data, you won't see a full list of your existing records—Salesforce keeps those tucked out of view until you manually recall them, in case you want to choose a subset of the full list. Choose an option within *View*, and click **Go!**



- *Related lists* are links featured at the bottom of object pages. Related lists provide quick access to other related objects that you might want to visit next. This feature adds a lot of value, because it gives you fast access to information you likely need next. It means less navigation and can speed up your workflow. In the Accounts object, your related lists might look like this:

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: All editions

### EDITIONS

Available in: Salesforce Classic

Available in: All Editions

Account Detail																					
Account Owner	Matt Wilson <a href="#">[Change]</a>	Phone	1-408-555-2091																		
Account Name	ABC Labs <a href="#">[View Hierarchy]</a>	Fax	1-408-555-2092																		
Parent Account		Website	<a href="http://www.ABCLabs.net">http://www.ABCLabs.net</a>																		
Prospect Rating  Warm																					
<div style="border: 2px solid red; padding: 5px;"> <p>▼ Sales Region</p> <p>Region  Zone </p> <hr/> <p>▼ Additional Information</p> <table border="0"> <tr> <td>Type</td> <td>Customer</td> <td>Employees</td> <td>120</td> </tr> <tr> <td>Industry</td> <td>Biotechnology</td> <td>Annual Revenue</td> <td>USD 7,500,000.00</td> </tr> </table> <hr/> <p>▼ Support Plan Information</p> <table border="0"> <tr> <td>Has Support Plan </td> <td>Support Plan Expiration Date </td> </tr> <tr> <td></td> <td>7/2/2014</td> </tr> <tr> <td colspan="2">Description</td> </tr> </table> <hr/> <p>▼ Address Information</p> <table border="0"> <tr> <td>Billing Address</td> <td>54 Park Drive San Jose, CA 95035 USA</td> <td>Shipping Address</td> <td>54 Park Drive San Jose, CA 95035 USA</td> </tr> </table> </div>				Type	Customer	Employees	120	Industry	Biotechnology	Annual Revenue	USD 7,500,000.00	Has Support Plan	Support Plan Expiration Date		7/2/2014	Description		Billing Address	54 Park Drive San Jose, CA 95035 USA	Shipping Address	54 Park Drive San Jose, CA 95035 USA
Type	Customer	Employees	120																		
Industry	Biotechnology	Annual Revenue	USD 7,500,000.00																		
Has Support Plan	Support Plan Expiration Date																				
	7/2/2014																				
Description																					
Billing Address	54 Park Drive San Jose, CA 95035 USA	Shipping Address	54 Park Drive San Jose, CA 95035 USA																		

Salesforce delivers the application with some standard related lists, but administrators can also customize some related list items.

- If you read or hear about a feature that you don't see in your own interface, don't worry. Your administrator can customize it to meet your organization's needs. If your administrator hasn't enabled help for the customization, contact them.
- Our help and training materials might mention a feature that your company hasn't enabled, or that your permissions profile doesn't allow you to see. If you believe this feature should be in your interface, or might help you in your job, contact the Salesforce administrator at your company. Not sure who that is? Reach out to the person at your company who introduced you to Salesforce.
- Save your work! It's easy to spend a lot of time updating the fields in a record and then to navigate away from that screen without saving. Make a habit of seeking out the save button before clicking away through another page element.

SEE ALSO:

[Why Can't I See Some Features?](#)

[Get to Know Your Salesforce Admin](#)

## Get Set Up For the Way You Work

Use your setup options to personalize your Salesforce experience. Set your display the way you like it, protect your information, and let others know you're here.

### [Verify Your Identity](#)

Easily verify your identity when logging in from outside a trusted IP range. Verifying your identity helps prevent unauthorized access to your Salesforce account.

### [Edit Your Personal Information](#)

### [Change Your Password](#)

After you log in, you can change your password for better security. If you lost your password, click the **Forgot Your Password** link on the login page to reset your password via email.

### [Change Your Security Question](#)

If you forget your password and need to reset it, you're sometimes required to verify your identity by answering a security question that you previously chose. You can change the security question and answer on the Change My Password page in your personal settings.

### EDITIONS

Available in: Salesforce Classic

Available in: All Editions.

[Edit Your Language and Locale Settings](#)[Edit Your Email Settings](#)

Edit outgoing email settings to specify the name that appears as well as an optional signature. You can also specify a return address, and opt to automatically send BCC emails to yourself at the return address.

[Set Record Type Preferences](#)

Set an option to automatically insert your default record type when creating new records. Using this setting, you can bypass the page prompting you to select a record type. If you have several different record types available to you, you may prefer to be prompted to select a record type every time you create a new record.

[Update Your Contact Information](#)

Update your contact information at any time on your profile page. Your contact information is visible to everybody in your company.

[Add Tabs for Frequently Used Items](#)

The Salesforce Classic user interface is composed of tabs that serve as starting points for viewing, adding, and editing information for an object. Different apps can have different sets of tabs. Add tabs for items you use frequently in any app.

[Customize Your Display](#)

You can customize your Salesforce display through your personal settings.


[Available Salesforce Tabs](#)[Accessibility Standards](#)

Learn about the standards Salesforce follows to design applications with accessibility in mind.

[View and Display FAQ](#)[Salesforce Pages](#)

Salesforce apps are made up of tabs and pages. Standard objects such as Accounts, Contacts, and Leads, and other features such as Chatter typically have tabs, and from a tab, you navigate through pages to interact with the features you're using. For example, if you want to create an account record, you'll click the Accounts Tab, and land on the Accounts Home page.

[The Home Tab](#)

From the Home tab, you can create a Chatter post, view dashboard snapshots, view your tasks and calendar, and search the feed (  ).

[Troubleshoot Login Issues](#)

Can't log in? Forgot your username or password, or you're locked out from too many login attempts? To resolve login problems, try these solutions.

## Verify Your Identity

Easily verify your identity when logging in from outside a trusted IP range. Verifying your identity helps prevent unauthorized access to your Salesforce account.

### [Activating Your Computer](#) (1:29 minutes)

When you log in to Salesforce from a browser or application that we don't recognize, and your IP address is outside a trusted IP range, you're prompted to verify your identity.

Salesforce asks you to verify your identity using one of the following verification methods.

#### **Salesforce Authenticator Mobile App**

If you connected the Salesforce Authenticator app (version 2 or later) to your account, use the app to verify your Salesforce account activity. Salesforce sends a push notification to your mobile device. When you get the notification, open the app, verify the activity details, and tap **Approve** on your mobile device.

#### EDITIONS

Available in: Both Salesforce Classic and Lightning Experience

### One-Time Password Generator App

If you connected an authenticator app (like Salesforce Authenticator or Google Authenticator) to your account, use the mobile app to generate a verification code. This type of code is sometimes called a “time-based one-time password.” The code value changes periodically.


### SMS Text Message

If you have a verified mobile number associated with your account, you receive a verification code in a text message sent to your phone. If you don't have a verified mobile number, you're prompted to register one when you log in to Salesforce. Registering your mobile phone number verifies it and enables this method when you're challenged in the future. If your mobile number changes, contact your Salesforce admin.

### Email

Salesforce sends a verification code in an email to the address associated with your account. The code expires after 24 hours.

The identity verification page includes a “Don't ask again” option, which is selected by default. If you leave the option selected and click **Verify**, Salesforce doesn't ask you to verify your identity again when you log in from the same browser or application. Exceptions are if you manually clear browser cookies, set your browser to delete cookies, or browse in private or incognito mode. In these cases, you're prompted to verify your identity every time you log in to Salesforce from an IP address that's not defined as trusted for your org.

 **Note:** When you log in from a public or shared device, deselect **Don't ask again**. Deselecting this option ensures that subsequent users have to verify their identity when they log in from that device.

### [Connect Salesforce Authenticator \(Version 2 or Later\) to Your Account for Identity Verification](#)

You can connect version 2 or later of the Salesforce Authenticator mobile app to your account. Use the app whenever Salesforce has to verify your identity. If your administrator requires two-factor authentication for increased security when you log in or access reports or dashboards, use the app to verify your account activity. If you're required to use two-factor authentication before you have the app connected, you're prompted to connect it the next time you log in to Salesforce. If you don't yet have the two-factor authentication requirement, you can still connect the app to your account through your personal settings.

### [Connect a One-Time Password Generator App or Device for Identity Verification](#)

You can connect a one-time password generator app, such as Salesforce Authenticator or Google Authenticator, to your account. Use a verification code generated by the app, sometimes called a “time-based one-time password,” whenever Salesforce has to verify your identity. If your administrator requires two-factor authentication for increased security when you log in, access connected apps, or access reports or dashboards, use a code from the app. If you're required to use two-factor authentication before you have an app connected, you're prompted to connect one the next time you log in to Salesforce. If you don't yet have the two-factor authentication requirement, you can still connect the app to your account through your personal settings.

### [Verify Your Identity with a Temporary Code](#)

When you can't access the device you usually use for two-factor authentication, ask your Salesforce admin to give you a temporary identity verification code. The code is valid for 1 to 24 hours. Your admin sets the expiration time, but you can expire the code early if you no longer need it.

## Connect Salesforce Authenticator (Version 2 or Later) to Your Account for Identity Verification

You can connect version 2 or later of the Salesforce Authenticator mobile app to your account. Use the app whenever Salesforce has to verify your identity. If your administrator requires two-factor authentication for increased security when you log in or access reports or dashboards, use the app to verify your account activity. If you're required to use two-factor authentication before you have the app connected, you're prompted to connect it the next time you log in to Salesforce. If you don't yet have the two-factor authentication requirement, you can still connect the app to your account through your personal settings.

The Salesforce Authenticator (version 2 or later) app on your mobile device is the second "factor" of authentication. Using the app adds an extra level of security to your account. Once you connect the app, you get a notification on your mobile device whenever you do something that requires identity verification. When you get the notification, open the app on your mobile device, check the activity details, and respond on your mobile device to verify. If you get a notification about activity you don't recognize, use the app to block the activity. You can flag the blocked activity for your Salesforce admin. The app also provides a verification code you can use as an alternate method of identity verification.

1. Download and install version 2 or later of the Salesforce Authenticator app for the type of mobile device you use. For iPhone, get the app from the [App Store](#). For Android devices, get the app from [Google Play](#).  
If you previously installed version 1 of Salesforce Authenticator on your mobile device, you can update the app to version 2 through the App Store or Google Play. The update preserves any connected accounts you already have in the app. These accounts are code-only accounts that generate verification codes but don't receive push notifications or allow location-based automated verifications. Code-only accounts appear on your Connected Accounts list without a > at the far right of the account name row, and there's no account detail page. If you have a code-only account for the username you used for your current login to Salesforce, swipe left in the app to remove that username before proceeding. In the following steps, you connect the account for that username again. The new connected account gives you full Salesforce Authenticator version 2 functionality: push notifications, location-based automated verifications, and verification codes.
2. From your personal settings, enter *Advanced User Details* in the **Quick Find** box, then select **Advanced User Details**. No results? Enter *Personal Information* in the **Quick Find** box, then select **Personal Information**.
3. Find **App Registration: Salesforce Authenticator** and click **Connect**.
4. For security purposes, you're prompted to log in to your account.
5. Open the Salesforce Authenticator app on your mobile device.  
If you're opening the app for the first time, you see a tour of the app's features. Take the tour, or go straight to adding your Salesforce account to the app.
6. In the app, tap **+** to add your account.  
The app generates a unique two-word phrase.
7. Back in your browser, enter the phrase in the **Two-Word Phrase** field.
8. Click **Connect**.  
If you previously connected an authenticator app that generates verification codes to your account, you sometimes see an alert. Connecting version 2 or later of the Salesforce Authenticator mobile app invalidates the codes from your old app. When you need a verification code, get it from Salesforce Authenticator from now on.
9. In the Salesforce Authenticator app on your mobile device, you see details about the account you're connecting. To complete the account connection, tap **Connect** in the app.

### EDITIONS

Available in: Both Salesforce Classic and Lightning Experience

Available in: **Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions

To help keep your account secure, we send you an email notification whenever a new identity verification method is added to your Salesforce account. You get the email whether you add the method or your Salesforce admin adds it on your behalf.

SEE ALSO:

[Verify Your Identity](#)

[Personalize Your Salesforce Experience](#)

## Connect a One-Time Password Generator App or Device for Identity Verification

You can connect a one-time password generator app, such as Salesforce Authenticator or Google Authenticator, to your account. Use a verification code generated by the app, sometimes called a “time-based one-time password,” whenever Salesforce has to verify your identity. If your administrator requires two-factor authentication for increased security when you log in, access connected apps, or access reports or dashboards, use a code from the app. If you’re required to use two-factor authentication before you have an app connected, you’re prompted to connect one the next time you log in to Salesforce. If you don’t yet have the two-factor authentication requirement, you can still connect the app to your account through your personal settings.

### EDITIONS

Available in: Both Salesforce Classic and Lightning Experience

Available in all editions

1. Download the supported authenticator app for your device type. You can use any authenticator app that supports the time-based one-time password (TOTP) algorithm (IETF RFC 6238), such as [Salesforce Authenticator for iOS](#), [Salesforce Authenticator for Android](#), or Google Authenticator.
2. From your personal settings, enter *Advanced User Details* in the **Quick Find** box, then select **Advanced User Details**. No results? Enter *Personal Information* in the **Quick Find** box, then select **Personal Information**.
3. Find **App Registration: One-Time Password Generator** and click **Connect**.
4. For security purposes, you’re prompted to log in to your account.
5. Using the authenticator app on your mobile device, scan the QR code.  
Alternatively, you can click **I Can’t Scan the QR Code** in your browser. The browser displays a security key. In the authenticator app, enter your username and the key displayed.
6. In Salesforce, enter the code generated by the authenticator app in the **Verification Code** field.  
The authenticator app generates a new verification code periodically. Enter the current code.
7. Click **Connect**.

To help keep your account secure, we send you an email notification whenever a new identity verification method is added to your Salesforce account. You get the email whether you add the method or your Salesforce admin adds it on your behalf.

SEE ALSO:

[Verify Your Identity](#)

[Personalize Your Salesforce Experience](#)



## Verify Your Identity with a Temporary Code

When you can't access the device you usually use for two-factor authentication, ask your Salesforce admin to give you a temporary identity verification code. The code is valid for 1 to 24 hours. Your admin sets the expiration time, but you can expire the code early if you no longer need it.

If your Salesforce admin has given other users permission to help you with two-factor authentication, they can give you a temporary code. Your company's Help Desk or support staff, for example, sometimes has this permission.

The temporary code is for two-factor authentication only. It isn't valid for identity verification when you log in from a browser or app we don't recognize.

1. Ask your Salesforce admin (or someone designated by your admin) for a temporary identity verification code.  
Your admin sets how long the code is valid. You can use the code multiple times until it expires. You get an email notification whenever your admin generates a temporary code for you.
2. Enter the temporary code where prompted in the identity verification screen.
3. If you don't need the code any more and it's still valid, expire the code.
  - a. From your personal settings, enter *Advanced User Details* in the **Quick Find** box, then select **Advanced User Details**. No results? Enter *Personal Information* in the **Quick Find** box, then select **Personal Information**.
  - b. Find **Temporary Verification Code** and click **Expire Now**.

SEE ALSO:

[Verify Your Identity](#)

[Connect Salesforce Authenticator \(Version 2 or Later\) to Your Account for Identity Verification](#)

[Connect a One-Time Password Generator App or Device for Identity Verification](#)

## Edit Your Personal Information

1. From your personal settings, enter *Advanced User Details* in the **Quick Find** box, then select **Advanced User Details**. No results? Enter *Personal Information* in the **Quick Find** box, then select **Personal Information**.
2. To make changes, click **Edit**.  
If you change your email address, a confirmation message is sent to the new address. Click the link in the message for the new email address to take effect. This process ensures system security.
3. Save your changes.

SEE ALSO:

[Change Your Password](#)

[Set Up Your Chatter Profile](#)

[Personalize Your Salesforce Experience](#)

### EDITIONS

Available in: Both Salesforce Classic and Lightning Experience

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### EDITIONS


Available in: Salesforce Classic and Lightning Experience

The available personal setup options vary according to which Salesforce Edition you have.

## Change Your Password

After you log in, you can change your password for better security. If you lost your password, click the **Forgot Your Password** link on the login page to reset your password via email.

To protect the privacy of your data, change your password periodically. If your Salesforce administrator expires user passwords on a periodic basis, you're prompted to change your password at the end of each period.

 **Note:** If you have the "User Single Sign-On" permission, only an administrator can reset your password. For help, contact your Salesforce administrator.

1. From your personal settings, enter *Password* in the **Quick Find** box, then select **Change My Password**.
2. Enter the password information requested.
3. Click **Save**.

### SEE ALSO:

[Reset Your Forgotten Password](#)

[Reset Your Security Token](#)

[Verify Your Identity](#)

[Personalize Your Salesforce Experience](#)


### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

## Change Your Security Question

If you forget your password and need to reset it, you're sometimes required to verify your identity by answering a security question that you previously chose. You can change the security question and answer on the Change My Password page in your personal settings.

 **Note:** If you don't see the Change My Password option, contact your Salesforce admin for assistance.

1. From your personal settings, enter *Password* in the **Quick Find** box, then select **Change My Password**.
2. Enter your current password.
3. From the Security Question drop-down menu, select a question.
4. Enter your answer to the question in the **Answer** field.
5. Click **Save**.

### SEE ALSO:

[Personalize Your Salesforce Experience](#)

### EDITIONS

Available in: Both Salesforce Classic and Lightning Experience

Available in all editions

## Edit Your Language and Locale Settings


1. From your personal settings, enter *Time Zone* in the *Quick Find* box, then select **Language and Time Zone**. No results? Enter *Personal Information* in the *Quick Find* box, then select **Personal Information**.
2. Specify these settings as needed.
  - For *Time Zone*, select your primary time zone.
  - For *Locale*, select your country or geographic region.
  - For *Language*, select your primary language. All text and online help appears in the language you select.
  - For *Email Encoding*, select the character set and encoding option for email that you send from Salesforce.
3. Click **Save**.

SEE ALSO:

[Personalize Your Salesforce Experience](#)

## Edit Your Email Settings

Edit outgoing email settings to specify the name that appears as well as an optional signature. You can also specify a return address, and opt to automatically send BCC emails to yourself at the return address.

1. From your personal settings, enter *My Email Settings* in the *Quick Find* box, then select **My Email Settings**.
  2. Make your changes.
-  **Note:** In Personal and Developer Editions, a Salesforce-specific tag line is added below your personal signature on all outbound emails.

SEE ALSO:

[Personalize Your Salesforce Experience](#)

## Set Record Type Preferences

Set an option to automatically insert your default record type when creating new records. Using this setting, you can bypass the page prompting you to select a record type. If you have several different record types available to you, you may prefer to be prompted to select a record type every time you create a new record.

1. From your personal settings, enter *Record Type* in the *Quick Find* box, then select **Set Default Record Types** or **Record Type Selection**—whichever one appears.
2. Check any box to automatically select the default record type when creating records of that type.
 

Any unchecked boxes indicate that you prefer to be prompted to select a record type.
3. Click **Save**.

### EDITIONS

Available in: Salesforce Classic

Available in: **All** editions except **Database.com**

### EDITIONS


Available in: Salesforce Classic Lightning Experience

Available in: **All** Editions except for **Database.com**

### EDITIONS

Available in: Salesforce Classic

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

 **Note:** The Record Type Selection option may not be available because your organization is not using record types or multiple record types are not available for a particular tab.

Individual checkboxes are only offered when you have more than one record type available for a tab.

If your organization uses person accounts, note that checking the `Account` box on this page causes one default record type selection for all types of accounts. It is not possible to set separate default record type selections for business accounts and person accounts. If you work with both types of accounts, leave the box blank.

SEE ALSO:

[Personalize Your Salesforce Experience](#)

## Update Your Contact Information

Update your contact information at any time on your profile page. Your contact information is visible to everybody in your company.

Available in: Salesforce Classic and Lightning Experience

Available in: **Group, Professional, Enterprise, Performance, Unlimited, Contact Manager**, and **Developer** Editions

To update your contact information, click your name or your profile picture. You can update all fields on your profile, except the Manager field. Only your Salesforce admin can update the Manager field.

In Communities, you can also control the visibility of your contact information within communities on a field-by-field basis. You can choose to expose fields to employees only, members of the community from outside your company, or guest users who aren't required to log in. Some fields are always visible to everyone accessing the community.

### [Change Your Profile or Group Photo](#)

Upload a photo to your profile so people can see who you are, or upload a photo for groups that you own or manage.

### [Follow People](#)

Follow people to see their updates in your feed, including posts, comments, and likes.

### [Follow Records](#)

Follow records so you can see updates in your feed, including field changes, posts, tasks, and comments on records.

### [Join or Leave Groups](#)

Join groups to collaborate with other people on projects or common areas of interest. Share project-related files and information with the group.

### [Search Across Your Feeds](#)

Looking for people, groups, or files? Use search to quickly find information across your feeds.

SEE ALSO:

[Change Your Profile or Group Photo](#)

## Change Your Profile or Group Photo

Upload a photo to your profile so people can see who you are, or upload a photo for groups that you own or manage.

Available in: Salesforce Classic and Lightning Experience

Available in: **Group, Professional, Enterprise, Performance, Unlimited, Contact Manager,** and **Developer** Editions

1. Go to your profile or the group's page.
2. Hover over the photo and click **Add Photo** or **Update**.
3. Browse for the photo you want to upload and open the file. You can upload photos in .jpg, .gif, or .png format up to 8 MB.
4. Create a thumbnail image by dragging the dotted lines across the photo.

If the photo is for your profile and you're a member of any communities, you can select `Show in communities with publicly accessible pages`. This option makes the photo visible to guest users viewing publicly accessible sites or pages that don't require login.

5. Save your changes.

## Follow People


Follow people to see their updates in your feed, including posts, comments, and likes.

Available in: Salesforce Classic and Lightning Experience

Available in: **Group, Professional, Enterprise, Performance, Unlimited, Contact Manager,** and **Developer** Editions

To follow a person, click **Follow** on a person's profile page.

Once you follow people, you see their posts, comments, and likes in your feed. You can follow a maximum combined total of 500 people, topics, and records. To see how many items you're following, view the Following list on your profile.

To stop following a person, click . When you stop following a person, you don't see future updates from that person in your feed.

SEE ALSO:

[Follow Records](#)

## Follow Records

Follow records so you can see updates in your feed, including field changes, posts, tasks, and comments on records.

Available in: Salesforce Classic and Lightning Experience

Available in: **Group, Professional, Enterprise, Performance, Unlimited, Contact Manager,** and **Developer** Editions

### USER PERMISSIONS

To view a record:


- "Read" on the record

The field changes you see in your feed depend on which of the fields your administrator configured for feed tracking. Updates to encrypted custom fields don't display in feeds.

To follow a record, click **Follow** on the record page.

When you follow a record, you see updates to the record in your feed. You can follow a maximum combined total of 500 people, topics, and records. To see how many items you're following, view the Following list on your profile.

If you want to automatically follow the records you create, enable this feature from your personal settings. Enter *My Feeds* in the *Quick Find* box, select **My Feeds**, and then select **Automatically follow records I create**. However, you don't auto-follow events, tasks, or dashboards after you create them.

To stop following a record, click  on the record page. After you stop following a record, you don't see future updates to the record in your feed.

SEE ALSO:

[Follow People](#)


[Personalize Your Salesforce Experience](#)

## Join or Leave Groups

Join groups to collaborate with other people on projects or common areas of interest. Share project-related files and information with the group.

1. Go to group's detail page.
2. To join a public group, click **Join** or **Join Group**. To join a private group, click **Ask to Join**. Your request is sent to the private group's owner and managers, who accept or decline your request.

You can join up to 300 groups. All groups count toward this limit, except archived groups. For example, if you're a member of 300 groups, of which 10 are archived, you can join 10 more groups.

To leave a group you joined or withdraw your request to join a private group, go to the group detail page and click  or **Leave Group**. If you don't see these options, ask your Salesforce admin to adjust the page layout.

## Search Across Your Feeds

Looking for people, groups, or files? Use search to quickly find information across your feeds.

[Search Your Feeds in Lightning Experience](#)

Search for people, groups, and files across your feeds.

[Search Your Feeds in Salesforce Classic](#)

Search feeds, people, groups, topics, and files across Chatter.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Group, Professional, Enterprise, Performance, Unlimited, Contact Manager,** and **Developer** Editions

### EDITIONS

Available in Salesforce Classic and Lightning Experience

Available in: **Group, Professional, Enterprise, Performance, Unlimited, Contact Manager,** and **Developer** Editions

## Search Your Feeds in Lightning Experience

Search for people, groups, and files across your feeds.

1. Enter your search term in the header search box.
2. On the search result page, click **FEEDS** to see posts from the All Company feed that include matches on your search term.



## Search Your Feeds in Salesforce Classic

Search feeds, people, groups, topics, and files across Chatter.

1. Enter your search term in the header search box.
2. Click **Search**.


The search results page shows matches across Salesforce, including Chatter. From the search results page, you can further refine your search. For example, to see search results across all Chatter feeds, click **Search Feeds**.

You can also search specific feeds. For example, to find where a person is mentioned in a group, type the person's name in the search box above the group feed.

 **Example:** Watch a Demo:  [Search in Salesforce Classic](#)

## Add Tabs for Frequently Used Items

The Salesforce Classic user interface is composed of tabs that serve as starting points for viewing, adding, and editing information for an object. Different apps can have different sets of tabs. Add tabs for items you use frequently in any app.

1. Click the Plus icon (  ) to the right of your current tabs.  
The All Tabs page appears. By default, it shows all the tabs you have available to view or add.
2. If you want to see a list of just the tabs for a specific app, select that app from the View drop-down list.
3. Click **Customize My Tabs**.
4. In the Custom App drop-down list, select the app where you want the tab to appear.  
For example, if you want the Ideas tab to appear in your Marketing app, select *Marketing* and the Ideas tab will appear in that app only.
5. Use the Add, Remove, Up, and Down arrows to customize which tabs appear in the app, and their order.
6. Click **Save**.
7. If you added a tab to an app you're not actively using, open that app to see your new tab.

SEE ALSO:

[Available Salesforce Tabs](#)

### EDITIONS

Available in Lightning Experience

Available in: **Group, Professional, Enterprise, Performance, Unlimited, Contact Manager,** and **Developer** Editions

### EDITIONS

Available in Salesforce Classic

Available in: **Group, Professional, Enterprise, Performance, Unlimited, Contact Manager,** and **Developer** Editions

### EDITIONS

Available in: Salesforce Classic

Available in: **All** editions except **Database.com**

## Customize Your Display

You can customize your Salesforce display through your personal settings.

- [Customize which tabs display in your app and in what order](#)
- [Customize what displays on your pages](#)

### Customize Your Tabs

Specify which tabs display when you log in, or if you have multiple apps, which tabs display in each app.

### Customize Your Pages

Specify the related lists that appear in detail pages.

#### EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions except for **Database.com**

## Customize Your Tabs

Specify which tabs display when you log in, or if you have multiple apps, which tabs display in each app.

1. From your personal settings, enter *Customize My* in the **Quick Find** box, then select **Customize My Tabs**. No results? Enter *Display* in the **Quick Find** box, then select **Change My Display**.
2. If you have access to multiple apps, select the app whose tabs you want to customize from the **Custom Apps** drop-down list.  
By default, you'll see the tabs for the selected custom app that are set for your profile.



**Note:** The first tab that displays when you select an app may change if your administrator changes the app's default landing tab.

3. If desired, add each tab you want to display and change the display order of the tabs you've selected.
4. Save your changes.

#### EDITIONS

Available in: Salesforce Classic

Available in: **All** editions except **Database.com**

SEE ALSO:

[Customize Your Pages](#)

[Personalize Your Salesforce Experience](#)

## Customize Your Pages

Specify the related lists that appear in detail pages.

1. From your personal settings, enter *Customize My* in the **Quick Find** box, then select **Customize My Pages**. No results? Enter *Display* in the **Quick Find** box, then select **Change My Display**.

For your Home tab, select the dashboard snapshot to display on the Home tab. The link to customize your Home tab is available only if your administrator has customized your home page layout to include a dashboard.

For all other tabs, specify which related lists display on your detail pages.

- To add or remove related lists, select a related list and click the **Add** or **Remove** arrow.

#### EDITIONS

Available in: Salesforce Classic

Available in: **All** editions except **Database.com**



 **Note:** This setting may change if your administrator changes the page layout for a particular tab.

- To change the order of the related lists, select a related list title in the Selected List box, and click the **Up** or **Down** arrow.

2. Save your changes.

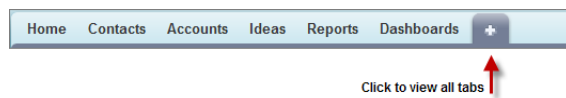
SEE ALSO:

[Customize Your Tabs](#)

[Personalize Your Salesforce Experience](#)

## Available Salesforce Tabs

To view all the tabs available to you in Salesforce, click the plus icon (+) next to the main tabs.



Using this page, you can:

- Click any of the tab names to quickly jump to that tab.
- If you have multiple apps, use the **view** drop-down list to see each app's logo and included tabs.
- Click **Customize My Tabs** to change how tabs display on your screen.

SEE ALSO:

[Add Tabs for Frequently Used Items](#)

### EDITIONS

Available in: Salesforce Classic

Available in: **All Editions** except for **Database.com**

## Accessibility Standards

Learn about the standards Salesforce follows to design applications with accessibility in mind.

Salesforce is committed to providing on-demand enterprise applications accessible to all individuals, including users working with assistive devices, such as speech recognition software and screen readers. To help meet our goal of universal design, Salesforce follows the internationally recognized best practices in Section 508 of the Rehabilitation Act and the Web Content Accessibility Guidelines (WCAG) 2.0 Level AA to the extent possible.

Our [Voluntary Product Accessibility Template \(VPAT\)](#) is a tool used to document a product's conformance with the accessibility standards under Section 508 of the Rehabilitation Act and includes an accessibility assessment of our products.

### EDITIONS

Available in: Salesforce Classic

Available in: **All Editions** except **Database.com**

## General Accessibility Requirements

Consider these requirements when using Salesforce.

- JavaScript support must be available and turned on.
- After a specified period of inactivity, a session timeout popup window automatically displays, prompting you to log out or continue working. Your administrator can set this time interval or disable it altogether. Your browser must allow pop-ups in Salesforce; otherwise you won't receive a warning about the upcoming timeout.

- Pilot and Beta features may not be accessible.

## Recommended Browsers

For general accessibility testing, Salesforce uses the most current version of Mozilla® Firefox® and Microsoft® Internet Explorer® on Windows®, and Apple® Safari® on OS X®.

## Contacting Salesforce with Accessibility Concerns

To access documentation and knowledge base articles or to contact customer support, click the **Help & Training** link at the top of any page.

To report any accessibility concerns or to request an alternate format of any document, send an email to [accessibility@salesforce.com](mailto:accessibility@salesforce.com).

- 📌 **Note:** Customer support is not available for Personal and Developer Edition users. In addition, knowledge base access is not available for Developer Edition users. All users are welcome to contact [accessibility@salesforce.com](mailto:accessibility@salesforce.com) in English with any accessibility-related queries.

### [Accessibility Mode](#)

Learn how accessibility mode changes your experience using Salesforce.

### [Enable Accessibility Mode](#)

Optimize your experience using Salesforce with assistive devices, such as speech recognition software and screen readers, by enabling accessibility mode.

### [Recommendations for Salesforce Accessibility](#)

Learn about Salesforce accessibility features designed for users working with assistive devices, such as speech recognition software and screen readers.

## Accessibility Mode

Learn how accessibility mode changes your experience using Salesforce.

Salesforce includes an alternate user interface mode that lets users with assistive devices, such as speech recognition software and screen readers, work with Salesforce more effectively. Most new features are designed with accessibility in mind and are inherently accessible in the standard mode. However, you may find that accessibility mode better suits your needs, particularly when using speech recognition or screen reading software to create reports and dashboards or interact with list views.

Accessibility mode includes the full functionality of Salesforce with the modifications detailed here to create a better experience for users with assistive devices.

### EDITIONS

Available in: **Salesforce Classic**

Available in: **All Editions except Database.com**


## Accessibility Mode Features that Enhance Usability

- Access setup pages from a Setup link at the top of the page.
- Drop-down menus include a **Go** button that you select to navigate to the option you choose in the drop-down list.
- Menu buttons are rendered as a drop-down list with a **Go** button.
- Overlay pages are rendered as separate pop-up windows.
- The HTML editor is replaced with a text box. This text box only accepts HTML and does not recognize plain text entries like carriage returns. To separate content, you must use paragraph or line break HTML tags.

- When viewing a dashboard, the `View Dashboard` auto-complete filter is replaced with a standard drop-down menu.
- The **Edit Columns** link on the Manage Members page, accessible via the Manage Members drop-down on a campaign detail page, becomes a drop-down button. The Edit Columns overlay is replaced by a standard setup page.
- Clicking a requested meeting in the Open Activities related list and in some list views doesn't open the meeting detail page. Instead, a dialog opens that instructs you to contact the meeting organizer for details about the requested meeting.
- The **Turn My Email On** drop-down list on a Chatter group displays as a **Chatter Email Settings** link that opens your settings for receiving Chatter email.


## Disabled Calendar Features

- Event detail overlays in the calendar view
- Drag-and-drop editing
- Drag-and-drop scheduling
- Click-and-create events
- The **New Meeting Request** button on the Open Activities related list

 **Note:** As a result, you can't request a meeting in accessibility mode, and the Requested Meetings subtab in the Calendar section of the Home tab doesn't display any meetings.

## Disabled Report and Dashboard Features

- Drag-and-drop editing in the dashboard builder
- Creating and editing reports in report builder

 **Note:** Report builder is required to create or edit joined reports and reports containing cross filters or buckets. Users with accessibility mode enabled can run those reports, but can't create or edit them. To create reports in accessibility mode, you must use the report wizard.

- Drag-and-drop to move reports and dashboards between folders

## Disabled List View Features

- Related list hover links
- These enhanced list features:
  - Inline editing
  - Rearranging and adjusting the width of columns
  - Editing, deleting, or refreshing the current list view
  - Changing the number of records displayed per page
  - Jumping to a specific page of results

## Other Disabled Features

- The **Check Spelling** button for solutions
- The latest Manage Members page
- The **Recent Tags** drop-down menu when you add the tag component to the sidebar
- When finding similar opportunities, the Match Criteria sidebar on the search results page

- The list of similar questions as you type a question in an answers community



**Tip:** Users with accessibility mode enabled should use the search box on the Answers tab to see if their question has already been asked before they post their question.

## Enable Accessibility Mode

Optimize your experience using Salesforce with assistive devices, such as speech recognition software and screen readers, by enabling accessibility mode.

1. From your personal settings, enter *Accessibility* in the **Quick Find** box, then select **Accessibility**. No matching results? Enter *Personal Information* in the **Quick Find** box, then select **Personal Information**.
2. Select **Accessibility Mode**.
3. Click **Save**.

SEE ALSO:

[Recommendations for Salesforce Accessibility](#)

[Personalize Your Salesforce Experience](#)

## Recommendations for Salesforce Accessibility

Learn about Salesforce accessibility features designed for users working with assistive devices, such as speech recognition software and screen readers.

Here are some recommendations to help you work with Salesforce.

- [Sighted Keyboard Users](#)
- [Screen Reader Users](#)
- [Deaf or Hearing Impaired Users](#)
- [Specific Color Users](#)
- [Low-Vision Users Who Need Magnification](#)

SEE ALSO:

[Enable Accessibility Mode](#)

## Sighted Keyboard Users

These Salesforce features help ensure an accessible experience.

- Accessibility Mode helps you work more effectively with Salesforce, particularly reports, dashboards, and list views. See [Accessibility Mode](#) on page 62 for more information.
- Selected areas on the screen include highlights to give you an on-screen visual indication of focus.
- These elements are identified in our page markup to help you interact with them.
  - Headings are marked up as headings rather than field set and legend elements for grouping form controls.
  - The main heading for the page (typically at the start of the main content area) is a level 1 heading. You can shift to this heading with a shortcut key.

### EDITIONS

Available in: Salesforce Classic

Available in: **All Editions** except **Database.com**

### EDITIONS

Available in: Salesforce Classic


Available in: **All Editions** except **Database.com**

- Data tables have data table markup (except enhanced listviews in Standard Mode only) to aid identification of headers for each cell.
- Lists provided in the main content area are marked up as lists.
- A skip link (the first keyboard-focusable link on each page) allows you to shift the focus to the start of the main content area. This generally bypasses the navigational menus before the main content area, greatly reducing the number of tab presses that would otherwise be required to reach the main content area of the page.
- Keyboard focus is placed inside of dialog boxes when they open and will remain locked there until the dialog is closed.
- On edit pages, the keyboard focus defaults to the first editable field on the page. When creating or editing a task or event, the keyboard focus defaults to the Subject field, regardless of its location on the page.
- Buttons, links, and fields that aren't currently active are labeled with a “disabled” attribute. For example, when using a wizard with multiple steps, some buttons may be disabled until you select a specific option.

## Screen Reader Users

Salesforce on-demand applications are designed to take advantage of the latest features of the most widely used screen reading software. Although you might find that many browser and screen reader combinations work well, we recommend you use the most current versions of Mozilla® Firefox® and JAWS® or NVDA with Salesforce.

These Salesforce features help ensure an accessible experience:

- Accessibility Mode helps you work more effectively with Salesforce, particularly reports, dashboards, and list views. See [Accessibility Mode](#) on page 62 for more information.
- Important images have text alternatives equivalent to the purpose of the image; non-important images have empty text equivalents or are implemented through CSS. Images showing detailed information are also links to source data. For example, Dashboards contain charts and graphs that are visual in nature. To access the report data used to generate the chart or graph, simply select the dashboard component.
-  **Note:** The underlying report may contain additional data than what is represented in the dashboard component. In addition, the underlying report may contain some data that you don't have access to view due to sharing settings.
- These elements are identified in our page markup to help you interact with them.
  - Headings are marked up as headings rather than field set and legend elements for grouping form controls.
  - The main heading for the page (typically at the start of the main content area) is a level 1 heading. You can shift to this heading with a shortcut key.
  - Data tables have data table markup (except enhanced listviews in Standard Mode only) to aid identification of headers for each cell.
  - Lists provided in the main content area are marked up as lists.
- A skip link (the first keyboard-focusable link on each page) allows you to shift the focus to the start of the main content area. This generally bypasses the navigational menus before the main content area, greatly reducing the number of tab presses that would otherwise be required to reach the main content area of the page.
- Keyboard focus is placed inside of dialog boxes when they open and will remain locked there until the dialog is closed.
- On edit pages, the keyboard focus defaults to the first editable field on the page. When creating or editing a task or event, the keyboard focus defaults to the Subject field, regardless of its location on the page.
- Buttons, links, and fields that aren't currently active are labeled with a “disabled” attribute. For example, when using a wizard with multiple steps, some buttons may be disabled until you select a specific option.

In addition, we recommend you enable these personalized web settings in your screen reader:

- Set pages to refresh automatically.

- Turn on live region update announcements.
- Set text links to show titles. This setting ensures the screen reader announces information provided through a link's title attribute, such as a warning that a new window will open.
- Set headings to announce Headings and Levels. Heading markup is used to provide context as well as navigation.
- Add common signs, such the @ (at) sign for mentioning people in Chatter posts and comments, to your screen reader dictionary to customize how they're announced by default.

## Deaf or Hearing Impaired Users

Salesforce provides video demos hosted on YouTube. To view synchronized captions for videos, click `Watch on YouTube.com` in the bottom-right corner of embedded videos.

## Specific Color Users

Browser and operating system settings don't change the colors displayed within images, and Salesforce implements many images as background images (which aren't displayed when browser and operating system settings for color display are in effect). If you rely on browser settings and your operating system to change your display to a particular color combination, you may need to:

- Display image text alternatives to access information provided by important images.
- Override our CSS for these classes: `assistiveText`, `zen-assistiveText`. Then set your browser settings according to your preferences.

In addition:

- Some charts (for example, in reports and dashboards) rely on color to display information. If you have trouble interpreting the information in charts, select `Color-Blind Palette on Charts` from your personal detail page. This option sets an alternate color palette for charts that has been optimized for use by color-blind users. Dashboard emails don't use the alternate palette. You can also click a chart to view its source report.
- Dashboards contain charts and graphs that are visual in nature. To access the report data used to generate the chart or graph, simply select the dashboard component.



**Note:** The underlying report may contain additional data than what is represented in the dashboard component. In addition, the underlying report may contain some data that you don't have access to view due to sharing settings.

## Low-Vision Users Who Need Magnification

Salesforce supports standard OS-level, browser, and third-party magnification tools. Adjust the zoom setting to suit your needs.

These elements are identified in our page markup. You can alter the styles for these elements to help you identify them.

- Headings are marked up as headings rather than field set and legend elements for grouping form controls.
- The main heading for the page (typically at the start of the main content area) is a level 1 heading. You can shift to this heading with a shortcut key.
- Data tables have data table markup (except enhanced listviews in Standard Mode only) to aid identification of headers for each cell.
- Lists provided in the main content area are marked up as lists.

## View and Display FAQ

[Which Languages Does Salesforce Support?](#)

[Why can't I see some buttons and links?](#)


[Why can't I view Salesforce popup windows such as lookup dialogs and the Help & Training window?](#)

[Why did my data disappear when I pressed the Backspace key while editing a record?](#)

[Can I change or delete the drop-down list of entries that appears when I edit a text field?](#)

## Which Languages Does Salesforce Support?

Salesforce offers three levels of language support: [fully supported languages](#), [end-user languages](#), and [platform-only languages](#). Each language is identified by a two-character language code, such as `en`, or a five-character locale code, such as `en_AU`.

 **Note:** Setting a default locale is different from setting a default language.


In addition to the Salesforce language support, you can localize your organizations in two ways. The Translation Workbench lets you specify languages you want to translate, assign translators to languages, create translations for customizations you've made to your Salesforce organization, and override labels and translations from managed packages. Everything from custom picklist values to custom fields can be translated so your global users can use all of Salesforce in their language.

The second option is to rename tabs and fields in Salesforce. If your custom application uses only a few standard Salesforce tabs and fields, you can translate them.

## Fully Supported Languages

You can change the language for all features, including Help, to one of the following fully supported languages from Setup by entering *Company Information* in the Quick Find box, selecting **Company Information**, then selecting **Edit**.

- Chinese (Simplified): `zh_CN`
- Chinese (Traditional): `zh_TW`
- Danish: `da`
- Dutch: `n1_NL`
- English: `en_US`
- Finnish: `fi`
- French: `fr`
- German: `de`
- Italian: `it`
- Japanese: `ja`
- Korean: `ko`
- Norwegian: `no`
- Portuguese (Brazil): `pt_BR`
- Russian: `ru`
- Spanish: `es`
- Spanish (Mexico): `es_MX`
- Swedish: `sv`
- Thai: `th`

-  **Note:**
- Spanish (Mexico) falls back to Spanish for customer-defined translations.
  - Even though the Salesforce user interface is fully translated to Thai, Help remains in English.

## End-User Languages

End-user languages are useful if you have a multilingual organization or partners who speak languages other than your company's default language. For end-user languages, Salesforce provides translated labels for all standard objects and pages, *except* administrative pages, Setup, and Help. When you specify an end-user language, labels and Help that aren't translated appear in English. End-user languages are intended only for personal use by end users. Don't use end-user languages as corporate languages. Salesforce doesn't provide customer support in end-user languages.

End-user languages include:

- Arabic: `ar`
- Bulgarian: `bg`
- Croatian: `hr`
- Czech: `cs`
- English (UK): `en_GB`
- Greek: `el`
- Hebrew: `iw`
- Hungarian: `hu`
- Indonesian: `in`
- Polish: `pl`
- Portuguese (Portugal): `pt_PT`
- Romanian: `ro`
- Slovak: `sk`
- Slovenian: `sl`
- Turkish: `tr`
- Ukrainian: `uk`
- Vietnamese: `vi`

 **Note:** Salesforce provides limited support for right-to-left languages—Arabic and Hebrew—for the following features.

- Live Agent
- Cases
- Accounts

These features are not supported in Lightning Experience, the Salesforce1 mobile app, any other mobile app or mobile browser, or any user interface except Salesforce Classic. There is no guarantee that right-to-left languages function correctly with any other Salesforce features. There are no plans to expand the list of supported features.

Features that aren't supported for right-to-left languages include, but are not limited to, the following.

- Report Builder
- Generating quote PDFs
- Customizable forecasting
- Emails
- Salesforce Knowledge
- Feeds
- Communities



The absence of a feature from this list does not imply support. Only Live Agent, Cases, and Accounts are supported with right-to-left languages.

## Platform-Only Languages

In situations where Salesforce doesn't provide default translations, use platform-only languages to localize apps and custom functionality that you've built on the Salesforce App Cloud. You can translate items such as custom labels, custom objects, and field names. You can also rename most standard objects, labels, and fields. Informative text and non-field label text aren't translatable.

Platform-only languages are available in all places where you can select a language in the application. However, when you select a platform-only language, all standard Salesforce labels default to English or, in select cases, to an end-user or fully supported language.

When you specify a platform-only language, labels for standard objects and fields fall back to English, except:

- English (Australia), English (India), English (Malaysia), and English (Philippines) fall back to English (UK).
- German (Austria) and German (Switzerland) fall back to German.
- French (Canada) falls back to French.
- Romanian (Moldova) falls back to Romanian.
- Montenegrin falls back to Serbian (Latin).
- Portuguese (Portugal) falls back to Portuguese (Brazil).

The following platform-only languages are currently supported.

- Albanian: `sq`
- Arabic (Algeria): `ar_DZ`
- Arabic (Bahrain): `ar_BH`
- Arabic (Egypt): `ar_EG`
- Arabic (Iraq): `ar_IQ`
- Arabic (Jordan): `ar_JO`
- Arabic (Kuwait): `ar_KW`
- Arabic (Lebanon): `ar_LB`
- Arabic (Libya): `ar_LY`
- Arabic (Morocco): `ar_MA`
- Arabic (Oman): `ar_OM`
- Arabic (Qatar): `ar_QA`
- Arabic (Saudi Arabia): `ar_SA`
- Arabic (Sudan): `ar_SD`
- Arabic (Syria): `ar_SY`
- Arabic (Tunisia): `ar_TN`
- Arabic (United Arab Emirates): `ar_AE`
- Arabic (Yemen): `ar_YE`
- Armenian: `hy`
- Basque: `eu`
- Bosnian: `bs`
- Bengali: `bn`

- Chinese (Simplified—Singapore): zh\_SG
- Chinese (Traditional—Hong Kong): zh\_HK
- English (Australia): en\_AU
- English (Canada): en\_CA
- English (Hong Kong): en\_HK
- English (India): en\_IN
- English (Ireland): en\_IE
- English (Malaysia): en\_MY
- English (Philippines): en\_PH
- English (Singapore): en\_SG
- English (South Africa): en\_ZA
- Estonian: et
- French (Belgium): fr\_BE
- French (Canada): fr\_CA
- French (Luxembourg): fr\_LU
- French (Switzerland): fr\_CH
- Georgian: ka
- German (Austria): de\_AT
- German (Luxembourg): de\_LU
- German (Switzerland): de\_CH
- Hindi: hi
- Icelandic: is
- Irish: ga
- Italian (Switzerland): it\_CH
- Latvian: lv
- Lithuanian: lt
- Luxembourgish: lb
- Macedonian: mk
- Malay: ms
- Maltese: mt
- Romanian (Moldova): ro\_MD
- Montenegrin: sh\_ME
- Romansh: rm
- Serbian (Cyrillic): sr
- Serbian (Latin): sh
- Spanish (Argentina): es\_AR
- Spanish (Bolivia): es\_BO
- Spanish (Chile): es\_CL
- Spanish (Colombia): es\_CO
- Spanish (Costa Rica): es\_CR

- Spanish (Dominican Republic): `es_DO`
- Spanish (Ecuador): `es_EC`
- Spanish (El Salvador): `es_SV`
- Spanish (Guatemala): `es_GT`
- Spanish (Honduras): `es_HN`
- Spanish (Nicaragua): `es_NI`
- Spanish (Panama): `es_PA`
- Spanish (Paraguay): `es_PY`
- Spanish (Peru): `es_PE`
- Spanish (Puerto Rico): `es_PR`
- Spanish (United States): `es_US`
- Spanish (Uruguay): `es_UY`
- Spanish (Venezuela): `es_VE`
- Tagalog: `tl`
- Tamil: `ta`
- Urdu: `ur`
- Welsh: `cy`

## Why can't I see some buttons and links?

Buttons and links only display for users who have the appropriate permissions to use them. For example, users who do not have the "Delete" permission on opportunities do not see the **Delete** button on an opportunity detail page nor do they see the **Del** link on an opportunity related list.

## Why can't I view Salesforce popup windows such as lookup dialogs and the Help & Training window?

If your browser's popup blocker settings are configured for maximum security, you won't be able to view any popup windows within Salesforce—even those that provide necessary functionality such as the calendar popup for choosing a date on an activity, lookup dialogs for selecting a record, the Help & Training window, and more.

To test your popup settings:

1. From your personal settings, enter *Reminders* in the **Quick Find** box, then select **Reminders & Alerts**. No results? Enter *Personal Information* in the **Quick Find** box, then select **Personal Information**.
2. Click **Preview Reminder Alert**.

To allow popup windows for Salesforce, add Salesforce as a trusted site within your browser's popup blocker settings. Consult the online help for your browser for specific instructions.

Some browser add-ons, like the Google toolbar, also have popup blocking. Consult your software documentation on those products for details on how to configure them to allow popup windows from Salesforce.

SEE ALSO:

[Personalize Your Salesforce Experience](#)

## Why did my data disappear when I pressed the Backspace key while editing a record?

Some versions of Internet Explorer use the Backspace key as a keyboard shortcut for the browser's Back button. When you press the Backspace key and your cursor is not within a text field, the browser goes back to the previous page, making it appear that your data has been lost. To retrieve your data and return to the page you were working on, click your browser's Forward button.

## Can I change or delete the drop-down list of entries that appears when I edit a text field?

No. These auto-complete entries that appear when you are editing certain text fields are a feature of Internet Explorer. The browser remembers text you have entered previously and provides a list of those entries for you to automatically complete the field. If you would like to turn this feature off, click **Tools** on your browser's menu bar, select **Internet Options**, click the **Content** tab, and then choose the **AutoComplete** button to change your browser's settings.

## Salesforce Pages

Salesforce apps are made up of tabs and pages. Standard objects such as Accounts, Contacts, and Leads, and other features such as Chatter typically have tabs, and from a tab, you navigate through pages to interact with the features you're using. For example, if you want to create an account record, you'll click the Accounts Tab, and land on the Accounts Home page.

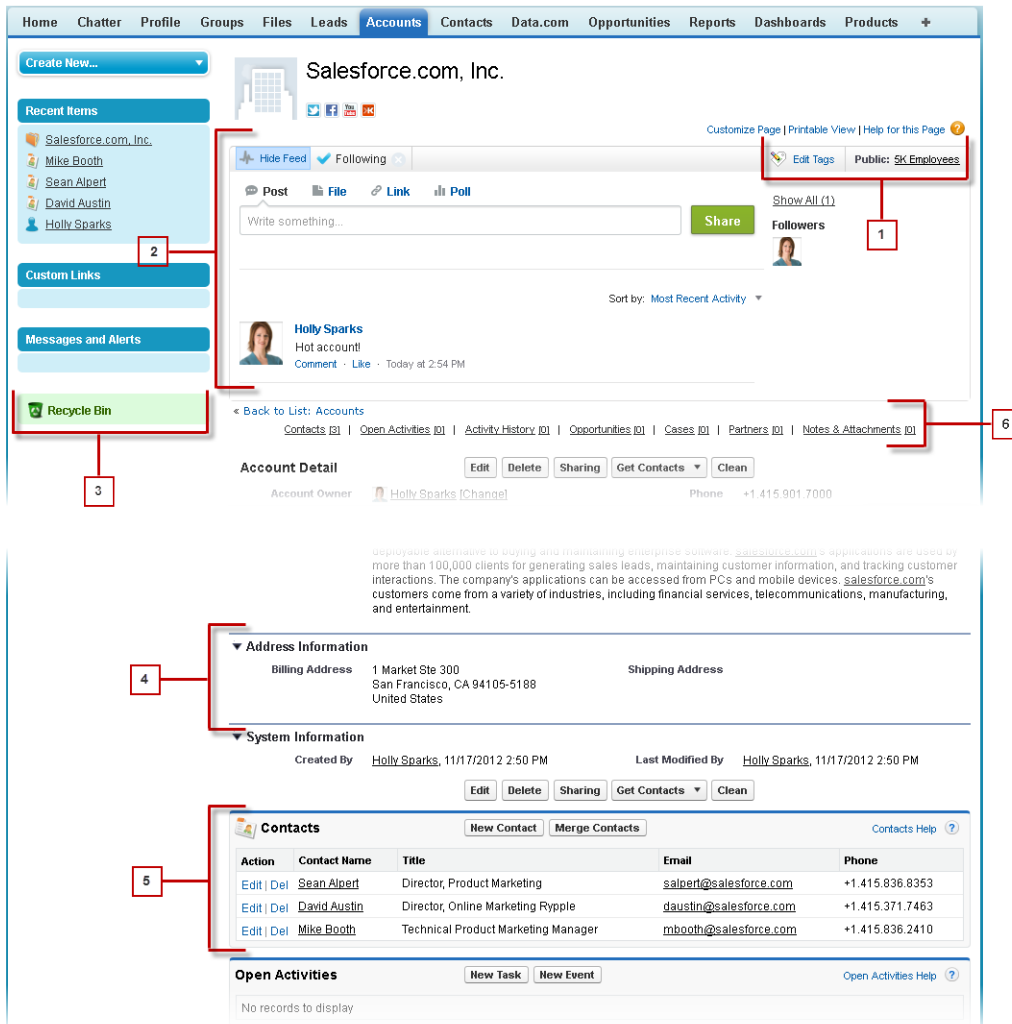
Click **New** to open the Account Edit page where you'll enter information for the account. Click **Save**, and you'll see the Account's Detail page. Return to the Accounts Home page and the new account is listed.

Salesforce tabs can have multiple types of pages, including Home, Edit, and Detail pages, and you can create list views for some objects. Chatter has one primary page type: a feed. And Data.com has a search interface. Dashboards and reports have their own page styles, as well.

Your system administrator typically sets up page layouts for standard objects and enables the navigation features your organization can use, but interacting with Salesforce is easier if you understand the most common page elements for the most frequently used objects. They include:

1. A *tag* bar, where you can view and add tags for a record.
2. A *feed*, where you can add and view comments about a record.
3. A *sidebar*, where you can do things like search and quickly create new records.
4. *Sections* for the record, with key fields and links.
5. *Related lists*, which group and display links to other records associated with the one you're viewing. You can change the order of related lists on your page.
6. Various *links* that help you move around the page or go to different pages or external sites.

Let's look at these elements on an account detail page.



Understanding the Salesforce Sidebar

Showing and Hiding the Collapsible Sidebar

Working with Related Items Directly from the Record You're Viewing

On Salesforce records, links and details for associated records are grouped within related lists. Some related lists let you perform common tasks for the related object, like creating new records or attaching files.

Working with Enhanced Lists

Navigating Long Lists

### [Changing Your Working Division](#)

You can change which records you are viewing by selecting the division you are currently working in.

#### SEE ALSO:

[Tags on Records](#)

[Understanding the Salesforce Sidebar](#)

[Navigating Object Home Pages](#)

[The Home Tab](#)

## Understanding the Salesforce Sidebar

The sidebar column that appears on the left side of most Salesforce pages provides convenient access to the following links and commands.

- Search  
Use the header search box, if you don't have sidebar search.
- The [Tags](#) link and Recent Tags drop-down list
- The [Divisions](#) drop-down list
- The [Create New](#) drop-down list
- A Calendar shortcut to your last used calendar view
- The [Recent Items](#) list
- [Messages and Alerts](#)
- [Custom Links](#)
- A shortcut to the [Recycle Bin](#)

The options in your sidebar vary depending on the features you have enabled and whether your administrator has customized the page layout.

#### EDITIONS

Available in: Salesforce Classic

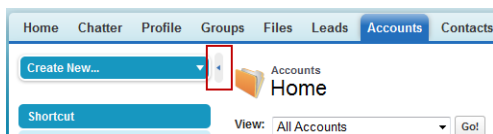
Available in: **All** Editions except **Database.com**

## Showing and Hiding the Collapsible Sidebar

If your administrator has enabled the Collapsible Sidebar, you can show or hide the sidebar as needed.

 **Note:** Call center users won't see incoming calls if they collapse the sidebar.

Click the edge of the sidebar to open or close the sidebar as needed.



#### EDITIONS

Available in: Salesforce Classic

Available in: **All** editions except **Database.com**

## Working with Related Items Directly from the Record You're Viewing

On Salesforce records, links and details for associated records are grouped within related lists. Some related lists let you perform common tasks for the related object, like creating new records or attaching files.

For example, the Lead record offers a number of related lists, including Open Activities, which lists open activities and key activity fields. On this related list, you can create a new task, a new activity, or a new meeting request. When a task related to the lead is closed, a link to that task appears in the Lead record's Activity History related list, which displays the same key fields as Open Activities, and offers other common tasks.

The related lists you can view and use are determined by:

- Your user permissions
- User interface and page layout customizations made by your Salesforce administrator
- Personal customizations you can make

It's easy to arrange and access related lists. Here's how.

### EDITIONS

Available in: Salesforce Classic

Available in: All editions

The screenshot displays the Salesforce interface for a Lead record. At the top, there are navigation tabs for Groups, Files, Leads, Accounts, Contacts, Opportunities, Reports, Dashboards, and Products. Below the navigation is the user profile for Denise Arlen, including her name, photo, and social media links. A 'Show Feed' button is visible. A 'Back to List: Leads' link is present. A 'Customize Page' button is highlighted with a red box and labeled '3'. Below the navigation is a 'Lead Detail' section with buttons for Edit, Delete, Convert, Clone, and Find Duplicates. The Lead Detail section shows the Lead Owner as Norah Logan (Change), Lead Status as Open, Name as Denise Arlen, Phone as +1.415.901.7000, Company as GrowthCo, Inc., Email as darlen@growthco.com, and Title as Buyer. Below the Lead Detail are three related lists: Approval History, Open Activities, and Activity History. The Approval History related list is highlighted with a red box and labeled '1'. The Open Activities related list shows 'No records to display'. The Activity History related list shows a table with columns for Action, Subject, Task, Due Date, Assigned To, and Last Modified Date/Time. The table contains two rows of activity records.



Action	Subject	Task	Due Date	Assigned To	Last Modified Date/Time
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Meet and Greet - Demo</a>	<input type="checkbox"/>	1/2/2014 12:00 PM	<a href="#">Norah Logan</a>	1/2/2014 11:57 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Send quote</a>	<input checked="" type="checkbox"/>	1/2/2014	<a href="#">Linda Valero</a>	1/2/2014 11:36 AM

1. Scroll the page to find the related list you need.
2. If related list hover links are enabled in your organization, click a link to view the list in a pop-up.
3. Click **Customize Page** to select and arrange the available related lists you want to see.

## Working with Enhanced Lists

Enhanced lists give you the ability to quickly view, customize, and edit list data to speed up your daily productivity. They must first be enabled by your administrator for you to take advantage of them.


Enhanced lists allow you to:

- Navigate through the list results by clicking the first page icon (<<), **Previous**, **Next**, or the last page icon (>>) at the bottom of the list.
- Jump to a specific page of results by entering a number in the text box in the lower right corner, and then pressing ENTER.
- Create a new view by clicking **Create New View**. Edit, delete or refresh the current view by clicking **Edit**, **Delete**, or , respectively.
- Change the number of records displayed per page. Click  in the lower left corner of the list and select the desired setting. You can view 10, 25, 50, 100, or 200 records at a time. When you change this setting, you return to the first page of list results.

Changing your preference for the number of records displayed per page applies to all lists in all Salesforce apps, not just the one currently displayed. In addition, if you change your preference to 200, a message warns you of possible performance degradation.

- Change the width of a column by dragging the right side of the column heading with your mouse. Any changes you make to column widths are specific to that list only, and are preserved when you next view the list.

If you add or remove columns from a list, any column width customizations for that list are discarded automatically.

- Change the order in which a column is displayed by dragging the entire column heading with your mouse to the desired position. If you have permission to edit the list definition, your changes are automatically saved for all users who see the list. If you do not have permission to edit the list definition, your changes are discarded when you navigate away from the page.
- Change the number and order of columns displayed by clicking **Edit** next to the list drop-down in the upper left corner.
- If your administrator has enabled inline editing for your organization, edit single records directly from the list by double-clicking on individual field values. If your administrator has granted you the “Mass Edit from Lists” permission, you can also edit up to 200 records at a time.
- On account, contact, and lead list views, click the  **Open Calendar** link at the bottom of the page to display a weekly view of a calendar underneath the list. Then, you can drag a record from the list to a time slot on the calendar to quickly create an event associated with the record. Note that your administrator controls the availability of the Drag-and-Drop Scheduling feature.

## Navigating Long Lists

Many list pages in Salesforce include the following tools for managing a large amount of data:

- To show a filtered list of items, select a predefined list from the **View** drop-down list, or click **Create New View** to define your own custom views.

To edit or delete any view you created, select it from the **View** drop-down list and click **Edit**.

- At the top of a list, click a letter to show items that correspond to that letter, or click **Other** to show items whose names begin with numbers or symbols. Click **All** to display all items that match the criteria of the current view.
- To sort list view items by the data in a particular column, click that column’s heading. This sorts text data alphabetically and numerical data in ascending order. Dates are sorted with the most recent date first. To reverse the sort order, click the column heading a second time.

### EDITIONS

Available in: Salesforce Classic

Available in: **All Editions** except **Database.com**

### USER PERMISSIONS

To use inline editing in an enhanced list:

- “Mass Edit from Lists”

### EDITIONS

Available in: Salesforce Classic

Available in all editions



 **Note:** You can sort by any custom field except multi-select picklists. User list views are not sorted for organizations with more than two million users. Organizations with more than 2 million users can contact Salesforce to re-enable sorting.

- Click the **Previous Page** or **Next Page** link to go to the previous or next set of items in the current view.
- At the bottom of a list, click the **fewer** or **more** link to decrease or increase the number of items per page.

In some related lists with many items, the following links are available:


- Click **Show [number] more** to increase the number of items in the list.
- Click **Go to list** to display a secondary page of the entire related list.

## Changing Your Working Division


You can change which records you are viewing by selecting the division you are currently working in.

You can change the division you are working in at any time and override the default division you were originally assigned for some searches and reports.

- From the Divisions field in the sidebar, select the division you want to work in.

 **Note:** Records you create are assigned to your default division, not to your working division. You can explicitly set a division other than your default division when you create the record.

## The Home Tab

From the Home tab, you can create a Chatter post, view dashboard snapshots, view your tasks and calendar, and search the feed (  ).

You can also use the sidebar components, such as Create New, Recent Items, and Custom Links, that you'll also see on other Salesforce pages. Your Home tab layout, sidebar components, and links are enabled and configured by your administrator.

Alert banners may appear on the Home tab to let you know when updates are available for desktop clients such as Connect Offline.

[Changing Your Home Tab Dashboard](#)

[Using Your Tasks and Calendar on the Home Page](#)

[Viewing Custom Links on the Home Tab](#)

[Viewing Messages and Alerts](#)

[Performance Chart](#)

Use the performance chart on the Home page in Lightning Experience to track your sales performance or the performance of your sales team against a customizable sales goal.

[The Assistant](#)

Use the Assistant on the Home page in Lightning Experience to view important updates over the course of your day.

SEE ALSO:

[Navigating Object Home Pages](#)

### EDITIONS

Available in: Salesforce Classic

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer Editions**

### EDITIONS

Available in: Salesforce Classic

The available tabs and options in the Create New drop-down list vary according to which permissions you have and which Salesforce edition you are using.

## Changing Your Home Tab Dashboard

Your administrator can create customized Home tab pages that display customized components such as a dashboard snapshot or your company logo. If your Home tab contains a dashboard snapshot, you can change the dashboard settings.


Click **Customize Page** in the Dashboard section of the Home tab if yours contains a dashboard. Use this page to select a different dashboard to display on the Home tab. Click **Refresh** to refresh the data in your dashboard.

### EDITIONS

Available in: Salesforce Classic


Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Using Your Tasks and Calendar on the Home Page



 **Note:** The My Tasks and Calendar sections display on the Home page if they are included as components on your Home page layout.

From the Home page, you can view, create, and edit tasks and events. If you have Salesforce for Outlook installed, you may be able to sync your Outlook items with Salesforce so they appear in the My Tasks and Calendar sections.

In the My Tasks section, you can:

- Click **New** to create a task.
- View a list of tasks assigned to you. Up to fifteen tasks can be displayed; to view all your tasks, click **View More**.
  -  identifies tasks that are part of a recurring series.
- Choose a time frame from the drop-down list to change which tasks display.
- Assign unresolved emails to related records; to view all your unassigned emails, click **My Unresolved Items**.
- If your organization has enabled hover links for the My Tasks list, hover your mouse over the subject of a task to see the details of the task in an overlay. Alternatively, click the subject of a task to open the detail page of that task.
- Click **X** to close a task.

In the Calendar section, you can:



- Click **New Event** to create a new event.
- Click the Scheduled Meetings subtab to view a list of the events you have scheduled for the next seven days. This tab displays a maximum of 50 events per day.
  -  identifies events that are part of a recurring series.
  -  identifies events with invitees. Events owned by multiple people aren't available in Personal Edition.
  - If your organization has enabled home page hover links for events, hover your mouse over the subject of an event to display the details of the event in an interactive overlay. Alternatively, click the subject of an event to open the detail page of that event.
- Click the Requested Meetings subtab to view meetings you have requested but not confirmed. This tab displays a maximum of 100 requested meetings.
  - Click the subject of the meeting to open its detail page where you can cancel and reschedule the meeting.
  - The Responses column shows the number of invitees that have responded to your meeting request.
  - Once you confirm a meeting, it appears on the Scheduled Meetings subtab.

If the Requested Meetings subtab doesn't appear, ask your Salesforce administrator to add it to the Calendar section.

### EDITIONS

Available in: Salesforce Classic

Available in: **All Editions** except **Database.com**

- View a small calendar of the current month. To change which month appears, click  and .
- Navigate to different views of your calendar and click the icons underneath the small monthly calendar as appropriate.

## Viewing Custom Links on the Home Tab

This section appears on the Home tab depending on your customized home page layout.

The Custom Links section of the Home tab contains links to websites or Salesforce pages that are useful for everyone in your organization. Your administrator sets which links appear in this section.

### EDITIONS

Available in: Salesforce Classic

Available in: **All Editions** except **Database.com**

## Viewing Messages and Alerts

The Messages and Alerts section of the Home tab sidebar displays announcements customized by your organization's administrator. The Messages and Alerts section is not available in Personal Edition.

### EDITIONS


Available in: Salesforce Classic

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

## Performance Chart

Use the performance chart on the Home page in Lightning Experience to track your sales performance or the performance of your sales team against a customizable sales goal.

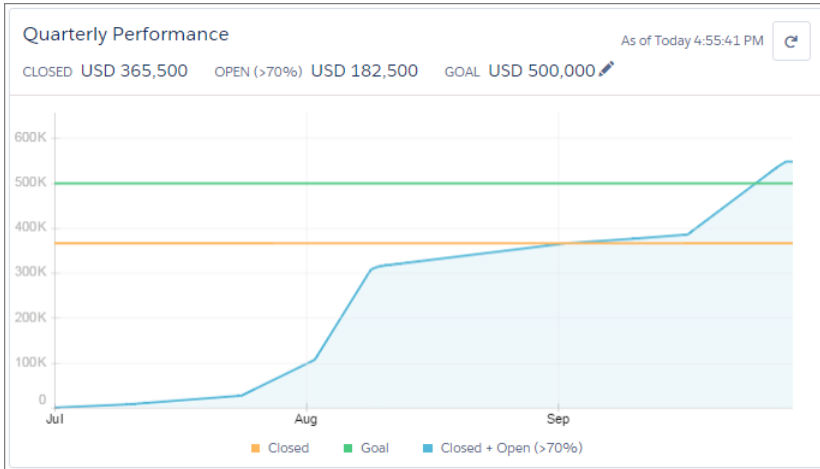
The performance chart displays data based on your sales team's opportunities if you have an associated team. Otherwise, the chart displays opportunities you own. Only opportunities for the current sales quarter that are closed or open with a probability over 70% are displayed.

- Closed—The sum of your closed opportunities.
- Open (>70%)—The sum of your open opportunities with a probability over 70%. The blue line in the chart is the combined total of the closed opportunities and open opportunities with a probability over 70%.
- Goal—Your customizable sales goal for the quarter. This field is specific to the performance chart and has no impact on forecast quotas or any other type of goal. Click  to set the goal.

### EDITIONS

Available in: Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions



Hover over the chart to see the closed and committed opportunity amounts for different dates. If you hover over a date when an opportunity was closed or set to a probability over 70%, a blue dot appears. Click the dot to see a window with more opportunity details.

SEE ALSO:

[The Assistant](#)

## The Assistant

Use the Assistant on the Home page in Lightning Experience to view important updates over the course of your day.

Click different leads or opportunities to go to the record's detail page.

**Assistant**

**New Lead Assigned to You Today**

[Kim Southbon](#)  
CFO - Universal Telco

**This Opportunity Has No Open Activities**

[Universal Paper - 60 Pallets](#)  
Universal Paper · 12/24/2015 · \$120,000.00

**This Opportunity Has Overdue Tasks**

[Acme - 500 Widgets](#)  
Acme · 1/14/2016 · \$80,000.00

### EDITIONS


Available in: Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

The following updates appear in the Assistant:

- Leads assigned to you today
- Opportunities with overdue tasks
- Opportunities with no activity in 30 days
- Opportunities with no open activity

Updates about leads appear before updates about opportunities. Opportunity updates are arranged in order of close date.

 **Note:** If you don't have access to activities on opportunities or if the opportunity pipeline is off, you instead see recommendations for opportunities that have close dates over the next 90 days.

SEE ALSO:

[Performance Chart](#)

## Troubleshoot Login Issues

Can't log in? Forgot your username or password, or you're locked out from too many login attempts?

To resolve login problems, try these solutions.

Your Salesforce admin sets password policies for your org. These policies determine how many times you can attempt to log in, how long you're locked out, and what your password requirements are.

To protect the privacy of your data, change your password periodically. If your Salesforce administrator expires user passwords on a periodic basis, you're prompted to change your password at the end of each period.

- Forgot your password? [Retrieve it](#).
- Locked out? Wait until the lockout period expires and try again, or contact your Salesforce admin.
- Password expired? We prompt you to change your password.
- Accessing Salesforce from outside a trusted IP range, using a new browser or app? We prompt you to [verify your identity](#).
- What does Use Custom Domain on the login page mean? If your Salesforce admin created a custom domain for your org, click **Use Custom Domain** to provide the domain name and log in.

A custom domain is in the form `https://universalcontainers.my.salesforce.com`, where `universalcontainers` is a name provided by your admin.

### [Reset Your Security Token](#)

When you access Salesforce from an IP address that's outside your company's trusted IP range using a desktop client or the API, you need a security token to log in. A security token is a case-sensitive alphanumeric code that you append to your password or enter in a separate field in a client application.

### [Grant Login Access](#)

To assist you, your administrator or a customer support representative can log in to the application using your login. By default, your company's administrators can access your account without any action from you. If your organization requires users to grant login access to administrators, you can grant access for a specified duration. You can also grant access to representatives of support organizations.

### [Reset Your Forgotten Password](#)

If you forgot your password, you can easily reset it using the forgot password link on the login page. All you need is your username.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **All Editions** except **Database.com**

## Reset Your Security Token

When you access Salesforce from an IP address that's outside your company's trusted IP range using a desktop client or the API, you need a security token to log in. A security token is a case-sensitive alphanumeric code that you append to your password or enter in a separate field in a client application.

Your security token isn't displayed in your settings or profile.


Some client applications provide a separate field for entering the security token. If the application doesn't have a separate field, add the security token to the end of your password. For example, if your password is *mypassword* and your security token is *XXXXXXXXXX*, enter *mypasswordXXXXXXXXXX* in the Password field. Don't use the security token or add it to your password when you log in to Salesforce via a browser.

If your admin assigned you the "Two-Factor Authentication for API Logins" permission, use the code generated by an authenticator app, such as Salesforce Authenticator, for the security token value.

### Get or Reset Your Token

A new security token is emailed to you when you reset your password. Or you can reset your token separately.

1. From your personal settings, enter *Reset* in the **Quick Find** box, then select **Reset My Security Token**.
2. Click **Reset Security Token**. The new security token is sent to the email address in your Salesforce personal settings.


 **Tip:** Before you access Salesforce from a new IP address, we recommend that you get your security token from a trusted network using **Reset My Security Token**.

### Update Your Token in Salesforce Outlook Edition

1. In Outlook, go to **Tools > Salesforce Options**.
2. In the password window, enter your password and security token, with the security token added to the end of your password. For example, *mypasswordXXXXXXXXXX*.
3. To test that you correctly entered your password and token, click **Verify**.
4. Click **OK**.

### Update Your Token in Connect Offline, Connect for Office, and Data Loader

When you log in, add the security token value to the end of your password, such as *mypasswordXXXXXXXXXX*.

 **Note:** If you get an invalid password error when you log in, try logging in only with your password. You can get this error if you use your security token to log in from an IP address that's within a trusted IP range set by your admin.

SEE ALSO:

- [Find Your Personal Settings in Salesforce Classic](#)
- [Missing "Reset My Security Token" Troubleshooting](#)

#### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions**  
Connect for Office not available in **Database.com**

Connect Offline available in: Salesforce Classic

Connect Offline available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

## Grant Login Access


To assist you, your administrator or a customer support representative can log in to the application using your login. By default, your company's administrators can access your account without any action from you. If your organization requires users to grant login access to administrators, you can grant access for a specified duration. You can also grant access to representatives of support organizations.

Watch a Demo: [▶ Letting Your Salesforce Administrator Access Your Account](#)

For security reasons, the maximum period for granting access is one year. During the time you granted access, administrators or support representatives can use your login and access your data to help you resolve problems.

1. From your personal settings, enter *Login Access* in the *Quick Find* box, then select the option to grant login access.
2. Set the access expiration date by choosing a value from the picklist.
3. Click **Save**.

If an administrator, support representative, or publisher makes setup changes using your login, the setup audit trail lists the changes and the username. In some organizations, records of clicks made by an administrator logged in as you are also kept for auditing purposes.

 **Note:** You can't grant access to certain support organizations if your administrator set up restrictions, or if a packaged application's license prevents it.

SEE ALSO:

- [Get to Know Your Salesforce Admin](#)
- [Personalize Your Salesforce Experience](#)

## Reset Your Forgotten Password

If you forgot your password, you can easily reset it using the forgot password link on the login page. All you need is your username.

 [Watch a Demo](#) (33 seconds)

1. On the login page, click the forgot password link.
2. Enter your username and click **Continue**. An email containing instructions to reset your password is sent to the address specified in your Salesforce personal settings.
3. Within 24 hours, click the link provided in the email, answer your security question, and click **Continue**. (The link in the email can be used only once, and expires after 24 hours.)
4. When prompted, enter a new password.

When you log in to Salesforce from a browser or application that we don't recognize, and your IP address is outside a trusted IP range, you're prompted to verify your identity.

SEE ALSO:

- [Verify Your Identity](#)
- [Troubleshoot Login Issues](#)

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

Granting administrator access available in: **Enterprise, Performance, Unlimited, Developer,** and **Database.com** Editions

### USER PERMISSIONS

To view setup audit trail history:

- "View Setup and Configuration"

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

## Work on Mobile Devices

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Salesforce provides several mobile apps to keep you connected and productive, no matter where you are.

### [Salesforce Mobile Product Comparison](#)

Salesforce1, SalesforceA, Salesforce Classic Mobile, and Salesforce Authenticator are available on different mobile devices and in different editions, with different support options.

### [Salesforce1 Mobile App](#)

The Salesforce1 mobile app is Salesforce on the go! This enterprise-class mobile experience gives you real-time access to the same information you see in the office, but organized for getting work done between customer meetings, while waiting for a flight, even when you're in line for coffee. The intuitive interface makes it easy to navigate and interact with data on a touchscreen, so you can review and update information with just a few taps. And Salesforce1 includes many of your org's customizations, so the app is tailored to your business needs.

### [Salesforce Classic Mobile](#)

The Salesforce Classic Mobile app provides mobile access to your Salesforce data from Android™ and iPhone® devices. You can view, create, edit, and delete records, keep track of your activities, view your dashboards, run simple reports, and log calls and emails. Your Salesforce admin must assign you a mobile license before you can use Salesforce Classic Mobile.

### [Salesforce Authenticator](#)

Welcome to the all-new Salesforce Authenticator mobile app! Version 2 is a powerful and innovative two-factor authentication app for your mobile device. The app adds an extra layer of security to protect your Salesforce account and data. And we've designed it to be super easy to use. You get increased security and increased convenience—all in one beautiful app.

## Salesforce Mobile Product Comparison

Salesforce1, SalesforceA, Salesforce Classic Mobile, and Salesforce Authenticator are available on different mobile devices and in different editions, with different support options.

Product	Description	Supported Salesforce Editions	Supported Mobile Devices	Offline Support?
Salesforce1	<p>Access and update Salesforce data from an interface that's optimized for navigating and working on your touchscreen mobile device.</p> <p>You can view, edit, and create records, manage your activities, view your dashboards and reports, and use Chatter. Salesforce1 supports many standard objects and list views, all your organization's custom objects, the integration of other mobile apps, and many of your organization's Salesforce customizations (including Visualforce tabs and pages and Lightning Pages).</p>	<p>Free for customers using:</p> <ul style="list-style-type: none"> <li>• Personal Edition</li> <li>• Group Edition</li> <li>• Professional Edition</li> <li>• Enterprise Edition</li> <li>• Unlimited Edition</li> <li>• Performance Edition</li> <li>• Developer Edition</li> <li>• Contact Manager Edition</li> </ul>	<ul style="list-style-type: none"> <li>• Android phones</li> <li>• Android tablets</li> <li>• iPad models</li> <li>• iPhone models</li> <li>• Windows 8.1 and Windows 10 phones (mobile browser app only)</li> </ul>	<p>Yes, for viewing data.</p> <p>Beta: Create and edit data (Salesforce1 for Android, v9.0 or later and Salesforce1 for iOS, v10.0 or later)</p>



Product	Description	Supported Salesforce Editions	Supported Mobile Devices	Offline Support?
SalesforceA	<p>Manage users and view information for Salesforce organizations from your smartphone.</p> <p>Deactivate or freeze users, reset passwords, unlock users, edit user details, and assign permission sets.</p> <p>This app is restricted to users with the "Manage Users" permission.</p>	<p>Free for customers using:</p> <ul style="list-style-type: none"> <li>• Group Edition</li> <li>• Professional Edition</li> <li>• Enterprise Edition</li> <li>• Unlimited Edition</li> <li>• Performance Edition</li> <li>• Developer Edition</li> <li>• Contact Manager Edition</li> </ul>	<ul style="list-style-type: none"> <li>• Android phones</li> <li>• Android tablets</li> <li>• iPad models</li> <li>• iPhone models</li> <li>• iPod Touch</li> </ul>	No
Salesforce Classic Mobile	<p>You can view your dashboards, run simple reports, log calls and emails, track your activities, and create, edit, and delete records. Most standard Sales objects and some Service objects are available. Custom objects and configurations are also supported.</p>	<p>App requires mobile licenses and is available for:</p> <ul style="list-style-type: none"> <li>• Professional Edition</li> <li>• Enterprise Edition</li> <li>• Unlimited Edition</li> <li>• Performance Edition</li> <li>• Developer Edition</li> </ul>	<ul style="list-style-type: none"> <li>• Android phones</li> <li>• Android tablets</li> <li>• iPhone models</li> </ul>	Yes
Salesforce Authenticator	<p>Secure your account by using your mobile device for two-factor authentication. Verify your identity or block unrecognized activity with a one-tap response to a push notification. If you enable location services for the app, you can set trusted locations, such as your home or office. If automation is available, the app can verify your identity automatically when you're in a trusted location. Get a code to use as a backup identity verification method.</p>	<p>Free for all customers using:</p> <ul style="list-style-type: none"> <li>• Group Edition</li> <li>• Professional Edition</li> <li>• Enterprise Edition</li> <li>• Performance Edition</li> <li>• Unlimited Edition</li> <li>• Developer Edition</li> <li>• Contact Manager Edition</li> </ul>	<ul style="list-style-type: none"> <li>• Android phones</li> <li>• iPhone 5 or later models</li> </ul>	Yes, for generating verification codes

## SEE ALSO:

[Requirements for the Salesforce1 Mobile App](#)

[Salesforce Classic Mobile](#)


[Salesforce Editions](#)

## Salesforce1 Mobile App

The Salesforce1 mobile app is Salesforce on the go! This enterprise-class mobile experience gives you real-time access to the same information you see in the office, but organized for getting work done between customer meetings, while waiting for a flight, even when you're in line for coffee. The intuitive interface makes it easy to navigate and interact with data on a touchscreen, so you can review and update information with just a few taps. And Salesforce1 includes many of your org's customizations, so the app is tailored to your business needs.

### EDITIONS

Salesforce1 mobile app available in: **All** editions except Database.com

 **Note:** Salesforce1 puts key data and features at your disposal, wherever you are. But there are business activities that are probably better done from your laptop or desktop. To see data or do actions that aren't available in Salesforce1, use Lightning Experience or Salesforce Classic instead.

### [Get the Salesforce1 Mobile App](#)

The way you access Salesforce1 depends on how you want to work: using an app installed on your device or using a mobile browser. It's possible that some of the Salesforce1 versions are disabled for your organization—ask your Salesforce administrator about your options.

### [Salesforce1 Mobile App Features: What's Available in Each Version](#)

Salesforce1 is available as a downloadable app on iOS and Android devices and as a mobile browser app in supported mobile browsers. In most cases, all of the Salesforce1 "flavors" include the same features. But there are some differences between the experiences, often related to differences in the mobile platforms on which Salesforce1 is supported.

### [Requirements for the Salesforce1 Mobile App](#)

Salesforce1 is available for most Salesforce editions and many user license types. The app is supported on a variety of mobile platforms, with some device, operating system, and mobile browser requirements. An Internet connection is necessary to communicate with Salesforce.

### [What Data Is Available in the Salesforce1 Mobile App?](#)

Salesforce1 uses your organization's Salesforce edition, your user license type, and your assigned user profile and permission sets to determine the data that's available to you. Usually you see the same objects, record types, fields, and page layouts that you do when working in the full Salesforce site. Not all Salesforce data or functionality is supported in Salesforce1, however.

### [Why Can't I Log in to the Salesforce1 Mobile App?](#)

You're certain that you're using your correct Salesforce credentials but you can't log in to Salesforce1? There are several common reasons why you might be having trouble.

### [Find Help in the Salesforce1 Mobile App](#)

Salesforce1 includes a **Help** link that you can use to learn about the mobile app.

### [Help Resources for the Salesforce1 Mobile App](#)

These resources provide information about using the Salesforce1 mobile app, setting up your organization to use the app, and developing for the app.

### [Locale and Language Support for the Salesforce1 App](#)

Salesforce1 works with almost all Salesforce-supported locales and the fully supported and end-user languages. (The Salesforce Help includes a complete list of supported locales and languages.) Languages that are read right to left, including Arabic and Hebrew, aren't supported in this release.

### [Salesforce1 Mobile App Accessibility Considerations](#)

Salesforce1 is designed with accessibility in mind and delivers a fully-accessible mobile experience for all individuals, including users working with screen readers.

[Turn the Salesforce1 Mobile Browser App Off or On](#)

When the Salesforce1 mobile browser app is enabled for your organization, you automatically redirect to this experience when you log in to Salesforce from a supported mobile browser. Using the full Salesforce site in a mobile browser isn't supported. But it is possible to turn off the mobile browser app if you need to access Salesforce Classic from your mobile device for awhile.

## SEE ALSO:

[Help Resources for the Salesforce1 Mobile App](#)


## Get the Salesforce1 Mobile App

The way you access Salesforce1 depends on how you want to work: using an app installed on your device or using a mobile browser. It's possible that some of the Salesforce1 versions are disabled for your organization—ask your Salesforce administrator about your options.

### Install a Downloadable App

The Salesforce1 downloadable apps are available for supported Android and iOS devices. You can download and install Salesforce1 from Google Play or the App Store.

Once the app is installed, launch it from your home screen and log in to your Salesforce account. You may be prompted to create a security PIN. By default, you're connected to your production environment.

 **Note:** If you're not able to log in, verify with your administrator that you're enabled to use the downloadable app.

### Access the Mobile Browser App

The Salesforce1 mobile browser app runs in a mobile browser. The mobile browser app is a great option if your organization prevents installing apps on your corporate-issued device.

If the mobile browser app is enabled for your organization, you're automatically redirected to Salesforce1 when you log in to Salesforce from a supported mobile browser. If Salesforce1 doesn't automatically start for you, make sure you didn't turn off the redirection to the mobile browser app and that you're using a supported browser.

(From most unsupported mobile browsers, you're redirected to Salesforce Classic instead. If you're using an iOS device, you can access the mobile browser from Google Chrome for iOS or when tapping a Salesforce link in Gmail for iOS, but working in either of these environments isn't supported by Salesforce.)

## SEE ALSO:

[Why Can't I Log in to the Salesforce1 Mobile App?](#)[Requirements for the Salesforce1 Mobile App](#)[Turn the Salesforce1 Mobile Browser App Off or On](#)

### EDITIONS

Salesforce1 mobile app available in: **All** editions except Database.com

## Salesforce1 Mobile App Features: What's Available in Each Version

Salesforce1 is available as a downloadable app on iOS and Android devices and as a mobile browser app in supported mobile browsers. In most cases, all of the Salesforce1 "flavors" include the same features. But there are some differences between the experiences, often related to differences in the mobile platforms on which Salesforce1 is supported.

Feature	Android Downloadable Apps	iOS Downloadable Ap	Mobile Browser App
<b>Navigation and Actions</b>			
Access up to 200 list views per object	✓	✓	✓
See visual snapshots of business data on list view charts			✓ (tablets only)
Sort and filter list views	✓	✓	✓
Do actions like make phone calls, log calls, and send emails (Phone calls supported on iPhones and Android phones only)	✓	✓	✓
Use quick actions created for your organization	✓	✓	✓
See Google Maps images in standard address fields	✓	✓	✓
<b>Search</b>			
Search for Salesforce records	✓	✓	✓
Scope global searches to find records by object			✓
See matching search results for all records, not just those that have been recently viewed			✓
Sort search results			✓
Get automatic spell checking and correction on search keywords	✓	✓	✓
Use global search to find Chatter posts in the "All Company" feed			✓
<b>Relationship and Data Management</b>			
Add new records and update existing records	✓	✓	✓
Prevent the creation of duplicate records	✓	✓	✓
Stay up to date about important companies and industries with the News app	✓	✓	✓
Track the latest news about accounts with Account Insights (from accounts and opportunities)	✓	✓	✓
See company logos for accounts (Beta)	✓	✓	✓
Locate, associate, and view Twitter profiles for Salesforce accounts, contacts, and leads	✓	✓	✓
Track relationships between accounts and contacts with Contacts to Multiple Accounts	✓	✓	✓
Add contacts to Salesforce from mobile device contact lists	✓	✓	

Feature	Android Downloadable Apps	iOS Downloadable Ap	Mobile Browser App
Convert qualified leads to contacts	✓	✓	✓
Use Sales Path to follow sales processes and get deals closed	✓	✓	✓
Work with account teams and opportunity teams	✓	✓	✓
Work with data stored outside of Salesforce	✓	✓	✓
<b>Productivity (Salesforce Today, Notes, Events, Tasks, Email)</b>			
Use Today to prepare for and manage the day's events, join conference calls, and log mobile calendar events in Salesforce	✓	✓	
Add contacts to Salesforce from events in Today	✓	✓	
Take rich text meeting notes and easily relate them to records	✓	✓	✓
Add images to notes		✓	
Create tasks from Notes	✓	✓	✓
Create tasks from Chatter posts			✓
Track, close, or reopen tasks	✓	✓	✓
Do quick task updates with a tap: edit comments or change a due date, status, or priority	✓	✓	✓
Create and view Salesforce events	✓	✓	✓
Send email from Salesforce using SalesforceIQ Inbox	✓	✓	
<b>Work.com</b>			
Use Work.com Coaching, Goals, Rewards, and Skills <i>(Skills available in Android only)</i>	✓	✓	✓
<b>Customer Service Tools</b>			
Use Social Customer Service to track cases and respond to Twitter Tweets in real time	✓	✓	✓
View Salesforce Knowledge articles	✓	✓	✓
Track purchased products with Assets	✓	✓	✓
Streamline field service with Work Orders (including milestones, linked articles, and work order hierarchies)	✓	✓	✓
View scheduled services and navigate to service locations with Field Service Lightning	✓	✓	✓
<b>Reports and Dashboards</b>			

Feature	Android Downloadable Apps	iOS Downloadable Ap	Mobile Browser App
View dashboards, dashboard components (including Visualforce dashboard components), and reports	✓	✓	✓
View Lightning Experience reports, dashboards, and charts	✓	✓	✓
Sort data in reports	✓	✓	✓
Apply dashboard filters	✓	✓	✓
Share dashboards in feeds		✓ (limited)	✓
<b>Salesforce Files</b>			
Use Salesforce Files	✓	✓	✓
Use Salesforce Files if Chatter is turned off			✓
Browse and share files from external data sources, such as SharePoint, OneDrive for Business, Google Drive, and Box ( <i>Requires Files Connect</i> )	✓	✓	✓
Edit Microsoft Office 365 files	✓	✓	
<b>Chatter (Feeds, Topics, Profiles, Groups)</b>			
Use Chatter feeds, people, and groups	✓	✓	✓
Search in the main Chatter feed	✓	✓	✓
View, edit, and follow feed entries organized by topic; add multiple topics to posts			✓
Bundle multiple record updates into a single post			✓
Attach photos or files to posts or comments, or use quick actions to post photos or files	✓	✓	✓
Share Chatter posts	✓	✓	
See previews of files posted to posts and comments	✓	✓	✓
Double-tap to add or remove bookmarks for Chatter posts		✓	
Ask questions and get answers in the feed			✓
Escalate questions in Chatter to cases			✓
Edit user profile details	✓		✓
Change the user profile picture	✓	✓	✓
Add records to groups	✓	✓	✓

Feature	Android Downloadable Apps	iOS Downloadable Ap	Mobile Browser App
Collaborate with more privacy in unlisted Chatter groups	✓	✓	✓
Post announcements in group feeds	✓	✓	✓
Manage groups	✓	✓	✓
Use Salesforce1 if Chatter is turned off	✓	✓	✓
Use quick actions in Salesforce1 if Chatter is turned off	✓	✓	✓
Launch Salesforce1 from Chatter email notifications and digest links	✓	✓	✓
<b>Salesforce Communities</b>			
Access communities created using the Salesforce Tabs + Visualforce template	✓	✓	✓
<b>Business Logic and Process Automation</b>			
Submit records for approval	✓	✓	✓
View the status of pending approvals and approve or reject approval requests		✓	✓
Resume or delete paused flow interviews	✓	✓	✓
<b>Notifications</b>			
Receive in-app notifications	✓	✓	✓
Receive push notifications	✓	✓	
Configure the push notifications that are sent	✓	✓	
<b>Offline</b>			
View cached data when working offline	✓	✓	
Create, edit, and delete records for recently accessed objects when offline (Beta)	✓	✓	
<b>Access and Security</b>			
Switch between multiple Salesforce accounts or communities without leaving the app	✓	✓	
Configure connections to multiple instances from the login page	✓	✓	
Open most Salesforce URLs directly in Salesforce1	✓	✓	
Control app access with a security passcode	✓	✓	
Get enhanced security with Mobile Device Management (MDM)	✓	✓	
<b>Customizations and User/App Settings</b>			

Feature	Android Downloadable Apps	iOS Downloadable Ap	Mobile Browser App
View Visualforce pages	✓	✓	✓
Access Lightning pages, and custom and third-party apps	✓	✓	✓
See a customized selection and arrangement of actions in the action bar and list item actions	✓	✓	✓
See custom branding	✓	✓	✓

## SEE ALSO:

[Help Resources for the Salesforce1 Mobile App](#)

## Requirements for the Salesforce1 Mobile App

Salesforce1 is available for most Salesforce editions and many user license types. The app is supported on a variety of mobile platforms, with some device, operating system, and mobile browser requirements. An Internet connection is necessary to communicate with Salesforce.

### Supported Devices and Browsers

Salesforce1 is supported in portrait orientation on these device–OS–mobile browser combinations only. If you run Salesforce1 in an environment other than what's listed here, you may encounter problems that Salesforce won't address.


#### EDITIONS

Salesforce1 mobile app available in: **All** editions except Database.com

Salesforce1 App	Supported Devices	Supported Mobile OS	Supported Mobile Browser
Downloadable app for iOS <i>(iPad supported in portrait and landscape orientation)</i>	iPhone 5c/5s or later models iPad 4 or later models (including iPad Air 2 and iPad Pro) iPad mini 2 or later models Apple Watch <i>(push notifications only)</i>	iOS 9.2 or later	Not applicable
Downloadable app for Android	Android phones	Android 4.4 or later	Not applicable
	Samsung Galaxy Note 10.1 tablets	Android 5.1.1 or later	Not applicable
Mobile browser app	iPhone 5c/5s or later models	iOS 9.2 or later	Apple Safari
	iPad 4 or later models (including iPad Air 2 and iPad Pro) iPad mini 2 or later models		Good Access
	Android phones	Android 4.4 or later	Google Chrome
	Android tablets		Good Access
	Nokia Lumia 950	Windows 10	Microsoft Edge



Salesforce1 App	Supported Devices	Supported Mobile OS	Supported Mobile Browser
	Nokia Lumia 1020 and HTC 8X phones (Support ends December 17, 2017)	Windows 8.1 Update	Microsoft Internet Explorer 11
	BlackBerry Z10 phones (Support ends Winter '17)	BlackBerry OS 10.2 or later	BlackBerry Browser
	BlackBerry Z30 phones (Support ends Winter '17)	BlackBerry OS 10.2.1.3175 or later	BlackBerry Browser

 **Note:** Salesforce supports touch-enabled laptops, such as Microsoft Surface and Surface Pro devices, as laptops instead of tablets. It's not possible to access the Salesforce1 mobile browser app on these devices. Users are always redirected to the full site experience that's enabled for them—Lightning Experience or Salesforce Classic. Only standard keyboard and mouse inputs are supported on these types of devices.

For optimal Salesforce1 performance, we recommend keeping your mobile devices' operating systems updated and upgrading to late model devices as allowed by your mobile plan. Future Salesforce1 versions may require removing support for older operating systems and sometimes newer operating system releases don't perform well on older devices.


When using the mobile browser app, we recommend turning off Incognito Mode in Chrome, InPrivate Browsing in Internet Explorer, or Private Browsing in Safari or BlackBerry Browser.

### Salesforce Editions and Licenses

These Salesforce editions and user license types allow the use of Salesforce1.

Salesforce Editions		
These Salesforce editions allow the use of Salesforce1.	<ul style="list-style-type: none"> <li>• Personal Edition</li> <li>• Group Edition</li> <li>• Professional Edition</li> <li>• Enterprise Edition</li> <li>• Performance Edition</li> <li>• Unlimited Edition</li> <li>• Developer Edition</li> <li>• Contact Manager Edition</li> </ul>	Database.com Edition isn't supported.
User License Types		
These user license types can access Salesforce1. A special Salesforce1 or mobile license isn't required.	<ul style="list-style-type: none"> <li>• Salesforce users</li> <li>• Salesforce Platform and Force.com users</li> <li>• Chatter Plus users (also known as Chatter Only), Chatter Free users, and Chatter External users*</li> </ul>	These user license types aren't supported: portal users (unless a member of a Salesforce community), Database.com users, Sites and Site.com users, Data.com users, and Work.com users.

- Customer Community, Customer Community Plus, and Partner Community external users
- Portal users who are a member of a Salesforce community

 **Note:** You can access the same data and functionality that's available to you in the full site, as determined by your organization's Salesforce edition, your user license type, and your assigned user profile and permission sets.

\*Chatter Plus, Chatter Free, and Chatter External users must have the "API Enabled" profile permission turned on to use any of the Salesforce1 downloadable apps. Chatter External users who have API access can't access Groups or People list views when using a downloadable app.

### Wireless Connection

A Wi-Fi® or cellular network connection is needed to communicate with Salesforce. For cellular connections, a 3G network or faster is required. For the best performance, we recommend using Wi-Fi or LTE.

If you're using one of the Salesforce1 downloadable apps, you can view your most recently accessed records, and create and edit records, when your device is offline.

### SEE ALSO:

[Locale and Language Support for the Salesforce1 App](#)

[Salesforce1 Mobile App Accessibility Considerations](#)

[What Data Is Available in the Salesforce1 Mobile App?](#)

## What Data Is Available in the Salesforce1 Mobile App?

Salesforce1 uses your organization's Salesforce edition, your user license type, and your assigned user profile and permission sets to determine the data that's available to you. Usually you see the same objects, record types, fields, and page layouts that you do when working in the full Salesforce site. Not all Salesforce data or functionality is supported in Salesforce1, however.

These objects are available in Salesforce1. Unless noted otherwise, you can view, edit, or create records for these objects.

- Accounts and Person Accounts
- Assets
- Campaigns
- Cases
- Contacts
- Contracts
- D&B Company (*view only, for Data.com Premium Prospector and Data.com Premium Clean customers*)
- Dashboards (*view only*)
- Events
- Leads
- Linked Articles (*view only*)


### EDITIONS

Salesforce1 mobile app available in: **All** editions except Database.com

- Live Chat Transcripts
- Opportunities
- Orders (*view or edit only*)
- Reports (*view only*)
- Salesforce Knowledge Articles (*view only*)
- Tasks
- Work.com Coaching, Goals, Thanks, Rewards, and Skills (*Skills not available in the iOS downloadable app*)
- Work Orders
- Work Order Milestones (*view only*)
- Custom objects that have a tab you can access
- Salesforce Connect external objects that are searchable and have a tab you can access

You can access all these objects from the Salesforce1 navigation menu. The navigation menu helps you focus on the objects you work with most frequently. Tap **More** at the bottom of the Recent section to see the full list of all objects available to you in Salesforce1.

With some exceptions, all the standard and custom fields are available on these records. And you can work with most of the related lists for supported objects.

 **Tip:** If you're new to Salesforce and don't yet have a history of recent items, you initially see these objects in the Recent section of the Salesforce1 navigation menu: Accounts, Cases, Contacts, Files, Groups (unless added directly to the navigation menu), Leads, Opportunities, and People (unless added directly to the navigation menu).

As you spend time working in Salesforce1 and the full Salesforce site, the objects that you use the most eventually replace the default ones in the Recent section and become the objects that are available for global searches in Salesforce1.

It can take up to 15 days for the objects that you work with regularly to appear in the Recent section. To make objects appear under Recent immediately, pin them from your search results in the full site.

When doing a global search in Salesforce1, you can find records for the objects that appear in the Recent section only. To find records for the other objects that are in the full object list when the Recent section is expanded, search from the object's home page.

If Chatter is enabled, you can access feeds, user profiles, groups, and files. You can access user profiles even if Chatter is disabled.

If you're using a Salesforce1 downloadable app, you can use Salesforce Today to prepare for meetings, stay in touch with customers, quickly join conference calls, and generally manage your day.

SEE ALSO:

[Requirements for the Salesforce1 Mobile App](#)

## Why Can't I Log in to the Salesforce1 Mobile App?

You're certain that you're using your correct Salesforce credentials but you can't log in to Salesforce1? There are several common reasons why you might be having trouble.

- Make sure that you actually have permission to use Salesforce1. Salesforce administrators can control who's able to use the Salesforce1 downloadable apps and can also disable access to the mobile browser app, for you or your entire company. If you're not sure that you have access, check with your administrator.
- If you're using a downloadable app, make sure you're logging in to the correct instance—production, sandbox, or a custom domain. By default, Salesforce1 connects to your production environment. If your

### EDITIONS

Salesforce1 mobile app available in: **All** editions except Database.com

organization uses single sign-on, configure the app to point to a different page during login. The same is true to connect Salesforce1 to a sandbox environment for testing purposes or to log in using a Community URL.

A custom domain is in the form of `https://universalcontainers.my.salesforce.com`, where `universalcontainers` is a name selected by your administrator. Your administrator can provide you with the domain name to use.

- To connect the downloadable app for iOS to a different instance, use [these steps](#).
- To connect the downloadable app for Android to a different instance, use [these steps](#).

If you're still unable to log in, ask your administrator for help.

#### SEE ALSO:

[Get the Salesforce1 Mobile App](#)

[Requirements for the Salesforce1 Mobile App](#)

## Find Help in the Salesforce1 Mobile App

Salesforce1 includes a **Help** link that you can use to learn about the mobile app.

The **Help** link is located at the bottom of the Salesforce1 navigation menu. Tap  to open the navigation menu.

And there are a lot of other resources that can help you get started with Salesforce1. Check out [Help Resources for the Salesforce1 Mobile App](#) on page 96.

## Help Resources for the Salesforce1 Mobile App

These resources provide information about using the Salesforce1 mobile app, setting up your organization to use the app, and developing for the app.

### Getting Started with Salesforce1

#### Guides

Using the Salesforce1 App	<a href="#">PDF</a>
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#### Help Topics

Introduction to the Salesforce1 Mobile App	<a href="#">HTML</a>
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Salesforce1 Mobile App Features: What's Available in Each Version	<a href="#">HTML</a>
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Requirements for the Salesforce1 Mobile App	<a href="#">HTML</a>
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What Data Is Available in the Salesforce1 Mobile App?	<a href="#">HTML</a>
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Get the Salesforce1 Mobile App	<a href="#">HTML</a>
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What's Not Available in the Salesforce1 Mobile App	<a href="#">HTML</a>
--	----------------------

#### Help in the App

For the Salesforce1 Downloadable App on iPhone	<a href="#">HTML</a>
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#### EDITIONS

Salesforce1 mobile app available in: **All** editions except Database.com

#### EDITIONS

Salesforce1 mobile app available in: **All** editions except Database.com

For the Salesforce1 Downloadable App on iPad	<a href="#">HTML</a>
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For the Salesforce1 Downloadable App on Android Phones	<a href="#">HTML</a>
--	----------------------

For the Salesforce1 Mobile Browser App on Mobile Phones	<a href="#">HTML</a>
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For the Salesforce1 Mobile Browser App on Tablets	<a href="#">HTML</a>
---	----------------------

### Salesforce1 Videos

Take Your Tasks from Desktop to Mobile	<a href="#">Video</a>
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Accounts and Contacts on the Go	<a href="#">Video</a>
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## Setting Up and Customizing Salesforce1

### Guides and Cheat Sheets

Salesforce1 Section in the Salesforce Summer '16 Release Notes	<a href="#">PDF</a>	<a href="#">HTML</a>
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Salesforce1 Mobile App Admin Guide	<a href="#">PDF</a>	<a href="#">HTML</a>
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Salesforce1 App Admin Rollout Guide		<a href="#">HTML</a>
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### Help Topics

Set Up the Salesforce1 Mobile App with the Salesforce1 Wizard	<a href="#">HTML</a>
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Salesforce1 Mobile App Setup Options	<a href="#">HTML</a>
--------------------------------------	----------------------

How Actions Are Ordered in the Salesforce1 Action Bar	<a href="#">HTML</a>
---	----------------------

Your Org's Branding in the Salesforce1 Mobile App	<a href="#">HTML</a>
---	----------------------

Enable Visualforce Pages for the Salesforce1 Mobile App	<a href="#">HTML</a>
---	----------------------

Work Offline with the Salesforce1 Mobile App	<a href="#">HTML</a>
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## Developing for Salesforce1

### Guides and Cheat Sheets


Salesforce1 App Developer Guide	<a href="#">PDF</a>	<a href="#">HTML</a>
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Salesforce1 Mobile URL Schemes for Android and iOS	<a href="#">PDF</a>
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Salesforce1 Mobile Security Guide	<a href="#">PDF</a>
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## Locale and Language Support for the Salesforce1 App

Salesforce1 works with almost all Salesforce-supported locales and the fully supported and end-user languages. (The Salesforce Help includes a complete list of supported locales and languages.) Languages that are read right to left, including Arabic and Hebrew, aren't supported in this release.

 **Note:** The Salesforce1 downloadable apps use the language and locale settings from both your Salesforce user profile and the locale settings on your mobile device. If your device uses different locale settings than are specified for your user profile, you may see different languages displayed throughout the app. For example, the navigation menu might display in English while records display in French.

Salesforce1 includes multi-currency support, but advanced currency management isn't available.

SEE ALSO:

[Requirements for the Salesforce1 Mobile App](#)

## Salesforce1 Mobile App Accessibility Considerations

Salesforce1 is designed with accessibility in mind and delivers a fully-accessible mobile experience for all individuals, including users working with screen readers.

Unlike the full Salesforce site, Salesforce1 doesn't require accessibility mode to give users working with assistive devices a fully accessible experience.


Check your mobile device's documentation for more information about using a screen reader.

SEE ALSO:

[Requirements for the Salesforce1 Mobile App](#)


## Turn the Salesforce1 Mobile Browser App Off or On

When the Salesforce1 mobile browser app is enabled for your organization, you automatically redirect to this experience when you log in to Salesforce from a supported mobile browser. Using the full Salesforce site in a mobile browser isn't supported. But it is possible to turn off the mobile browser app if you need to access Salesforce Classic from your mobile device for awhile.

 **Note:** If you disable automatic redirection to the Salesforce1 mobile browser app, you're turning off automatic access for any supported browser, on any of your mobile devices. For example, if you turn off the mobile browser app from your tablet, you won't be able to use the mobile browser app on your smartphone either.

These steps don't affect the Salesforce1 downloadable apps which always display the Salesforce1 interface.

To turn off the mobile browser app from within the app:

1. Tap .
2. Tap **Full Site**.

You switch immediately to the Salesforce Classic full site. It's not possible to access Lightning Experience from any mobile browser.

### EDITIONS

Salesforce1 mobile app available in: **All** editions except Database.com

### EDITIONS

Salesforce1 mobile app available in: **All** editions except Database.com

### EDITIONS

Salesforce1 mobile app available in: **All** editions except Database.com

The full site is now your default environment whenever you log in from a mobile browser. You can switch back to the Salesforce1 mobile browser app using the **Go to Salesforce1** link in the full site footer, after which Salesforce1 returns to being your default environment.

To turn off the mobile browser app from the full site:

1. From your personal settings, enter *Advanced User Details* in the **Quick Find** box, then select **Advanced User Details**. No results? Enter *Personal Information* in the **Quick Find** box, then select **Personal Information**.
2. Deselect **Salesforce1 User**.
3. Save your changes.


To turn the Salesforce1 mobile browser app back on from the full site, repeat the previous steps and select the **Salesforce1 User** checkbox.

#### SEE ALSO:

- [Get the Salesforce1 Mobile App](#)
- [Requirements for the Salesforce1 Mobile App](#)
- [Personalize Your Salesforce Experience](#)

## Salesforce Classic Mobile

The Salesforce Classic Mobile app provides mobile access to your Salesforce data from Android™ and iPhone® devices. You can view, create, edit, and delete records, keep track of your activities, view your dashboards, run simple reports, and log calls and emails. Your Salesforce admin must assign you a mobile license before you can use Salesforce Classic Mobile.

 **Note:** Supported features may vary depending on your mobile operating system and device model.

Salesforce Classic Mobile stores your Salesforce records in a local database on your mobile device, which means you can use the Salesforce Classic Mobile app even when a data connection is unavailable. Salesforce Classic Mobile periodically polls Salesforce for new and updated records, saving you from the hassle of manually synchronizing your data.

Check the [list of supported mobile devices](#) to see if you can use the Salesforce Classic Mobile app on your smartphone.

- [Requirements for Using Salesforce Classic Mobile](#)
- [Installing the Salesforce Classic Mobile App](#)
- [Using Salesforce Classic Mobile FAQ](#)

#### SEE ALSO:

- [salesforce\\_mobile\\_implementation.pdf](#)
- [salesforce\\_axm\\_user\\_guide\\_for\\_blackberry.pdf](#)
- [salesforce\\_mobile\\_user\\_guide\\_for\\_iphone.pdf](#)

#### EDITIONS

Salesforce Classic Mobile setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited, and Developer** Editions, and for an extra cost in: **Professional** and **Enterprise** Editions

## Requirements for Using Salesforce Classic Mobile

The Salesforce Classic Mobile app can run on Android and iOS operating systems. It's also supported by wireless carriers—if the device can establish a data connection to the Internet, it can typically run the mobile app. [Verify that your device is supported](#) before installing the mobile app. Recently released mobile devices aren't immediately supported because every device goes through the official certification and quality assurance process.

### Notes About iOS Devices

Use of the Salesforce Classic Mobile app for Apple products is subject to certain limitations:

- Third parties (including, but not limited to, Apple Inc. and your network connectivity provider) may at any time restrict, interrupt or prevent use of Salesforce Classic Mobile for the iPhone and iPod touch devices, or delete the Salesforce Classic Mobile app from iPhone or iPod touch devices, or require Salesforce to do any of the foregoing, without entitling the customer to any refund, credit or other compensation from such third-party or Salesforce.
- Service level agreements don't apply to the Salesforce Classic Mobile for iPhone product. Additional limitations are described in the Order Form Supplement for Salesforce Classic Mobile for iPhone, which users are required to accept upon download or installation of the Salesforce Classic Mobile for iPhone product.

SEE ALSO:

- [Salesforce Mobile Product Comparison](#)
- [Salesforce Classic Mobile](#)

## Installing the Salesforce Classic Mobile App

You can install the Salesforce Classic Mobile app on any [supported](#) Android or iPhone device.

The easiest way to install Salesforce Classic Mobile is to visit

<http://mobile.salesforce.com> from your mobile device and follow the on-screen instructions.

Or, you can use the installation steps for your type of device.

### Android Installation

Salesforce Classic Mobile is available for download from Google Play. To access Google Play, your Android device must be connected to the network. You also need a Google account to download applications. If you don't already have a Google account, go to <https://accounts.google.com> and select **Sign up** to set one up.

To install Salesforce Classic Mobile from Google Play:

1. From the Apps screen of your Android device, select the Google Play Store.
2. Select the **Search** field, and type *salesforce*.
3. Select Salesforce Classic Mobile from the search results.
4. Select **Download**.
5. Tap **Accept and Download** if you agree to the terms.
6. Select **Open** to launch the application.

#### EDITIONS

Salesforce Classic Mobile setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited, and Developer** Editions, and for an extra cost in: **Professional and Enterprise** Editions

#### EDITIONS

Salesforce Classic Mobile setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited, and Developer** Editions, and for an extra cost in: **Professional and Enterprise** Editions



7. The first time you launch the Salesforce Classic Mobile app on your device, you must activate the app for your device by logging in and downloading data. Verify that your phone is connected to a network.
  - a. Select **I Accept**.
  - b. On the activation screen, enter your Salesforce username and password.
  - c. Select **Activate**.


Depending on your organization's setup, you might need to set up a passcode before accessing the app.

## iPhone Installation


Salesforce Classic Mobile is available for download from Apple's App Store. To use the App Store, your iPhone or iPod touch must be connected to the network. You also need an iTunes™ Store account to download applications. If you don't already have an iTunes Store account, open iTunes on your computer and select **Store > Account** to set one up.

To install Salesforce Classic Mobile from [the App Store](#):

1. From the Home screen of your iPhone or iPod touch, select the App Store icon.
2. Tap **Search**.
3. Tap within the `search` field to open the keyboard. Type `salesforce`.
4. Select Salesforce Classic Mobile in the list of search results to view information about the application.
5. Tap **Free**, and then tap **Install**.

 **Note:** There's no charge to download the app from the App Store. But only users in Enterprise, Professional, Unlimited, Performance, or Developer Editions who've been assigned a mobile license can run Salesforce Classic Mobile.

6. Enter your iTunes Store account and password and tap **OK**.
7. The first time you launch Salesforce Classic Mobile, you must activate the app for your device by logging in and downloading data. Verify that your device is connected to a network.
  - a. Tap the Salesforce icon on the Home screen.
  - b. Tap **I Accept**.
  - c. On the activation screen, enter your Salesforce username and password.
  - d. Tap **Activate**.

 **Warning:** If the application closes or the device locks during the activation process, the iPhone operating system pauses the download process but it will resume the next time you open the app.

Depending on your organization's setup, you might need to set up a passcode before accessing the app.

### SEE ALSO:

[salesforce\\_mobile\\_implementation.pdf](#)  
[salesforce\\_axm\\_user\\_guide\\_for\\_blackberry.pdf](#)  
[salesforce\\_mobile\\_user\\_guide\\_for\\_iphone.pdf](#)  
[Salesforce Mobile Product Comparison](#)  
[Salesforce Classic Mobile](#)

## Using Salesforce Classic Mobile FAQ

[Do I need a license to use Salesforce Classic Mobile?](#)

[Is my phone compatible with the Salesforce Classic Mobile app?](#)

[What Salesforce data is stored on my device when I use the Salesforce Classic Mobile app?](#)

[Can I see records in the Salesforce Classic Mobile app that I can't access in Salesforce?](#)

[How frequently does the Salesforce Classic Mobile app update my data?](#)

[How do I use the Salesforce Classic Mobile app to access records that aren't on my mobile device?](#)

[When I receive a call on my mobile device, will the Salesforce Classic Mobile app open the associated contact record?](#)

### Do I need a license to use Salesforce Classic Mobile?

You need a mobile license for each user who needs to access Salesforce Classic Mobile. .

If you've been assigned a mobile license but your administrator hasn't set up your mobile configuration yet, you can activate Salesforce Classic Mobile with the default mobile configuration. The default configuration automatically synchronizes the records you most recently accessed in Salesforce to your mobile device. You can also search for and download any records from Salesforce that aren't available locally on your device.


To find out if your user account has been assigned a mobile license to access Salesforce Classic Mobile, review your personal setup.

- If the **Mobile User** checkbox is selected, you can install and run Salesforce Classic Mobile. If the **Mobile User** checkbox is selected but the `Mobile Configuration` field is blank, you can activate Salesforce Classic Mobile using the default mobile configuration.

 **Note:** The `Mobile User` checkbox is disabled by default for new Unlimited and Performance Edition users.

### Is my phone compatible with the Salesforce Classic Mobile app?

The Salesforce Classic Mobile app can run on iPhones, iPod touch devices, and most Android devices. To find out if your phone can run the app, see the [list of supported mobile devices](#).

 **Note:** Supported features may vary depending on your mobile operating system and device model.

### What Salesforce data is stored on my device when I use the Salesforce Classic Mobile app?

Using the Salesforce Classic Mobile app to access Salesforce on a mobile device is much different from using the full Salesforce application on your computer. Mobile devices have a minimal amount of memory and a small screen, and don't always maintain a constant network connection. To work with these limitations, a subset of your Salesforce data is stored in a local database on your phone.

The following types of tabs are available in the Salesforce Classic Mobile app:

- All custom object tabs and these standard object tabs:

- Accounts
- Assets
- Attachments
- Cases
- Contacts
- Content

- Events
  - Groups
  - Group Members
  - Leads
  - Notes
  - Opportunities
  - Price Books
  - Products
  - Solutions
  - Tasks
  - Users
  - Dashboards
  - Reports
- Web and Visualforce tabs

 **Note:** The tabs and objects that you see in the app are determined by your mobile configuration and might not include all the tabs and objects listed here.

Additionally, the iPhone and Android apps don't support reports.

When you open the tab for an object, you probably won't see all of your Salesforce records. For each mobilized object, your administrator can create filter criteria to limit the number of records on your device. For example, in a large organization, sending all open and closed opportunities to your mobile device could consume too much memory or potentially crash it. Instead of sending all opportunities, your administrator might send a subset of them, such as open opportunities that you own that are scheduled to close this month.

## Can I see records in the Salesforce Classic Mobile app that I can't access in Salesforce?

No. User permissions, sharing rules, and field-level security are inherited from Salesforce—the mobile application enforces all the restrictions set up in Salesforce.

## How frequently does the Salesforce Classic Mobile app update my data?

The Salesforce Classic Mobile app checks for data changes every 20 minutes. During this incremental update, the server retrieves any newly created Salesforce records that you own, and then sends that data to your device. It also sends modifications to any records already stored on the device.

 **Note:** Note the following about data synchronization:

- The Android client app adjusts data polling time based on app usage. If the app isn't in use, the polling time interval increases in an exponential fashion, until it reaches eight hours. From that point forward, the device polls for data every eight hours. This prevents the Salesforce Classic Mobile app from draining the device battery when the app is rarely used.
- Because only one app can run on the iPhone at a time, the Salesforce Classic Mobile app can't request a data update unless the app is open. When you launch the app on the iPhone, it performs an incremental update unless a data synchronization has occurred in the past 20 minutes.

## How do I use the Salesforce Classic Mobile app to access records that aren't on my mobile device?

The Salesforce data available on your device is defined by your mobile configuration. You can easily search for records that aren't automatically downloaded to your device. A search box is available on each object tab in the Salesforce Classic Mobile app, as well as on the app's home page.

## When I receive a call on my mobile device, will the Salesforce Classic Mobile app open the associated contact record?

The Salesforce Classic Mobile app can't open a Salesforce contact when you receive incoming calls. However, if you place a call from Salesforce Classic Mobile, you're automatically prompted to log the call.

## Salesforce Authenticator

Welcome to the all-new Salesforce Authenticator mobile app! Version 2 is a powerful and innovative two-factor authentication app for your mobile device. The app adds an extra layer of security to protect your Salesforce account and data. And we've designed it to be super easy to use. You get increased security and increased convenience—all in one beautiful app.

### EDITIONS

Available in: Both Salesforce Classic and Lightning Experience

Two-factor authentication with Salesforce Authenticator available in: **Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions

### [What Is Two-Factor Authentication?](#)

We all want to keep our online accounts and data secure. Two-factor authentication is a great way to do just that. Two-factor authentication means that you have to have two things, or two *factors*, to access your account. The first factor is something you know, like your username and password combination. The second is something you have, like a mobile device with a security app installed. That second factor—the mobile device with a security app—adds an extra layer of protection to your account. Even if hackers steal your password, they can't log in, because they don't have your mobile device with Salesforce Authenticator installed on it.

### [Get the Salesforce Authenticator Mobile App \(Version 2 or Later\)](#)

Salesforce Authenticator is an app that you download and install on your mobile device.

### [Requirements for Salesforce Authenticator \(Version 2 or Later\)](#)

The Salesforce Authenticator mobile app is supported on various mobile platforms, with some device, operating system, and mobile browser requirements. An Internet connection is necessary to communicate with Salesforce for user verifications of account activity and location-based automated verifications. Verification codes (time-based one-time passwords, or TOTP) can be generated without an Internet connection on the mobile device.

### [Salesforce Authenticator \(Version 2 or Later\) Accessibility Considerations](#)

Salesforce Authenticator is designed with accessibility in mind and delivers a fully accessible mobile experience for all individuals, including users working with screen readers. Unlike the full Salesforce site, Salesforce Authenticator doesn't require accessibility mode to give users working with assistive devices a fully accessible experience.

### [Locale and Language Support for Salesforce Authenticator \(Version 2 or Later\)](#)

Salesforce Authenticator works with almost all Salesforce supported locales and the fully supported end-user languages. Salesforce Help includes a list of supported locales and languages. Languages that are read right to left, including Arabic and Hebrew, aren't supported in this release.

### [Salesforce Authenticator \(Version 2 or Later\) Account Types](#)

The Salesforce Authenticator mobile app (version 2 or later) supports two types of connected accounts. Standard accounts feature push notifications, location-based automated verifications, and verification codes for two-factor authentication. Code-only accounts provide only verification codes.

### [Connect an Account to Salesforce Authenticator \(Version 2 or Later\)](#)

Connect your Salesforce account to the Salesforce Authenticator mobile app to use the app for two-factor authentication. In some orgs, you're prompted to connect your account as you log in. In other orgs, you connect the account through your personal settings.

### [Remove an Account from Salesforce Authenticator \(Version 2 or Later\)](#)

When you no longer want to use the app for two-factor authentication, remove your Salesforce account from the Salesforce Authenticator mobile app. Before you remove an account from the Salesforce Authenticator app on your mobile device, make sure that you don't lose access to your Salesforce account. Either ask your Salesforce admin to disable the two-factor authentication requirement from your account, or make sure that you have another two-factor authentication method available.

### [Verify Account Activity with Salesforce Authenticator \(Version 2 or Later\) for Two-Factor Authentication](#)

If your org settings require you to complete two-factor authentication when you log in or access restricted resources in Salesforce, use the Salesforce Authenticator mobile app. You use the app to verify identifying details for your logins and other account activity. Using the app to verify account activity satisfies the two-factor authentication requirement.

### [Block Unrecognized Account Activity with Salesforce Authenticator \(Version 2 or Later\)](#)

If you get a notification from the Salesforce Authenticator mobile app about account activity you don't recognize, use the app to block the activity. You can also flag the blocked activity for your Salesforce admin.

### [Automate Two-Factor Authentication from a Trusted Location with Salesforce Authenticator \(Version 2 or Later\)](#)

Enable location services in the Salesforce Authenticator mobile app, and then use the app to automate two-factor authentication from a trusted location. Examples of trusted locations can include your home or office.

### [Stop Location-Based Automated Verifications in Salesforce Authenticator \(Version 2 or Later\)](#)

You can remove a location from your list of trusted locations to turn off automated verification from there.

## What Is Two-Factor Authentication?

We all want to keep our online accounts and data secure. Two-factor authentication is a great way to do just that. Two-factor authentication means that you have to have two things, or two *factors*, to access your account. The first factor is something you know, like your username and password combination. The second is something you have, like a mobile device with a security app installed. That second factor—the mobile device with a security app—adds an extra layer of protection to your account. Even if hackers steal your password, they can't log in, because they don't have your mobile device with Salesforce Authenticator installed on it.

Many mobile authenticator apps generate verification codes that expire after a certain amount of time. When you log in to an online account that requires two-factor authentication, you enter the code along with your username and password. Salesforce Authenticator also generates codes for whenever you need them, but version 2 of the app introduces new features for added convenience, without sacrificing security.

When someone tries to log in or access restricted online data in your account, Salesforce sends a notification to your mobile device. You open the Salesforce Authenticator app to see details of the online activity. After you check the details, you can tap **Approve** to verify that the activity belongs to you. If you don't recognize the activity, you tap **Deny** to block it. You can also flag the blocked activity for your Salesforce admin.

When you enable location services for Salesforce Authenticator, you unleash even more powerful features. If you're in your home or office, for example, you can tell Authenticator to verify your activities automatically from that trusted location. Automation gives you the extra security of two-factor authentication, and you don't even have to take your phone out of your pocket.

Before you can use Salesforce Authenticator for two-factor authentication, you connect the app to your online account. In Salesforce, you can connect the app to your account in your personal settings. Connecting the app doesn't mean that you're required to use two-factor authentication every time you log in. Your admin sets up a two-factor authentication requirement for you in keeping with

### EDITIONS

Available in: Both Salesforce Classic and Lightning Experience

Two-factor authentication with Salesforce Authenticator available in: **Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions

your company's security policies. If your admin requires two-factor authentication before you connect Salesforce Authenticator to your account, you're prompted to connect the app the next time you log in.

## Get the Salesforce Authenticator Mobile App (Version 2 or Later)

Salesforce Authenticator is an app that you download and install on your mobile device.

### New Installations

You can download and install the Salesforce Authenticator mobile app from Google Play or the App Store to supported Android and iOS devices.

After you install the app, launch it from your home screen and connect it to your Salesforce account. In some orgs, you're prompted to connect the app during login. Otherwise you connect the app through your personal settings in Salesforce.

### Updating from Salesforce Authenticator Version 1

If you already have version 1 installed on your mobile device, download the update from the App Store or Google Play. The update preserves the connected accounts you already have in the app. These accounts are code-only accounts that generate verification codes but don't receive push notifications or allow location-based automated verifications. Code-only accounts appear on your Connected Accounts list without a > at the far right of the account name row, and there's no account detail page. The verification codes in these code-only accounts are valid until you connect the new version 2 functionality to your Salesforce account via your personal settings. After you connect the new version, your account gives you full Salesforce Authenticator version 2 functionality: push notifications, location-based automated verifications, and verification codes.

SEE ALSO:

[Requirements for Salesforce Authenticator \(Version 2 or Later\)](#)

## Requirements for Salesforce Authenticator (Version 2 or Later)

The Salesforce Authenticator mobile app is supported on various mobile platforms, with some device, operating system, and mobile browser requirements. An Internet connection is necessary to communicate with Salesforce for user verifications of account activity and location-based automated verifications. Verification codes (time-based one-time passwords, or TOTP) can be generated without an Internet connection on the mobile device.

### Supported Devices and Browsers

Salesforce Authenticator is supported in portrait orientation in these environments.

Salesforce Authenticator App	Supported Devices	Supported Mobile OS
iOS, v2 or later	iPhone 5 or later models	iOS 8 or later
Android, v2 or later	Android phones	Android 4.2 or later

For optimal Salesforce Authenticator performance, we recommend keeping your mobile device's operating system updated and upgrading to a late model device as allowed by your mobile plan. Future Salesforce versions might require removing support for older operating systems, and sometimes newer operating system releases don't perform well on older devices.

### Salesforce Editions and Licenses

#### EDITIONS

Available in: Both Salesforce Classic and Lightning Experience

Two-factor authentication with Salesforce Authenticator available in: **Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions

#### EDITIONS

Available in: Both Salesforce Classic and Lightning Experience

Two-factor authentication with Salesforce Authenticator available in: **Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions

These Salesforce editions and user license types allow the use of Salesforce Authenticator for identity verification and two-factor authentication.

#### Salesforce Editions

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- Group Edition
  - Professional Edition
  - Enterprise Edition
  - Performance Edition
  - Unlimited Edition
  - Developer Edition
  - Contact Manager Edition
- Database.com Edition isn't supported.

#### User License Types

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- Salesforce users
  - Salesforce Platform and Salesforce users
  - Customer Community, Customer Community Plus, and Partner Community external users
  - Portal users who are a member of a Salesforce community
- These user license types aren't supported: portal users (unless a member of a Salesforce community), Database.com users, Sites and Site.com users, Data.com users, and Work.com users.

### Wireless Connection

A Wi-Fi or cellular network connection is needed to communicate with Salesforce. For cellular connections, a 3G network or faster is required. For the best performance, we recommend using Wi-Fi or LTE. Salesforce Authenticator generates valid verification codes when your device is offline. You can also view your activity history and list of trusted locations when the device is offline.

#### SEE ALSO:

- [Locale and Language Support for Salesforce Authenticator \(Version 2 or Later\)](#)
- [Salesforce Authenticator \(Version 2 or Later\) Accessibility Considerations](#)

## Salesforce Authenticator (Version 2 or Later) Accessibility Considerations

Salesforce Authenticator is designed with accessibility in mind and delivers a fully accessible mobile experience for all individuals, including users working with screen readers. Unlike the full Salesforce site, Salesforce Authenticator doesn't require accessibility mode to give users working with assistive devices a fully accessible experience.

Check your mobile device's documentation for more information about using a screen reader.

#### SEE ALSO:

- [Requirements for Salesforce Authenticator \(Version 2 or Later\)](#)

## Locale and Language Support for Salesforce Authenticator (Version 2 or Later)

Salesforce Authenticator works with almost all Salesforce supported locales and the fully supported end-user languages. Salesforce Help includes a list of supported locales and languages. Languages that are read right to left, including Arabic and Hebrew, aren't supported in this release.

SEE ALSO:

[Requirements for Salesforce Authenticator \(Version 2 or Later\)](#)

## Salesforce Authenticator (Version 2 or Later) Account Types

The Salesforce Authenticator mobile app (version 2 or later) supports two types of connected accounts. Standard accounts feature push notifications, location-based automated verifications, and verification codes for two-factor authentication. Code-only accounts provide only verification codes.

### Standard Accounts

In your Connected Accounts list, standard accounts display a > at the far right of the row. Tap anywhere on the account row to go to the account detail page. The detail page shows information about the account, including recent account activity.

### Code-Only Accounts

In your Connected Accounts list, code-only accounts don't display a > at the far right of the row, and there's no account detail page.

SEE ALSO:

[Connect an Account to Salesforce Authenticator \(Version 2 or Later\)](#)

[Remove an Account from Salesforce Authenticator \(Version 2 or Later\)](#)

### EDITIONS

Available in: Both Salesforce Classic and Lightning Experience

Two-factor authentication with Salesforce Authenticator available in: **Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions

## Connect an Account to Salesforce Authenticator (Version 2 or Later)

Connect your Salesforce account to the Salesforce Authenticator mobile app to use the app for two-factor authentication. In some orgs, you're prompted to connect your account as you log in. In other orgs, you connect the account through your personal settings.

If you're prompted to connect Salesforce Authenticator to your Salesforce account as you log in, follow the onscreen instructions. To connect the app from your personal settings in Salesforce, log in to your account, then follow these steps.

1. Download and install version 2 or later of the Salesforce Authenticator app for the type of mobile device you use. For iPhone, get the app from the [App Store](#). For Android devices, get the app from [Google Play](#).

If you previously installed version 1 of Salesforce Authenticator on your mobile device, you can update the app to version 2 through the App Store or Google Play. The update preserves any connected accounts you already have in the app. These accounts are code-only accounts that generate verification codes but don't receive push notifications or allow location-based automated verifications. Code-only accounts appear on your Connected Accounts list without

a > at the far right of the account name row, and there's no account detail page. If you have a code-only account for the username you used for your current login to Salesforce, swipe left in the app to remove that username before proceeding. In the following

### EDITIONS

Available in: Both Salesforce Classic and Lightning Experience

Two-factor authentication with Salesforce Authenticator available in: **Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions



steps, you connect the account for that username again. The new connected account gives you full Salesforce Authenticator version 2 functionality: push notifications, location-based automated verifications, and verification codes.

2. From your personal settings, enter *Advanced User Details* in the **Quick Find** box, then select **Advanced User Details**. No results? Enter *Personal Information* in the **Quick Find** box, then select **Personal Information**.
3. Find **App Registration: Salesforce Authenticator** and click **Connect**.
4. For security purposes, you're prompted to log in to your account.
5. Open the Salesforce Authenticator app on your mobile device.  
If you're opening the app for the first time, you see a tour of the app's features. Take the tour, or go straight to adding your Salesforce account to the app.
6. In the app, tap **+** to add your account.  
The app generates a unique two-word phrase.
7. Back in your browser, enter the phrase in the **Two-Word Phrase** field.
8. Click **Connect**.  
If you previously connected an authenticator app that generates verification codes to your account, you sometimes see an alert. Connecting version 2 or later of the Salesforce Authenticator mobile app invalidates the codes from your old app. When you need a verification code, get it from Salesforce Authenticator from now on.
9. In the Salesforce Authenticator app on your mobile device, you see details about the account you're connecting. To complete the account connection, tap **Connect** in the app.

To help keep your account secure, we send you an email notification whenever a new identity verification method is added to your Salesforce account. You get the email whether you add the method or your Salesforce admin adds it on your behalf.

#### SEE ALSO:

[Salesforce Authenticator \(Version 2 or Later\) Account Types](#)

[Remove an Account from Salesforce Authenticator \(Version 2 or Later\)](#)

## Remove an Account from Salesforce Authenticator (Version 2 or Later)

When you no longer want to use the app for two-factor authentication, remove your Salesforce account from the Salesforce Authenticator mobile app. Before you remove an account from the Salesforce Authenticator app on your mobile device, make sure that you don't lose access to your Salesforce account. Either ask your Salesforce admin to disable the two-factor authentication requirement from your account, or make sure that you have another two-factor authentication method available.

1. Begin in a web browser, in your Salesforce account. From your personal settings, enter *Advanced User Details* in the **Quick Find** box, then select **Advanced User Details**. No results? Enter *Personal Information* in the **Quick Find** box, then select **Personal Information**.
2. Find **App Registration: Salesforce Authenticator**, and click **Disconnect**.
3. Find **App Registration: One-Time Password Generator**, and click **Disconnect**.
4. Open the Salesforce Authenticator app on your mobile device.
5. In the app list of connected accounts, find the account you want to remove.

#### EDITIONS

Available in: Both Salesforce Classic and Lightning Experience

Two-factor authentication with Salesforce Authenticator available in: **Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions

6. Swipe left on the account username.
7. Tap **Remove** or **Delete**, whichever appears.  
A confirmation dialog appears.
8. To confirm the removal of the account, tap **Remove**.

## SEE ALSO:

[Salesforce Authenticator \(Version 2 or Later\) Account Types](#)

[Connect an Account to Salesforce Authenticator \(Version 2 or Later\)](#)

## Verify Account Activity with Salesforce Authenticator (Version 2 or Later) for Two-Factor Authentication

If your org settings require you to complete two-factor authentication when you log in or access restricted resources in Salesforce, use the Salesforce Authenticator mobile app. You use the app to verify identifying details for your logins and other account activity. Using the app to verify account activity satisfies the two-factor authentication requirement.

Before you can use the app for two-factor authentication, connect the app to your account. When you do something that requires verification in Salesforce, you receive a notification from the Salesforce Authenticator app on your mobile device.

1. Respond to the notification by opening the Salesforce Authenticator app on your mobile device. The app displays details of your account activity, including your username, the service you're trying to access (such as Salesforce), and information about the device used for the activity. If location services are enabled and available, the app shows your current location. Owing to the nature of geolocation technology, the accuracy of geolocation fields (for example, street address, country, city) can vary.
2. Check the details.
3. If you recognize the details, tap **Approve** on your mobile device.  
In Salesforce, you're logged in or granted access to the desired resource.

## SEE ALSO:

[What Is Two-Factor Authentication?](#)

[Automate Two-Factor Authentication from a Trusted Location with Salesforce Authenticator \(Version 2 or Later\)](#)

[Block Unrecognized Account Activity with Salesforce Authenticator \(Version 2 or Later\)](#)

### EDITIONS

Available in: Both Salesforce Classic and Lightning Experience

Two-factor authentication with Salesforce Authenticator available in: **Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions

## Block Unrecognized Account Activity with Salesforce Authenticator (Version 2 or Later)

If you get a notification from the Salesforce Authenticator mobile app about account activity you don't recognize, use the app to block the activity. You can also flag the blocked activity for your Salesforce admin.

1. Respond to the notification by opening the Salesforce Authenticator app on your mobile device. The app displays details of your account activity, including your username, the service you're trying to access (such as Salesforce), and information about the device used for the activity. If location services are enabled and available, the app shows the user's current location. Owing to the nature of geolocation technology, the accuracy of geolocation fields (for example, street address, country, city) can vary.
2. Check the details.
3. If you don't recognize the details, tap **Deny** on your mobile device. The app asks you what to do about the unrecognized activity.
4. To prevent unauthorized access to your account and alert your Salesforce admin of the potential security breach, tap **Block Activity and Flag**. To prevent access to your account without flagging, tap **Just Block Activity**. If you tapped **Deny** by mistake, tap **Cancel** to go back and verify the activity.

### EDITIONS

Available in: Both Salesforce Classic and Lightning Experience

Two-factor authentication with Salesforce Authenticator available in: **Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions

### SEE ALSO:

[What Is Two-Factor Authentication?](#)

[Verify Account Activity with Salesforce Authenticator \(Version 2 or Later\) for Two-Factor Authentication](#)

## Automate Two-Factor Authentication from a Trusted Location with Salesforce Authenticator (Version 2 or Later)

Enable location services in the Salesforce Authenticator mobile app, and then use the app to automate two-factor authentication from a trusted location. Examples of trusted locations can include your home or office.

Before you can use the app for two-factor authentication, connect the app to your account. The first time you use Salesforce Authenticator to verify your account activity, the app asks for access to your location. Either respond to allow access, or go later to your mobile device's settings to allow Salesforce Authenticator to access your location. Your mobile device's location data does not leave the app. Allowing access to your location lets you automate two-factor authentication when you're working at your office, home, or other trusted location.

1. Respond to a notification from Salesforce Authenticator by opening the app on your mobile device. The app displays details of your account activity, including your username, the service you're trying to access (such as Salesforce), and information about the device used for the activity. If location services are enabled and available, the app shows your current location. Owing to the nature of geolocation technology, the accuracy of geolocation fields (for example, street address, country, city) can vary.
2. Check the details.
3. If you recognize the details, and you're in a location you trust, like your office or home, switch on **Always verify from here**.
4. Tap **Approve**.

### EDITIONS

Available in: Both Salesforce Classic and Lightning Experience

Two-factor authentication with Salesforce Authenticator available in: **Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions

In Salesforce, you're logged in or granted access to the desired resource. The next time you take the same action from the same location, the Salesforce Authenticator app automatically verifies the activity for you. You need your mobile device with you, but you don't have to respond to an app notification.

**SEE ALSO:**

- [Verify Account Activity with Salesforce Authenticator \(Version 2 or Later\) for Two-Factor Authentication](#)
- [Stop Location-Based Automated Verifications in Salesforce Authenticator \(Version 2 or Later\)](#)

## Stop Location-Based Automated Verifications in Salesforce Authenticator (Version 2 or Later)

You can remove a location from your list of trusted locations to turn off automated verification from there.

1. Open the Salesforce Authenticator app on your mobile device.
2. In your Connected Accounts list, tap your username to go to the account detail page.
3. In Trusted Locations, tap **View All**.
4. Swipe left on the location you want to stop trusting.
5. Tap **Delete** or **Stop Trusting**, whichever appears.  
The app asks you to confirm that you want to turn off automated verifications from this location.
6. Tap **Stop Trusting**.

**SEE ALSO:**

- [Automate Two-Factor Authentication from a Trusted Location with Salesforce Authenticator \(Version 2 or Later\)](#)

**EDITIONS**

Available in: Both Salesforce Classic and Lightning Experience

Two-factor authentication with Salesforce Authenticator available in: **Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions

## Manage Relationships and Data With Records

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Much of your Salesforce data is stored in individual *records*, and organized within objects. For example, the Account object presents all of your account records. If the Acme company is one of your accounts, you'll have an account record for Acme.

[Find and View Records and Data](#)

Use tabs, search, or lists to look at your data.

[Create Records](#)

Creating records is standard procedure for most Salesforce users. Some objects (such as Account) have special *guidelines and considerations* you need to be aware of, but the *process* of creating a record is similar for all.

[Edit Records](#)[Delete Records](#)[Attach Files to Records](#)

You can attach files—such as Microsoft® Office documents, Adobe® PDFs, and images and videos—to most kinds of Salesforce records. The size limit for an attached file is 25 MB when attached directly to the related list, including a file attached to a solution. The size limit for multiple files attached to the same email is 25 MB, with a maximum size of 5 MB per file.

### Topics on Records

Topics are words or phrases that you can associate with Salesforce records to organize them around common themes. Use topics to group records by a common theme, and then use those topics to filter list views.

### Tags on Records

Tags are words or short phrases that you can associate with most Salesforce records to describe and organize their data in a personalized way. Use tags to group records from various objects by a common theme or use, and then use those tags in search to make finding information fast and intuitive.

### Guidelines for Entering Currency, Dates, Times, and Phone Numbers

### Select Picklist Values

You may encounter a few different types of picklist fields in Salesforce.

### Notes

Notes is an enhanced version of the Salesforce note-taking tool that lets your users take better notes faster. Use Notes to streamline your workflow, increase productivity, and get the most out of Salesforce.

### Considerations for Managing Files and Notes Attached to Records

When working with attachments, Google docs, or notes created with the old note-taking tool, there are a number of things to keep in mind.

### Note and Attachment Fields

Notes is an enhanced version of the Salesforce note-taking tool. This table lists the fields available when you create a note using Notes. There's also a toolbar with icons for adding bulleted and numbered lists to notes.

### Delete Notes and Attachments from Records

To delete a note or attachment, click **Del** next to the note or attachment in the Notes and Attachments related list or Attachments related list of a record.

### Why is the record I'm trying to save being flagged as a duplicate? What can I do?

Your organization uses duplicate rules, which prevent users from creating duplicate records. Read the message to decide how to proceed.

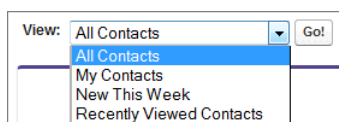
## Find and View Records and Data

Use tabs, search, or lists to look at your data.

When you're working with records, it's important to remember that the types of records you can create, view, edit, and delete are determined by administrator settings, such as a user profile or permission set. Your access to individual records may be determined by other configurations, such as sharing settings. And your access to fields on types of records may be controlled by field-level security. Work with your administrator to make sure you have access to the records and data you need.

There are a few easy ways to find and view your records.

- From a tab, such as Accounts or Contacts, start from the default view and click **Go!** or select a different view.

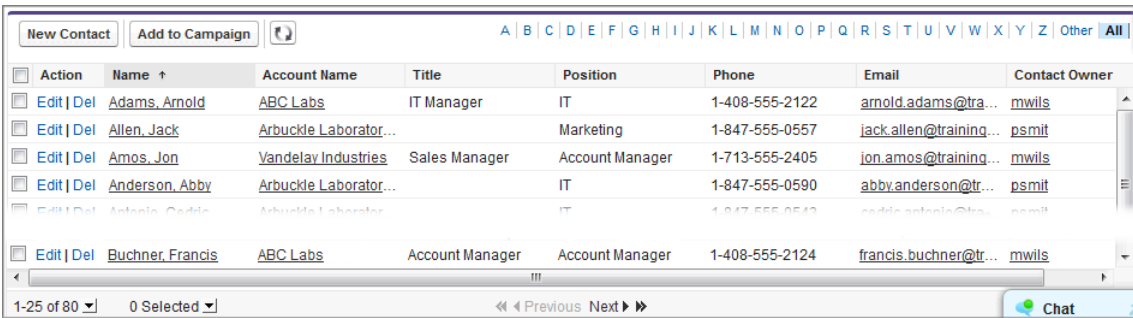


The resulting page you see is called a *list view*.

### EDITIONS

Available in: Salesforce Classic

Available in: All Editions



Action	Name	Account Name	Title	Position	Phone	Email	Contact Owner
Edit   Del	Adams, Arnold	ABC Labs	IT Manager	IT	1-408-555-2122	arnold.adams@tra...	mwils
Edit   Del	Allen, Jack	Arbuckle Laborator...		Marketing	1-847-555-0557	jack.allen@training...	psmit
Edit   Del	Amos, Jon	Vandelay Industries	Sales Manager	Account Manager	1-713-555-2405	jon.amos@training...	mwils
Edit   Del	Anderson, Abby	Arbuckle Laborator...		IT	1-847-555-0590	abby.anderson@tr...	psmit
Edit   Del	Anderson, Gabe	Arbuckle Laborator...		IT	1-847-555-0513	gabe.anderson@tra...	psmit
Edit   Del	Buchner, Francis	ABC Labs	Account Manager	Account Manager	1-408-555-2124	francis.buchner@tr...	mwils

- Search for a record using keywords, such as a name or address stored in the record. Use the search bar in the banner displayed on most pages.
- On many records, below the main page sections, look for related lists, which identify records that are associated with the record you're currently viewing. For example, an account record probably has a related list of contacts at that account.

### Granting Access to Records

You can use manual sharing to give specific other users access to certain types of records, including accounts, contacts, and leads. In some cases, granting access to one record includes access to all its associated records.

### Editing or Deleting Record Access

Edit or remove access to a record.

### Viewing Which Users Have Access to Your Records

After you have granted access to a record you own, you can view a list of users who have access to the record and its related information and records, including their access level and an explanation. The list shows every user who has access that's greater than the org-wide default settings.

### Record Access Levels

### List Views

List views give you quick access to your important records. You can find preconfigured views, such as a list of recently viewed records, for every standard and custom object. Create customized list views to display records that meet your own criteria. Scroll through preconfigured views and list views that you created, and use list view charts to see a graphical display of your list view data.

### How does the sharing model work?

### Which kinds of records can I print list views for?

### Open Items You've Recently Viewed

In the Recent Items section of the Salesforce sidebar, you'll find a list of up to 10 items (records, documents, custom objects, and the like) you've most recently added, edited, or viewed.

### SEE ALSO:

[Salesforce Pages](#)

[Get to Know Your Salesforce Admin](#)

## Granting Access to Records

You can use manual sharing to give specific other users access to certain types of records, including accounts, contacts, and leads. In some cases, granting access to one record includes access to all its associated records.

For example, if you grant another user access to an account, the user will automatically have access to all the opportunities and cases associated with that account.

To grant access to a record, you must be one of the following users.

- The record owner
- A user in a role above the owner in the hierarchy (if your organization's sharing settings control access through hierarchies)
- Any user granted "Full Access" to the record
- An administrator



[Walk Through It: grant users access to your account](#)

To grant access to a record using a manual share:

1. Click **Sharing** on the record you want to share.
2. Click **Add**.
3. From the **Search** drop-down list, select the type of group, user, role, or territory to add.

Depending on the data in your organization, your options can include:

Type	Description
Managers Groups	All direct and indirect managers of a user.
Manager Subordinates Groups	A manager and all direct and indirect reports who he or she manages.
Public Groups	All public groups defined by your administrator.
Personal Groups	All personal groups defined by the record owner. Only the record owner can share with his or her personal groups.
Users	All users in your organization. Does not include portal users.
Roles	All roles defined for your organization. This includes all of the users in each role.
Roles and Subordinates	All of the users in the role plus all of the users in roles below that role in the hierarchy. Only available when no portals are enabled for your organization.
Roles and Internal Subordinates	All roles defined for your organization. This includes all of the users in the specified role plus all of the users in roles below that role,

### EDITIONS


Available in: Salesforce Classic

Sharing for accounts and contacts is available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Sharing for campaigns, cases, custom object records, leads, and opportunities is available in **Enterprise, Performance, Unlimited, and Developer** Editions

Territory management available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Type	Description
	excluding partner portal and Customer Portal roles.
Roles and Internal and Portal Subordinates	Adds a role and its subordinate roles. Includes all of the users in that role plus all of the users in roles below that role. Only available when a partner or Customer Portal is enabled for your organization. Includes portal roles and users.
Territories	For organizations that use territory management, all territories defined for your organization, including all users in each territory.
Territories and Subordinates	For organizations that use territory management, all users in the territory plus the users below that territory.

 **Note:** In organizations with more than 2,000 users, roles, and groups, if your query doesn't match any items in a particular category that category won't show up in the Search drop-down menu. For example, if none of your group names contain the string "CEO," after searching for "CEO" you'll notice the Groups option no longer appears in the drop-down. If you enter a new search term, all of the categories will still be searched even if they don't appear in the list. You can repopulate the drop-down by clearing your search terms and pressing **Find**.

- Choose the specific groups, users, roles, or territories who should have access by adding their names to the Share With list. Use the **Add** and **Remove** arrows to move the items from the Available list to the Share With list.
- Choose the [access level](#) for the record you are sharing and any associated records that you own.

 **Note:**

- If you're sharing an opportunity or case, those you share it with must also have at least "Read" access to the associated account (unless you are sharing a case via a case team). If you also have privileges to share the account itself, those you share it with are automatically given "Read" access to the account. If you do not have privileges to share the account, you must ask the account owner to give others "Read" access to it.
  - `Contact Access` is not available when the organization-wide default for contacts is set to Controlled by Parent.
  - For sharing rules that specify access for associated object records, the given access level applies to that sharing rule only. For example, if an account sharing rule specifies Private as the access level for associated contacts, a user can still have access to associated contacts via other means, such as org-wide defaults, the "Modify All Data" or "View All Data" permission, or the "Modify All" or "View All" permission for contacts.
- When sharing a forecast, select `Submit Allowed` to enable the user, group, or role to submit the forecast.
  - Select the reason you're sharing the record so users and administrators can understand.
  - Click **Save**.

SEE ALSO:

[Editing or Deleting Record Access](#)

[Your Access to UI Elements, Records, and Fields](#)

[Viewing Which Users Have Access to Your Records](#)

[Record Access Levels](#)



## Editing or Deleting Record Access

Edit or remove access to a record.

Manual shares are deleted automatically if the record owner is changed or if they are no longer needed, such as when the organization-wide defaults or sharing rules grant a similar or wider access than the manual share.

To edit or delete access to a record:

1. Open the record for which you want to edit or delete.
2. Click **Sharing** on the record.
3. Click **Edit** or **Del** next to the group, user, role, or territory whose access you want to modify or remove.

SEE ALSO:


[Granting Access to Records](#)

[Record Access Levels](#)

## Viewing Which Users Have Access to Your Records

After you have granted access to a record you own, you can view a list of users who have access to the record and its related information and records, including their access level and an explanation. The list shows every user who has access that's greater than the org-wide default settings.

For forecast sharing, the list shows whether the user can submit a forecast (in forecasting versions where sharing is available). High-volume portal users and Customer Portal super users are excluded from this list.

 **Note:** For sharing rules that specify access for associated object records, the given access level applies to that sharing rule only. For example, if an account sharing rule specifies Private as the access level for associated contacts, a user can still have access to associated contacts via other means, such as org-wide defaults, the "Modify All Data" or "View All Data" permission, or the "Modify All" or "View All" permission for contacts.

1. Click **Sharing** on the desired record.
2. Click **Expand List**.
3. Click **Why?** next to a user's name to see the reason the user has access to the record.

If there are multiple reasons with different access levels, the user is always granted the most permissive access level.

The possible reasons are:

Reason	Description
Account Sharing Rule	The user has access via an account sharing rule created by the administrator.

### EDITIONS

Available in: Salesforce Classic

Sharing for accounts and contacts is available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Sharing for campaigns, cases, custom object records, leads, and opportunities is available in **Enterprise, Performance, Unlimited, and Developer** Editions

Sharing for custom objects is available in **Database.com**

### EDITIONS

Available in: Salesforce Classic

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Reason	Description
Account Sharing	The user was granted access via the <b>Sharing</b> button on the associated account.
Account Team	The user is a member of the account team.
Account Territory	The account has been assigned to a territory to which the user has access.
Account Territory Rule	The user has access via an account territory sharing rule created by the administrator.
Administrator	The user has the "Modify All Data" or "View All Data" administrative permission, or the "Modify All" or "View All" object permission.
Associated Portal User or Role	The portal user or any role above the portal user's role has access to the account for which the portal user is a contact.
Associated Record Owner or Sharing	The user owns or has sharing access to a contact or contract associated with the account. Click the link to view which associated records the user owns or has been given sharing access to.
Associated Record Sharing	The user is a member of a share group that has access to a contact or contract that's associated with the account owned by high-volume portal users.
Campaign Sharing Rule	The user has access via a campaign sharing rule created by the administrator.
Case Sharing Rule	The user has access via a case sharing rule created by the administrator.
Contact Sharing Rule	The user has access via a contact sharing rule created by the administrator.
Delegated Forecast Manager	A user has access to forecast data that was granted via the <b>Sharing</b> button on the forecast (in forecasting versions where sharing is available).
Forecast Manager	A user has access due to being a forecast manager in the forecast hierarchy.
Group Member	The user has access via a group, such as a Managers Group or Manager Subordinates Group.
Lead Sharing Rule	The user has access via a lead sharing rule created by the administrator.
Manager of Territory Member	The user has a subordinate in the role hierarchy who is assigned to the territory with which the account is associated.
Manual Sharing	The user has access that was granted via the <b>Sharing</b> button on the record.

Reason	Description
Manual Territory Sharing	The account has been manually assigned to a territory to which the user has access.
Opportunity Sharing Rule	The user has access via an opportunity sharing rule created by the administrator.
Owner	The user owns the record, or the user is a member of the queue that owns the record or above the queue member in the role hierarchy.
Portal Share Group	The user is a member of a share group that has access to records owned by high-volume portal users.
Related Portal User	The portal user is a contact on the case.
Role Above Owner or Shared User (Portal Only)	The user's role is above the role of a portal user who has access to the record via ownership or sharing.
Sales Team	The user is a member of the opportunity sales team.
View All Forecasts Permission	The user has the "View All Forecasts" permission.

If a user has access to a record as a result of multiple sharing reasons, you might see some reasons compressed into a single record that contains the highest level of permission. The reasons that are compressed are: Associated Portal User or Role, Associated Record Owner or Sharing, Manual Sharing, and Owner. For example, if a user owns opportunities associated with an account and was also manually given access to that account, the user is listed only once on sharing pages.

**SEE ALSO:**

[Your Access to UI Elements, Records, and Fields](#)

[Granting Access to Records](#)

[Record Access Levels](#)

## Record Access Levels

When you share records with other users, you can assign them different levels of access to the records.

The available access levels are:


Access Level	Description
Full Access	User can view, edit, delete, and transfer the record. User can also extend sharing access to other users; however, the user cannot grant Full Access to other users.
Read/Write	User can view and edit the record, and add associated records, notes, and attachments to it.
Read Only	User can view the record, and add associated records to it. They cannot edit the record or add notes or attachments.
Private	User cannot access the record in any way.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Sharing for accounts and contacts is available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Sharing for campaigns, cases, custom object records, leads, and opportunities is available in **Enterprise, Performance, Unlimited, and Developer** Editions

 **Note:** If you encounter an error when selecting the Full Access option, you no longer have the permission to set full access on records. Contact your administrator to determine if this access is necessary.

### SEE ALSO:

[Your Access to UI Elements, Records, and Fields](#)

[Viewing Which Users Have Access to Your Records](#)

## List Views

List views give you quick access to your important records. You can find preconfigured views, such as a list of recently viewed records, for every standard and custom object. Create customized list views to display records that meet your own criteria. Scroll through preconfigured views and list views that you created, and use list view charts to see a graphical display of your list view data.

### [Create a List View](#)

Create a list view to see a specific set of records. You can create and save views for opportunities, contacts, leads, and other standard and custom objects. You determine which records display by setting filters. All records that meet your filter criteria appear in your list view.

### [Edit List View Filters](#)

Refine or update your list views to make sure that you're seeing the most relevant records. To change which records display in a list view, edit the list view filters.

### [Sort List Views](#)

Lots of objects let you view records in lists, also called "list views." If your list is long, you can sort the records by one of the field columns. For example, you can sort the All Accounts list view by the `Account Name` field column, `Billing State/Province` field column, and others. You can also sort custom list views. Sorting is alphanumeric.

[Print a List View in Salesforce Classic](#)[Delete a List View](#)

Delete a list view when you no longer need it to keep your workspace up to date.

[Relative Date Values for Filter Criteria](#)

When you create a list view that includes a filter for a range of dates, such as `Create Date` or `Last Update Date`, use one or more of the relative date values provided to specify the range.

[Visualize List View Data with Charts in Lightning Experience](#)

See a graphic display of list view data with list view charts. There are three types of charts: vertical bar, horizontal bar, and donut. For any list view, select from available standard and custom list view charts. You can change the data display to another type, if desired.

[Create a List View Chart in Lightning Experience](#)

Create a chart to visualize list view data. There are three types of charts: vertical bar, horizontal bar, and donut. For any list view chart, you can change the data display to another type, if desired. When you create a list view chart for an object, such as Opportunities or Leads, the chart is associated with the object. The chart is available for any list view that you have permission to see for that object, except the Recently Viewed list.

[Edit a List View Chart in Lightning Experience](#)

Refine or update your custom list view charts to make sure that you're seeing the most meaningful data visualizations. There are three types of charts: vertical bar, horizontal bar, and donut. For any list view chart, you can change the data display to another type, if desired.

## Create a List View

Create a list view to see a specific set of records. You can create and save views for opportunities, contacts, leads, and other standard and custom objects. You determine which records display by setting filters. All records that meet your filter criteria appear in your list view.

[Create a List View in Lightning Experience](#)


Create a view to see an infinitely scrollable list of records that meet your filter criteria.

[Create a List View in Salesforce Classic](#)

Create a list view to see a specific set of contacts, documents, or other object records. For example, create a list view of accounts in your state, leads with a specific lead source, or opportunities above a particular amount. You can also create views of contacts, leads, users, or cases to use for mass email recipient lists.

## Create a List View in Lightning Experience

Create a view to see an infinitely scrollable list of records that meet your filter criteria.

 **Note:** These steps work in Lightning Experience. If you see a navigation bar on the left side of your screen, you're in Lightning Experience. If you see a row of tabs across the top of the screen, you're in Salesforce Classic.


Actions you can take for list views are available in the List View Controls menu, accessed by clicking



next to the list view name.

1. From List View Controls, select **New**. A dialog box appears.
2. Enter a name for your list.
3. Choose who can see this list view: just you, or all users, including Partner and Customer Portal users.
4. Click **Save**. The Filters panel appears.
5. Click **Show me**, then select **All objects** or **My objects**.
6. Click **Done**.
7. Add and set filters to view only the records that meet your criteria. You have different options depending on the field you want to filter and the operator you choose.

Filters support values only between the minimum and maximum for a signed 23-bit integer, or between 1 and 2,147,483,648. A value outside of this range disables that filter.

- a. Click **Add Filter**.
  - b. From the New Filter drop-down menu, select the field to filter.
  - c. From the Filter by... drop-down menu, select an operator. For example, choose **equals**, **starts with**, or **does not contain**.
  - d. For Value, make a selection or enter a value.
  - e. Click **Done**.
  - f. To set another filter, click **Add Filter**.
  - g. To remove a filter, click  near the filter name.
8. To add logic that further refines which records appear in your list view, click **Filter Logic**. Use the number assigned to each filter to reference filters in your logic statement.

 **Important:** Include every filter number in your logic statement. You can't have filters that aren't referenced in the logic statement.

Operand	Definition
<b>AND</b>	Finds records that match both values. <b>1 AND 2</b>
<b>OR</b>	Finds records that match either value. <b>1 OR 2</b>

### EDITIONS

Available in: **Lightning Experience**

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To create list views:

- "Read" on the type of record included in the list AND "Create and Customize List Views"

To create, edit, or delete public list views:

- "Manage Public List Views"

Operand	Definition
<b>NOT</b>	Finds records that exclude values. For example, Filter 1 is <b>Industry equals Biotechnology</b> . You set filter logic as <b>NOT 1</b> . Your report returns records that don't have Biotechnology as the Industry value.

Let's say a rep wants to see all opportunities created in July 2015 or later, that are either in late stages of negotiation or have high probability to close, or both. Here are the filters:

- Last Modified Date greater or equal 7/1/2015
- Stage contains Proposal/Price Quote, Negotiation/Review
- Probability greater or equal 50

Then the rep adds the logic statement: **1 AND (2 OR 3)**.

OPPORTUNITIES

Recent Promising Opportunities ⌵ ⚙️

8 items - Sorted by Opportunity Name - Filtered by Last Modified Date, Stage, Probability (%) - Last updated 03/11/2016 at 11:30

OPPORTUNITY NAME ↑	ACCOUNT NAME	STAGE	CLOSE DATE	AMOUNT
August Order	Emerson Electric Co	Perception Analysis	8/29/2015	\$250,000.00
Avocados	Rosa Mexicano	Id. Decision Makers	7/31/2015	\$5,700.00
Cell Towers	AT&T Corp	Negotiation/Review	7/31/2015	\$250,000.00
Cilantro	Rosa Mexicano	Id. Decision Makers	7/14/2015	\$1,200.00
Microprocessors	Advanced Micro D...	Closed Won	9/21/2015	\$150,000.00
Tomatoes	Chipotle2	Value Proposition	1/5/2016	\$68,000.00
Tomatoes	Rosa Mexicano	Value Proposition	7/31/2015	\$4,050.00
Tomatoes	H.J. Heinz Company	Value Proposition	11/12/2015	\$60,000.00

Filters →

Show me  
All opportunities

Matching these filters

- Last Modified Date greater or equal 7/1/2015 ×
- Stage contains Proposal/Price Quote, Negotiation/Review ×
- Probability (%) greater or equal 50 ×

Add Filter Remove All

Filter Logic Remove


1 AND (2 OR 3)

**Note:** NOT doesn't work with parenthetical expressions. For example, the expression **1 AND NOT (2 AND 3)** evaluates as **1 AND (NOT 2 AND 3)**. In the filter results, no records are returned when you'd expect to see some records.

- Click **Save**. The view appears in the list view drop-down list so you can access it later.

10. Optionally, choose and order the columns in your list view.

- a. From the List View Controls menu, select **Select Fields to Display**.
- b. To add columns, select one or more fields from Available Fields and use the arrow to move them to Visible Fields.
- c. To remove columns, select one or more fields from Visible Fields and use the arrow to move them to Available Fields.
- d. Order columns by selecting one or more fields from Visible Fields and using the arrows to move them up or down.
- e. Click **Save**.

 **Note:** In list views you see only the data that you have access to. You see records that you own or have read or write access to, and records shared with you. List views also include records owned by or shared with users in roles below you in the role hierarchy. You can see only the fields that are visible according to your page layout and field-level security settings.

SEE ALSO:

[Create a List View in Salesforce Classic](#)


[Edit List View Filters in Lightning Experience](#)

[Filter Operators Reference](#)


[Visualize List View Data with Charts in Lightning Experience](#)

## Create a List View in Salesforce Classic

Create a list view to see a specific set of contacts, documents, or other object records. For example, create a list view of accounts in your state, leads with a specific lead source, or opportunities above a particular amount. You can also create views of contacts, leads, users, or cases to use for mass email recipient lists.

 **Note:** These steps work in Salesforce Classic. If you see a row of tabs across the top of your screen, you're in Salesforce Classic. If you see a navigation bar on the left, you're in Lightning Experience.

To create a view, click **Create New View** at the top of any list page or in the Views section of any tab home page.

 **Note:** If you don't see **Create New View**, you don't have the "Create and Customize List Views" permission. Contact your Salesforce admin to request it.

1. For **Enter View Name**, enter the name to display in the views drop-down list.
2. If you have the "Customize Application" permission, enter a unique name to be used by the API and managed packages.
3. Specify your filter criteria.

### Filter by Owner

These options vary depending on the kind of record. In general, select **All . . .** or **My . . .** to specify the set of records to search. Possible options include:

- Viewing leads and cases by queue.
- Grouping by price book.
- Viewing activity list views in any of several ways.
- If your org has territory management, restricting account and opportunity list views by **My Territories** or **My Territory Teams**. **My Territories** means records associated with territories to which you belong. **My**

### EDITIONS

Available in: Salesforce Classic

Available in all editions

### USER PERMISSIONS

To create custom list views:

- "Read" on the type of record included in the list AND "Create and Customize List Views"

To create, edit, or delete public list views:

- "Manage Public List Views"



`Territory Teams` means records associated with either territories to which you belong or territories below you in the territory hierarchy.

- If your org has case teams, restricting case list views by `My Case Teams`.
- If your org has account teams, restricting account list views by `My Account Teams`.
- If your org has opportunity teams, restricting opportunity list views by `My Opportunity Teams`.

### Filter by Campaign

This option is available on these list views:

- Contacts home
- Leads home
- Mass email contacts
- Mass email leads
- Mass add campaign members wizard
- Mass update campaign members wizard

If you're editing a list view that's filtered by campaign and don't have at least read access to the campaign, you get an error when attempting to save the list view.


### Filter by Division

If your org uses divisions to segment data and you have the "Affected by Divisions" permission, select the division for the records you want to view. This option is disabled if you're not searching all records.

Select **Current** to show records in your current working division.

### Filter by Additional Fields

Optionally, enter filter criteria to specify conditions that the selected items must match—for example, *Lead Source equals web*. You can also use date values in your filter criteria.

-  **Note:** When you select the `Created Date` field in a list view filter, the value you specify can only be a date and not a time. This restriction does not apply to other filters.

## 4. Select which fields to display.

The default fields are automatically selected. From the fields that are in your page layout, you can display up to 15 different fields in your view.

- To add or remove fields, select a field name, and click the **Add** or **Remove** arrow.
- Use the arrows to arrange the fields in the proper sequence.

### Considerations for adding fields

When you select a long text area field, up to 255 characters are displayed in the list view.

You can use only custom long text area fields in custom list views; standard long text area fields aren't available.


If you add or remove a field and save the change, the list view's columns adjust to the default width to accommodate the change. This change ignores any previously set custom widths.

## 5. Optionally restrict the view's visibility.

If you're an admin or a user with the "Manage Public List Views" permission, specify whether everyone or just you can see the custom view. This option is not available in Personal Edition. To see a list view, users also require "Read" permission for the type of records within the list view.

Enterprise, Unlimited, Performance, and Developer Edition users can give access to a public group or role, including all users below that role. To share the list view:

- a. Select `Visible to certain groups of users`.
- b. Choose the type of group or role from the drop-down list, and then select the group or role from the list.
- c. Click **Add**.


 **Note:** List views are visible to your Salesforce Customer Portal users if the `Visible to all users` setting is enabled for views of objects in Customer Portal users' profiles. To make list views visible only to your Salesforce users, select `Visible to certain groups of users`. Then share the view with the All Internal Users group or a selected set of internal groups and roles.

When implementing a Customer Portal, create custom views that contain only relevant information for Customer Portal users. Then make those views visible to Customer Portal users by sharing them with the All Customer Portal Users group, or a set of portal groups and roles.

6. Click **Save**. The view appears in the View drop-down list so you can access it later.

You can rename an existing list view and click **Save As** to save the criteria of the list view without altering the original view.

To navigate back to the last list page you viewed, click **Back to list** at the top of any detail page.

 **Note:** In list views you see only the data that you have access to. You see records that you own or have read or write access to, and records shared with you. List views also include records owned by or shared with users in roles below you in the role hierarchy. You can see only the fields that are visible according to your page layout and field-level security settings.

Archived activities are not included in activity list views. You can use the Activity History related list to view these activities.

## Edit List View Filters

Refine or update your list views to make sure that you're seeing the most relevant records. To change which records display in a list view, edit the list view filters.

### [Edit List View Filters in Lightning Experience](#)

Edit filters on a list view from List View Controls, or click  to access the Filters panel.

### [Edit List View Filters in Salesforce Classic](#)


To change a list view's filters, edit the list.


## SEE ALSO:

[Filter Operators Reference](#)


[Create a List View in Lightning Experience](#)


## Edit List View Filters in Lightning Experience


Edit filters on a list view from List View Controls, or click  to access the Filters panel.

 **Important:** These steps work in Lightning Experience. If you see a navigation bar on the left side of your screen, you're in Lightning Experience. If you see a row of tabs across the top of the screen, you're in Salesforce Classic.


Actions you can take for list views are available in the List View Controls menu, accessed by clicking


 next to the list view name.


 **Note:** Some list views have predefined filter scopes and can't be filtered. For example, the SOQL query for a generic Team list view or the Recently Viewed list view doesn't allow further filtering of the query results.

1. From List View Controls, select **Edit List Filters**. Alternatively, click . The Filters panel appears.
2. Edit, remove, or add filters to view only the records that meet your criteria. You have different options depending on the field you want to filter and the operator you choose.

- a. Click the filter you want to change.
- b. From the Filter by... drop-down menu, select an operator. For example, choose **equals**, **starts with**, or **excludes**.
- c. In Value, make a selection or enter a value.


 **Note:** Filters support values only between the minimum and maximum for a signed 23-bit integer, or between 1 and 2,147,483,648. A value outside of this range disables that filter.

- d. Click **Done**.
  - e. To set another filter, click **Add Filter**.
  - f. To remove a filter, click  near the filter name.
3. Adjust your filter logic if needed. The filter logic statement can't reference a filter number that doesn't exist.

 **Note:** NOT doesn't work with parenthetical expressions. For example, the expression `1 AND NOT (2 AND 3)` evaluates as `1 AND (NOT 2 AND 3)`. In the filter results, no records are returned when you'd expect to see some records.

4. To apply the edited filters and update the list, click **Save**.

Everyone with access to the list sees the results of your saved changes.

 **Example:** You want to display a set of opportunities on a board rather than in a grid, but the list view includes records with different record types. The Opportunities board can only display list views with records of a single record type. To make the view displayable on a board, edit the filters on your list view. On the Filters panel, select **Add Filter**. Choose **Opportunity Record Type** and the **equals** operator, then input the value of the record type you want. Your edited list view can now be displayed on the board.

SEE ALSO:

[Filter Operators Reference](#)

[Create a List View in Lightning Experience](#)

### EDITIONS

Available in: Lightning Experience

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To edit list views:


- "Read" on the type of record included in the list AND "Create and Customize List Views"

To create, edit, or delete public list views:


- "Read" on the type of record included in the list AND "Create and Customize List Views"

## Edit List View Filters in Salesforce Classic

To change a list view's filters, edit the list.

-  **Note:** These steps work in Salesforce Classic. If you see a row of tabs across the top of your screen, you're in Salesforce Classic. If you see a navigation bar on the left, you're in Lightning Experience.
- 1. Click **Edit** next to the list view name. Users without the "Manage Public List Views" permission see **Clone** instead of **Edit** so they can clone a public or standard view.
- 2. In Specify Filter Criteria, change your **Filter By Owner** selection, if desired. Add or change the **Field**, **Operator**, or **Value** selections in Filter By Additional Fields.  
 If you add or remove a field and save the change, the list view's columns adjust to the default width to accommodate the change. This change ignores any previously set custom widths.
- 3. Click **Save** to apply your edited filters to the list view.


All users with access to the list view see the results of your saved changes.

-  **Note:** In list views you see only the data that you have access to. You see records that you own or have read or write access to, and records shared with you. List views also include records owned by or shared with users in roles below you in the role hierarchy. You can see only the fields that are visible according to your page layout and field-level security settings.

## Sort List Views

Lots of objects let you view records in lists, also called "list views." If your list is long, you can sort the records by one of the field columns. For example, you can sort the All Accounts list view by the **Account Name** field column, **Billing State/Province** field column, and others. You can also sort custom list views. Sorting is alphanumeric.

1. Open the list view.
2. Click the header for the field column you want to sort by.  
 An arrow appears indicating how the list is sorted: from the column's first record (↑) (alphanumerically) or its last (↓).

-  **Note:** Starting in Spring '13, you can't sort list views for the Users object in Salesforce orgs that have more than two million users.

SEE ALSO:

[Create a List View in Salesforce Classic](#)

### EDITIONS

Available in all editions

### USER PERMISSIONS

To edit list views:

- "Read" on the type of record included in the list AND "Create and Customize List Views"

To edit create, edit, or delete public list views:

- "Read" on the type of record included in the list AND "Create and Customize List Views"

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience


Available in all editions

### USER PERMISSIONS


To sort a list view:

- "Read" on the records in the list

## Print a List View in Salesforce Classic

 **Note:** These steps work in Salesforce Classic. If you see a row of tabs across the top of your screen, you're in Salesforce Classic. If you see a navigation bar on the left, you're in Lightning Experience.

If printable list views are enabled for your organization, you can print standard list views and custom list views.

1. Go to the list view you want to print. For example: All Accounts on the Accounts tab.
2. Sort the contents of the list view if you want to.
3. Click .
4. In the new window, select the number of records you want to print—up to 1,000. (To print more than 1,000 records, run a report and then click **Printable View** on the report.)
5. Click **Print This Page**.

## Delete a List View

Delete a list view when you no longer need it to keep your workspace up to date.

### [Delete a List View in Lightning Experience](#)


You can delete a list view when you no longer need it.


### [Delete a List View in Salesforce Classic](#)

You can delete a custom view when you no longer need it.

## Delete a List View in Lightning Experience

You can delete a list view when you no longer need it.

 **Note:** These steps work in Lightning Experience. If you see a navigation bar on the left side of your screen, you're in Lightning Experience. If you see a row of tabs across the top of the screen, you're in Salesforce Classic.

1. Select a list view.
2. Click  to access List View Controls.
3. Select **Delete**.

### EDITIONS

Available in: Salesforce Classic

Available in: **All Editions** except **Database.com**

### USER PERMISSIONS

To print list views:

- "Read" on the records included in the list

### EDITIONS

Available in all editions

### USER PERMISSIONS

To delete public list views

- "Manage Public List Views"

### EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions


### USER PERMISSIONS

To delete public list views

- "Manage Public List Views"

## Delete a List View in Salesforce Classic

You can delete a custom view when you no longer need it.

 **Note:** These steps work in Salesforce Classic. If you see a row of tabs across the top of your screen, you're in Salesforce Classic. If you see a navigation bar on the left, you're in Lightning Experience.


1. Select a custom list view.
2. Click **Edit**.
3. Click **Delete**.

SEE ALSO:

[Create a List View in Salesforce Classic](#)

## Relative Date Values for Filter Criteria


When you create a list view that includes a filter for a range of dates, such as `Create Date` or `Last Update Date`, use one or more of the relative date values provided to specify the range.

 **Important:** Creation and filtering of list views in Lightning Experience is currently available only in Trial orgs. We provide this feature to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Because pilot programs are subject to change, we can't guarantee acceptance. This pilot feature isn't generally available, as referenced in this document or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available features.

For example, to create a custom view or report of accounts created the previous week, enter `Create Date equals LAST WEEK`. For relative date values with variables, such as "NEXT *N* DAYS", substitute *N* with any number greater than zero.

Relative date values are not case-sensitive. You can use "LAST WEEK" or "last week."

You can use multiple range values in a single field, separated by commas.

 **Note:** For Enterprise, Unlimited, Performance, Professional, and Developer Editions, the week is defined by the Locale drop-down list on your personal information page. For Contact Manager, Group, and Personal Editions, the week is defined by the Locale setting in the company profile. For example, when the locale is US English, a week runs Sunday to Saturday, whereas with UK English, a week spans Monday to Sunday.

 **Note:** In the table, the relative date values marked with an asterisk (\*) aren't available in Lightning Experience.

Relative Date Value	Range
YESTERDAY	Starts at 12:00:00 AM on the day before the current day and continues for 24 hours.
TODAY	Starts at 12:00:00 AM on the current day and continues for 24 hours.
TOMORROW	Starts at 12:00:00 AM. on the day after the current day and continues for 24 hours.
LAST WEEK	Starts at 12:00:00 AM on the first day of the week before the current week and continues for seven days.

### EDITIONS

Available in: **Salesforce Classic**

Available in: **All Editions**

### USER PERMISSIONS

To delete public list views


- "Manage Public List Views"

### EDITIONS

Available in: **Both Salesforce Classic and Lightning Experience**

Available in **all editions**

Relative Date Value	Range
THIS WEEK	Starts at 12:00:00 AM on the first day of the current week and continues for seven days.
NEXT WEEK*	Starts at 12:00:00 AM on the first day of the week after the current week and continues for seven days.
LAST <i>n</i> WEEKS*	Starts at 12:00:00 AM on the first day of the week that started <i>n</i> weeks before the current week, and continues up to 11:59 PM on the last day of the week before the current week.
NEXT <i>n</i> WEEKS*	Starts at 12:00:00 AM on the first day of the week after the current week and continues for <i>n</i> times seven days.
<i>n</i> WEEKS AGO*	Starts at 12:00:00 AM on the first day of the week that started <i>n</i> weeks before the start of the current week and continues for seven days.
LAST MONTH	Starts at 12:00:00 AM on the first day of the month before the current month and continues for all the days of that month.
THIS MONTH	Starts at 12:00:00 AM on the first day of the current month and continues for all the days of that month.
NEXT <i>n</i> MONTHS*	Starts at 12:00:00 AM on the first day of the month after the current month and continues until the end of the <i>n</i> th month.
LAST <i>n</i> MONTHS*	Starts at 12:00:00 AM on the first day of the month that started <i>n</i> months before the current month and continues up to 11:59 PM on the last day of the month before the current month.
<i>n</i> MONTHS AGO*	Starts at 12:00:00 AM on the first day of the month that started <i>n</i> months before the start of the current month and continues for all the days of that month.
NEXT MONTH*	Starts at 12:00:00 AM on the first day of the month after the current month and continues for all the days of that month.
LAST 90 DAYS*	Starts at 12:00:00 AM 90 days before the current day and continues up to the current second. (The range includes today.)
NEXT 90 DAYS*	Starts at 12:00:00 AM on the day after the current day and continues for 90 days. (The range does not include today.)
LAST <i>n</i> DAYS*	Starts at 12:00:00 AM <i>n</i> days before the current day and continues up to the current second. (The range includes today. Using this date value includes records from <i>n</i> + 1 days ago up to the current day.)
NEXT <i>n</i> DAYS*	Starts at 12:00:00 AM on the next day and continues for the next <i>n</i> days. (The range does not include today.)
<i>n</i> DAYS AGO*	Starts at 12:00:00 AM on the day <i>n</i> days before the current day and continues for 24 hours. (The range does not include today.)
LAST QUARTER	Starts at 12:00:00 AM on the first day of the calendar quarter before the current calendar quarter and continues to the end of that quarter.


Relative Date Value	Range
THIS QUARTER	Starts at 12:00:00 AM on the first day of the current calendar quarter and continues to the end of the quarter.
NEXT QUARTER*	Starts at 12:00:00 AM on the first day of the calendar quarter after the current calendar quarter and continues to the end of that quarter.
LAST <i>n</i> QUARTERS*	Starts at 12:00:00 AM on the first day of the calendar quarter <i>n</i> quarters ago and continues to the end of the calendar quarter before the current quarter. (The range does not include the current quarter.)
NEXT <i>n</i> QUARTERS*	Starts at 12:00:00 AM on the first day of the calendar quarter after the current quarter and continues to the end of the calendar quarter <i>n</i> quarters in the future. (The range does not include the current quarter.)
<i>n</i> QUARTERS AGO*	Starts at 12:00:00 AM on the first day of the calendar quarter <i>n</i> quarters before the current calendar quarter and continues to the end of that quarter.
LAST YEAR	Starts at 12:00:00 AM on January 1 of the year before the current year and continues through the end of December 31 of that year.
THIS YEAR	Starts at 12:00:00 AM on January 1 of the current year and continues through the end of December 31 of the current year.
NEXT YEAR*	Starts at 12:00:00 AM on January 1 of the year after the current year and continues through the end of December 31 of that year.
<i>n</i> YEARS AGO*	Starts at 12:00:00 AM on January 1 of the calendar year <i>n</i> years before the current calendar year and continues through the end of December 31 of that year.
LAST <i>n</i> YEARS*	Starts at 12:00:00 am on January 1, <i>n+1</i> years ago. The range ends on December 31 of the year before the current year.
NEXT <i>n</i> YEARS*	Starts at 12:00:00 AM on January 1 of the year after the current year and continues through the end of December 31 of the <i>n</i> th year.
LAST FISCAL QUARTER*	Starts at 12:00:00 AM on the first day of the fiscal quarter before the current fiscal quarter and continues through the last day of that fiscal quarter. The fiscal quarter is defined on the Fiscal Year page in Setup.
	 <b>Note:</b> None of the FISCAL literal date values are supported when creating mobile custom views.
THIS FISCAL QUARTER*	Starts at 12:00:00 AM on the first day of the current fiscal quarter and continues through the end of the last day of the current fiscal quarter. The fiscal quarter is defined on the Fiscal Year page in Setup.
NEXT FISCAL QUARTER*	Starts at 12:00:00 AM on the first day of the fiscal quarter after the current fiscal quarter and continues through the last day of that fiscal quarter. (The range does not include the current quarter.) The fiscal quarter is defined on the Fiscal Year page in Setup.
LAST <i>n</i> FISCAL QUARTERS*	Starts at 12:00:00 AM on the first day of the fiscal quarter <i>n</i> fiscal quarters ago and continues through the end of the last day of the previous fiscal quarter. (The range






Relative Date Value	Range
	does not include the current fiscal quarter.) The fiscal quarter is defined on the Fiscal Year page in Setup.
NEXT <i>n</i> FISCAL QUARTERS*	Starts at 12:00:00 AM on the first day of the fiscal quarter after the current fiscal quarter and continues through the end of the last day of the <i>n</i> th fiscal quarter. (The range does not include the current fiscal quarter.) The fiscal quarter is defined on the Fiscal Year page in Setup.
<i>n</i> FISCAL QUARTERS AGO*	Starts at 12:00:00 AM on the first day of the fiscal quarter <i>n</i> fiscal quarters before the current fiscal quarter and continues through the end of the last day of that fiscal quarter.
LAST FISCAL YEAR*	Starts at 12:00:00 AM on the first day of the fiscal year before the current fiscal year and continues through the end of the last day of that fiscal year. The fiscal quarter is defined on the Fiscal Year page in Setup.
THIS FISCAL YEAR	Starts at 12:00:00 AM on the first day of the current fiscal year and continues through the end of the last day of the fiscal year. The fiscal quarter is defined on the Fiscal Year page in Setup.
NEXT FISCAL YEAR*	Starts at 12:00:00 AM on the first day of the fiscal year after the current fiscal year and continues through the end of the last day of that fiscal year. The fiscal quarter is defined on the Fiscal Year page in Setup.
LAST <i>n</i> FISCAL YEARS*	Starts at 12:00:00 AM on the first day of the fiscal year <i>n</i> fiscal years ago and continues through the end of the last day of the fiscal year before the current fiscal year. (The range does not include the current fiscal year.) The fiscal quarter is defined on the Fiscal Year page in Setup.
NEXT <i>n</i> FISCAL YEARS*	Starts at 12:00:00 AM on the first day of the fiscal year after the current fiscal year and continues through the end of the last day of the <i>n</i> th fiscal year. (The range does not include the current fiscal year.) The fiscal quarter is defined on the Fiscal Year page in Setup.
<i>n</i> FISCAL YEARS AGO*	Starts at 12:00:00 AM on the first day of the fiscal year <i>n</i> fiscal years ago and continues through the end of the last day of that fiscal year.

## Visualize List View Data with Charts in Lightning Experience

See a graphic display of list view data with list view charts. There are three types of charts: vertical bar, horizontal bar, and donut. For any list view, select from available standard and custom list view charts. You can change the data display to another type, if desired.

 **Note:** These steps work in Lightning Experience. If you see a navigation bar on the left side of your screen, you're in Lightning Experience. If you see a row of tabs across the top of the screen, you're in Salesforce Classic.

1. On an object home page, select a list view with data you want to visualize.
2. Click .  
The Charts panel appears.
3. To select a different chart, click  next to the chart name.
4. To change the graphical display of data, click  in the Charts panel and choose a new chart type.  
Your data changes to the new display.


SEE ALSO:



[Create a List View Chart in Lightning Experience](#)

[Edit a List View Chart in Lightning Experience](#)

## Create a List View Chart in Lightning Experience

Create a chart to visualize list view data. There are three types of charts: vertical bar, horizontal bar, and donut. For any list view chart, you can change the data display to another type, if desired. When you create a list view chart for an object, such as Opportunities or Leads, the chart is associated with the object. The chart is available for any list view that you have permission to see for that object, except the Recently Viewed list.

 **Note:** These steps work in Lightning Experience. If you see a navigation bar on the left side of your screen, you're in Lightning Experience. If you see a row of tabs across the top of the screen, you're in Salesforce Classic.

1. On an object home page, select a list view with data you want to visualize.
2. Click .
3. In the Charts panel that appears, click .
4. Select **New Chart**.  
A dialog box appears.
5. Enter a chart name.
6. Select a chart type: vertical bar, horizontal bar, or donut.
7. Select the aggregate type, aggregate field, and grouping field.  
The aggregate type specifies how the field data is calculated: by sum, count, or average. The aggregate field specifies the type of data to calculate. The grouping field labels the chart segments.
8. To view your chart, click **Save**.

### EDITIONS

Available in: Lightning Experience

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To see list view charts:

- "Read" on the type of record included in the list

### EDITIONS


Available in: Lightning Experience

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To create list view charts:

- "Read" on the type of record included in the list AND "Create and Customize List Views"

 **Example:** Your sales team wants to compare accounts by number of employees to focus prospecting efforts on large corporations. One of the reps creates a horizontal bar chart by selecting **Sum** as the aggregate type, **Employees** as the aggregate field, and **Account Name** as the grouping field. The chart shows the number of employees at each account by account name.


SEE ALSO:



[Visualize List View Data with Charts in Lightning Experience](#)


[Edit a List View Chart in Lightning Experience](#)

## Edit a List View Chart in Lightning Experience

Refine or update your custom list view charts to make sure that you're seeing the most meaningful data visualizations. There are three types of charts: vertical bar, horizontal bar, and donut. For any list view chart, you can change the data display to another type, if desired.

 **Note:** These steps work in Lightning Experience. If you see a navigation bar on the left side of your screen, you're in Lightning Experience. If you see a row of tabs across the top of the screen, you're in Salesforce Classic.

1. On an object home page, click .
2. In the Charts panel that appears, select the name of one of your custom charts.
3. Click .
4. Select **Edit Chart**.  
A dialog box appears.
5. Make your changes to the chart name, chart type, aggregate type, aggregate field, or grouping field.  
  
The aggregate type specifies how the field data is calculated: by sum, count, or average. The aggregate field specifies the type of data to calculate. The grouping field labels the chart segments.
6. To view your edited chart, click **Save**.

 **Note:** You can't edit standard or preconfigured charts. You can only edit charts that you create. You can't delete list view charts.

SEE ALSO:

[Visualize List View Data with Charts in Lightning Experience](#)

[Create a List View Chart in Lightning Experience](#)

## How does the sharing model work?

In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, the administrator can define the default sharing model for your organization by setting organization-wide defaults. Organization-wide defaults specify the default level of access to records. For most objects, organization-wide defaults can be set to Private, Public Read Only, or Public Read/Write.

In environments where the sharing model for an object has been set to Private or Public Read Only, an administrator can grant users additional access to records by setting up a role hierarchy and defining sharing rules. Role hierarchies and sharing rules can only be used to grant additional access—they cannot be used to restrict access to records beyond what was originally specified with the sharing model through organization-wide defaults.

### EDITIONS

Available in: Lightning Experience

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To edit list view charts:

- "Read" on the type of record included in the list AND "Create and Customize List Views"

After restricting access using organization-wide defaults, users typically get access through one or more of these methods:

- Role hierarchy
- Sharing rules
- Manual sharing
- Implicit access (Accounts and associated child records)
- Teams (Account, Case, and Opportunity)

## Which kinds of records can I print list views for?


If printable list views are enabled for your organization, you can print standard and custom list views for these kinds of records.


- Accounts
- Activities
- Campaigns
- Cases
- Contacts
- Contracts
- Custom objects
- Documents
- Leads
- Opportunities
- Permission sets
- Price books
- Profiles
- Products
- Reports
- Solutions

## Open Items You've Recently Viewed

In the Recent Items section of the Salesforce sidebar, you'll find a list of up to 10 items (records, documents, custom objects, and the like) you've most recently added, edited, or viewed.

To open any item's detail or edit page, just click its link.

 **Tip:** If your organization has enabled hover details, you can hover your mouse over any item in the Recent Items list to view key information about the record before clicking into that record's detail or edit page.

 **Note:** Your Recent Items may show fewer than 10 items if you have recently deleted any of your recently viewed items. Likewise, the Recent lists on the tab home pages (for example, the Recent Leads list) may show fewer than 10 or 25 items if you have recently deleted items.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

## Create Records

Creating records is standard procedure for most Salesforce users. Some objects (such as Account) have special *guidelines and considerations* you need to be aware of, but the *process* of creating a record is similar for all.

### [Create a Record in Salesforce Lightning Experience](#)

Create new Salesforce records for opportunities, leads, tasks, notes, accounts, and contacts. Some objects (such as Account) have special *guidelines and considerations* for you to be aware of, but the *process* of creating a record is similar for all.

### [Create a Record in Salesforce Classic](#)

Create new Salesforce records for opportunities, leads, tasks, notes, accounts, and contacts. Some objects (such as Account) have special *guidelines and considerations* for you to be aware of, but the *process* of creating a record is similar for all.

#### SEE ALSO:

[Edit Records](#)

[Delete Records](#)

[Guidelines for Entering Currency, Dates, Times, and Phone Numbers](#)

[Create Notes and Add Them to Records](#)

[Attach Files to Records](#)

#### EDITIONS


Available in: Lightning Experience

Available in: Salesforce Classic

Available in all editions

## Create a Record in Salesforce Lightning Experience

Create new Salesforce records for opportunities, leads, tasks, notes, accounts, and contacts. Some objects (such as Account) have special *guidelines and considerations* for you to be aware of, but the *process* of creating a record is similar for all.

 **Note:** This information is for Lightning Experience. If you see a navigation bar on the left side of your screen, you're in Lightning Experience. If you see a row of tabs across the top of the screen, you're in Salesforce Classic.

You can create records in different ways in Lightning Experience.

- To create records from any Salesforce page, select the item you want in the navigation menu, then click **New** in the list view.
- To create records from an existing record, click **New** for the item you want. For example, let's say you're viewing a contact record and want to create a note about the contact—click **New** in the Notes section of the contact page.


#### EDITIONS

Available in: Lightning Experience

Available in all editions

## Create a Record in Salesforce Classic

Create new Salesforce records for opportunities, leads, tasks, notes, accounts, and contacts. Some objects (such as Account) have special *guidelines and considerations* for you to be aware of, but the *process* of creating a record is similar for all.

 **Note:** This information is for Salesforce Classic. If you see a row of tabs across the top of your screen, you're in Salesforce Classic. If you see a navigation bar on the left, you're in Lightning Experience

Depending on how your administrator has set up your Salesforce organization, you can create records in a few different ways.

#### EDITIONS

Available in: Salesforce Classic

Available in all editions

[Creating Records from Object Tabs](#)


[Creating Records in Feeds](#)

[Creating Records Using the Create New Drop-Down List](#)

[Creating Records with Quick Create](#)

## Creating Records from Object Tabs

Before you create a record, make sure you're aware of any guidelines for the kind of record you're creating.

1. Click the tab for the kind of record you want to create. You'll start from that object's Home page. For example, click the Accounts tab if you want to create an account record.
2. Click **New**.
3. Select a record type if you're prompted to.
4. Enter values in the fields. Required fields are identified with a red bar (|).
  -  **Tip:** Most objects have field definitions in the Salesforce help. Just search the help for the object name + "fields". For example, if you're creating or editing an account record and want to know more about your options in the `INDUSTRY` drop-down list, look up "Account Fields" in the help.
5. When you finish entering values for your new record, click **Save**, or click **Save & New** to save the current record and create another. If you navigate away from the page before clicking **Save**, you may lose your changes.

SEE ALSO:

[Creating Records in Feeds](#)

[Creating Records with Quick Create](#)

[Create Records](#)

## Creating Records in Feeds

Depending on how your administrator has set up Salesforce, you may be able to create records in the feed on the home page, the Chatter tab, and record detail pages. Publishers on different feeds may have different actions available; check with your administrator for information on what you can do in each feed. Before you create a record, make sure you're aware of any guidelines for the kind of record you're creating.

1. In the feed in which you want to create a record, click the quick action that corresponds to the kind of record you want to create.
2. Enter values in the fields. Required fields are identified with a red bar (|).
 

Most objects have field definitions in the Salesforce help. Just search the help for the object name + "fields". For example, if you're creating or editing an account record and want to know more about your options in the `INDUSTRY` drop-down list, look up "Account Fields" in the help.
3. When you finish entering values for your new record, click **Create**.

A feed item for the record you've created appears:

- In the feed in which you created the record.

### EDITIONS

Available in: Salesforce Classic

Available in all editions

### USER PERMISSIONS

To create records:

- "Create" on the object for the kind of record you're creating

### EDITIONS

Available in: Salesforce Classic

Available in all editions

### USER PERMISSIONS

To create records:

- "Create" on the object for the kind of record you're creating

- As the first item in the feed for the new record itself.
- In your Chatter feed.
- In the Chatter feed of anyone who follows the record from which you created the new record. For example, if you create a contact from the record detail page for the account ABC Industries, anyone who follows ABC Industries will see a feed item for the contact record you created.

## SEE ALSO:

[Creating Records from Object Tabs](#)

[Creating Records with Quick Create](#)

[Create Records](#)

## Creating Records Using the Create New Drop-Down List


The Create New drop-down list, available in the sidebar, provides options to create new records.

To create a new record using the drop-down list:

1. Select the type of record you want to create. The new record page immediately displays in the appropriate tab or the Upload a File dialog box displays if you selected **File**.
2. Fill in the fields.
3. Click **Save** or **Upload to My Files** if you selected **File**.

## Creating Records with Quick Create

If your administrator has enabled Quick Create, you can create records from the home pages for leads, accounts, contacts, and opportunities. You can also create accounts from the Account lookup field results list on the Quick Create form on contacts, leads, and opportunities. Validation rules don't apply when you create new records with Quick Create.

1. Click the tab for the kind of record you want to create. To create an account while you create a contact, lead or opportunity, click the  icon next to the Account field in the Quick Create form you're using.
2. Enter values in the fields. Required fields are identified with a red bar (|). Most objects have field definitions in the Salesforce help. Just search the help for the object name + "fields". For example, if you're creating or editing an account record and want to know more about your options in the `INDUSTRY` drop-down list, look up "Account Fields" in the help.
3. Click **Save**.

## SEE ALSO:

[Creating Records from Object Tabs](#)

[Creating Records in Feeds](#)

[Create Records](#)

### EDITIONS

Available in: Salesforce Classic

The available options in the Create New drop-down list vary according to which permissions you have, which Salesforce Edition you are using, and which app you are using.

### EDITIONS

Available in: Salesforce Classic

Available in all editions


### USER PERMISSIONS

To create records:

- "Create" on the object for the kind of record you're creating

## Edit Records

1. Make sure you're aware of any guidelines for the kind of record you're editing. The Salesforce help will tell you.
2. Find and open the record you want to edit.
3. Click **Edit**.
4. Enter or edit values in the fields.

 **Tip:** Most objects have field definitions in the Salesforce help. Just search the help for the object name + "fields". For example, if you're creating or editing an account record and want to know more about your options in the `INDUSTRY` drop-down list, look up "Account Fields" in the help.

5. When you finish entering or editing values, click **Save**.

### [Edit Fields in Salesforce](#)

Many Salesforce objects, including custom objects, offer the convenience of inline editing for records.

[Guidelines for Editing Records with the Inline Editor](#)

[Editing Records Directly From Enhanced Lists](#)

### SEE ALSO:

[Create Records](#)

[Guidelines for Entering Currency, Dates, Times, and Phone Numbers](#)

[Guidelines for Editing Records with the Inline Editor](#)

[Editing Records Directly From Enhanced Lists](#)

[Create Notes and Add Them to Records](#)

[Attach Files to Records](#)

## Edit Fields in Salesforce

Many Salesforce objects, including custom objects, offer the convenience of inline editing for records.

### [Edit Record Fields With the Inline Editor in Salesforce Classic](#)

Users can edit record fields for many Salesforce objects, including custom objects, offer the convenience of inline editing for records.

### [Edit Record Fields with the Inline Editor in Lightning Experience](#)

Inline editing speeds up updating records. From a Details tab, a rep can open a record for editing and update several fields at the same time.

### EDITIONS

Available in: Salesforce Classic

Available in all editions

### USER PERMISSIONS



To edit records:



- "Edit" on the object for the kind of record you're editing



## Edit Record Fields With the Inline Editor in Salesforce Classic

Users can edit record fields for many Salesforce objects, including custom objects, offer the convenience of inline editing for records.

 **Tip:** Not all fields on all objects can be edited inline. To find out whether a field supports inline editing, hover over it and look for a pencil icon ().

1. Within a record you're creating or editing, double-click within the field you want to define or edit. If the field offers Lookup to help you find the value you want, you'll see a magnifying glass icon ().
2. Enter your text in the field or use Lookup to find the value you want. Click the undo icon () or delete your entry if you need to.
3. Click **Save**.

## Edit Record Fields with the Inline Editor in Lightning Experience

Inline editing speeds up updating records. From a Details tab, a rep can open a record for editing and update several fields at the same time.

Double-click a field or click the edit icon () next to it. The record opens in edit mode.

### EDITIONS

Available in: Salesforce Classic

Available in all editions

### USER PERMISSIONS











To edit records:

- "Edit" on the object for the kind of record you're editing

### EDITIONS

Available in: Lightning Experience


Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

ACTIVITY	COLLABORATE	DETAILS	
Opportunity Name Acme - 1,200 Widgets (Sample)		Opportunity Owner Admin User	<a href="#">Change O...</a>
Account Name Acme (Sample)		Close Date 8/9/2015	
Type Existing Business		Stage Needs Analysis	
Primary Campaign Source		Probability (%) 35%	
Budget Confirmed <input type="checkbox"/>		Amount \$140,000.00	
Discovery Completed <input type="checkbox"/>			
ROI Analysis Completed <input type="checkbox"/>			

Use keyboard shortcuts to edit a record quickly.

- To move to the next field in the record, press the Tab key.
- To return to the revert icon of the previous field, press Shift + Tab.
- To revert the change in a field, press Enter on the revert icon.
- To revert all changes made to the record, press Esc to move to Cancel and press Enter.
- To save, press Enter and press Enter again.

Here are a few more advantages to inline editing in Lightning Experience.

- Reps can navigate within the page while editing a record. They can switch to the record's chatter feed and back without losing changes.
- Reps are warned if they try to navigate to another page or browser tab without saving changes.
- Error messages appear in a window at the bottom of the page. Reps can click  to hide the window when scrolling through a long record.

ACCOUNT  
Global Media + Follow Edit New Con

TYPE Prospect PHONE (905) 555-1212 WEBSITE ACCO Leo

RELATED DETAILS ACTIVITY CO

Account Owner Leo User Phone (905) 555-1212


Account Name \* Complete this field Fax

Parent Account Select Account Website

Additional Information Type Prospect

Review the following errors  
These required fields must be completed: Account Name

Cancel Save

 **Note:** Inline editing works only when editing record details. It'll soon be available in the Highlights panel and list views.

## Guidelines for Editing Records with the Inline Editor

### Tips for Saving Inline Edits

- Press **Enter** while your cursor is in a field's edit box to confirm the change for that field.
- Press **Enter** when no fields are in edit mode to save all edits to the record.

### Limitations

- Inline editing isn't available in:
  - Accessibility mode
  - Setup pages
  - Dashboards
  - Customer Portal
  - Descriptions for HTML solutions
- The following standard checkboxes on case and lead edit pages are not inline editable:
  - Case Assignment (Assign using active assignment rules)
  - Case Email Notification (Send notification email to contact)

### EDITIONS

Available in: Salesforce Classic

Inline editing settings available in: **All** Editions except **Database.com**

### USER PERMISSIONS

To use inline editing:

- "Edit" on the object

- Lead Assignment (Assign using active assignment rule)
- The fields in the following standard objects are not inline editable.
  - All fields in Documents and Price Books
  - All fields in Tasks except for Subject and Comment
  - All fields in Events except for Subject, Description, and Location
  - Full name fields of Person Accounts, Contacts, and Leads. However, their component fields are, for example, First Name and Last Name.
- You can use inline editing to change the values of fields on records for which you have read-only access, either via field-level security or your organization's sharing model; however, Salesforce doesn't let you save your changes, and displays an insufficient privileges error message when you try to save the record.

## Special Cases


- Inline editing is available on detail pages for all editable fields on edit pages, except for some fields on tasks, events, price books, and documents. To edit any of these, navigate to the edit page of a record, change the value of the field desired, and then click **Save**. The following table lists the objects that have inline editing restrictions on some of their fields. You may need special permissions to view some of these fields:

Object	Fields
All Objects	All fields are editable except long text area fields.
Opportunities	All fields are editable, except the following fields are only editable on detail pages (not on list views): <ul style="list-style-type: none"> <li>- Amount</li> <li>- Stage</li> <li>- Forecast Category</li> <li>- Quantity</li> </ul>
Leads	All fields are editable, except Lead Status is only editable on detail pages (not on list views).
Cases	All fields are editable, except Case Status is only editable on detail pages (not on list views).
Contracts	All fields are editable, except Contract Status is only editable on detail pages (not on list views).
Events	Only the following fields are editable: <ul style="list-style-type: none"> <li>- Description</li> <li>- Location</li> <li>- Subject</li> <li>- Type</li> <li>- Custom fields</li> </ul>
Tasks	Only the following fields are editable: <ul style="list-style-type: none"> <li>- Call Type</li> <li>- Description</li> </ul>

Object	Fields
	<ul style="list-style-type: none"> <li>- Subject</li> <li>- Type</li> <li>- Custom fields</li> </ul>
Documents	No fields are editable.
Price Books	No fields are editable.

## Editing Records Directly From Enhanced Lists

If both inline editing and enhanced lists are enabled for your organization, you can edit records directly in a list. Editable cells display a pencil icon (✎) when you hover over the cell, while non-editable cells display a lock icon (🔒).

 **Warning:** In enhanced list views, when different users make inline edits to the same fields on a record simultaneously, records are updated with the most recent edit, but we don't identify the conflict with a message.

If you have the "Mass Edit from Lists" permission, you can change the value for a common field in up to 200 records at a time for most kinds of records. Products must be edited one at a time.


To edit a single record from a list:

1. From the list, double-click the editable cell.
2. Enter the value you want.
3. Click **OK**.

To mass edit records from a list:

1. Select the checkbox next to each record you want to edit. You can select records on multiple pages.
2. Double-click one of the cells you want to edit. Apply your edit to just one record or to every record you selected.

If you encounter any errors when trying to update records, a console window appears, showing the name of each record in error (if known), as well as an explanation. Click a record in the console window to open its detail page in a new window.

 **Note:** To view the error console, you must have pop-up blockers disabled for the Salesforce domain.

### Tips for Using Inline Editing with Lists

- Some standard fields don't support inline editing. For example, `Case Status`, `Opportunity Stage`, `Opportunity Amount`, `Opportunity Quantity` and `Lead Status`, and most Task and Event fields can only be edited from a record's edit page. For more information, see [Guidelines for Editing Records with the Inline Editor](#) on page 143.
- If your organization uses record types, inline editing with lists is only available when all of the records in the list are of the same record type. Therefore, you must specify a filter of `Record Type equals X`, where `X` is the name of a single record type (or blank for the master record type).
- You can't use inline editing on an enhanced list if your list view filter criteria contain an OR clause.
- For lists of activities, you must specify an additional filter of either `Task equals True` (for tasks) or `Task equals False` (for events) for inline editing to be available.

#### EDITIONS

Available in: Salesforce Classic

Available in: **All Editions** except **Database.com**

#### USER PERMISSIONS

To use inline editing in an enhanced list:

- "Mass Edit from Lists"

- If your organization is using Person Accounts:
  - You can't use inline editing to change Person Accounts from a Contact list. You can only inline edit them from an Account list.
  - You can only use inline editing on contacts associated to business accounts by specifying an additional filter of *Is Person Account EQUALS False* in your list criteria.

## Delete Records

Deleting records is standard procedure for most Salesforce users. For some kinds of objects, deleting one record affects other, related records. For example, if you delete an account or contact, all associated assets are also deleted.

1. Make sure you're aware of the effects (if any) of deleting the kind of record you want to delete. The Salesforce help will tell you.
2. Find and open the record you want to delete.
3. Click **Delete**.

### SEE ALSO:

[Using the Recycle Bin](#)

[Delete Notes and Attachments from Records](#)

## Attach Files to Records

You can attach files—such as Microsoft® Office documents, Adobe® PDFs, and images and videos—to most kinds of Salesforce records. The size limit for an attached file is 25 MB when attached directly to the related list, including a file attached to a solution. The size limit for multiple files attached to the same email is 25 MB, with a maximum size of 5 MB per file.

1. Open the record
2. Click **Attach File**.
3. Click **Browse** and find the file you want to attach
4. Click **Attach File** to upload the file.
5. Click **Done** when the upload is finished

### Note:

- When a file is attached to a record's Chatter feed it's added to the Notes and Attachments related list as a feed attachment. The file size limit for Chatter feed attachments is 2 GB.
- If the `Don't allow HTML uploads as attachments or document records` security setting is enabled for your organization, you cannot upload files with the following file extensions: `.htm`, `.html`, `.htt`, `.htx`, `.mhtm`, `.mhtml`, `.shtm`, `.shtml`, `.acgi`, `.svg`.

### EDITIONS

Available in: Salesforce Classic

Available in all editions

### USER PERMISSIONS

To delete records:

- "Delete" on the object for the kind of record you're deleting

### EDITIONS

Available in: Salesforce Classic

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To attach files to records:

- "Edit" on the object

## Topics on Records

Topics are words or phrases that you can associate with Salesforce records to organize them around common themes. Use topics to group records by a common theme, and then use those topics to filter list views.

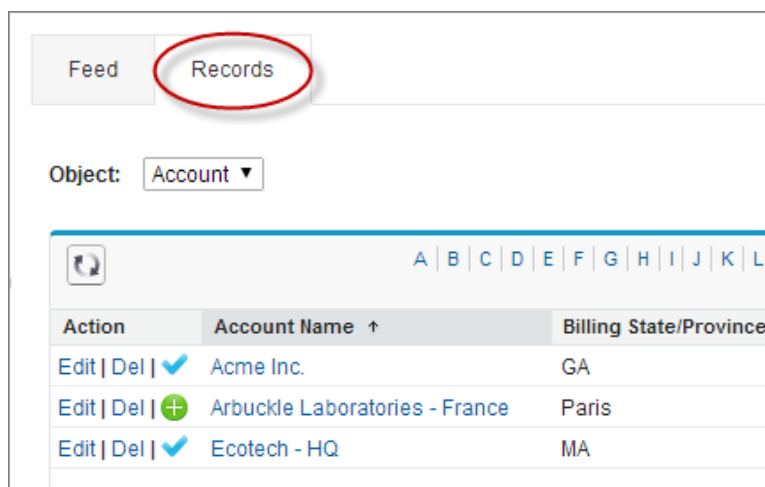
If Chatter is enabled, you can also see records on a topic in one central place—the Records tab of the topic detail page. For example, if a number of accounts are participating in a conference, you might add the topic *User Conference 2014* to their records. You could then use that topic to filter an accounts list view, or (with Chatter) view the accounts together on the Records tab of the *User Conference 2014* topic page.

Here's an example topic detail page, with the Records tab showing accounts on the topic. (If you don't see a Records tab like this for a particular topic, the topic hasn't been added to any records.)

### EDITIONS

Available in: Salesforce Classic

Available in all editions



Admins can enable or disable topics for accounts, assets, campaigns, cases, contacts, contracts, files, leads, opportunities, orders, solutions, custom objects, and English articles. Topics can also be enabled for tasks and events, they aren't accessible via list views or the Records tab. Topics on files are added to files automatically when topics are added to the feed posts they're attached to.

 **Note:** Only English Knowledge articles support topics.

#### [Add Topics to Records](#)

Add topics to quickly organize records around common themes, retrieve them in list views, and (with Chatter) view them on topic detail pages.


#### [Remove Topics from Records](#)

Remove a topic from a record if it no longer applies.

## Add Topics to Records

Add topics to quickly organize records around common themes, retrieve them in list views, and (with Chatter) view them on topic detail pages.

Topics for objects must be enabled before you can add topics to records of that object type.

 **Note:** All topic names are public and appear in search results, but this doesn't affect the visibility of records that have topics.

1. On the top of the record detail page under the record name, click **Click to add topics**. If the record already has topics, click **Topics**.

### EDITIONS

Available in: Salesforce Classic

Available in all editions

### USER PERMISSIONS

To add topics to a record:

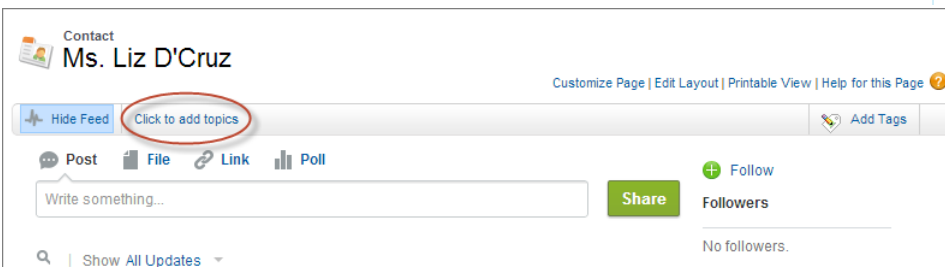
- "Read" and "Edit" on the record

AND

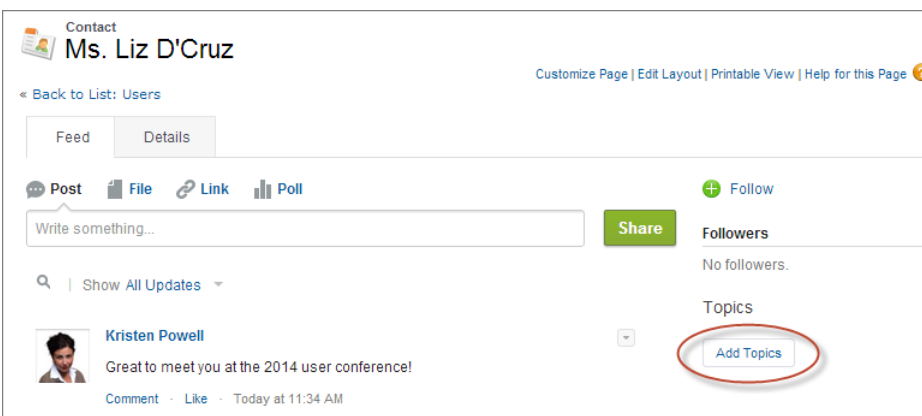
"Assign Topics" to add existing topics

OR

"Create Topics" to add new topics



If your administrator enabled feed-based layouts, click **Add Topics** in the sidebar of the feed view.



2. In the topic editor, start typing your text. As you type, you can pick a topic from the list of suggestions, or keep typing to create your own unique topic. To add more than one topic, type a comma after each topic.



Commas ( , ) and closing square brackets ( ] ) automatically end a topic. Other punctuation, symbols, and separators are supported in topic names.

Records can have up to 100 topics.

3. When you're done adding topics, click **Done** or press **Enter**.

You can now use topics you add to records to filter your list views. And if your administrator enabled Chatter, topics added to records become links to topic detail pages, where associated records appear on the Records tab for easy access. (Note that Chatter posts on a record aren't automatically added to a record's topics; you must add the topics to the posts.)

SEE ALSO:


[Create a List View in Salesforce Classic](#)

[Remove Topics from Records](#)

## Remove Topics from Records

Remove a topic from a record if it no longer applies.

Removing topics doesn't delete them. Before you remove a topic from a record, consider whether someone else added it; they may be using the topic to track the record.

1. On the top of the record detail page, click **Topics**.
2. Click  next to the topic you want removed from the record.
3. Click **Done** or press ENTER.

Removing a topic from a record removes the record from any list views using that topic as a filter. If Chatter is enabled, the record is also removed from the Records tab of the topic detail page.

## Tags on Records

Tags are words or short phrases that you can associate with most Salesforce records to describe and organize their data in a personalized way. Use tags to group records from various objects by a common theme or use, and then use those tags in search to make finding information fast and intuitive.

For example, if you met a number of contacts and leads at a conference, you might tag them all with the phrase *User Conference 2011*. You could then search for the *User Conference 2011* tag and click that tag in search results to retrieve those records.

Salesforce supports two types of tags.

- *Personal tags* are private. Only you can view any personal tags that you add to a record.
- *Public tags* are shared among all users in an organization. Any user with access to the record can view the public tags that you add.

Administrators can enable personal and public tags for accounts, activities, assets, campaigns, cases, contacts, contracts, dashboards, documents, events, leads, notes, opportunities, reports, solutions, tasks, and any custom objects (except relationship group members), allowing you to:

### EDITIONS

Available in: Salesforce Classic

Available in all editions

### USER PERMISSIONS

To remove topics from a record:

- "Read" and "Edit" on the record

AND

"Assign Topics"

### EDITIONS

Available in: Salesforce Classic

Available in: **All Editions** except **Database.com**

- [Tag records](#)
- [Remove tags from a record](#)
- [Browse, search, and manage tags](#)

 **Note:** If your administrator enables [topics](#) for an object, public tags are disabled for that object. Personal tags aren't affected.

[Tagging Records](#)

[Removing Tags from Records](#)

[Browsing, Searching, and Managing Tags](#)


[Viewing Recently Used Tags](#)


## Tagging Records

1. On the top right corner of the record detail page, click **Add Tags**. If the record already has associated tags, click **Edit Tags**.
2. In the `Personal Tags` or `Public Tags` text boxes, enter comma-separated lists of the [tags](#) that you want to associate with the record. Tags can only contain letters, numbers, spaces, dashes, and underscores, and must contain at least one letter or number.

As you enter new tags, up to 10 tags that have already been defined are displayed as auto-complete suggestions. As you type, the list of suggestions changes to show only those tags that match the prefix you have entered. To choose a suggestion, click it or use your keyboard arrow keys to select it and press the TAB or ENTER key.

3. Click **Save**.

 **Tip:** When you create or edit tags, you can press the ENTER key to save your changes or the ESC key to discard them.

 **Note:** There are limits on the number of personal and public tags you can create and apply to records. For all editions, if you attempt to tag a record with a new tag that exceeds one or more of these limits, the tag isn't saved. If you reach a limit, you can go to the [Tags](#) page and delete infrequently used tags.

SEE ALSO:

[Tags on Records](#)

[Removing Tags from Records](#)

### EDITIONS

Available in: **Salesforce Classic**

Available in: **All Editions** except **Database.com**

### USER PERMISSIONS

To edit tags on a record:

- "Read" on the record

To rename or delete public tags:

- "Tag Manager"

## Removing Tags from Records

1. On the top right corner of the record detail page, click **Edit Tags**.
2. Next to the `Personal Tags` or `Public Tags` text boxes, click **[X]** next to the tag that you want to remove.
3. Click **Save**.



**Tip:** When you create or edit tags, you can press the ENTER key to save your changes or the ESC key to discard them.

If the tag that you removed is the last instance of the tag, the tag is deleted from your organization completely. If other records use the tag, the tag still appears in search results and the Tags page.

## Browsing, Searching, and Managing Tags

To access the [Tags](#) page, click the name of any tag on a detail page, or if your administrator added tags to the sidebar, click **Tags** in the sidebar.

From this page, you can:

- [View and browse tags](#)
- [Find records with tags](#)
- [Search tags](#)
- [Rename and delete tags](#)
- [Review personal tag statistics](#)

## Viewing and Browsing Tags

Use the `Personal Tags` and `Public Tags` checkboxes to limit or expand your view. Because personal tags are private, you can only see the personal tags that you have defined. You can see all public tags that are defined in your organization.

Click a letter at the top of the tag browsing area to view only tags that begin with that letter or click **Next Page** or **Previous Page**.

By default, tags are listed in alphabetical order. From the `Sort` picklist, choose **By Number of Uses** to sort tags by the number of records that are tagged by them, or choose **By Most Recently Used** to sort tags by how recently they were added to a record.

## Finding Records with Tags

Click a tag to see the list of records organized by object. The number of records associated with the tag is displayed next to the tag. You can narrow your results further by clicking additional tags. When more than one tag is selected, only records that match all selected tags are displayed in the list of results. Click **[X]** next to a tag to deselect it and remove it from the filter. Click **Clear Selected Tag(s)** to deselect all tags and start over.



**Note:**

- The number of records associated with a tag can sometimes be greater than the number of records displayed when you click that tag in the Tags page. This situation occurs if you tagged a record and then lost permission to view it because of a change in sharing, or if a record that you don't have access to has one or more public tags.

### EDITIONS

Available in: Salesforce Classic

Available in: **All Editions** except **Database.com**

### USER PERMISSIONS

To edit tags on a record:

- "Read" on the record

### EDITIONS

Available in: Salesforce Classic

Available in: **All Editions** except **Database.com**

### USER PERMISSIONS

To rename or delete public tags:

- "Tag Manager"

- Search results and the Tags page don't display custom objects without an associated tab, even if tags are enabled for the custom object.

You can customize columns and filter the search results.

## Searching Tags

Enter terms in the Search Tags text box and click **Search**. Only tags that meet your search criteria are listed in the tag browsing area. You can then click any tag to view records associated with that tag.

Search strings must include at least two characters and can include wildcards and operators.

The most recent search result is saved in the tag browsing area next to the alphabet at the top of the page. Click the search string to return to your results.

## Renaming and Deleting Tags

- To rename a tag, hover over the tag and select **Rename** from the drop-down list that appears around the tag. Enter a new name for the tag in the text box that appears and click **Save**.
- To delete a tag, hover over the tag and select **Delete** from the drop-down list that appears around the tag. The tag is removed from every record in your organization and is placed in the Recycle Bin.

If you restore a tag from the Recycle Bin, it is automatically reassociated with the records from which it was removed. For more information, see [Using the Recycle Bin](#) on page 186.

You can rename or delete any personal tag, but you must have the "Tag Manager" permission to rename or delete a public tag.

## Reviewing Personal Tag Statistics

Click **Personal Tag Usage** on the right side. This page displays your current number of unique personal tags and personal tag applications. You can have a maximum of:

- 500 unique personal tags
- 5,000 instances of personal tags applied to records

If you are approaching your personal tag limits, consider merging similar tags into a single tag by renaming. For example, if you have tags for Bicycling, Cycling, and Biking, you can rename Cycling and Biking to Bicycling to reduce your number of unique personal tags.

To reduce the number of instances of tags applied to records, delete personal tags that you no longer use.

## Viewing Recently Used Tags

The **Tags** link and Recent Tags drop-down list, available in the sidebar, allow you to browse tags and access your most recently used tags, respectively.

- Click **Tags** to browse, search, and manage your entire tag collection.
- Select a tag in the Recent Tags drop-down list to view all records that have been marked with that tag. The tags that appear in this list are those you have most recently used to tag records.

## Guidelines for Entering Currency, Dates, Times, and Phone Numbers

Creating and editing records is easier if you understand a few guidelines and tips for the currency, date, time, and phone number fields you'll find in various records.


### EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: **All Editions** except **Database.com**

### Currency

In most Salesforce editions, the format and currency type you can use for currency fields, such as `Quota` or `Annual Revenue`, are determined by the `Currency Locale` setting for your company. In Group, Professional, Enterprise, Unlimited, and Performance Edition organizations that use multiple currencies, the format and currency type are determined by the `Currency` field in the record you're creating or editing.


 **Tip:** When you enter a monetary amount (or any other type of number), you can use the shortcuts **k**, **m**, or **b** to indicate thousands, millions, or billions. For example, when you enter `50k` it appears as `50,000`. However, these shortcuts do not work for filter criteria.

### Dates and Times

Many fields allow you to enter a date or a time in the format specified by your personal `Locale` setting.

When entering dates, you can choose a date from the calendar, or manually enter a date.


Only dates within a certain range are valid. The earliest valid date is `1700-01-01T00:00:00Z GMT`, or just after midnight on January 1, 1700. The latest valid date is `4000-12-31T00:00:00Z GMT`, or just after midnight on December 31, 4000. These values are offset by your time zone. For example, in the Pacific time zone, the earliest valid date is `1699-12-31T16:00:00`, or 4:00 PM on December 31, 1699.

 **Tip:**

- Years appear and are saved as four digits, but you can enter the final two digits and Salesforce will determine the first two. Entries `60` through `99` are assumed to be in the 20th century (for example: `1964`), and entries `00` to `59` are assumed to be in the 21st century (for example: `2012`).
- If you enter numbers for month and day only (example: `01/15`), Salesforce supplies the *current* year.
- If your locale and language are English, you can enter words like *Yesterday*, *Today*, and *Tomorrow*, or any day of the week, and Salesforce figures it out. Weekday names (such as *Monday*) are always considered to be in the following week.

### Phone Numbers


When you enter phone numbers in various phone fields, Salesforce preserves whatever phone number format you enter. However, if your `Locale` is set to English (United States) or English (Canada), ten-digit phone numbers and eleven-digit numbers that start with "1" are automatically formatted as `(800) 555-1212` when you save the record.

 **Tip:**

- If you do not want the parentheses-space-hyphen formatting (`(800) 555-1212`) for a ten- or eleven-digit number, enter a "+" before the number. For example: `+49 8178 94 07-0`.
- If your ten- and eleven-digit phone numbers have Salesforce's automatic format, you may need to enter the parentheses when specifying filter conditions. For example: *Phone starts with (415)*.

## Select Picklist Values


You may encounter a few different types of picklist fields in Salesforce.

- Standard picklists - Click the down arrow to select a single value.
- Multi-select picklists - Double click on any available value in one scrolling box to add that value to the selected scrolling box on the right. You can choose a single value or multiple values. To select values within a range, select the first value and click the last value in the range while holding down the SHIFT key; then, click the arrow to add selections to the chosen box.
- Dependent and controlling picklists work in conjunction with each other. The value chosen in the controlling picklist affects the values available in its dependent picklist. Both controlling and dependent picklists are indicated on edit pages by an  icon. Hover your mouse over the icon to display the name of the controlling or dependent picklist.

## Notes

Notes is an enhanced version of the Salesforce note-taking tool that lets your users take better notes faster. Use Notes to streamline your workflow, increase productivity, and get the most out of Salesforce.

Notes is built on top of Salesforce Files, so you can do many of the same things with notes that you can do with files, such as report on notes and use Chatter to share notes.

For more information on what you can do with Notes, check out the video:  [How to Use Notes](#).

### [Create Notes and Add Them to Records](#)

Use Notes, our enhanced note-taking tool in Salesforce, to add important information to your records.

### [View or Revert to a Previous Version of a Note](#)

Notes lets you see old versions of notes and restore them if necessary.

### [Share a Note with Users or Groups](#)

Collaborate with your colleagues by sharing your notes with other Salesforce users or Chatter groups.

### [Create a Report on Your Notes](#)

View and analyze details about all your notes using reports. You can only report on notes taken with Notes, our enhanced note-taking tool.

### [Guidelines for Using Notes in the Salesforce1 Mobile App](#)

Learn some tips, tricks, and best practices for using Notes in Salesforce1.

### [What's the Difference Between Notes and the Old Note-Taking Tool?](#)

Notes is an enhanced version of the original Salesforce note-taking tool. With Notes, you can get a number of features that help you take better notes faster and increase productivity.


### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Create Notes and Add Them to Records

Use Notes, our enhanced note-taking tool in Salesforce, to add important information to your records.

-  **Note:** If you're still using the old note-taking tool, talk to your administrator about switching to the enhanced version of Notes.

### [Create Notes and Add Them to Records in Salesforce Classic](#)

Add important information to your records using Notes, our enhanced note-taking tool in Salesforce, so you can be more organized and increase productivity.

### [Create Notes and Add Them to Records in Salesforce Lightning Experience](#)

Notes let you add important information to your records so you can stay organized.


#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

## Create Notes and Add Them to Records in Salesforce Classic

Add important information to your records using Notes, our enhanced note-taking tool in Salesforce, so you can be more organized and increase productivity.

-  **Note:** These steps work in Salesforce Classic. If you see a row of tabs across the top of your screen, you're in Salesforce Classic. If you see a navigation bar on the left, you're in Lightning Experience.

1. From a record's Notes related list, click **New Note**. Or, to create a private, stand-only note that's not related to a record, go to the Files tab and click any of the Notes filters to show the New Note option.
2. Enter a title and body text.
3. Save the note.

Notes taken with the enhanced version of Notes appear in the record's Notes related list, while notes taken with the old note-taking tool appear in the record's Notes & Attachments related list.

SEE ALSO:

[Guidelines for Using Notes in the Salesforce1 Mobile App](#)

[What's the Difference Between Notes and the Old Note-Taking Tool?](#)


#### EDITIONS

Available in: Salesforce Classic

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

## Create Notes and Add Them to Records in Salesforce Lightning Experience

Notes let you add important information to your records so you can stay organized.

-  **Note:** These steps work in Lightning Experience. If you see a navigation bar on the left side of your screen, you're in Lightning Experience. If you see a row of tabs across the top of the screen, you're in Salesforce Classic.

1. From the record's Notes related list, click **New**. Or, to create a note that's related to a different record or no record at all, click the Global Actions icon and select **New Note**.
2. Enter a title and body text. You can add images to your note.
3. Relate the note to other records, if needed.

#### EDITIONS

Available in: Lightning Experience

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Notes taken with the enhanced version of Notes appear in the record's Notes related list, while notes taken with the old note-taking tool appear in the record's Notes & Attachments related list.


#### SEE ALSO:


[Guidelines for Using Notes in the Salesforce1 Mobile App](#)

[What's the Difference Between Notes and the Old Note-Taking Tool?](#)

## View or Revert to a Previous Version of a Note

Notes lets you see old versions of notes and restore them if necessary.

 **Note:** These steps work in Lightning Experience. If you see a navigation bar on the left side of your screen, you're in Lightning Experience. If you see a row of tabs across the top of the screen, you're in Salesforce Classic.

1. From the record's Notes related list, click the note title.
2. In the note window, click .
3. From the list, select the version of the note you'd like to view.
4. To restore the selected version of the note, click **Restore**.

## Share a Note with Users or Groups

Collaborate with your colleagues by sharing your notes with other Salesforce users or Chatter groups.

[Share a Note with Users or Groups in Lightning Experience](#)


Collaborate with your colleagues by sharing your notes with other Salesforce users or Chatter groups.

[Share a Note with Users or Groups in Salesforce Classic](#)

Collaborate with your colleagues by sharing your notes with other Salesforce users or Chatter groups.

## Share a Note with Users or Groups in Lightning Experience

Collaborate with your colleagues by sharing your notes with other Salesforce users or Chatter groups.

 **Note:** These steps work in Lightning Experience. If you see a navigation bar on the left side of your screen, you're in Lightning Experience. If you see a row of tabs across the top of the screen, you're in Salesforce Classic.

1. Navigate to a note you'd like to share.
2. In the note window, click **Share**.
3. Enter the names of users or groups you want to share with.
4. Add more users or groups if necessary.
5. To prevent the recipients from sharing or unsharing the note themselves, click **Prevent others from sharing and unsharing**.

#### EDITIONS

Available in: Lightning Experience

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

#### EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

#### EDITIONS

Available in: Lightning Experience

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions




## 6. Click **Share**.

The users you share with receive an email with a link to the shared note.

## Share a Note with Users or Groups in Salesforce Classic

Collaborate with your colleagues by sharing your notes with other Salesforce users or Chatter groups.

 **Note:** These steps work in Salesforce Classic. If you see a row of tabs across the top of your screen, you're in Salesforce Classic. If you see a navigation bar on the left, you're in Lightning Experience.

1. Navigate to a note you'd like to share.
2. In the note window, click **Note Sharing Settings**.
3. Choose whether you'd like to share with another user, a group, or a library.
4. Enter the names of users or groups you want to share with.
5. For each user or group, choose whether you want them to be a viewer or a collaborator. Only collaborators can edit the note you share.
6. Enter a short message to the recipients. When you share your note, the recipients receive an email which includes your message, if any.
7. Click **Share**.
8. To prevent the recipients from sharing or unsharing the note themselves, click **Prevent others from sharing and unsharing**.
9. Click **Close**.

The users you share with receive an email with a link to the shared note.

## Create a Report on Your Notes

View and analyze details about all your notes using reports. You can only report on notes taken with Notes, our enhanced note-taking tool.

1. Make sure you're familiar with standard reports and how to customize them.
2. Create a new report with the following criteria.

Report type	File and Content Report
Fields	File Name Published Date Created By Last Revised Date Last Revised By File Type
Filters	File Type equals <i>SNOTE</i>

### EDITIONS

Available in: Salesforce Classic

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To create, edit, and delete reports:

- "Create and Customize Reports"
- AND
- "Report Builder"

3. Be sure to save your report so you can run it again later.
4. If you'd like to share the report with others, create a report folder and save the report to it. Then, use the sharing settings for the folder to add individuals or groups of users.

SEE ALSO:



[Notes](#)

## Guidelines for Using Notes in the Salesforce1 Mobile App

Learn some tips, tricks, and best practices for using Notes in Salesforce1.

Watch a video:  [How to Use Notes](#)

Your administrator will need to set up Notes for your organization. Then, you can start using Notes in Salesforce1. Here are some guidelines to help you out.

- Create notes by tapping  in the action bar.
- Add bulleted and numbered lists to notes using the icons in the Notes toolbar.
- Relate notes to multiple records by tapping **Relate Records**. To change the related records, tap the names of the related records (3).
- Create a task by swiping a line in a note. Alternatively, tap on a line or highlight some text, and then tap  in the toolbar.
- Work with related tasks directly from a note.
- View and search all their notes by selecting **Notes** in the Salesforce1 navigation menu.
- If you or your administrator has added the Notes related list to object page layouts, you can:
  - Quickly access related notes directly from records instead of having to switch away to the navigation menu to open the Notes item.
  - Create notes from the related list.








### EDITIONS

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

## What's the Difference Between Notes and the Old Note-Taking Tool?

Notes is an enhanced version of the original Salesforce note-taking tool. With Notes, you can get a number of features that help you take better notes faster and increase productivity.

### Notes vs. the Old Note-Taking Tool

Feature	Notes	Old Note-Taking Tool
Add notes to records		
Use the Notes related list to manage notes		
Use the Notes & Attachments related list to manage notes		
Notes save automatically	 (Lightning Experience only)	
Check spelling	 (Lightning Experience only)	

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Feature	Notes	Old Note-Taking Tool
Add private notes to records		✓
Create private, standalone notes (not related to records)	✓	
Relate notes to multiple records	✓ (Lightning Experience and Salesforce1 only)	
Use rich text formatting, including bulleted and numbered lists	✓	
Search Salesforce for just notes	✓	
Create tasks from notes	✓ (Salesforce1 only)	
Create a report on your notes	✓	
Add images to a note	✓ (Lightning Experience only)	
View or revert to an earlier version of a note	✓ (Lightning Experience only)	
Notes are automatically related to the parent account		✓

## SEE ALSO:

- [Guidelines for Using Notes in the Salesforce1 Mobile App](#)
- [Create Notes and Add Them to Records](#)
- [Notes](#)

## Considerations for Managing Files and Notes Attached to Records

When working with attachments, Google docs, or notes created with the old note-taking tool, there are a number of things to keep in mind.

- If Chatter is enabled for your organization, files posted to a feed on a record are added to the record's Notes & Attachments related list as feed attachments. You can preview (if available), download, and delete feed attachments from the Notes & Attachments related list, but you can't edit them.
- You can't edit a note or attachment unless you also have access to edit the record associated with it.
- To delete a note or attachment, you must be the owner of the note or attachment or an administrator with the "Modify all Data" permission. Note ownership is determined by the owner field. Attachment ownership is determined by the created by field.
- Record owners can delete attachments on records even if they did not add the attachment.
- Community users can download attachments, but can only preview, edit, or delete attachments that they've created..

### EDITIONS

Available in: Salesforce Classic

Notes and attachments are available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Google Docs available in all editions

- Notes and attachments marked as private via the `Private` checkbox are accessible only to the person who attached them and administrators. For administrators to view private notes and attachments, they need the “View All Data” permission; to edit or delete them, they need the “Modify All Data” permission.
- If the Add Google Docs to Salesforce service is enabled in your organization, the Notes & Attachments related list is entitled Google Docs, Notes & Attachments. The Attachments related list is entitled Google Docs & Attachments.
- To access a Google doc from a record detail page, the doc must be shared with your Google Apps account.
- The Notes and Attachments related list includes files from Salesforce CRM Content when they are posted to a Chatter feed on a record. However, the Notes and Attachments related list does not include Salesforce CRM Content files that only exist in Salesforce CRM Content. If your organization has Salesforce CRM Content enabled, you can add the Related Content related list to the detail pages for accounts, contacts, leads, opportunities, cases, products, or custom objects.
- If you publish notes to external contacts via Salesforce to Salesforce, all public notes are automatically shared with a connection when you share the parent object. Attachments are automatically shared if the `Share With Connections` checkbox on the attachment is selected. To stop sharing a note or attachment, select `Private`.
- Not all files can be previewed, such as encrypted files, password-protected files, copy-protected PDFs, unknown file types, and any file larger than 25 MB. For files that can't be previewed, the **Preview** option isn't available on feeds or list views, and files appear as generic file type icons in the feed. Some Microsoft Office 2007 features don't display correctly in previews. If a file can be previewed, but a preview doesn't exist, contact your Salesforce administrator who may be able to regenerate the preview.
- All notes and attachments added to contacts and opportunities roll up under the associated account as well.


## SEE ALSO:

[Notes](#)[Create Notes and Add Them to Records](#)[Guidelines for Using Notes in the Salesforce1 Mobile App](#)

## Note and Attachment Fields

Notes is an enhanced version of the Salesforce note-taking tool. This table lists the fields available when you create a note using Notes. There's also a toolbar with icons for adding bulleted and numbered lists to notes.

### Fields for Notes

 **Note:** In Salesforce1 and Lightning Experience, there are additional fields for relating multiple records to the note.

Field	Description
Body	Text of the note. Can hold up to 50 MB of data.
Title	Subject of note. Maximum of 200 characters.

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### Fields for the Old Note-Taking Tool

Field	Description
Body	Text of the note. Can hold up to 32 KB of data.

Field	Description
Private	Checkbox to indicate that note is only accessible to the owner and administrators. For administrators to view private notes, they need the "View All Data" permission; to edit them, they need the "Modify All Data" permission.
Title	Short description of note. Maximum of 80 characters.

## Fields for Attachments

Attachment Fields	
Field	Description
Description	Description of the uploaded file. Maximum of 500 characters.
File Name	Name of the uploaded file.
Private	Checkbox to indicate that the attachment is only accessible to the owner and administrators. For administrators to view private attachments, they need the "View All Data" permission; to edit them, they need the "Modify All Data" permission.
Share With Connections	Checkbox to indicate that the attachment is shared with connections when the parent record is shared. This checkbox is only available if Salesforce to Salesforce is enabled, the parent record is shared, and the attachment is public.
Size	Size of the uploaded file.

## Delete Notes and Attachments from Records

To delete a note or attachment, click **Del** next to the note or attachment in the Notes and Attachments related list or Attachments related list of a record.

Deleted notes and attachments can be restored from the Recycle Bin.

To delete a file that was attached from a Chatter feed, click **Del** next to the feed attachment. This removes the file from all Chatter feeds where it's been shared and deletes the file from the Notes and Attachments related list. Restore the file by clicking on the Recycle Bin, selecting the file, and clicking **Undelete**. If the file was attached from your computer, a Chatter feed, group, or a Salesforce CRM Content library, deleting it from the Notes and Attachments related list also removes it from the post, but doesn't delete it from its original location.

### SEE ALSO:

[Create Notes and Add Them to Records](#)

[Considerations for Managing Files and Notes Attached to Records](#)

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To delete a note or attachment:

- Owner of the parent record

OR

"Edit" or "Delete" on the parent record type

OR

"Modify All Data"

## Why is the record I'm trying to save being flagged as a duplicate? What can I do?

Your organization uses duplicate rules, which prevent users from creating duplicate records. Read the message to decide how to proceed.

Here's what you'll see if the record you're trying to save is flagged as a possible duplicate.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Lead Owner

Lead Edit

Save (Ignore Alert) Save & New (Ignore Alert) Cancel

8 Possible Duplicate Records Found  
You're creating a duplicate record. We recommend you use an existing record instead.

Leads

Name	Street	Phone	Zip/Postal Code	Email	Company	City	Title	Lead Owner	Last Modified Date
<a href="#">marc benioff</a>	1 market street	(800) 555-5555		mbenioff@salesforce.com	salesforce.com, Inc	San Francisco		<a href="#">Madison Rigsby</a>	10/3/2014 2:47 PM
<a href="#">m benioff</a>	1 market street	(800) 555-1234		mbenioff@salesforce.com	salesforce.com, Inc	San Francisco		<a href="#">Madison Rigsby</a>	10/3/2014 2:48 PM
<a href="#">marc benioff</a>	1 market street	(800) 555-5555		marc.benioff@salesforce.com	salesforce.com, Inc	San Francisco		<a href="#">Madison Rigsby</a>	10/3/2014 2:51 PM
<a href="#">marc benioff</a>	1 market street	(800) 555-5555		marc.benioff@salesforce.com	salesforce.com, Inc	San Francisco		<a href="#">Madison Rigsby</a>	10/10/2014 3:37 PM
<a href="#">marc benioff</a>	100 market street	(800) 555-5555		m.benioff@salesforce.com	salesforce.com, Inc	San Francisco		<a href="#">Madison Rigsby</a>	10/17/2014 1:12 PM

Show All >>

Contacts

Name	Phone	Mailing City	Account Name	Email	Mailing Street	Mailing Zip/Postal Code	Title	Contact Owner	Last Modified Date
<a href="#">marc Benioff</a>	(800) 555-5555	San Francisco	<a href="#">Salesforce.com, Inc</a>	mbenioff@salesforce.com	1 Market Street			<a href="#">Madison Rigsby</a>	10/17/2014 10:27 AM
<a href="#">Mike Benioff</a>		San Francisco	<a href="#">Salesforce.com, Inc</a>	mbenioff@salesforce.com	1 Market Street			<a href="#">Madison Rigsby</a>	10/17/2014 10:28 AM

Lead Information

Lead Owner: Madison Rigsby

Lead Status: Open

First Name: --None-- marc

Last Name: benioff

Company: salesforce.com

Phone: (800) 555-5555

Email: mbenioff@salesforce.com

Rating: --None--

1. A system-generated message tells you how many possible duplicates were found. The number includes only the records you have access to. If you don't have access to any of the records that are identified as possible duplicates, then this message won't include a number but will include a list of record owners so you can request access to the existing duplicates.
2. A custom alert written by whoever created the duplicate rule. Ideally, the alert should explain why you can't save the record and what you should do.
3. If the duplicate rule allows you to save a record despite it being a possible duplicate, the **Save (Ignore Alert)** button is present. If the duplicate rule blocks you from saving a record that is a possible duplicate, the **Save** button is present but the record cannot be saved successfully until you make the necessary changes to the record so it's no longer flagged as a possible duplicate.
4. The list of possible duplicates includes only records you have access to. The fields shown in the list include only fields you have access to (up to the first 7 fields that were compared and determined to match). A maximum of 5 records are displayed in this list, but if more than 5 duplicates were found, click **Show All >>** to see full list of records, up to 100. Records are listed in the order they were last modified. Go directly to one of the records in the list by clicking on its link.
5. The highlighted fields are the fields that were compared and determined to match.

[What formats should I use for dates, times, and names in Salesforce?](#)

[How do I allow only certain users to share data?](#)

[Can an individual user control the sharing of records they own?](#)

[Can I transfer records to other users?](#)

[How do I print Salesforce records?](#)

## What formats should I use for dates, times, and names in Salesforce?

The format used for dates, times, and names of people in Salesforce is determined by your `Locale` setting.

To find out what date/time format your `Locale` setting uses:

1. From your personal settings, enter *Advanced User Details* in the `Quick Find` box, then select **Advanced User Details**. No results? Enter *Personal Information* in the `Quick Find` box, then select **Personal Information**.
2. View the date/time format used in the read-only `Created By` field. This is the format you should use for entering dates and times in Salesforce fields.

SEE ALSO:

[Personalize Your Salesforce Experience](#)

## How do I allow only certain users to share data?

If your Professional, Enterprise, Unlimited, Performance, or Developer Edition organization has a Private or Public Read Only sharing model, your administrator can still allow certain users to share information. Your administrator can create public groups and then set up sharing rules to specify that users in certain roles or groups will always share their data with users in another role or public group. Individual users can also create personal groups to give access to their own accounts, contacts, and opportunities.

## Can an individual user control the sharing of records they own?

Yes. In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, all account owners are empowered to further extend the sharing on an account-by-account basis. For example, if the organization has a Private model, the Acme account owner can share this account and its related data to selected groups, or to individual users.

In Enterprise, Unlimited, Performance, and Developer Editions, opportunity owners can also extend the sharing for individual opportunities separately from account sharing.

You can use account, lead, case, and opportunity sharing to increase access to your data; you cannot restrict access beyond your organization's default access levels.

This type of sharing is called manual sharing, and is done by the **Sharing** button on the record detail page.

## Can I transfer records to other users?

In most editions, you can transfer ownership of records using one of these methods. When you change a record's owner, Salesforce also transfers ownership of certain related records.

### Transferring ownership of a single record you own

Click **Change Owner** on the record's detail page. For more information, see [Changing Ownership](#) and [Transfer of Associated Items](#).

### Transferring ownership of multiple cases, leads, or custom object records that you own

Click the object's tab and view a list view. Select the records to be transferred, and click **Change Owner**.

### Transferring ownership of multiple records owned by other users

Use the Mass Transfer feature. For more information about using Mass Transfer and which related records are transferred, see [Mass Transferring Records](#).

### Transferring record ownership using workflow rules

When a record owner is changed by a workflow rule, Salesforce does not change the ownership of any related records.

## How do I print Salesforce records?

To print the details of a Salesforce record:



1. Click the **Printable View** link located in the upper right corner of most detail pages. A new browser window opens with the record displayed in a simple, print-ready format.
2. Optionally, collapse and expand individual sections in the printable view by clicking the triangles next to the section headings.
3. Optionally, click **Expand All** or **Collapse All** to show or hide all of the collapsible sections on the page. Related lists, such as the list of opportunities related to an account, are not collapsible.
4. Click **Print This Page** or use your browser's print function to send the page to a printer.

 **Note:** On the Console tab, you can click the print icon (  ) to open a record's printable view.

## Find Information with Search

Salesforce search gives you the power to find information faster. Search is available via the Salesforce site, a Salesforce1 mobile app, or a custom search implementation built on the Salesforce platform.

### EDITIONS

Available in: **All Editions except Database.com**

#### [How Does Search Work?](#)

Search efficiently finds what you're looking for by breaking apart your search terms and finding matches for them from the index.

#### [How Does Search Break Up Information?](#)

Each time you create a record, the search engine breaks up the searchable information into pieces. Knowing how these pieces are broken up helps you choose which search terms to use.

#### [How Is Search Different Between Lightning Experience, Salesforce Classic, and Salesforce1?](#)

Global search in the full Salesforce site (whether Lightning Experience or Salesforce Classic) and the Salesforce1 mobile app uses the same search index, so you're always searching the same data. You see the same set of recently accessed records in instant results. The search scope (the list of objects you use the most) influences search results. But remember that some standard objects aren't available in Salesforce1 and Lightning Experience, so you might not always see the exact same search results. And the global search interface is different between all these experiences, so there are visual and navigational differences to consider.

#### [How Do I Search in Lookup Fields?](#)

Use lookup search to associate two records together.

#### [Search Results](#)

In many cases, you'll quickly find the record you searched for by just reviewing the top results because results are sorted by relevance for each user. Understand why certain records are returned and how to best refine your results.

#### [Limitations for Search in Salesforce Classic](#)

When using global search, sidebar search, advanced search, structured queries, list views, and filters, certain restrictions apply.

## How Does Search Work?

Search efficiently finds what you're looking for by breaking apart your search terms and finding matches for them from the index.

Check out the video:


 [How Does Search Work?](#)

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions except Database.com**

When you enter a search term in the search field (1), the search engine breaks up your search term into smaller pieces, called *tokens* (2). It matches those smaller terms to the record information stored in the index (3), ranks the associated records by relevance (4), and returns the results you have access to (5).

-  **Note:** After a searchable object's record is created or updated, it could take about 15 minutes or more for the updated text to become searchable. An object's records are only searchable after they're stored in the search index. The search engine only returns results you have permission to view.



For more information on what you can do with search, check out these videos.

-  [Search in Salesforce Classic](#)
-  [Search in Salesforce Lightning Experience](#)

## How Does Search Break Up Information?

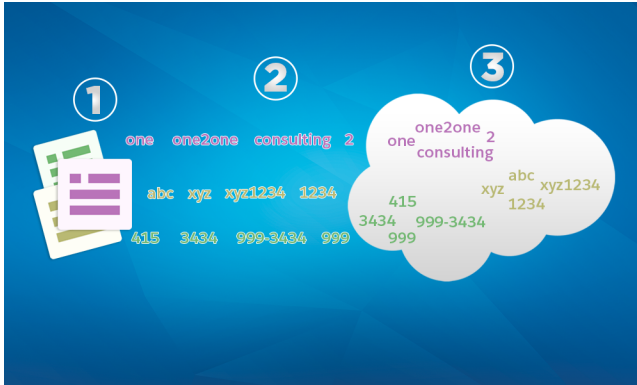
Each time you create a record, the search engine breaks up the searchable information into pieces. Knowing how these pieces are broken up helps you choose which search terms to use.

When you create or update a record (1), the search engine breaks up the record's searchable text into smaller terms, called *tokens* (2). It then stores the tokens in the search index (3). Similarly, when you search, the search engine breaks down your search terms into tokens so that it can return records with matching tokens from the index.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions except Database.com**



Here are some examples of the tokens created from record information. The search engine creates alphanumeric tokens when search terms contain punctuation. You could find the record with a search using any indexed token listed.

Record Information	Indexed Tokens
Acme, Inc.	acme inc
Web2Lead	web2lead web 2 lead
Exhibit-XYZ1234	exhibit-xyz1234 exhibitxyz1234 exhibit xyz1234 xyz 1234
(415) 999-3434	415 999-3434 9993434 999 3434
john.smith@domain.com	john.smith@domain.com @domain.com john.smith john

**Record Information****Indexed Tokens**

smith  
johnsmith  
domain.com  
domain  
com  
domaincom

The search engine returns accurate search results from searches in East Asian languages that don't include spaces between words using a special form of tokenization.

**Record Information****Indexed Tokens**

東京都 (Tokyo Prefecture)

東京 (Tokyo)  
都 (Prefecture)

SEE ALSO:

[How Does Search Work?](#)

## How Is Search Different Between Lightning Experience, Salesforce Classic, and Salesforce1?

Global search in the full Salesforce site (whether Lightning Experience or Salesforce Classic) and the Salesforce1 mobile app uses the same search index, so you're always searching the same data. You see the same set of recently accessed records in instant results. The search scope (the list of objects you use the most) influences search results. But remember that some standard objects aren't available in Salesforce1 and Lightning Experience, so you might not always see the exact same search results. And the global search interface is different between all these experiences, so there are visual and navigational differences to consider.



**Note:** Although small differences in the order of search results can occur, you're still searching the same set of data.

**EDITIONS**

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions except Database.com**

Feature	Salesforce1 Downloadable Apps for Android and iOS	Salesforce1 Mobile Browser App	Full Site Lightning Experience	Full Site Salesforce Classic
Access Search	Search box at the top of the Salesforce1 navigation menu.	Search icon located in the header.	Search box located in the header.	Search box located in the header.

Feature	Salesforce1 Downloadable Apps for Android and iOS	Salesforce1 Mobile Browser App	Full Site Lightning Experience	Full Site Salesforce Classic
Instant Results When Search Box is Selected	You see a list of your most recently used records across all objects.	You see a list of your most recently used records for the object currently selected in the search scope bar.	You see a list of your most recently used records across all objects.	Not available. Start typing to see instant results.
Instant Results as You Type	The characters you type filter the list of most recently used records.	The characters you type filter the list of most recently used records. As you type, the list also starts showing matching records that you haven't accessed recently.	The characters you type filter the list of most recently used records. As you type, the list also starts showing matching records that you haven't accessed recently.	The characters you type filter the list of most recently used records.
Full Search Results	You see the top 3 records for each of your most recently used objects. Results are grouped by object and sorted by relevance.	You see several results for the object selected in the search scope bar. Change the object to see more results. Results are sorted by relevance.	You see results for the object selected in the search scope bar. <b>Top Results</b> lists the top results for most frequently used objects. Change the object to see more results. Results are sorted by relevance.	You see the top 5 records for each of your most recently used objects. Results are grouped by object and sorted by relevance.
Refine Search Results	Not available.	You can sort results by any of the fields shown in search results.	You can sort results by column heading.	You can sort results by column heading. If enabled by your admin, filtering is also available.
Feed Search	Global search doesn't find information in feeds. Use feed search instead. On the <b>Feed</b> page, pull down from the top of the page to expose the search box.	From the search results page, select <b>Feeds</b> in the search scope bar to see results from the All Company Feed.	You use global search on Feeds home to see results from the All Company feed. If you didn't search from Feeds home, switch to <b>Feeds</b> on the search scope bar.	From the search results page, use <b>Search Feeds</b> to see results from everything at your company.
Search Term Characters	<b>iOS:</b> Global search returns results for the first 155 characters of your search term. Feed search returns results for the first 100 characters. <b>Android:</b> Returns results for entire search term,	Returns results for the first 100 characters of your search term.	Returns results for the first 100 characters of your search term.	<b>Sidebar and Advanced:</b> Returns results for the first 80 characters of your search term. <b>Global:</b> Returns results for the first 100 characters of your search term.

Feature	Salesforce1 Downloadable Apps for Android and iOS	Salesforce1 Mobile Browser App	Full Site Lightning Experience	Full Site Salesforce Classic
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regardless of the number of characters.

## How Do I Search in Lookup Fields?

Use lookup search to associate two records together.

Term	Definition	Available in Salesforce Classic?	Available in Lightning Experience?
Standard Lookup	Searches a limited set of fields for each object, such as the name field. Results are limited to 50 records at a time. You can't sort, filter, or customize the columns in the results.	Yes	No
Enhanced Lookup	Searches more fields for each object. Search queries are broken into separate search terms, which allows for better matching and results. Results don't have a lookup-specific limit, and you can refine results.	Yes, if enabled by admin	Yes, but filtering is not available
Blank Lookup	A lookup search when you click the lookup icon without entering a search term.	Yes	Yes
Lookup Auto-Complete (Instant Results)	All lookup searches display a dynamic list of matching records when you start typing in a lookup field.	Yes, if enabled by admin. The characters you type filter the list of most recently used records.	Yes. The characters you type filter the list of most recently used records. As you type, the list also starts showing matching records that you haven't accessed recently.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions except Database.com**

Term	Definition	Available in Salesforce Classic?	Available in Lightning Experience?
Related Lookup Filters	Admin-set filters that restrict the valid values and search results for lookup fields for enhanced lookup dialog searches. Can be required or optional.  For example, you can configure the <b>Account Owner</b> lookup field to only show active users on the same record.	Yes, if enabled by admin	Yes
Dependent Lookup Filters	Admin-set filters that references fields on the current object record (the source) for enhanced lookup dialog searches. Can be required or optional.  For example, you can configure the case <b>Contact</b> field to only show contacts associated with the account selected in the case <b>Account Name</b> field on the same record.	Yes, if enabled by admin	No
Lookup Dialogs (Search Layout)	In Setup, admins define the fields that are available within the lookup dialog search layout. Users can add and remove fields from the list using My Columns. Users can't add extra fields that were not defined in the search layout by admins.	Yes	Yes, but lookup and global search results are both combined under the Search Results layout. My Columns isn't available.
Lookup Filter Fields (Search Layout)	In Setup, admins define the fields available for filtering for enhanced lookup searches.  Users access the filters using Show Filters in the lookup dialog. Users can't add extra fields that were not defined in the search layout by admins.	Yes, if enabled by admin	No

### [Lookup Search in Salesforce Classic](#)

Lookup fields allow you to associate two records together in a relationship. For example, a contact record includes an account lookup field that associates the contact with its account.


### [Lookup Search in Lightning Experience](#)

Lookup fields allow you to associate two records together in a relationship. For example, a contact record includes an account lookup field that associates the contact with its account. In the lookup search for searchable objects, terms are matched against all searchable fields within a record, not just the name of the record. If you don't see a record in the auto-suggested instant results, perform a full search. If you don't see a new record in search results, wait 15 minutes and try again. Check out some more answers to frequently asked questions about lookups.

## Lookup Search in Salesforce Classic

Lookup fields allow you to associate two records together in a relationship. For example, a contact record includes an account lookup field that associates the contact with its account.

### [Standard and Enhanced Lookups in Salesforce Classic](#)

Salesforce objects often include *lookup fields* that allow you to associate two records together in a relationship. For example, a contact record includes an `ACCOUNT` lookup field that associates the contact with its account. Lookup fields appear with the  button on record edit pages. Clicking the icon opens a lookup search dialog that allows you to search for the record that you want to associate with the record you're editing. There are two main types of lookups: standard and enhanced.

### [Tips for Using Standard and Enhanced Lookups](#)

Consider these tips when using standard and enhanced lookups.

### [Lookup Search Auto-Completion](#)


If enabled by your administrator, lookups support auto-complete.

#### EDITIONS

Available in: Salesforce Classic

Available in: **All Editions except Database.com**

## Standard and Enhanced Lookups in Salesforce Classic

Salesforce objects often include *lookup fields* that allow you to associate two records together in a relationship. For example, a contact record includes an `ACCOUNT` lookup field that associates the contact with its account. Lookup fields appear with the  button on record edit pages. Clicking the icon opens a lookup search dialog that allows you to search for the record that you want to associate with the record you're editing. There are two main types of lookups: standard and enhanced.

### [Standard Lookups in Salesforce Classic](#)

Standard lookups search through a limited set of searchable fields per object and users can't refine search results.

### [Enhanced Lookups in Salesforce Classic](#)

Enhanced lookups offer more search capabilities than standard lookups. In addition, enhanced lookups allow search result sorting and filtering.

#### EDITIONS

Available in: Salesforce Classic

Available in: **All Editions except Database.com**



## Standard Lookups in Salesforce Classic

Standard lookups search through a limited set of searchable fields per object and users can't refine search results.

### Availability

Standard lookups are available for most standard objects. All lookup fields use standard lookups by default.

### Search Behavior

When you perform a blank lookup, a list of recently viewed records displays in the lookup search dialog.

Standard lookups query selected *Name* fields for objects.

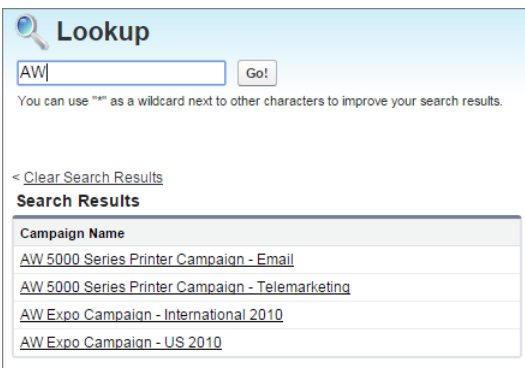
A wildcard is automatically appended to each of your search terms. For example, a search for *bob jo* is really a search for *bob\*jo\** and returns items with *bob jones*, *bobby jones*, or *bob johnson*.

Standard lookup queries match your search term against the org's database (not the search index) without breaking up the term into separate tokens.

### Search Results

Most standard lookups return up to 200 of the most relevant records and allow you to page through 50 records at a time. Lookup searches for campaigns only return the top 100 results. If you've gone through all the results and still don't see the desired record, enter a more specific search term.

Results are ordered in alphabetical order by the primary record name field.



**Lookup**

AW

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


[Clear Search Results](#)

**Search Results**

Campaign Name
<a href="#">AW 5000 Series Printer Campaign - Email</a>
<a href="#">AW 5000 Series Printer Campaign - Telemarketing</a>
<a href="#">AW Expo Campaign - International 2010</a>
<a href="#">AW Expo Campaign - US 2010</a>

You can't sort, filter, or customize the columns in the search results.

Salesforce only returns matches for a custom object if your admin has associated a custom tab with it. You don't have to add the tab for display.

 **Note:** Consider converting standard lookups into enhanced lookups for better search results. Admins enable enhanced lookups.

## EDITIONS

Available in: Salesforce Classic

Available in: **All Editions except Database.com**

## Enhanced Lookups in Salesforce Classic

Enhanced lookups offer more search capabilities than standard lookups. In addition, enhanced lookups allow search result sorting and filtering.

### Availability

Enhanced lookups are available for the Business Account, Contact, Custom Object, Opportunity, Person Account, User, Work Order, and Work Order Line Item objects. Admins enable enhanced lookups for each object.

### Search Behavior

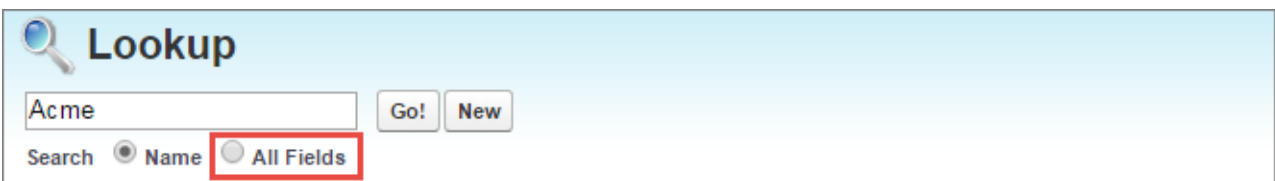
When you perform a blank lookup, a list of recently viewed records displays in the lookup search dialog. If available, you can sort and filter recently viewed records. If you don't see a record, perform a full lookup search.

By default, enhanced lookups query a limited set of fields, primarily *Name* fields for each object. If available in the enhanced lookup search dialog, select **All Fields** and enter other search terms unique to the record, to search through all searchable fields.

### EDITIONS

Available in: Salesforce Classic

Available in: **All Editions except Database.com**



The screenshot shows the Salesforce Lookup search interface. At the top left is a magnifying glass icon followed by the word "Lookup". Below this is a search input field containing the text "Acme". To the right of the input field are two buttons: "Go!" and "New". Below the input field are two radio buttons: "Name" and "All Fields". The "All Fields" radio button is selected and highlighted with a red rectangular box.

Enhanced lookup search queries breaks down your search terms into tokens so that it can return records with matching tokens from the index.

### Search Results

Enhanced lookups return up to 2,000 of the most relevant records and allow you to page through large sets of search results. If you've gone through all the results and still don't see the desired record, enter a more specific search term.

Results are initially presented in ascending alphabetical order by the primary record name field. Custom objects are listed in descending order by the date when you most recently accessed them.

Sort results by clicking on the column heading. Use **Show Filters** to filter results. Use **My Columns** to change which columns display in the search results.

**Lookup**

Acme


Search  Name  All Fields

[< Clear Search Results](#)

**Search Results**

**Accounts [4]**

Account Name	Phone	Account Owner Alias
<a href="#">Acme Corporation</a>	(415) 555-1234	JSmit
<a href="#">Acme Food Company</a>	(650) 213-1234	JSmit
<a href="#">Acme Toy Company</a>	(510) 451-1234	JSmit
<a href="#">Acme</a>	(212) 555-5555	JSmit

 **Note:** Admins must setup a search layout for the Lookup Filter Field before users can sort or filter results. Admins determine the available fields that appear as columns in the search layout. Although you can hide and organize the columns that appear in the layout with **My Columns**, you can't add columns that aren't included in the layout. So, contact your admin to request additional columns added to the layout.

Salesforce only returns matches for a custom object if your admin has associated a custom tab with it. You don't have to add the tab for display.

## Tips for Using Standard and Enhanced Lookups

Consider these tips when using standard and enhanced lookups.

- If you can't find a record in lookup search results, verify the search term is correct or try entering a more specific search term. If enhanced lookups are enabled by the admin, you can filter or sort results. Admins also define which fields appear as columns in the search layout for refining results.
- If you enter a value in the lookup text box and save the record without clicking the lookup icon, Salesforce automatically performs a standard lookup search. If it finds an exact match, it saves that value to the lookup field, even if it finds other partial matches. If it doesn't find an exact match and finds one or more partial matches, Salesforce requires you to select a value from a drop-down list of matches. If no results match the text you entered, an error displays instead.
- To search for contacts, leads, users, or other individuals that include spaces in the `First Name` or `Last Name` fields, enter quotes around the terms. For example, to search for someone with the last name *von hausen*, enter `"von hausen"`.
- In organizations where the Salesforce Customer Portal or partner portal is enabled, you can filter the results that appear on the user lookup dialog by selecting either a queue or group of users from the `Owner` or `Assigned To` drop-down list.
- If your organization uses divisions and you have the "Affected by Divisions" permission, your lookup dialog search results include records in the division you select in the lookup dialog window.

### EDITIONS

Available in: Salesforce Classic

Available in: **All Editions except Database.com**

- When you perform a *blank lookup*, a list of recently used records displays. For standard lookups, records are ordered in alphabetical order by the primary record name field. For enhanced lookups, records are ordered by when you last viewed them. The number of records vary for some object types. Here are some examples of common blank lookup scenarios.
  - For standard lookups of products, the dialog displays 50 records.
  - For standard lookups of campaigns, the dialog displays 100 active campaigns.
  - For standard lookups of assets, the dialog displays all assets tied to the contact on the case.

If you don't see the desired record in the list of recently used records, perform a full lookup search. You'll get the best results with more specific search terms.

## Lookup Search Auto-Completion

If enabled by your administrator, lookups support auto-complete.

Both standard lookups and enhanced lookups can display a dynamic list of matching recently used records when a lookup field is edited. This list is restricted to objects of the appropriate type and, with the exception of lookups of users, is populated from recently used items. For example, while editing an Account lookup, you can see recently used accounts with names that match the prefix you have entered. Recently used contacts don't appear in this list.

Lookup auto-completion is subject to the following restrictions:

- You must have recently visited records of the appropriate type for the lookup's auto-completion list to be populated.
- You must be editing the lookup field on a record's edit page.

Hover details are displayed only for lookup fields on object types that are included in lists of recently used records. For example, products aren't included in lists of recently used records, so hover details aren't displayed for a lookup field on products.

### EDITIONS

Available in: **Salesforce Classic**

Available in: **All Editions except Database.com**

## Lookup Search in Lightning Experience

Lookup fields allow you to associate two records together in a relationship. For example, a contact record includes an account lookup field that associates the contact with its account. In the lookup search for searchable objects, terms are matched against all searchable fields within a record, not just the name of the record. If you don't see a record in the auto-suggested instant results, perform a full search. If you don't see a new record in search results, wait 15 minutes and try again. Check out some more answers to frequently asked questions about lookups.

### EDITIONS

Available in: **Lightning Experience**

Available in: **All Editions except Database.com**

### [Why Can't I See Any Results in the Picklist?](#)

If an object hasn't been made searchable in your org or if you haven't previously viewed the record, the drop-down is empty.

### [Can I Use a Partially Matching Search?](#)

To find the correct record, enter the full search term. The lookup search does not use automatic partially matching searches with trailing wildcards. This behavior is to avoid returning unwanted results to you.

### [What Determines the Secondary Field Under the Record Name?](#)

When available, there's a secondary field displayed under the primary record name in lookups that provide more contextual information. For example, the location *San Francisco* appears under the company *Acme, Inc.* to help you distinguish similar record names and pick the right record. Your admin customizes secondary fields when setting which record fields display and in which order.

### Which Fields are Searched in Lookup Dialog Search?

When you start typing in the lookup field, you see a list of auto-suggested results. These instant results are matches for the search term to the name type field of the record. However, if you perform a full search, the returned results match the search term to all searchable fields for the object. This behavior is similar to global search results.

#### SEE ALSO:

[How Do I Refine Search Results in Lightning Experience?](#)

[What Are the Results I See As I Type in the Search Bar?](#)

## Why Can't I See Any Results in the Picklist?

If an object hasn't been made searchable in your org or if you haven't previously viewed the record, the drop-down is empty.

#### EDITIONS

Available in: Lightning Experience

Available in: **All Editions except Database.com**

## Can I Use a Partially Matching Search?

To find the correct record, enter the full search term. The lookup search does not use automatic partially matching searches with trailing wildcards. This behavior is to avoid returning unwanted results to you.

#### EDITIONS

Available in: Lightning Experience

Available in: **All Editions except Database.com**

## What Determines the Secondary Field Under the Record Name?

When available, there's a secondary field displayed under the primary record name in lookups that provide more contextual information. For example, the location *San Francisco* appears under the company *Acme, Inc.* to help you distinguish similar record names and pick the right record. Your admin customizes secondary fields when setting which record fields display and in which order.

#### EDITIONS

Available in: Lightning Experience

Available in: **All Editions except Database.com**

## Which Fields are Searched in Lookup Dialog Search?

When you start typing in the lookup field, you see a list of auto-suggested results. These instant results are matches for the search term to the name type field of the record. However, if you perform a full search, the returned results match the search term to all searchable fields for the object. This behavior is similar to global search results.

#### EDITIONS

Available in: Lightning Experience

Available in: **All Editions except Database.com**

## Search Results

In many cases, you'll quickly find the record you searched for by just reviewing the top results because results are sorted by relevance for each user. Understand why certain records are returned and how to best refine your results.

### [How Are Search Results Ordered?](#)

The search engine sorts results most relevant to the user based on search term frequency, order, and uniqueness, record and user activity, and access permissions. Search result relevancy can vary for each user.

### [How Do I Refine Search Results?](#)

Use these guidelines to quickly find records on the search result page.

### [What Search Term Variations Will I See in the Search Results?](#)

Search results include expanded results for relevant or similar terms through lemmatization (returns matches for root form of word), synonym groups, spell correction, and nicknames.

### [What Are the Results I See As I Type in the Search Bar?](#)

As you type in the global search box, a list of auto-suggested records appears. These instant results let you quickly access a record before performing a full search.

#### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions except Database.com**

## How Are Search Results Ordered?

The search engine sorts results most relevant to the user based on search term frequency, order, and uniqueness, record and user activity, and access permissions. Search result relevancy can vary for each user.

### Priority Boosts and Filters

The search engine uses many factors to prioritize records. These factors aren't listed in the order they are applied or by importance.

#### Frequency

Prioritizes records that include more occurrences of the search term. In addition, records that contain all or more of the multiple search terms entered are prioritized higher.

#### Uniqueness

Prioritizes records that contain unique terms, under the assumption that uniqueness increases the likelihood of a relevant match.

#### Location

Prioritizes records with the search term in the name, title, or subject type fields.

#### Proximity

Prioritizes records with the search terms closer together with few or no intervening words. Records that contain the same sequence of terms are prioritized higher. Similarly, if a single alphanumeric string is indexed with multiple tokens, exact matches are prioritized over matches with intervening words.

#### Ownership

Prioritizes records that you own.

#### Length

Normalizes the number of instances of a term in a record so that longer documents aren't given undue priority over shorter ones. This boost applies to Salesforce Knowledge records only.

#### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions except Database.com**

**Record Attachment**

Normalizes the number of instances of a term in an attachment. Attachments with many instances of a search term aren't given undue priority over more relevant records with fewer instances. Applies only to Salesforce Knowledge records.

**Record Activity**

Prioritizes records frequently viewed or edited and records having more associated records, such as related lists. The creation date of the data doesn't affect result priority.

**User Activity**

Prioritizes records that you recently edited or viewed.

**Access**

Returns only the records that you have access to view.

**Why do different users see different results?**

Search results are adjusted for the user who performs the search.

- Access permissions are based on the users' profiles. If you don't have access to a record, but someone else does, it appears for them but not you.
- Record ownership boosts records in results. If you own the record, it appears higher in the search results.
- View or edit record history boosts records in results. If you recently viewed or edited a record, the record is prioritized higher in the search than someone else viewing it for the first time.
- Object history boosts records in results. Records from object types that you use more frequently have higher priority in your search results.

**How Do I Refine Search Results?**

Use these guidelines to quickly find records on the search result page.

[How Do I Refine Search Results in Salesforce Classic?](#)

Use our guidelines for sorting and filtering your results to quickly find records.

[How Do I Refine Search Results in Lightning Experience?](#)

Use our guidelines for navigating the search results page to quickly find records.

**EDITIONS**

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions except Database.com**

**How Do I Refine Search Results in Salesforce Classic?**

Use our guidelines for sorting and filtering your results to quickly find records.

When you use the global search bar, you search through all objects and multiple fields types, including custom and long text fields, within a record. If you enter multiple terms, results containing all the search terms are returned, which can be a lot of records! Here are some strategies to find the record that you're looking for after performing a full search.

**Search All**

Search defaults to return results for the objects that you use most frequently. To expand the search to other objects, use **Search All**. If you don't have a **Search All** option, global search doesn't have enough information about which objects you use. Your results include all objects until it has more information.

**EDITIONS**

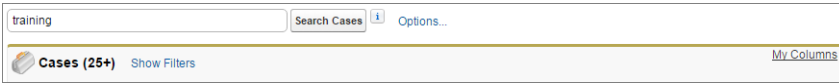
Available in: Salesforce Classic


Available in: **All Editions except Database.com**

## Pin

Hover over and pin important objects to the top of the search results object list. You can always unpin or reorder objects later. Pinning is helpful for objects that you don't use frequently.

## Filter



- Use **Options...** to restrict your search to items you own, if available, to exact phrase searches, and to divisions, if your organization uses them.
  - Use **Show Filters**, if available, to filter your search results.
  - Use **My Columns**, if available, to customize which columns display by customizing **Selected Fields** from the **Available Fields**.
-  **Note:** Your admin determines the availability of filter fields and customizable columns in a search layout. If your admin didn't create a search layout or if search layouts aren't available for an object, you can't filter search results or customize the columns in search results. Filters aren't available in Customer Portals or partner portals.

## More Guidelines

- Make sure that you are on the right object scope. You can change the scope in the left navigation.
- Check your spelling and that you entered the full search term. Or, try entering a more specific search term.
- If you recently created the record or the record was changed multiple times, the record won't appear in the search results right away. The process for making a record searchable, called indexing, can take 15 minutes.

 [Search in Salesforce Classic](#)

## SEE ALSO:

[Why Can't I See Some Features?](#)

## How Do I Refine Search Results in Lightning Experience?

Use our guidelines for navigating the search results page to quickly find records.

### Sort your results

You can order the results using the sort drop-down. The menu lists all the columns in the search layout in addition to **Relevance**. Sort by choosing one of the items in the drop-down. Or, click the column headers.

Sorting results helps if there are too many records on the search results page.

If the search layout includes all non-sortable fields, the sort button is disabled.

### See the most relevant results on one page with Top Results

The Top Results search results page lists the most relevant record results for each of your most frequently used objects.

This page is a good choice when you want to review results for a search term but you aren't looking for a specific object type. For example, you search for *Acme Inc.* and look at the Top Results page for accounts, leads, and opportunities. Each person's Top Results page is different depending on which objects they use the most. Use the **View More** link in case you want to see more results for an object.

## EDITIONS

Available in: Lightning Experience

Available in: **All Editions except Database.com**



### See All Company posts under Feeds

If enabled by your administrator, the Feeds search results page lists posts from the All Company feed that include matches on the search term entered.

Using Feeds is helpful when searching for a post that you want to review again. For example, you saw a post about a new training video, but you don't remember who posted the information.

### Filter results by object with the search scope bar

Quickly click through filtered results by object using the search scope bar beneath the global search box. Searchable objects are shown in the same order they appear in the navigation menu. To see results for the object, click the name.

Let's say that you search for a contact from the Accounts home page and landed on the Accounts search results page. Click the Contacts object to see results for contacts.

### See all available objects under More

If you don't see an object in the search scope bar, select **More** to see a list of all objects that are available to you. Searchable objects listed in the navigation menu that don't fit in the search scope bar appear at the top of the **More** object list.

### More Guidelines

- Check your spelling and that you entered the full search term. Or, try entering a more specific search term.
- If you recently created the record or the record was changed multiple times, the record won't appear in the search results right away. The process for making a record searchable, called indexing, can take 15 minutes.

 [Search in Salesforce Lightning Experience](#)

SEE ALSO:

[Why Can't I See Some Features?](#)

## What Search Term Variations Will I See in the Search Results?

Search results include expanded results for relevant or similar terms through lemmatization (returns matches for root form of word), synonym groups, spell correction, and nicknames.

### Lemmatization

Lemmatization reduces different inflected forms of a word to a single form depending on the context. Search then returns matches for the expanded forms. This behavior applies to the type of word for which you're searching. A search for a noun could return matches for variants of the noun form. A search for a verb could return matches for variants of the verb form. For example, a search for *feature* returns results for *features*, and a search for *add* matches items that contain *adds*, *adding*, and *added*.

Matches on forms of a search term rank lower than matches on the exact term in search results.

These objects are supported.

- Case (including comments)
- Chatter Feed
- Chatter Group
- File
- Idea (including comments)
- Knowledge Article

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions except Database.com**

- Question
- Solution
- Work Order
- Work Order Line Item

These languages are supported.

- Chinese
- Danish
- Dutch
- English
- French
- German
- Italian
- Japanese
- Korean
- Norwegian
- Portuguese
- Russian
- Spanish
- Swedish
- Thai

## Synonym Groups

Synonym groups have words or phrases that are treated equally in searches. A search for one term in a synonym group returns results for all terms in the group. For example, a search for *USB* returns results for all terms in the synonym group which contains *USB*, *thumb drive*, *flash stick*, and *memory stick*.

These objects are supported.

- Case
- Chatter Feed
- File
- Knowledge Article
- Idea
- Question
- Work Order
- Work Order Line Item

## Spell Correction

When you enter a search term that doesn't yield any results because of incorrect spelling, you see results that match a corrected spelling of the search term. There's no visual indication when results are from a spell-corrected search term.

These objects are supported.

- Asset

- Attachment
- Business Account
- Campaign
- Case
- Chatter Feed
- Chatter Group
- Contact
- File
- Knowledge Article
- Lead
- Note
- Opportunity
- User
- Question
- Task

These languages are supported.

- English

## Nicknames

Can't remember if someone goes by Mike or Michael? You can look for a name and the returned results include matches for associated nicknames. For example, you search for *Mike Smith* and see results for *Michael Smith*.

These objects are supported.

- Business Account
- Contact
- Lead
- User

These languages are supported.

- English

## What Are the Results I See As I Type in the Search Bar?

As you type in the global search box, a list of auto-suggested records appears. These instant results let you quickly access a record before performing a full search.

Instant results only appear for records within searchable objects.

The suggested records displayed are ones that you recently viewed or that include the search term you entered. If you don't see the record you're looking for in the instant results, perform a full search for more results.

Stopwords, such as *how* and *to*, are included in the instant results for these objects.

- Account
- Campaign

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions except Database.com**

- Case
- Contact
- Contract
- Custom objects
- Endorsement
- Fund
- Goal
- Lead
- Opportunity
- Order
- Reward
- Skill
- Topic
- User

## Limitations for Search in Salesforce Classic

When using global search, sidebar search, advanced search, structured queries, list views, and filters, certain restrictions apply.

### EDITIONS

Available in: Salesforce Classic

Available in: **All Editions except Database.com**

## Chatter and Global Search

When Chatter is enabled, global search and feed search are enabled, but sidebar search and advanced search are disabled. Your organization's administrator must have Chatter enabled to use global search. Search options aren't available to Chatter Free users.

Search scope doesn't affect Chatter feed searches; which include matches for posts across all objects.

## Sidebar and Advanced Search

The table outlines the main differences between the sidebar and advanced search.

Feature	Sidebar	Advanced
Location	If made available, located to the left of the page. The sidebar panel can be customized to be collapsible.	Link to advanced search within the sidebar search.
Record Fields and Attachments	Searches all custom field types except for type text area, long text area, and rich text area. The standard fields searched vary by object. Attachments aren't searched.	Searches all custom field types. The standard fields searched vary by object.
Multiple Object Searches	Choose 1 object by which to limit your search. Select <b>Search All</b> to search across all objects searchable by sidebar.	Choose one or more objects by which to limit your search. Select <b>Search All</b> to search across all objects searchable by advanced.

Feature	Sidebar	Advanced
Search Terms	Uses a phrase search and matches terms in the exact sequence that they appear. For example, searching for <i>bob jones</i> returns items with <i>Bob Jones</i> , but not <i>Bobby Jones</i> or <i>Bob T Jones</i> . In addition, a trailing wildcard is added at the end of the search terms. For example, <i>Bob T Jones*</i> .	Uses separate word search for searchable fields within a record. For example, searching for <i>bob jones</i> returns items with <i>Bob Jones</i> , and a contact named Bob Smith because his email address is <i>bsmith@jones.com</i> .
Nickname Search	Doesn't include results for nicknames.	Includes results for nicknames.
Spell Correction	Not available.	Available. When you enter a search term that doesn't yield results because of incorrect spelling, you see results that match a corrected spelling of the search term. Spell check availability varies by object.

## Structured Queries Based on Multiple Criteria

To look for records based on a structured query, such as accounts in a certain area or open opportunities within a company, use a list view, report, or dashboard.

## Limit to Items I Own

When **Limit to items I own** is selected, the search results don't return asset, idea, invoice, order, question, quote, reply, and user records because these records don't have owners.

## Filters

Your administrator determines the available filter fields in a search layout. Search filters aren't available in Customer Portals or partner portals.

When filtering search results, the operator is selected automatically based on the field type. Except as noted, all fields use the contains operator. Auto number and phone fields use the contains operator because they can contain non-numeric characters. The = (equals) operator is used with these types of fields.

- Dates
- Numbers, except auto number or phone fields
- Record IDs

Explicitly using the OR operator is only supported in number fields. Except for number fields, commas are used as OR operators in search results filters. For example, if you enter *acme, california* in the Account Name filter field, your results include account names with either *acme* or *california*. For number fields (where a comma can be part of a number) commas aren't treated as OR operators, so explicitly enter the OR operator.

If you specify more than one criterion, the result includes only records that match all the criteria. For example, if you enter *acme california* in the Account Name filter field, your results include account names with both *acme* and *california*.

Don't include *http://* or *https://* in URL filter criteria to avoid receiving unexpected results. When you enter values in URL fields and save records, Salesforce adds *http://* to any URL that doesn't start with *http://* or *https://*. The added *http://* isn't stored in the database. For example, if you enter *salesforce.com* in the Website field and save the record, the Website field displays *http://salesforce.com*, but the

value stored is salesforce.com. Therefore, if you enter `http://salesforce.com` in the Website filter field, your results don't include your record.

### Using the Recycle Bin

## Using the Recycle Bin

The **Recycle Bin** link in the sidebar lets you view and restore recently deleted records for 15 days before they are permanently deleted. Your Recycle Bin record limit is 25 times the Megabytes (MBs) in your storage. For example, if your organization has 1 GB of storage then your limit is 25 times 1000 MB or 25,000 records. If your organization reaches its Recycle Bin limit, Salesforce automatically removes the oldest records if they have been in the Recycle Bin for at least two hours.

### Viewing Items in the Recycle Bin

Choose **My Recycle Bin** from the drop-down list to view just the items you deleted. Administrators, and users with the "Modify All Data" permission, can choose **All Recycle Bin** to view all data that has been deleted for the entire organization. In Personal Edition, the **All Recycle Bin** option shows all of your deleted items.

### Searching for Items in the Recycle Bin

1. Choose **My Recycle Bin** or **All Recycle Bin** from the drop-down list. Choosing **My Recycle Bin** searches for matches only in the items you deleted.
2. Enter your search terms. Search terms are treated as separate words with an implied AND between them. For example, searching for *bob jones* returns items with *bob* and *jones* together but not *bob smith* whose email address is *bsmith@jones.com*. An implied wildcard is appended to your search terms so searching for *bob* returns any *bob* or *bobby*. Searches look for matches in the field displayed in the Name column of the Recycle Bin such as `lead Name`, `Case Number`, `Contract Number`, or `Product Name`.



**Note:** Some search features, including stemming and synonyms, are not available in the Recycle Bin search.

3. Click **Search**.

### Restoring Items in the Recycle Bin

You can restore items by checking the box next to those items and clicking **Undelete**. To restore all deleted items, check the box in the column header and then click **Undelete**.

When you undelete a record, Salesforce restores the record associations for the following types of relationships:

- Parent accounts (as specified in the `Parent Account` field on an account)
- Parent cases (as specified in the `Parent Case` field on a case)
- Master solutions for translated solutions (as specified in the `Master Solution` field on a solution)
- Managers of contacts (as specified in the `Reports To` field on a contact)
- Products related to assets (as specified in the `Product` field on an asset)
- Opportunities related to quotes (as specified in the `Opportunity` field on a quote)

#### EDITIONS

Available in: Salesforce Classic

Available in: **All Editions** except for **Database.com**

#### USER PERMISSIONS

To view and recover your deleted records:

- "Read" on the records in the Recycle Bin

To view and recover records deleted by other users:

- "Modify All Data"


To recover deleted public tags:

- "Tag Manager"

To purge the Recycle Bin:

- "Modify All Data"

- All custom lookup relationships
- Relationship group members on accounts and relationship groups, with some exceptions
- Tags
- An article's categories, publication state, and assignments

 **Note:** Salesforce only restores lookup relationships that have not been replaced. For example, if an asset is related to a different product prior to the original product record being undeleted, that asset-product relationship is not restored.

## Purging the Recycle Bin

To permanently remove your deleted items prior to the 15 day period, administrators, and users with the “Modify All Data” permission, can click **Empty your Recycle Bin** or **Empty your organization’s Recycle Bin** .

SEE ALSO:

[Delete Records](#)

## Run a Report

To run a report, find it on the Reports tab and click the report name. Most reports run automatically when you click the name. If you’re already viewing a report, click **Run Report** to run it immediately or schedule a future run. In Lightning Experience, the **Run Report** button only appears after you save a report.

If you don’t see any results, check the report for one of these conditions:

- The report didn’t return any data. Check your filter criteria to make sure some data is returned.
- Due to field-level security, you don’t have access to one of the groupings you selected.
- Your custom summary formula’s context didn’t match the chart settings. For example, if the formula is calculated for Industry, but the chart doesn’t include Industry, no results are returned.
- Your values are out of the range of acceptable values. The maximum value allowed is 9999999999999999. The minimum value allowed is -9999999999999999.

If your report returns more than 2,000 records, only the first 2,000 records are displayed. To see a complete view of your report results, click **Export Details**.

If your report takes longer than 10 minutes to complete, Salesforce cancels the report. Try the following techniques to reduce the amount of data in your report:

- Filter for your own records, rather than all records.
- Limit the scope of the data to a specific date range.
- Exclude unnecessary columns from your report.
- Hide the report details.

[Add Filter Logic](#)

Filter logic governs how and when filters apply to your report.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** editions except **Database.com**

### USER PERMISSIONS

To run reports:

- “Run Reports”

To schedule reports:

- “Schedule Reports”

To create, edit, and delete reports:

- “Create and Customize Reports”

AND

“Report Builder”

### Sort Report Results

Sort a report by the data in a particular column by clicking that column's heading. Clicking a column header sorts data according to that column's ascending order: text is sorted from A to Z, numerical data is sorted from lowest to highest, and time/date data is sorted from earliest to latest.

### Visualizing Data with Dashboards

A *dashboard* shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or Visualforce pages. The components provide a snapshot of key metrics and performance indicators for your organization. Each dashboard can have up to 20 components.

## Add Filter Logic

Filter logic governs how and when filters apply to your report.

After adding a filter to your report, the filter is numbered. Your first filter becomes Filter 1 and your second filter becomes Filter 2. You apply filter logic based on these numbered filters.

For example, let's say you have a report of Accounts with fields like `State`, `Annual Revenue`, and `Industry`. Your report has these filters:

1. State includes California, Arizona, Nevada
2. Industry equals Banking
3. Annual Revenue greater than 1000000

These three filters cause your report to return Accounts located in California, Arizona, or Nevada in the Banking industry with annual revenue greater than \$1,000,000. But what if you only want Accounts located in California, Arizona, or Nevada AND in the Banking industry, OR with annual revenue greater than \$1,000,000.00? Add filter logic to your report.

1. Click **Add > Filter Logic**.
2. Enter each filter line number, separated by a filter logic operator.

For example, **(1 AND 2) OR 3** finds records that match both Filter 1 and Filter 2, or Filter 3.

Here's a complete table of filter logic operators:

Operator	Definition
<b>AND</b>	Finds records that match both values. <b>1 AND 2</b>
<b>OR</b>	Finds records that match either value. <b>1 OR 2</b>
<b>NOT</b>	Finds records that exclude values. For example, Filter 1 is <b>Industry equals "Biotechnology"</b> . You set filter logic as <b>Not 1</b> . Your report returns records which aren't equal to Biotechnology.

3. Click **Save**.

### USER PERMISSIONS

To create, edit, and delete reports:

- "Create and Customize Reports"

AND

"Report Builder"

To create custom list views:

- "Read" on the type of record included in the list

To create, edit, or delete public list views:

- "Manage Public List Views"



Now your report shows Banking industry Accounts in California, Arizona, and Nevada with any amount of revenue, and any Account with annual revenue above \$1,000,000.00.

 **Note:**

- Filter logic isn't available for all filters. For example, you can't use them for roll-up summary fields.
- On reports where object A may or may not have object B, you can't use the OR condition to filter across multiple objects. For example, if you enter filter criteria *Account Name starts with M OR Contact First Name starts with M*, an error message displays informing you that your filter criteria is incorrect.
- Except filter logic on lookup fields, you can't use filter logic if your field filters use any of the following fields:
  - Topics
  - Description
  - any Address Line 1, Address Line 2, Address Line 3 fields
  - Forecast Category
  - Campaign: Member Type
  - User: Profile Name
  - Login Status
  - custom long-text area fields

[Filter Operators Reference](#)

The operator in a filter is like the verb in a sentence. Operators specify how filter criteria relate to one another. Refer to this list of filter operators while setting filters on list views, reports, dashboards, and some custom fields.

[Filtering on Special Picklist Values](#)

SEE ALSO:


[Filter Operators Reference](#)

[Filtering on Special Picklist Values](#)

## Filter Operators Reference

The operator in a filter is like the verb in a sentence. Operators specify how filter criteria relate to one another. Refer to this list of filter operators while setting filters on list views, reports, dashboards, and some custom fields.


Operator	Uses
equals	Use for an exact match. For example, "Created equals today."
less than	Use for results that are less than the value you enter. For example, "Quota less than 20000" returns records where the quota field ranges from 0 to 19,999.99.
greater than	Use when you want results that exceed the value you enter; for example, "Quota greater than 20000" returns records where the quota amount begins at 20,000.01.
less or equal	Use for results that match or are less than the value you enter.
greater or equal	Use for results that match or exceed the value you enter.

Operator	Uses
not equal to	Shows results that don't have the value you enter. This operator is especially useful for eliminating empty fields. For example, "Email not equal to <blank>."
contains	Use for fields that include your search string, but sometimes also include other information. For example, "Account contains California" would find California Travel, California Pro Shop, and Surf California. Keep in mind that if you enter a short search string, it can match a longer word. For example, "Account contains pro" would find California Pro Shop and Promotions Corporation. This operator is not case-sensitive.
does not contain	<p>Eliminates records that don't contain the value you enter. For example, "Mailing Address Line 2 does not contain P. O. Box."</p> <p> <b>Note:</b> When specifying filter criteria on roll-up summary fields, <code>does not contain</code> uses "or" logic on comma-separated values. On list views, reports, and dashboards, <code>does not contain</code> uses "and" logic.</p> <p>This operator is not case-sensitive.</p>
starts with	Use when you know what your value starts with, but not the exact text. This operator is a narrower search term than "contains." For example, if you enter "Account starts with California," you find California Travel and California Pro Shop, but not Surf California.
includes	<p>Available when you choose a multi-select picklist as the selected field. Use this operator to find records that include one or more of the values you enter.</p> <p>For example, if you enter "Interests includes hockey, football, baseball," you find records that have only hockey selected, and records that have two or three of the values entered. Results do not include partial matches of values.</p>
excludes	<p>Available when you choose a multi-select picklist as the selected field. Use this operator to find records that do not contain any values that match the ones entered.</p> <p>For example, if you enter "Interests exclude wine, golf," your report lists records that contain any other values from that picklist, including values that are blank. Results do not include partial matches of values.</p>
between	<p>Available for dashboard filters only. Use to filter on ranges of values. For each range, the filter returns results that are greater than or equal to the minimum value and less than the maximum value.</p> <p>For example, if you enter "Number of Employees from 100 through 500," your results include accounts with 100 employees up to those with 499 employees. Accounts with 500 employees aren't included in the results.</p>
within	Available when you create list views based on a Geolocation custom field. Shows results that are within the specified radius from a fixed latitude and longitude. For example, if you enter "Warehouse location within 50 miles 37.775° -122.418°", your list view includes all warehouses within a 50-mile radius of San Francisco, California.


## Filtering on Special Picklist Values

When creating filter criteria, you can use special picklist values for your search criteria. These special picklists have values of either `True` or `False`.

For example, to show all opportunities you have won, enter `Won equals True` as your search criteria. To show all closed/lost opportunities, enter `Closed equals True` and `Won equals False`.

 **Note:** If you are creating filter criteria for a report or list view, the lookup icon automatically displays when you choose to filter on one of the special picklists. Click the lookup icon to choose the value `True` or `False`. Alternatively, you can manually enter `True` or `False` in the filter criteria.

These are the available fields and their values:

Special Picklist Field	Value	Description
Accounts and contacts: <code>Is Person Account</code>	<code>True</code>	The account is a person account. Your administrator could have customized the name of this field. This field displays as the person account icon (  ).
	<code>False</code>	The account is a business account.
Accounts, leads, and opportunities: <code>Partner Account</code>	<code>True</code>	The account is a partner account, or the lead or opportunity owner is a partner user.
	<code>False</code>	The account is not a partner account or the lead or opportunity owner is not a partner user.
Activities: <code>All-day</code>	<code>True</code>	Applies only to events, not tasks. The event is marked as an all day event.
	<code>False</code>	The event has a specific time.
Activities: <code>Closed</code>	<code>True</code>	Applies only to tasks, not events. The task has been closed, that is, the task <code>Status</code> field has a "Closed" value.
	<code>False</code>	Task is still open.
Activities: <code>Event Invitation</code> (Only for reports)	<code>True</code>	Applies only to events, not tasks. The event is the meeting invite sent to another user for a multi-person event.
	<code>False</code>	The event is the original multi-person event assigned to the event host.
	<code>False</code>	Activity does not have a green sheet.
Activities: <code>Task</code>	<code>True</code>	Activity is a task, not an event.
	<code>False</code>	Activity is an event.
Campaigns: <code>Active</code>	<code>True</code>	Campaign is active and can be chosen from various campaign picklists.
	<code>False</code>	Campaign is inactive.


### EDITIONS

Available in: Salesforce Classic

The available fields vary according to which Salesforce Edition you have.

Special Picklist Field	Value	Description
Cases: Closed	True	The case is closed, that is, the case <code>Status</code> field has a "Closed" value.
	False	Case is still open.
Cases: Escalated	True	Case has been automatically escalated via your org's escalation rule.
	False	Case has not been escalated.
Cases: New Self-Service Comment	True	Case has a new comment added by a Self-Service user.
	False	Case does not have a new Self-Service comment.
Cases: Open (Only for reports)	True	The case is open, that is, the case <code>Status</code> has a value that is not equivalent to "Closed."
	False	Case has been closed.
Cases: Self-Service Commented	True	Case has a comment added by a Self-Service user.
	False	Case does not have a Self-Service comment.
Contacts: Email Opt Out	True	The contact cannot be included in a mass email recipient list.
	False	The contact can receive mass email.
Contacts: Self-Service Active (Only for reports)	True	The contact is enabled to log in to your Self-Service portal.
	False	The contact is not enabled for Self-Service.
Leads: Converted (Only for reports)	True	The lead has been converted.
	False	The lead has not been converted.
Leads: Email Opt Out	True	The lead cannot be included in a mass email recipient list.
	False	The lead can receive mass email.
Leads: Unread	True	The lead has not yet been viewed or edited by the owner since it was assigned to that user.
	False	The lead has been viewed or edited at least once by the owner since it was assigned.
Opportunities: Closed	True	The opportunity is closed, that is, the <code>Stage</code> field has a value of the type Closed/Won or Closed/Lost.
	False	The opportunity is still open.
Opportunities: Primary (Only for Partner Opportunities report)	True	The partner for the opportunity has been marked as the primary partner.
	False	The partner for the opportunity has not been marked as the primary partner.

Special Picklist Field	Value	Description
Opportunities: Private	True	The opportunity owner has checked the <code>Private</code> box on the opportunity edit page.
	False	The <code>Private</code> box on the opportunity is not checked.
Opportunities: Won	True	The opportunity is closed and won, that is, the <code>Stage</code> field has a value of the type <code>Closed/Won</code> .
	False	The opportunity has not been won. The <code>Stage</code> field may have a value of the type <code>Open</code> or <code>Closed/Lost</code> .
Products: Active	True	Product is active and can be added to opportunities in Enterprise, Unlimited, and Performance Edition orgs.
	False	Product is inactive and cannot be added to opportunities.
Product: Has Quantity Schedule	True	Product has a default quantity schedule.
	False	Product does not have a default quantity schedule.
Product: Has Revenue Schedule	True	Product has a default revenue schedule.
	False	Product does not have a default revenue schedule.
Solutions: Visible in Self-Service Portal	True	The solution has been marked <code>Visible in Self-Service Portal</code> and is visible to Self-Service portal users.
	False	Solution is not marked <code>Visible in Self-Service Portal</code> and is not visible to Self-Service portal users.
Solutions: Reviewed	True	The solution has been reviewed, that is, the solution <code>Status</code> field has a "Reviewed" value.
	False	Solution is not reviewed.
Solutions Out of Date	True	The translated solution has not been updated to match the master solution with which it is associated.
	False	The translated solution has been updated to match the master solution with which it is associated.
Users: Active	True	User is active and can log in.
	False	User is inactive and cannot log in.
Users: Offline User	True	User has access to use Connect Offline.
	False	User is not enabled for Connect Offline use.
Users: Marketing User	True	User can manage campaigns.
	False	User is not enabled to manage campaigns.
User: Is Partner	True	User is a partner user.
	False	User is not a partner user.

 **Note:** The special picklists you can view are only those that are visible in your page layout and field-level security settings.

## Sort Report Results

Sort a report by the data in a particular column by clicking that column's heading. Clicking a column header sorts data according to that column's ascending order: text is sorted from A to Z, numerical data is sorted from lowest to highest, and time/date data is sorted from earliest to latest.

- To reverse the sort order, click the column heading a second time.
- If the floating report header is enabled for your organization, sort behavior is slightly different. When users sort data by clicking a floating report heading, the report refreshes and redirects users to the beginning of report results.
- In a report with multiple grouping levels, you can sort by the summary value that defines each grouping. For example, take an Opportunities report that's grouped by type of business. Each `Type` grouping is in turn grouped by `Stage`, and each `Stage` grouping is grouped by `Lead Source`. Now you can sort the `Type` groupings by amount, the `Stage` grouping by stage, and the `Lead Source` grouping by record count.

### EDITIONS

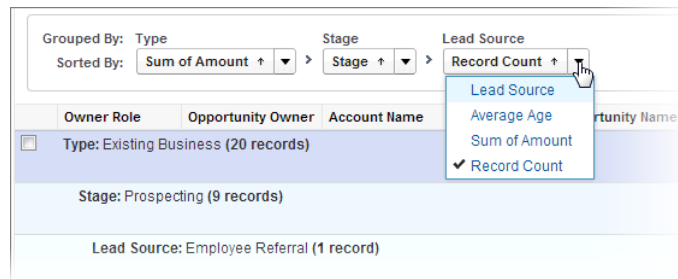
Available in: both Salesforce Classic and Lightning Experience

Available in: **All** editions except **Database.com**

### USER PERMISSIONS

To sort report results:

- "Run Reports"



## Visualizing Data with Dashboards

A *dashboard* shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or Visualforce pages. The components provide a snapshot of key metrics and performance indicators for your organization. Each dashboard can have up to 20 components.

Clicking the Dashboards tab displays the dashboard you viewed most recently. The top of the page shows the time the dashboard was refreshed last and the user whose permissions determine what data is visible on the dashboard.

Each component in a dashboard shows data from an underlying report. If you have access to the folder for the underlying source report, you can see the related dashboard component. Click a dashboard component or its elements to drill down to the source report, filtered report, record detail page, or other URL. If you drill down on a filtered component, the dashboard filters are applied to the source report.

Click **Go to Dashboard List** to view your dashboards. Find a dashboard using dashboard finder. Type a name in the `View Dashboard` field and choose a dashboard from the list of results. You can only see dashboards in folders you can access.

Follow a dashboard to get updates about the dashboard posted to your Chatter feed.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To view and refresh dashboards:

- “Run Reports” AND access to dashboard folder

To create dashboards:

- “Run Reports” AND “Manage Dashboards”

To edit and delete dashboards you created:

- “Run Reports” AND “Manage Dashboards”

To edit and delete dashboards you didn't create:

- “Run Reports,” “Manage Dashboards,” AND “View All Data”

## Your Access to UI Elements, Records, and Fields

Your Salesforce admin can customize many different areas to secure your company's data. Users in Professional, Enterprise, Performance, Unlimited, and Developer Edition orgs can control other users' access to their data by sharing records individually with colleagues.

Action	Access Needed
To view a tab:	<ul style="list-style-type: none"> <li>• You must have the “Read” permission on the records within that tab.</li> <li>• Make sure you have customized your personal display to show the tab.</li> </ul>

### EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions except **Database.com**

**Action****Access Needed**

---

To view a record:

- Make sure you have the “Read” permission on the type of record you want to view.
- Professional, Enterprise, Performance, Unlimited, and Developer Edition orgs can set a sharing model that determines the access users have to records they do not own. Depending on your sharing model, the owner may need to share the record with you if you are not the owner of the record or above the owner in the role hierarchy.
- Developer and Performance Edition orgs, and Enterprise and Unlimited Edition orgs with the Sales Cloud, can use territory management to grant access to accounts, opportunities, and cases.

---

To view a field:

- Make sure you have the “Read” permission on the type of record for the field.
- For Professional, Enterprise, Performance, and Unlimited Edition orgs, check the field-level security; your field-level security settings may prevent you from seeing the field.
- Check your page layout; depending on your page layout settings, you may see some fields and not others.

---

To edit a field:

- Make sure you have the “Edit” permission on the type of record for the field.
- For Professional, Enterprise, Performance, and Unlimited Edition orgs, check the field-level security; your field-level security settings may set a field to “Read-Only.”
- Check your page layout; page layouts can set fields to read only.

---

To view a related list:

- Make sure you have the “Read” permission on the type of records displayed in the related list.
- Check your page layout; depending on your page layout settings, you may see some fields and not others.

---

To view a button or link:

- Make sure you have the necessary permission to perform the action. Buttons and links only display for users who have the appropriate user permissions to use them.
- 

**SEE ALSO:**

[Granting Access to Records](#)

[Viewing Which Users Have Access to Your Records](#)

[Record Access Levels](#)



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