

7. JULY 2021

Salesforce Admin Training



Agenda



1 Intro

Setup Navigation, Setup Access

2 Administration

Users, Data Management

3 Settings

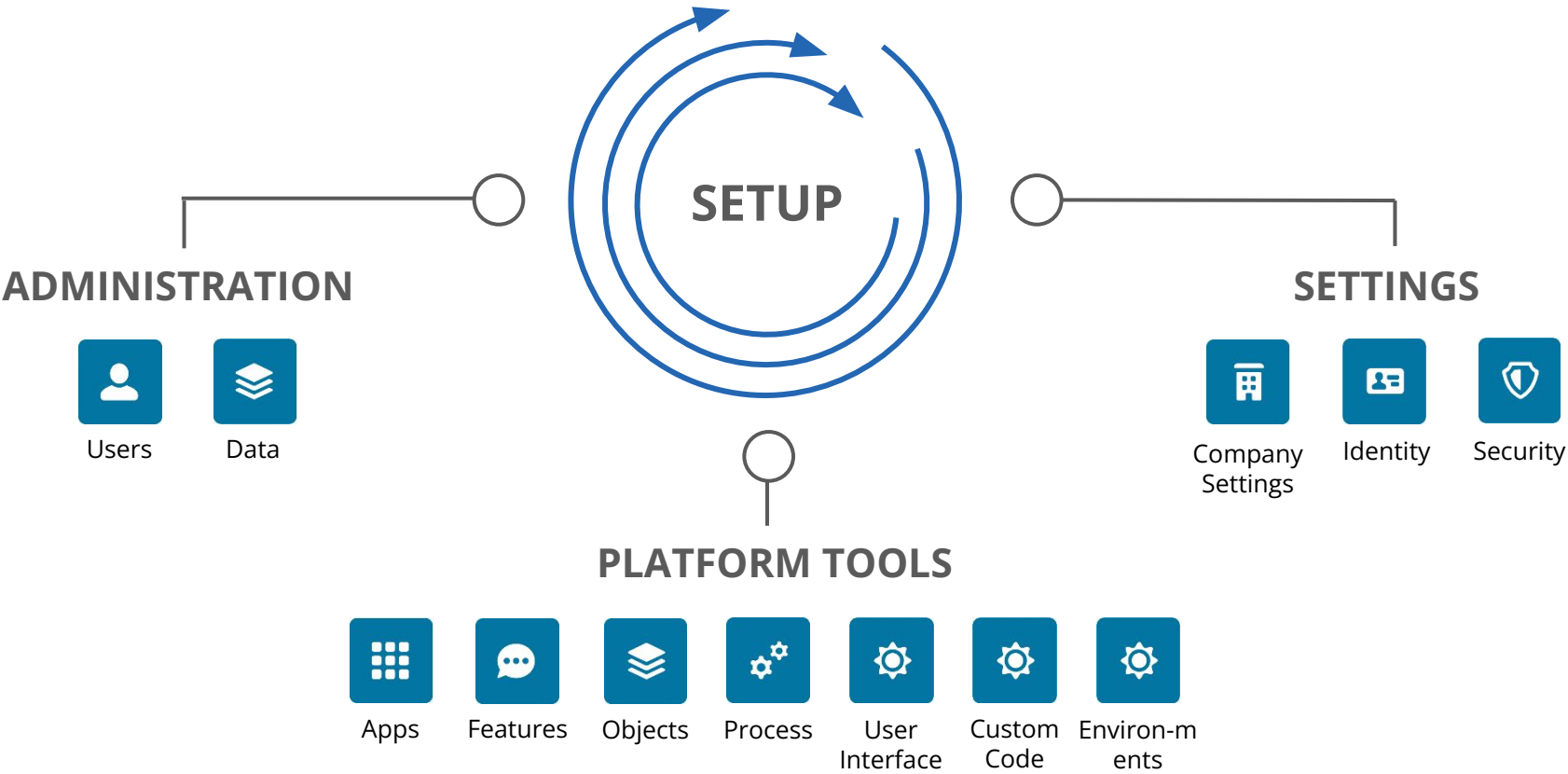
Company Information, Login History, Sharing Settings

4 Platform Tools

App Manager, Chatter Settings, Object Manager, Process Builder

Setup

Overview



Setup

Setup Access

Overview

1. From any page, you can click the gear icon in the upper right corner and select Setup
2. Use the setup tree to quickly find what you need to change without searching
3. If you can't find a specific subcategory, just search for it in the Quick Find search bar
4. Click on Object Manager to find all your objects - custom and standard - in one place

The screenshot shows the Salesforce Setup interface. Callout 1 points to the gear icon in the top right corner. Callout 2 points to the 'Setup' link in the left-hand navigation menu. Callout 3 points to the 'Quick Find' search bar at the top of the left menu. Callout 4 points to the 'Object Manager' link in the top navigation bar.

Setup Home

Go Mobile
Prepare the mobile app for your users.
[Get Started](#)

Visit AppExchange
Extend Salesforce with the #1 business app marketplace.
[Get Started](#)

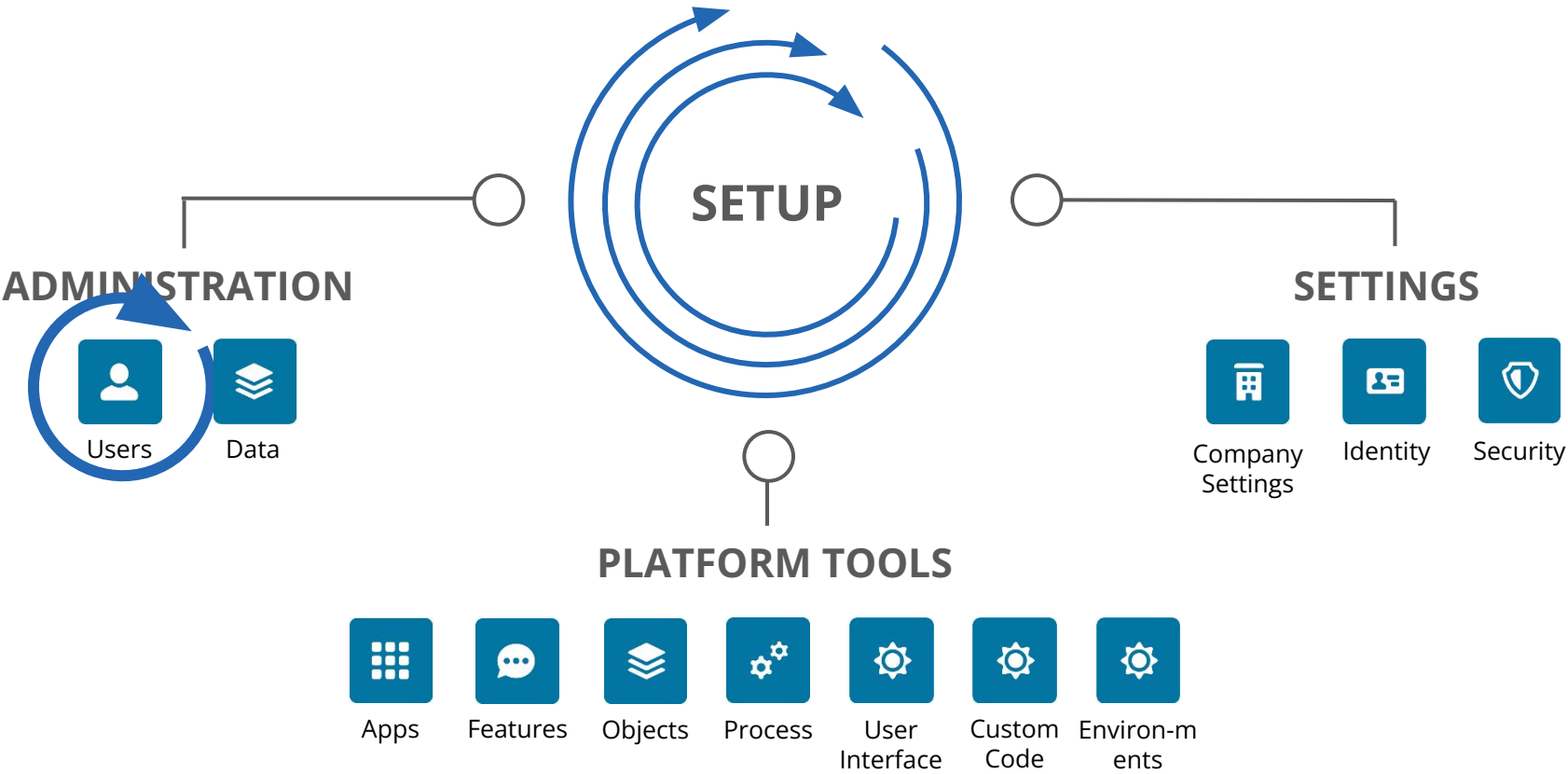
Click to Customize
Use the Object Manager to add fields, build layouts, and more.
[Get Started](#)

Most Recently Used
10 items

| NAME | TYPE | OBJECT |
|---|------------------|--------|
| | User | |
| Process Automation Home | Lightning Page | |
| HeatMap | Visualforce Page | |

Setup

Overview



Users

Setup | Users | Users

Manage User

1. In the user list, you can view and manage all users in your org
2. Reset Password for a particular or multiple user
3. Freeze a user to quickly restrict access to Salesforce
4. You can't delete a user, but you can deactivate an account so a user can no longer log in to Salesforce

All Users [Help for this Page](#)

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

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

1

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

| Action | Full Name | Alias | Username | Last Login | Role | Active | Profile | Manager |
|----------------------|-----------|-------|----------|------------------|--|--------|---------------------------------------|---------|
| Edit | | | | | | ✓ | Chatter Free User | |
| Edit | | | | 20.11.2017 16:43 | CEO | ✓ | System Administrator | |
| Edit | | | | | Director, Direct Sales | ✓ | Custom: Sales Profile | |

2 **3**

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

| | | |
|----------|----------------|--|
| Name | Role | Director, Direct Sales |
| Alias | User License | Salesforce |
| Email | Profile | Custom: Sales Profile |
| Username | Active | ✓ 4 |
| Nickname | Marketing User | <input type="checkbox"/> |
| Title | Offline User | <input type="checkbox"/> |
| Company | Knowledge User | <input type="checkbox"/> |

Profiles

Setup | Users | Profiles

Profiles define how users access objects and data, and what they can do within the application

General information about profiles

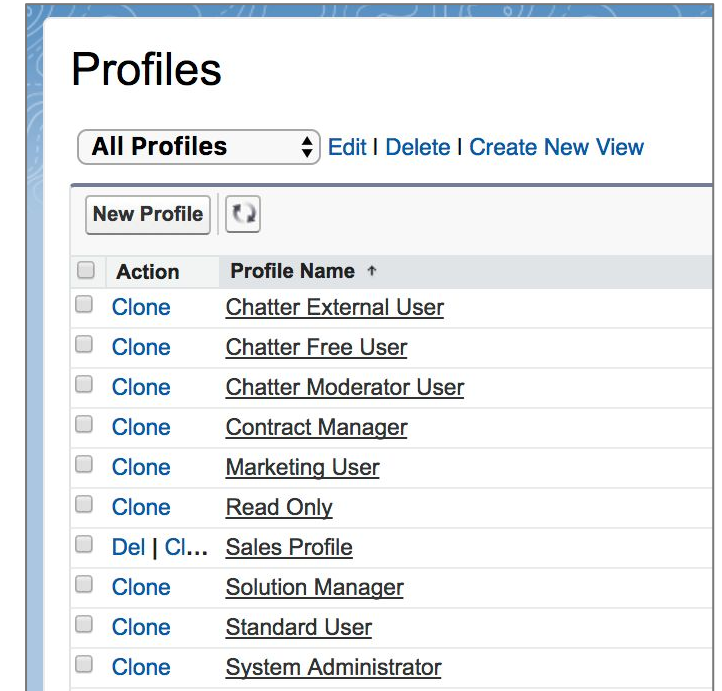
- When creating a user, a profile must be assigned. Each user can have one profile
- Standard profiles are available, custom profiles can be created
- Tipp: Clone a standard profile and adjust it to your needs

A profile determines what a user can do

- Create, read, edit, delete records (can be defined per object)
- Administrative permission (customize app)
- General functionality (e.g. run report, create public list views)

A profile describes what a user can see

- Apps
- Tabs
- Record Types
- Page Layouts
- Fields

A screenshot of the Salesforce 'Profiles' page. At the top, there's a header 'Profiles' and a sub-header 'All Profiles' with a dropdown arrow. To the right of the sub-header are links for 'Edit', 'Delete', and 'Create New View'. Below this is a 'New Profile' button and a refresh icon. The main content is a table with two columns: 'Action' and 'Profile Name'. The table lists several profiles, each with a 'Clone' link in the 'Action' column and the profile name in the 'Profile Name' column. The profiles listed are: Chatter External User, Chatter Free User, Chatter Moderator User, Contract Manager, Marketing User, Read Only, Sales Profile, Solution Manager, Standard User, and System Administrator. The 'Sales Profile' row has a 'Del | Cl...' link instead of just 'Clone'.

| Action | Profile Name ↑ |
|-----------------------------|--|
| Clone | Chatter External User |
| Clone | Chatter Free User |
| Clone | Chatter Moderator User |
| Clone | Contract Manager |
| Clone | Marketing User |
| Clone | Read Only |
| Del Cl... | Sales Profile |
| Clone | Solution Manager |
| Clone | Standard User |
| Clone | System Administrator |

Profiles

Setup | Users | Profiles

Object Settings

1. Use the search box to find the setting you need
2. Click on Assigned Users to view and manage all assigned users to this profile
3. Click on Object Settings to see the levels of permission on all objects. Select the object you want to set permissions – e.g. Accounts
4. Specify the type of access (Read, Create, Edit, Delete..) that users have on objects, fields, record types or tabs

1 Find Settings... Clone Delete Edit Properties

2 Assigned Users

3 Object Settings

4

All Object Settings

| Object Name | Object Permissions |
|--------------------|--------------------|
| Accounts | Read, Create, Edit |
| Aircraft | |
| App Launcher | |
| Asset Relationship | |
| Assets | |
| Badges | |
| Badges Received | |
| Campaign Influence | |
| Campaign Member | |

Object Permissions

| Permission Name | Enabled |
|-----------------|-------------------------------------|
| Read | <input checked="" type="checkbox"/> |
| Create | <input checked="" type="checkbox"/> |
| Edit | <input checked="" type="checkbox"/> |
| Delete | <input type="checkbox"/> |
| View All | <input type="checkbox"/> |
| Modify All | <input type="checkbox"/> |

Profiles

Setup | Users | Profiles

Important System Permissions

- Create and Customize Dashboards
- Create and Customize List Views
- Create and Customize Reports
- Create and Own New Chatter Groups
- Create Report Folders
- Export Reports
- Hide Option to Switch to Salesforce Classic
- Lightning Experience User
- Manage Public List Views
- Mass Edits from Lists
- Run Reports
- View Setup and Configuration

System

System Permissions

Permissions to perform actions that apply across apps, such as "Modify All Data"

Desktop Client Access

Permissions to access desktop clients, such as "Connect for Office"

Login Hours

Settings that control when users can login

Settings that apply across record and user management

[Learn More](#)

| Permission Name | Enabled | Description |
|--|---------------------------------------|--|
| Access Libraries | <input checked="" type="checkbox"/> | Access libraries. |
| Add People to Direct Messages | <input checked="" type="checkbox"/> | Lets a user add others to direct messages the user is in. |
| Allow Inclusion of Code Snippets from UI | <input type="checkbox"/> | Allow users to post code snippets from the UI where available. |
| Allow sending of List Emails | <input checked="" type="checkbox"/> ⓘ | Allow users to create, edit and send List Emails |
| Allow WebLink access via the Tooling API | <input checked="" type="checkbox"/> | Allow users to access WebLinks via the Tooling API |
| Assign Topics | <input checked="" type="checkbox"/> | Assign existing topics to feed items. Remove topics from feed items. |

Roles

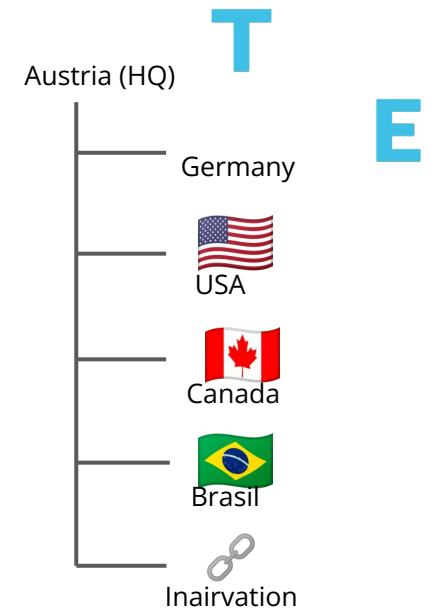
Setup | Users | Roles

Role Hierarchy

- Use roles together with sharing settings to determine the levels of access that users have to your Salesforce org's data
- Users at any role level can view, edit, and report on all data that's owned by or shared with users below them in the role hierarchy (unless your Salesforce org's sharing model for an object specifies otherwise)
- To enable managers to see team records, create a role hierarchy



Role Hierarchy F/LIST



The Role Hierarchy is a functional setup to manage access, not an org chart!

Permission Sets

Setup | Users | Permission Sets

Permission Sets

- A permission set is a collection of settings and permissions that give users access to various tools and functions
- When a new permission set is created, the administrator can set the same permissions and settings as in profiles, with one distinction, that permission sets extend users' functional access without changing their profiles
- Create permission sets to grant access among logical groupings of users, regardless of their primary job function
- Each user can have multiple permission sets if required

Permission Sets

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

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

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

| Action | Permission Set Label | Description | License |
|--|-------------------------|--------------------------------|--------------------|
| <input type="checkbox"/> Clone | Salesforce Console User | Enable Salesforce Console User | Sales Console User |

Permission Set Overview

Find Settings... | [Clone](#) | [Delete](#) | [Edit Properties](#) | [Manage Assignments](#)

| Description | API Name | Opens Access to Reports |
|-----------------------------|------------------|-------------------------|
| License | Namespace Prefix | |
| Session Activation Required | | |
| Created By | Nikolaus Günzl | 21.11.2017 15:09 |
| Last Modified By | Nikolaus Günzl | 21.11.2017 15:09 |

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

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

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

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

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access
Permissions to authenticate against external data sources

Settings that apply to Salesforce apps, such as Sales, and custom apps built on Force.com
[Learn More](#)

Public Groups

Setup | Users | Public Groups

Groups

- A public group consists of a set of users. Following can be added:
 - Other Public Groups
 - Roles
 - Roles and Subordinates
 - Users
- A public group can only be created by Administrators but everyone in the organization can use such groups
- Within Public Groups it can be defined, if access should be granted by using the roll-up access functionality of the Role Hierarchy

The screenshot displays the Salesforce 'Public Groups' management page. At the top, there's a header 'Public Groups' with a 'Help for this Page' link. Below the header, a descriptive text states: 'A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.' A 'View:' dropdown is set to 'All', with links for 'Edit' and 'Create New View'. A navigation bar includes letters A-Z and 'Other', with 'All' selected. A table lists existing groups, with one row highlighted: 'Salesforce Administrators' (Group Name), 'Salesforce Administrators' (Label), 'Eichhorn, Christian' (Created By), and '08.09.2017 06:25' (Created Date). A blue arrow points from the 'New' button in the table to the 'New Group' modal. The modal is titled 'Group Membership New Group' and contains a 'Group Information' section with 'Save' and 'Cancel' buttons. Below this is the 'New Public Group' section with input fields for 'Label' and 'Group Name', a checked checkbox for 'Grant Access Using Hierarchies', and a search section with a dropdown menu showing 'Public Groups', 'Roles', 'Roles and Subordinates', and 'Users'. The search section also includes a 'for:' field, a 'Find' button, and a table for 'Selected Members' with a '--None--' entry and an 'Add' button.

Public Groups [Help for this Page](#)

A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.

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

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

| Action | Label | Group Name | Created By | Created Date |
|--|---------------------------|---------------------------|---------------------|------------------|
| Edit Del | Salesforce Administrators | Salesforce Administrators | Eichhorn, Christian | 08.09.2017 06:25 |

Group Membership
New Group

Group Information [Save](#) [Cancel](#)

New Public Group

Label

Group Name [i](#)

Grant Access Using Hierarchies ☒ [i](#)

Search ☒ Public Groups
Roles
Roles and Subordinates
Users

for: [Find](#)

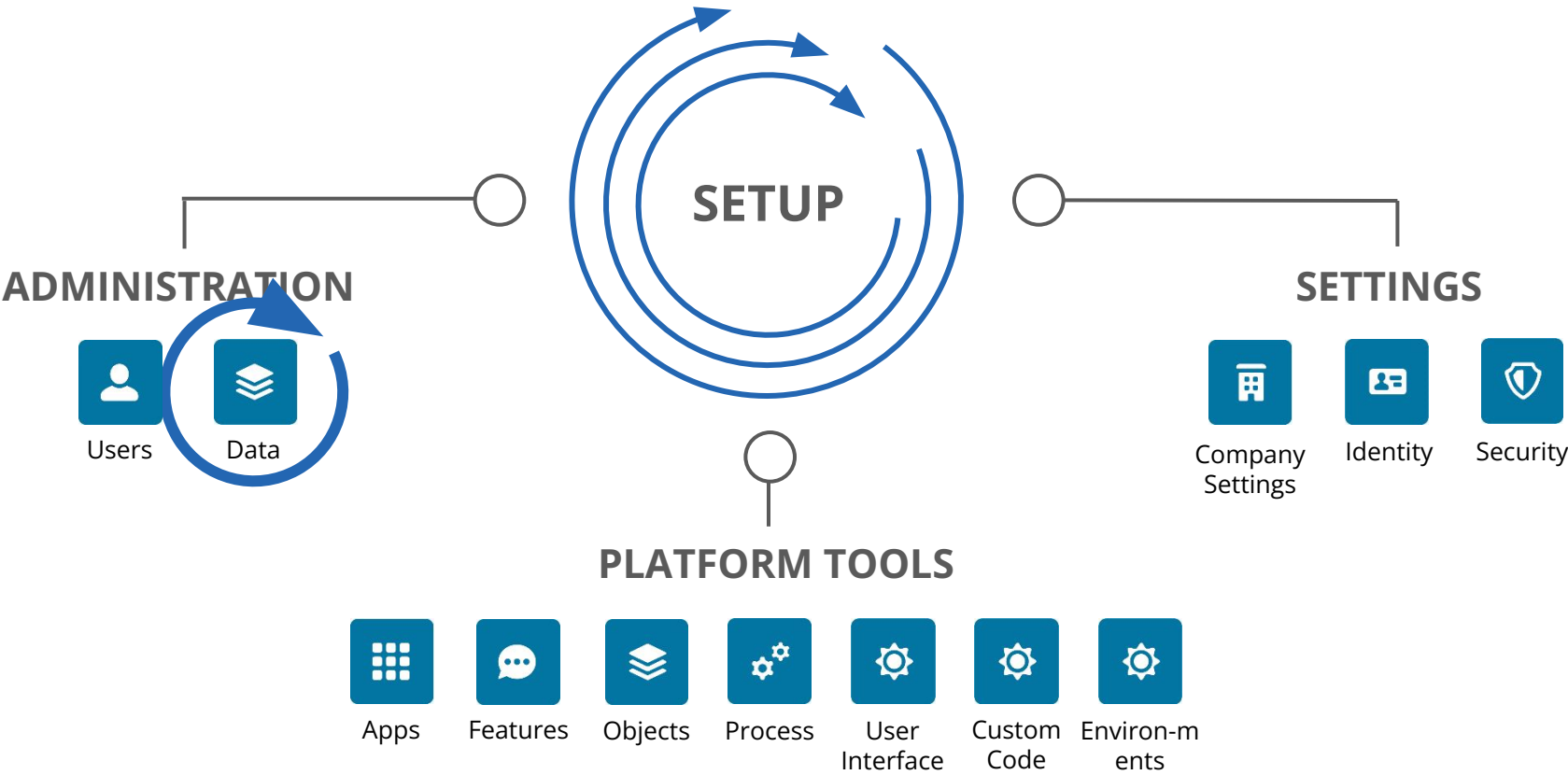
Available **Selected Members**

--None--

Add [▶](#)

Setup

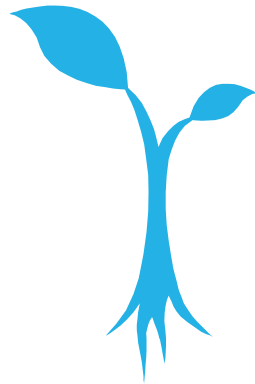
Overview



Data Import Wizard

Setup | Data | Data Import Wizard

Import
your data
in 4 easy
steps



1. Prepare your data

for import and create an import file. Doing this step first prevents errors, duplication of data, and frustration. See how to clean your data in this [video](#).



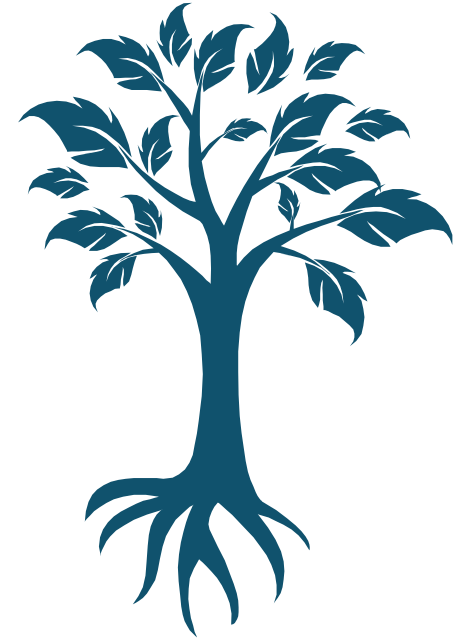
2. Start the wizard

and choose the data you want to import. Select Standard- or Custom objects depending in which data you want to import. Choose if you want to add new or update existing records



3. Edit field mapping

Salesforce maps as many fields as possible. Make sure your field names match Salesforce field names. Unmapped fields are not imported into Salesforce



4. Review

your import information on the Review page, start the import and check the import status afterwards

Data Import Wizard

Setup | Data | Data Import Wizard

Import Wizard

- Test a small fraction of your import data first to make sure that you've prepared your source data correctly
- Import up to 50,000 records at a time
- To import User, Opportunity or a record count that exceeds 50,000, use Data Loader

Data Import Wizard [Help for this page](#)

Recent Import Jobs

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

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

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

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

Before you import your data . . .

Import your data in 3 easy steps!
Launch the Data Import Wizard to import your data.

Pre-step: Prepare your data for import → **Choose data to import** → **Edit field mapping**

Launch Wizard!

Import your Data into Salesforce

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

What kind of data are you importing?

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

What do you want to do?

Add new records

Match Contact by:
--None--

Match Account by:
--None--

Which Contact field in your file do you want to match against to set the Contact: Link To New Contact lookup field?
--None--

Trigger workflow rules and processes?
☐ Trigger workflow rules and processes for new and updated records

Record type
Partner

Assign All Contacts to Campaigns
☐ Assign contacts to campaigns

Where is your data located?

Drag CSV file here to upload

CSV

Outlook CSV

ACT! CSV

GMail CSV

Data Export

Setup | Data | Data Export

Export your data

- Data Export generates backup files of your data on a weekly or monthly basis (depending on your edition)
- Choose if single objects or all data should be exported into a set of comma-separated values (CSV) files
- Exports complete as soon as possible, however Salesforce can't guarantee the date and time of completion

Monthly Export Service [Help for this Page](#)

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

Next scheduled export:
None

[Export Now](#) [Schedule Export](#)

[Start Export](#) [Cancel](#)

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

☒ Include all data

| | | |
|--|---|---|
| <input type="checkbox"/> Contract | <input type="checkbox"/> Order | <input type="checkbox"/> OrderItem |
| <input type="checkbox"/> Approval | <input type="checkbox"/> ContractContactRole | <input type="checkbox"/> RecordType |
| <input type="checkbox"/> BusinessProcess | <input type="checkbox"/> EntityHistory | <input type="checkbox"/> FieldHistory |
| <input type="checkbox"/> EmailRoutingAddress | <input type="checkbox"/> Campaign | <input type="checkbox"/> CampaignMember |
| <input type="checkbox"/> Account | <input type="checkbox"/> Contact | <input type="checkbox"/> Lead |
| <input type="checkbox"/> Opportunity | <input type="checkbox"/> OpportunityContactRole | <input type="checkbox"/> OpportunityHistory |
| <input type="checkbox"/> OpportunityLineItem | <input type="checkbox"/> OpportunityCompetitor | <input type="checkbox"/> Partner |
| <input type="checkbox"/> ForecastingAdjustment | <input type="checkbox"/> ForecastingQuota | <input type="checkbox"/> FiscalYearSettings |
| <input type="checkbox"/> Period | <input type="checkbox"/> PricebookEntry | <input type="checkbox"/> Product2 |
| <input type="checkbox"/> Asset | <input type="checkbox"/> Case | <input type="checkbox"/> CaseComment |
| <input type="checkbox"/> CaseContactRole | <input type="checkbox"/> CaseHistory2 | <input type="checkbox"/> CaseSolution |
| <input type="checkbox"/> Solution | <input type="checkbox"/> ContentVersion | <input type="checkbox"/> Note |

Duplicate Rules

Setup | Data | Duplicate Management | Duplicate Rules and Matching Rules

Duplicate Rule

- Use duplicate rules to define what happens when a user tries to save a duplicate record
- Specify an action that triggers when a user tries to save a duplicate record
- Select a matching rule for this duplicate rule
- Notice: Matching rules must be created before creating a duplicate rule

Matching Rule

- A matching rule consists of fields and matching methods, which determine how the rule compares records
- Select matching method Fuzzy, if values should match approximately, or Exact, if values should match exactly
- Set the checkbox Match Blank Fields if blank fields should be considered as matches

The image shows a screenshot of the 'Duplicate Rule Edit' interface. The interface is divided into several sections: 'Rule Details', 'Actions', and 'Matching Rules'. The 'Rule Details' section includes fields for 'Rule Name', 'Description', 'Object' (set to 'Account'), and 'Record-Level Security' (with options 'Enforce sharing rules' and 'Bypass sharing rules'). The 'Actions' section includes 'Action On Create' and 'Action On Edit' with dropdowns for 'Allow' and checkboxes for 'Alert' and 'Report'. The 'Alert Text' field contains 'Use one of these records?'. The 'Matching Rules' section includes 'Compare Accounts With' (set to 'Accounts'), 'Matching Rule' (set to 'Standard Account Matching Rule'), 'Matching Criteria' (set to 'Matching rule for account records. Mo'), and 'Field Mapping' (set to 'Mapping Selected'). A blue arrow points from the 'Matching Rule' dropdown to a detailed view of the 'Matching Rule' interface. This detailed view shows 'Rule Details' (Object: Account, Rule Name: Account Matching Rule, Unique Name: Account_Matching_Rule, Description: Matching rule for account records) and 'Matching Criteria' (Tell the rule which fields to compare and how). The 'Matching Criteria' section includes a table with columns 'Field', 'Matching Method', and 'Match Blank Fields'. The table has four rows, each with a dropdown for 'Field' (set to 'Account Name'), a dropdown for 'Matching Method' (set to 'Fuzzy: Company Name'), and a checkbox for 'Match Blank Fields' (unchecked). The 'Match Blank Fields' column has a label 'AND' next to each row. Below the table is a link 'Add Filter Logic...'. The 'Duplicate Rule Edit' interface also has buttons for 'Save', 'Save & New', and 'Cancel'.

Duplicate Rule Edit [Save] [Save & New] [Cancel]

Rule Details

Rule Name []
Description []
Object Account
Record-Level Security ☒ Enforce sharing rules ☐ Bypass sharing rules

Actions

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

Action On Create [Allow] ☒ Alert ☒ Report
Action On Edit [Allow] ☐ Alert ☐ Report
Alert Text Use one of these records?

Matching Rules

Define how duplicate records are identified.

Compare Accounts With [Accounts]
Matching Rule [Standard Account Matching Rule]
Matching Criteria Matching rule for account records. Mo
Field Mapping ☒ Mapping Selected

[Add Rule] [Remove Rule]

Rule Details

Object Account
Rule Name Account Matching Rule
Unique Name Account_Matching_Rule
Description Matching rule for account records

Matching Criteria

Tell the rule which fields to compare and how.

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

[Add Filter Logic...](#)

Mass Delete/Transfer Records

Setup | Data | Mass Delete/Transfer Records

Mass Delete Records

- Delete multiple reports or records at the same time
- Use this tool for instance when a user imported his leads incorrectly and he wants to start over

► Step 1: Review what will happen when you mass delete your Accounts:

► Step 2: Recommendation prior to mass deleting:

▼ Step 3: Find Accounts that match the following criteria:

| | | | | | |
|---------------------|---|----------|---|---------|-----|
| Account Record Type | ↕ | equals | ↕ | Partner | AND |
| --None-- | ↕ | --None-- | ↕ | | AND |
| --None-- | ↕ | --None-- | ↕ | | AND |
| --None-- | ↕ | --None-- | ↕ | | AND |
| --None-- | ↕ | --None-- | ↕ | | |

Filter By Additional Fields (Optional):

- You can use "or" filters by entering multiple items in the third column, separated
- For date fields, enter the value in following format: 22.11.2017
- For date/time fields, enter the value in following format: 22.11.2017 15:59

Search

► Step 4: Choose to delete Accounts with Closed-Won Opportunities

► Step 5: Choose to delete Accounts with another owner's Opportunities

► Permanently delete

Mass Transfer Records

- Transfer multiple accounts, leads and custom objects from one user to another
- Use this for transferring ownership and access rights

Mass Transfer Accounts

Transfer from

Transfer to

☐ Transfer open opportunities not owned by the existing account owner

☐ Transfer closed opportunities

☐ Transfer open cases owned by the existing account owner

☐ Transfer closed cases

Find accounts that match the following criteria:

| | | | | | |
|-----------------|---|----------|---|-----|-----|
| Billing Country | ↕ | equals | ↕ | USA | AND |
| --None-- | ↕ | --None-- | ↕ | | AND |
| --None-- | ↕ | --None-- | ↕ | | AND |
| --None-- | ↕ | --None-- | ↕ | | AND |
| --None-- | ↕ | --None-- | ↕ | | |

Filter By Additional Fields (Optional):

- You can use "or" filters by entering multiple items in the third column
- For date fields, enter the value in following format: 22.11.2017
- For date/time fields, enter the value in following format: 22.11.2017 15:59

Storage Usage

Setup | Data | Storage Usage

Storage

- You can view the available space for data storage and file storage, the amount of storage in use per record type, the top users according to storage utilization, and the largest files in order of size. To view what types of data a particular user is storing, click that user’s name
- Individual users can view their own storage usage in their personal information
- When you need more storage, increase your storage limit or reduce your storage usage by deleting outdated leads or contacts and removing any unnecessary files and attachments

Storage Usage

[Help for this Page](#)

Your organization's storage usage is listed below.

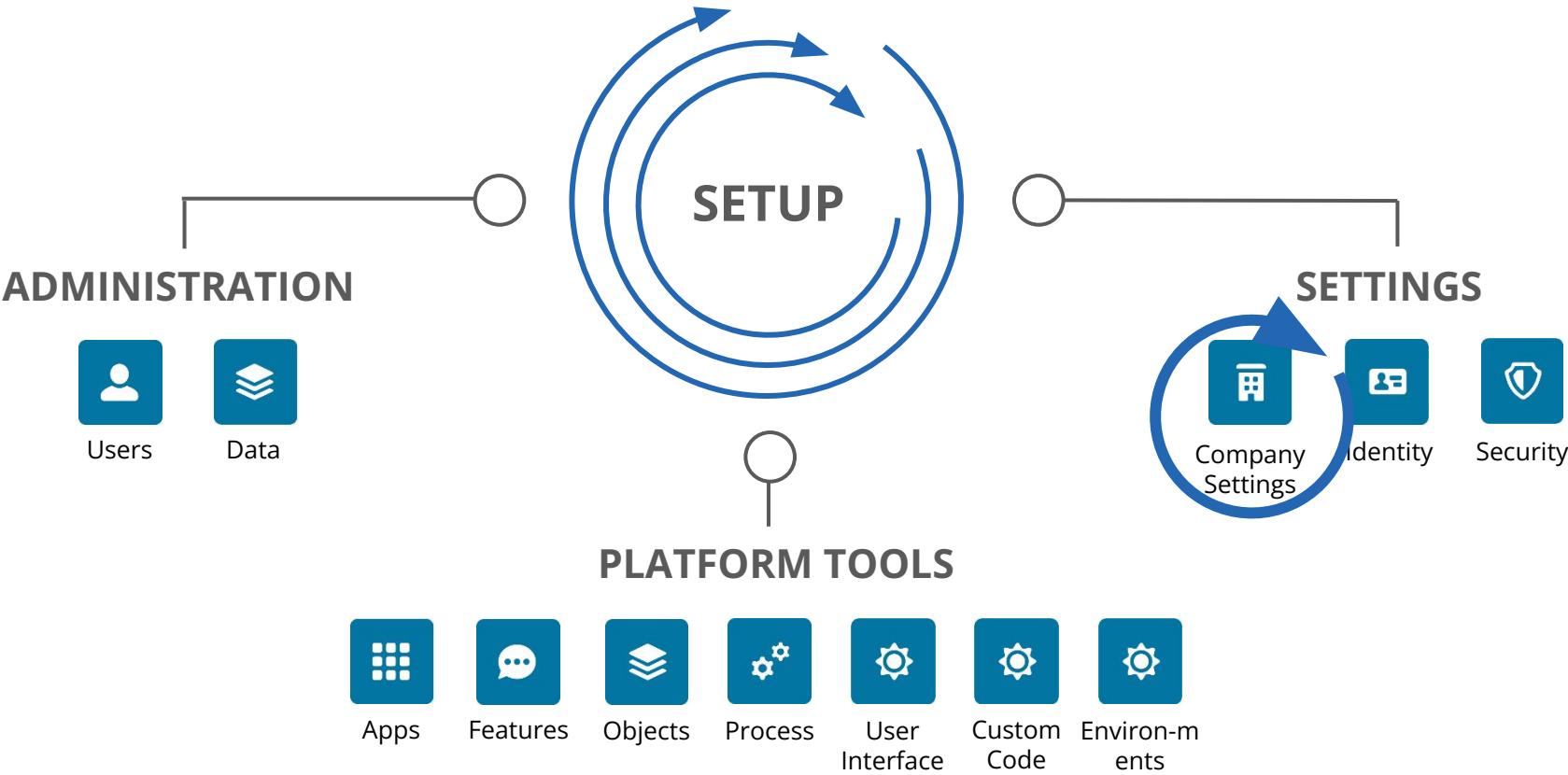
| Storage Type | Limit | Used | Percent Used |
|--------------------|-----------|--------|--------------|
| Data Storage | 5,0 MB | 400 KB | 8% |
| File Storage | 20,0 MB | 41 KB | 0% |
| Big Object Storage | 1.000.000 | 0 | 0% |

Current Data Storage Usage

| Record Type | Record Count | Storage | Percent |
|---------------|--------------|---------|---------|
| Opportunities | 33 | 66 KB | 16% |
| Cases | 27 | 54 KB | 14% |
| Contacts | 26 | 52 KB | 13% |
| Leads | 24 | 48 KB | 12% |
| Properties | 18 | 36 KB | 9% |
| Accounts | 17 | 34 KB | 8% |
| Campaigns | 4 | 32 KB | 8% |

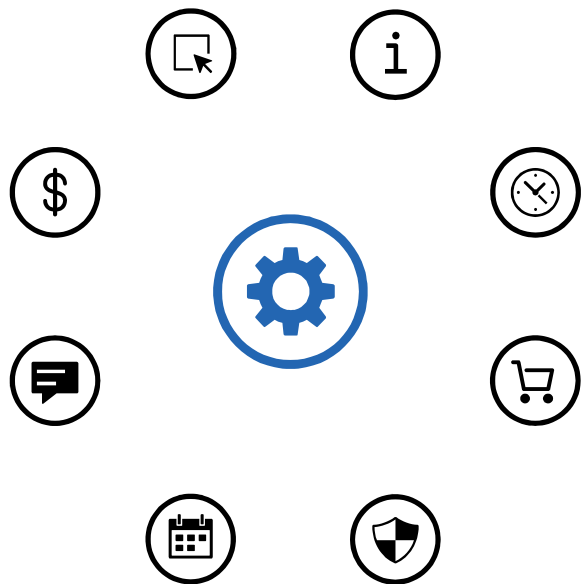
Setup








Overview



Company Settings

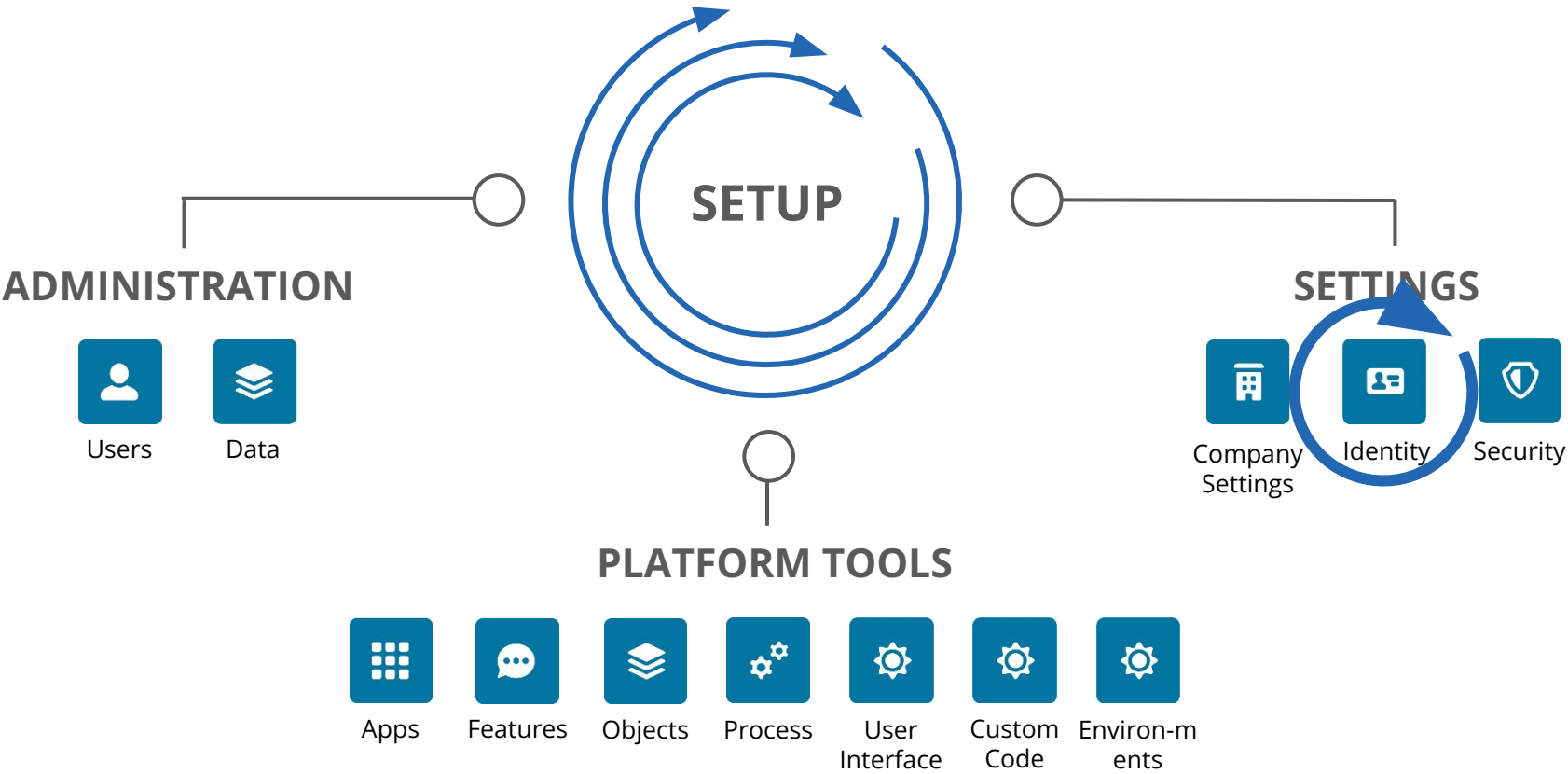
Overview



| | | |
|--|----------------------------|---|
|  | Company Information | Locale, Language, Time Zone, Currency, Data Space, Organization ID, Salesforce-Edition, User Licenses |
|  | Business Hours | Specify the hours when your support team is available to serve customers |
|  | Checkout | Salesforce.com online store and order center |
|  | Critical Updates | Lists critical updates that are scheduled for activation in your organization |
|  | Fiscal Years | Set up a custom fiscal year for your organization |
|  | Language Settings | Add and change languages you want your site to support |
|  | Manage Currencies | Define currencies used by your organization and add conversion rates |
|  | My Domain | Set up a custom domain for your organization and customize your login page |

Setup

Overview



Login History

Setup | Identity | Login History

Monitor Logins

- Monitor which users logged in when, from where and the status of the login - e.g. invalid password or computer activation required
- The login history page displays the most recent 20,000 attempts. To see more records, download the information to a CSV or GZIP file
- Users can view their own login history in their personal information

Login History

Filter and display up to 20,000 of the most recent login records. Or, access the last six months in a CSV file.

Location shows the approximate location of the IP address from where the user logged in. To show more geographic information, such as approximate city and postal code, create a custom view to include those fields. Due to the nature of geolocation technology, the accuracy of geolocation fields (for example, country, city, postal code) may vary.

Download Options

File Type

☒ CSV File
☐ GZIP File

File Contents

All Logins

[Download Now](#)

View: All [Create New View](#)

[<Previous Page](#) | [Next Page>](#)

| Username | Login Time + | Source IP | Location | Login Type | Status | Browser | Platform | Application | Client Version | API Type | API Version | Login URL |
|----------|--------------------------|---------------|---------------|----------------------|--------------------------------------|-----------------------|----------|-----------------------------------|----------------|----------|-------------|---|
| | 05.11.2017 23:41:35 CET | 62.47.240.84 | Austria | Remote Access Client | Failed: Computer activation required | Salesforce 14 | iPhone | Browser | N/A | N/A | N/A | login.salesforce.com |
| | 05.11.2017 23:39:44 CET | 62.47.240.84 | Austria | Remote Access 2.0 | Success | Unknown | Unknown | Business Card Reader | N/A | N/A | N/A | login.salesforce.com |
| | 05.11.2017 23:24:40 CET | 62.47.240.84 | Austria | Remote Access 2.0 | Success | Unknown Webkit Mobile | iPhone | Business Card Reader | N/A | N/A | N/A | login.salesforce.com |
| | 05.11.2017 23:24:03 CET | 62.47.240.84 | Austria | Remote Access Client | Success | Unknown Webkit Mobile | iPhone | Browser | N/A | N/A | N/A | login.salesforce.com |
| | 05.11.2017 23:23:40 CET | 62.47.240.84 | Austria | Remote Access Client | Failed: Computer activation required | Unknown Webkit Mobile | iPhone | Browser | N/A | N/A | N/A | login.salesforce.com |
| | 05.11.2017 23:08:40 CET | 62.47.240.84 | Austria | Remote Access 2.0 | Success | Unknown Webkit Mobile | iPhone | ScanBizCards Business Card Reader | N/A | N/A | N/A | login.salesforce.com |
| | 05.11.2017 23:08:37 CET | 62.47.240.84 | Austria | Remote Access Client | Success | Unknown Webkit Mobile | iPhone | Browser | N/A | N/A | N/A | login.salesforce.com |
| | 05.11.2017 23:08:18 CET | 62.47.240.84 | Austria | Remote Access Client | Failed: Computer activation required | Unknown Webkit Mobile | iPhone | Browser | N/A | N/A | N/A | login.salesforce.com |
| | 25.10.2017 10:53:10 CEST | 193.22.85.250 | Austria | Application | Success | Chrome 60 | Mac OSX | Browser | N/A | N/A | N/A | login.salesforce.com |
| | 24.10.2017 09:48:19 CEST | 52.205.41.207 | United States | Remote Access 2.0 | Success | Unknown | Unknown | Trailhead | N/A | N/A | N/A | playful-moose-374269-dev-ed.my.salesforce.com |

Identity Verification History

Setup | Identity | Identity Verification History

Monitor Verifications

- Use Identity Verification History to monitor and audit up to 20,000 records of your org users' identity verification attempts from the past six months
- For example, suppose that two-factor authentication is enabled when a user logs in. When the user successfully provides a time-based, one-time password as proof of identity, that information is recorded in Identity Verification History

Identity Verification History

Filter and display up to 20,000 of the most recent identity verification records.

Location shows the approximate location of the user's IP address at the time of identity verification. To show more geographic information, such as approximate city and postal code, create a custom view to include those fields. Due to the nature of geolocation technology, the accuracy of geolocation fields (for example, country, city, postal code) may vary.

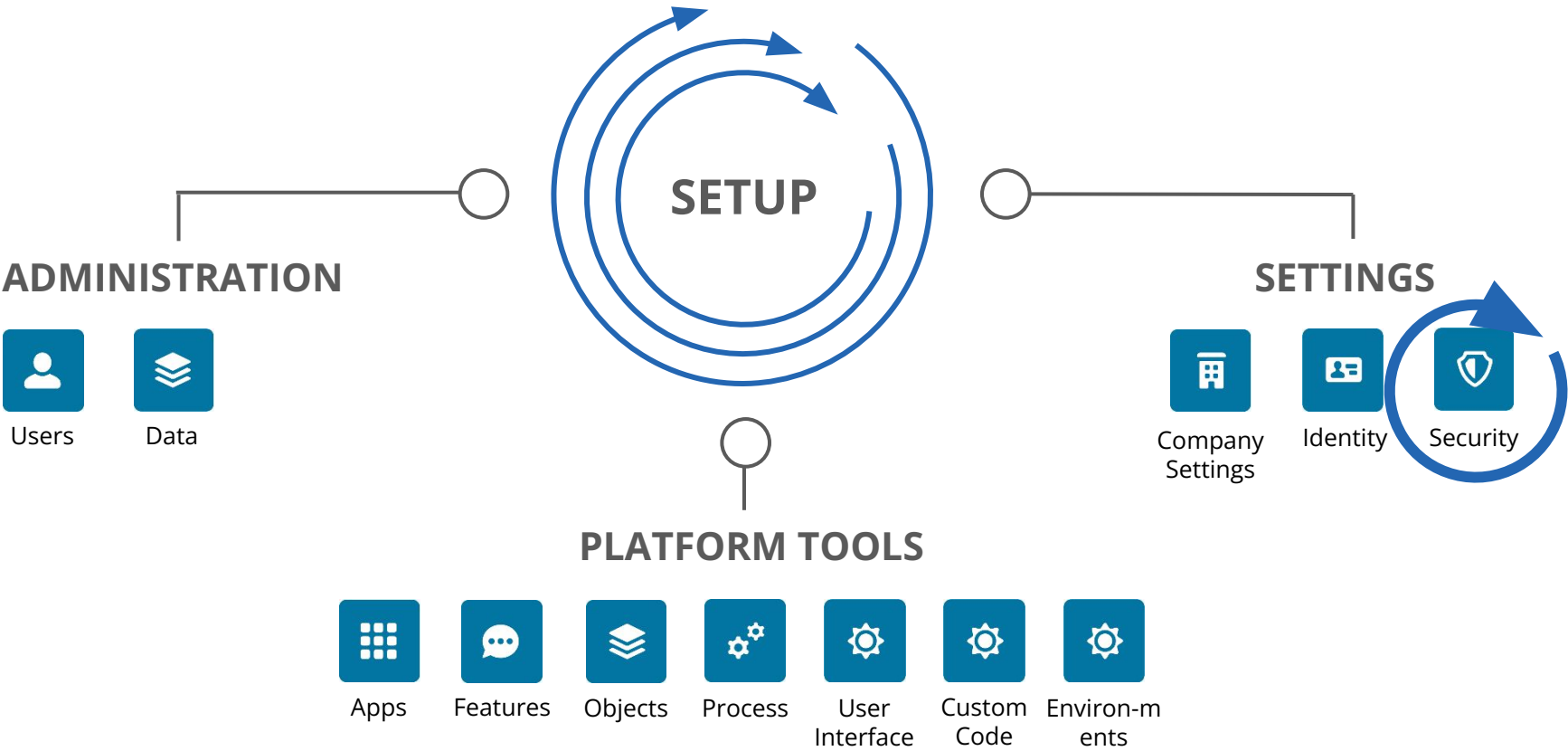
Want to see who's using Salesforce Authenticator and other identity verification methods? Go to the [Identity Verification Methods](#) report.

View: All Create New View

| Time + | Verification Attempt i | Username | Activity Message | Triggered By | Method | Status | Login Time | Source IP | Location |
|--------------------------|------------------------|----------|----------------------|--------------|---------------|---------------------------------------|--------------------------|-----------|----------|
| 05.11.2017 23:41:54 CET | 1959398795 | | Log In to Salesforce | Activation | Email message | Succeeded | 05.11.2017 23:41:35 CET | | Austria |
| 05.11.2017 23:41:36 CET | 1959398795 | | Log In to Salesforce | Activation | Email message | User challenged; waiting for response | 05.11.2017 23:41:35 CET | | Austria |
| 05.11.2017 23:24:03 CET | 1894867999 | | Log In to Salesforce | Activation | Email message | Succeeded | 05.11.2017 23:23:40 CET | | Austria |
| 05.11.2017 23:23:40 CET | 1894867999 | | Log In to Salesforce | Activation | Email message | User challenged; waiting for response | 05.11.2017 23:23:40 CET | | Austria |
| 05.11.2017 23:08:37 CET | 1876915638 | | Log In to Salesforce | Activation | Email message | Succeeded | 05.11.2017 23:08:18 CET | | Austria |
| 05.11.2017 23:08:19 CET | 1876915638 | | Log In to Salesforce | Activation | Email message | User challenged; waiting for response | 05.11.2017 23:08:18 CET | | Austria |
| 14.09.2017 11:36:54 CEST | 0106822919 | | Log In to Salesforce | Activation | Email message | Succeeded | 14.09.2017 11:36:40 CEST | | Austria |

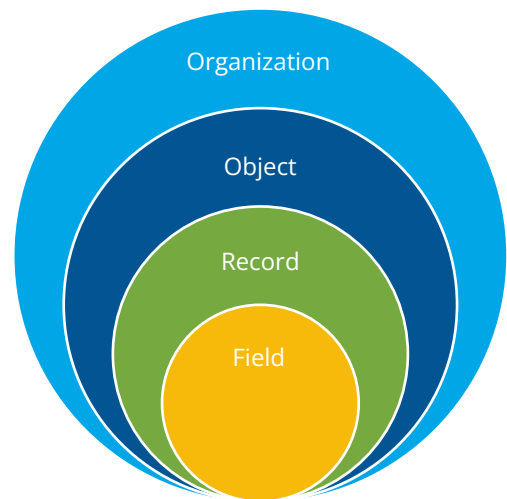
Setup

Overview



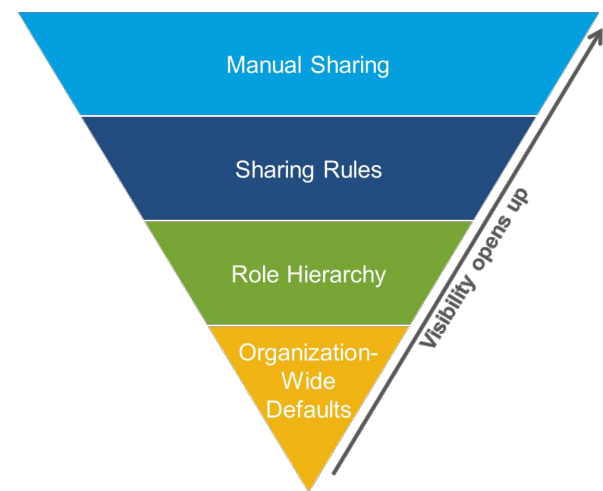
Levels of Data Access

Overview



| | |
|---------------------|--|
| Organization | Maintain a list of authorized users, set password policies, and limit logins to certain hours and locations |
| Object | By setting permissions on an object, a group of users can be prevented from creating, viewing, editing, or deleting any records of that object |
| Record | Particular users can be allowed to view an object, but then restrict the individual object records they're allowed to see |
| Field | Access to certain fields can be restricted, even if a user has access to the object |

In Salesforce,
you can
control access
to data at
many different
levels



| | |
|-----------------------|--|
| Manual Sharing | Allows owners of particular records to share them with other users |
| Sharing Rules | Automatic exceptions to OWDs for particular groups of users, so they can get to records they don't own or can't normally see |
| Role Hierarchy | Give access for users higher in the hierarchy to all records owned by users below them in the hierarchy |
| OWDs | Specify the default level of access users have to each others' records |

Organization-Wide Defaults

Setup | Security | Sharing Settings

OWDs

- Administrators use organization-wide defaults to define the default sharing settings for an organization
- Organization-wide defaults specify the baseline level of access that the most restricted user should have
- Whereas sharing rules, roles and profiles open up access, organization-wide defaults restrict access and should be defined first

| Default Access | Impact |
|------------------------------|--|
| Private | Only record owners have access to the record |
| Public Read Only | Every user can read all records of a particular object, but can't edit them. They can only edit records they own |
| Public Read/Write (Transfer) | Every user can read and update all records of a particular object (Transfer is only applicable to leads and cases) |
| Controlled by Parent | Sharing access is controlled by access to the related parent record |

Default Sharing Settings

Organization-Wide Defaults

Edit

Organization-Wide Defaults Help ?

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

Private

✓ Public Read Only

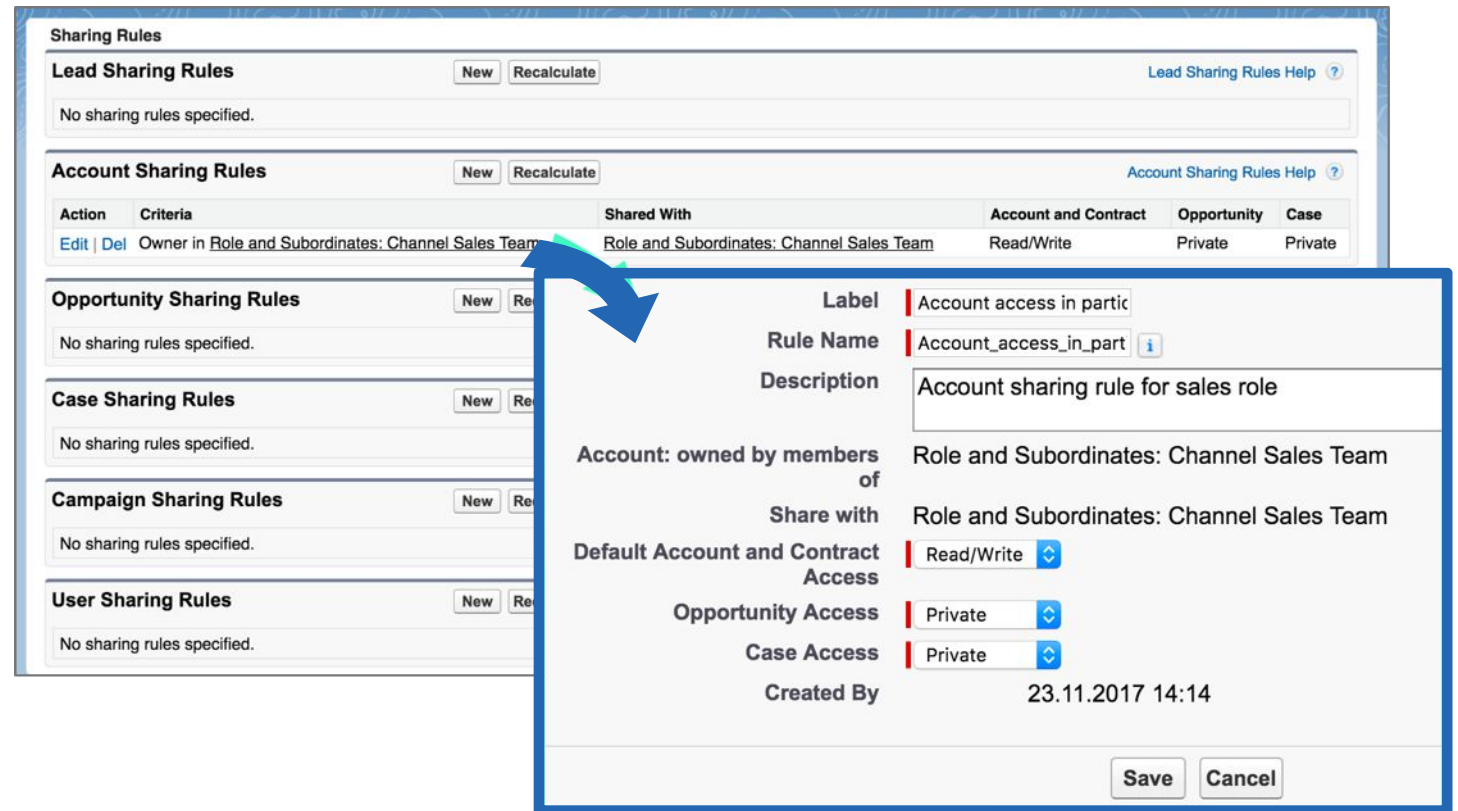
Public Read/Write

Sharing Rules

Setup | Security | Sharing Settings

Sharing Rules

- Sharing rules represent the exceptions to your organization-wide default settings
- If you have organization-wide sharing defaults of Public Read Only or Private, you can define rules that give additional users access to records they do not own
- You can create sharing rules based on record owner or field values in the record



The screenshot shows the Salesforce Sharing Rules configuration page. It has sections for Lead, Account, Opportunity, Case, Campaign, and User Sharing Rules. A modal is open for creating a new Account Sharing Rule. A blue arrow points from the 'New' button in the Account Sharing Rules section to the modal.

Sharing Rules

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

No sharing rules specified.

Account Sharing Rules [New] [Recalculate] [Account Sharing Rules Help ?](#)

| Action | Criteria | Shared With | Account and Contract | Opportunity | Case |
|--|--|---|----------------------|-------------|---------|
| Edit Del | Owner in Role and Subordinates: Channel Sales Team | Role and Subordinates: Channel Sales Team | Read/Write | Private | Private |

Opportunity Sharing Rules [New] [Recalculate]

No sharing rules specified.

Case Sharing Rules [New] [Recalculate]

No sharing rules specified.

Campaign Sharing Rules [New] [Recalculate]

No sharing rules specified.

User Sharing Rules [New] [Recalculate]

No sharing rules specified.

Modal Details:

- Label:** Account access in part
- Rule Name:** Account_access_in_part [i](#)
- Description:** Account sharing rule for sales role
- Account: owned by members of:** Role and Subordinates: Channel Sales Team
- Share with:** Role and Subordinates: Channel Sales Team
- Default Account and Contract Access:** Read/Write [v](#)
- Opportunity Access:** Private [v](#)
- Case Access:** Private [v](#)
- Created By:** 23.11.2017 14:14

[Save] [Cancel]

Network Access

Setup | Security | Network Access

Trusted IP Ranges

- Trusted IP Ranges define a list of IP addresses from which users can log in without receiving a login challenge for verification of their identity, such as a code sent to their mobile phone
- Click on New to enter a starting and ending IP Address

The screenshot displays the Salesforce 'Network Access' configuration page. At the top, the title 'Network Access' is followed by a 'Help for this Page' link. Below the title, a descriptive paragraph states: 'The list below contains IP address ranges from sources that your organization trusts. Users logging in to salesforce.com with a browser from trusted networks are allowed to access salesforce.com without having to activate their computers.'

The main section is titled 'Trusted IP Ranges' and includes a 'New' button. Below this is a table with the following structure:

| Start IP Address ↑ | End IP Address | Description |
|------------------------|----------------|-------------|
| No records to display. | | |

A blue arrow points from the 'New' button to the 'Trusted IP Range Edit' modal window. The modal has a title bar 'Network Access' and a subtitle 'Trusted IP Range Edit', with its own 'Help for this Page' link. The modal's introductory text reads: 'Enter the range of valid IP addresses from which user logins are trusted. Users logging in from trusted IP addresses are not asked to activate their computers and may use their user password instead of a security token to log in to the API or a desktop client such as Connect for Outlook, Connect Offline, Connect for Office, Connect for Lotus Notes, or the Data Loader.'

Below the text is a form titled 'Please specify IP range' with a legend indicating that a red vertical bar denotes 'Required Information'. The form contains three fields: 'Start IP Address' (required), 'End IP Address' (required), and 'Description' (optional). At the bottom of the modal are 'Save' and 'Cancel' buttons.

Password Policies

Setup | Security | Password Policies

Set Passwords Policies

- Improve your Salesforce org security with password protection
- Set password expire days, history, length, and complexity requirements along with other values. In addition, you can specify what to do if a user forgets their password

Password Policies

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

Password Policies

User passwords expire in 90 days

Enforce password history 3 passwords remembered

Minimum password length 10

Password complexity requirement Must mix alpha, numeric, and special characters

Password question requirement Cannot contain password

Maximum invalid login attempts 3

Lockout effective period 30 minutes

Obscure secret answer for password resets ☐

Require a minimum 1 day password lifetime ☒

Allow use of setPassword() API for self-resets ☒

Session Settings

Setup | Security | Session Settings

Session Security

Session Settings let admins modify session security settings to specify session connection type, timeout settings, and IP address ranges to protect against malicious attacks and more

1. With Session Timeout, you can set the length of time after which the system logs out inactive users. Select a value between 15 minutes and 24 hours. Choose a shorter timeout period if your org has sensitive information and you want to enforce stricter security
2. Set Session Security Levels to restrict access to certain types of resources based on the level of security associated with the authentication (login) method for the user's current session. By default, each login method has one of two security levels: Standard or High Assurance. You can change the session security level and define policies so specified resources are only available to users with a High Assurance level

The screenshot shows the 'Session Settings' page. A blue circle with the number '1' points to the 'Session Timeout' section. Another blue circle with the number '2' points to the 'Session Security Levels' section.

Session Settings

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

Session Timeout

Timeout Value 2 hours

☐ Disable session timeout warning popup

☒ Force logout on session timeout

Session Settings

☒ Lock sessions to the domain in which they were first used

Require secure connections (HTTPS)

☒ Require secure connections (HTTPS)

☒ Require secure connections (HTTPS) for all third-party domains

☒ Force relogin after Login-As-User

☐ Require HttpOnly attribute

☐ Use POST requests for cross-domain sessions

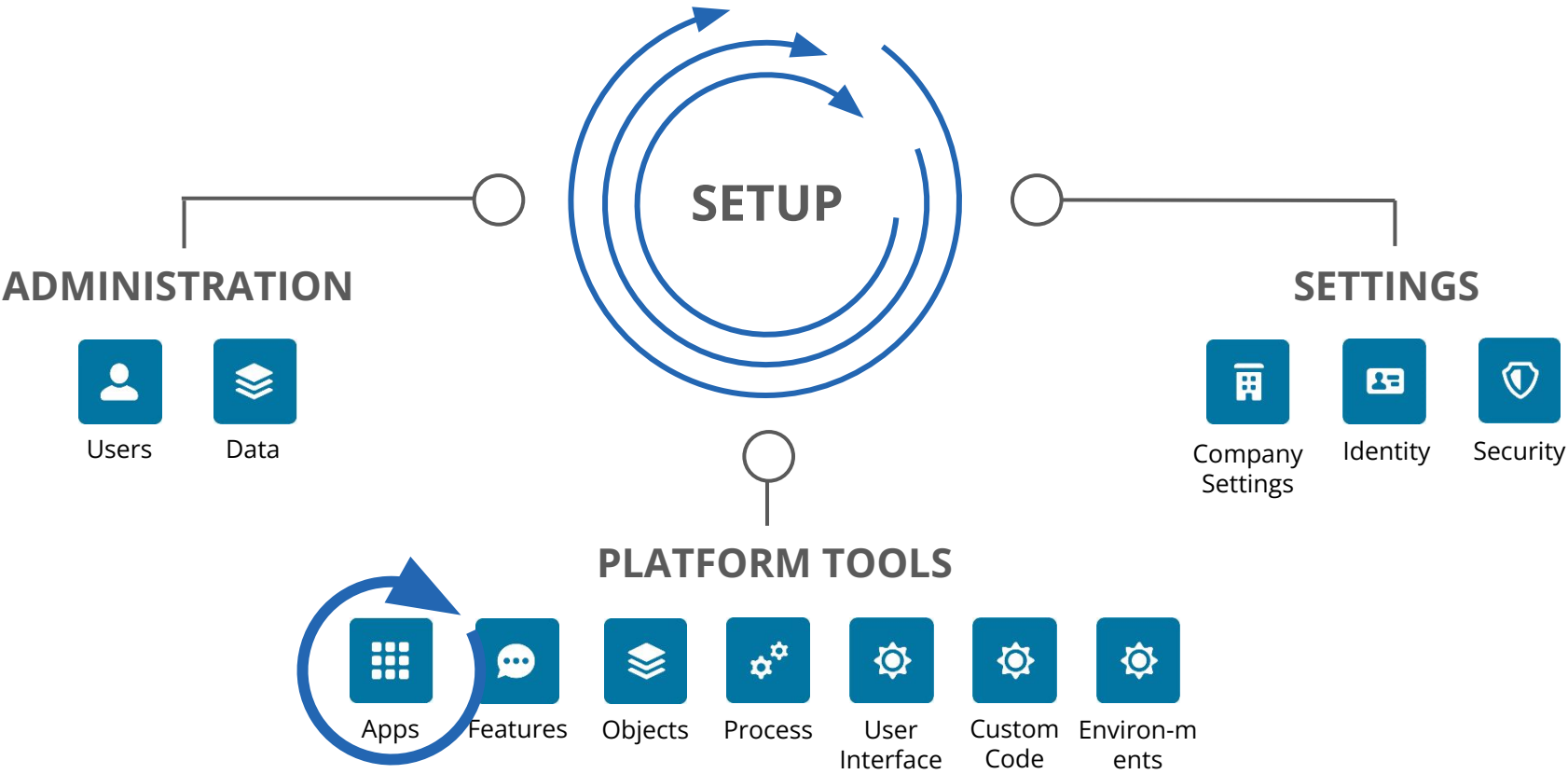
☐ Enforce login IP ranges on every request

Session Security Levels

| Standard | | High Assurance |
|--|---------------------------------------|---------------------------|
| Username Password Delegated Authentication Activation Lightning Login | <div>Add ▶ ◀ Remove</div> | Two Factor Authentication |

Setup

Overview



App Manager

Setup | Apps | App Manager

Manage your Apps

- The App Manager shows you all your apps in one place. You can make changes to them or create new ones. To create a new one, click the button New Lightning App. You will be asked to define your app step by step:
 1. Give your app a name and description. Upload an image and choose the highlight color for its navigation bar
 2. Choose standard navigation or console navigation for your app
 3. Give your users quick access to common productivity tools by adding Utility Bar Items
 4. Choose the items to include in the app. You can rearrange the order in which items appear
 5. Choose the user profiles that can access this app

The screenshot displays the 'Lightning Experience App Manager' interface. At the top, there are buttons for 'New Lightning App' and 'New Connected App'. Below this is a table listing 21 items, sorted by App Name. The table columns include APP NAME, DEVELOPER NAME, DESCRIPTION, LAST MODIFIED, APP TYPE, and a checkbox. The 'App Launcher' app is highlighted. A blue arrow points from the 'App Launcher' row to a detailed view of the app, titled 'App Details & Branding'.


App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.


App Details

- *App Name: Sales App
- *Developer Name: Sales_App
- Description: CRM Sales App

App Branding

- Image:  Clear
- Primary Color Hex Value: #0070C

App Launcher Preview

 Sales App CRM Sales App

Installed Packages

Setup | Apps | Installed Packages

Packages

- Installed Packages lists all Apps and components installed from AppExchange. View and manage these packages installed in your Salesforce org, including assigning licenses to users, uninstalling packages and exporting package data
- View key details about a package, such as the number of custom apps, tabs, and objects it uses

Installed Packages

Help for this Page

salesforce appexchange

Visit AppExchange »

On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

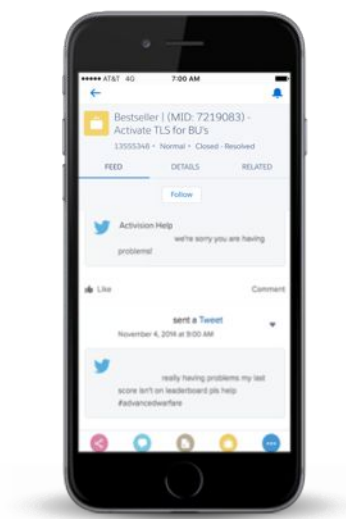
To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Installed Packages

| Action | Package Name | Publisher | Version Number | Namespace Prefix | Install Date | Limits | Apps | Tabs | Objects |
|---------------------------|--|----------------|----------------|------------------|------------------|--------|------|------|---------|
| Uninstall | <div><div>Download</div><div>Salesforce Connected Apps</div></div> <div>Description This package contains Connected Applications for all the officially supported Salesforce client applications such as Touch, Salesforce for Outlook, Sa...</div> | Salesforce.com | 1.7 | sf_com_apps | 17.11.2017 17:41 | ✓ | 0 | 0 | 0 |
| Uninstall | <div><div>Download</div><div>Salesforce.com CRM Dashboards</div></div> <div>Description Salesforce.com CRM Dashboards</div> | salesforce.com | 1.0 | | 28.08.2017 11:47 | ✓ | 0 | 0 | 0 |
| Uninstall | <div><div>Download</div><div>Salesforce and Chatter Apps</div></div> <div>Description This package contains Connected Applications for the officially supported Salesforce apps for iOS and Android and Chatter applications on your desktop...</div> | Salesforce.com | 1.15 | sf_chttr_apps | 25.10.2017 10:43 | □ | 0 | 0 | 0 |

Salesforce Mobile App

Setup | Apps | Mobile Apps | Salesforce



Branding

Customize the appearance of the mobile app so it matches your company's branding

| | |
|--------------------|----------------------------------|
| Brand Color | <input type="checkbox"/> #fff |
| Loading Page Color | <input type="checkbox"/> #d8e5f2 |
| Loading Page Logo | Logo.png |

Notification

Allow users to receive notifications in the mobile app

☒ Enable in-app notifications ⓘ

☒ Enable push notifications ⓘ

☐ Enable full content in push notifications ⓘ

Mobile Quick Start

The Salesforce Mobile Wizard provides an easy way to complete the essential setup tasks in only a few minutes

Quick Start Wizard

Complete the essential setup tasks in only a few minutes.

Launch Quick Start Wizard

Navigation

Organizing the menu items in your app. Put the items that users will want most at the top. The first item becomes the landing page

Available

Selected

Command Center
Einstein Vision
Heat Map
House Explorer
Property Explorer

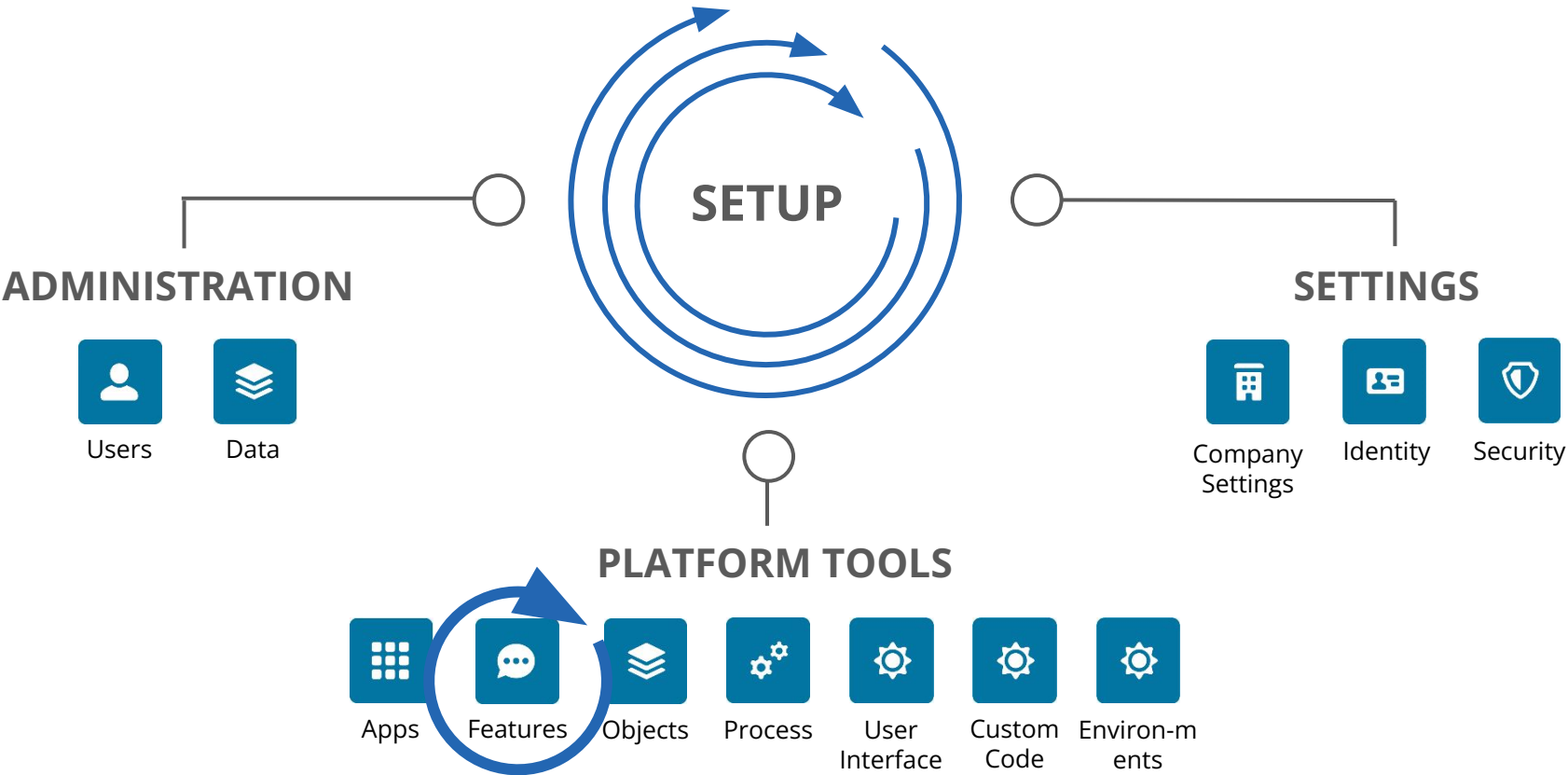
Add
Remove

Up
Down

Dashboards
Tasks
Smart Search Items
MyData
People
Groups
Reports
Events
Approvals
Paused Flow Interviews

Setup

Overview



Setup | Feature Settings | Analytics | Reports & Dashboards | Report Types

Custom report types allow you to build a framework in the report wizard, from which users can create and customize reports. You build custom report types off of the relationships (master-detail and lookup) between object so that you can:

- Report Type Focus

Specify what type of records (rows) will be the focus of reports generated by this report type.

Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object

Accounts

Identification

Report Type Label

Accounts & Visit Reports

Report Type Name

Accounts_Visit_Report

Description

Use this Report Type for Reports with Visit Reports

Store in Category

Accounts & Contacts

Deployment

A report type with deployed status is available authorized administrators and their delegates

Deployment Status

In Development

Deployed

A

Accounts

Primary Object

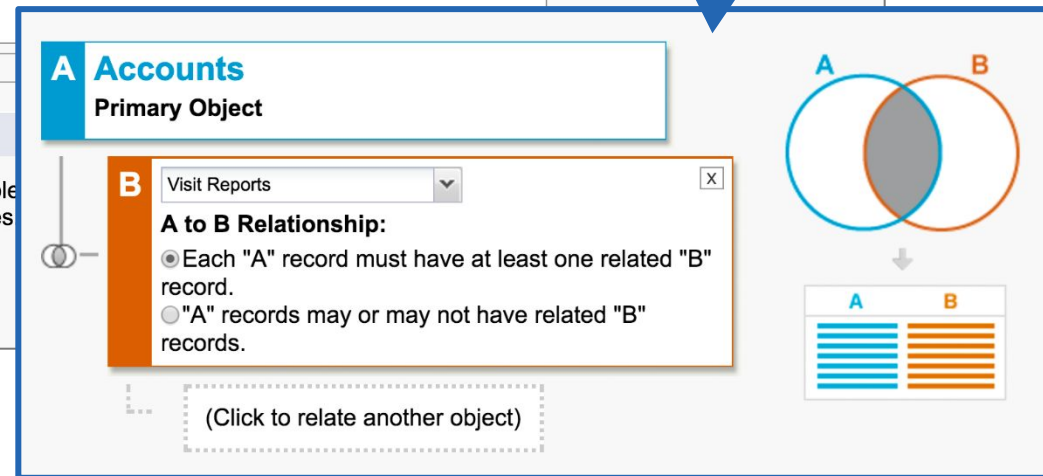
B

Visit Reports

A to B Relationship:

Each "A" record must have at least one related "B" record.

"A" records may or may not have related "B" records.



Feed Tracking

Setup | Feature Settings | Chatter | Feed Tracking

Chatter Feed

- Enable feed tracking for objects and records, so users see updates for the objects and records they follow in their Chatter feed
- Many objects and fields are tracked by default, but you can further customize feed tracking to include or exclude specific objects and fields
- You can configure feed tracking for users, Chatter groups, topics, external objects and standard & custom objects

The image shows the Salesforce Feed Tracking configuration page and a resulting Chatter feed. The configuration page is titled "Feed Tracking" and includes a "Help for this Page" link. It explains that users can follow records of a specific object type by selecting fields to track. A table lists various objects and the number of fields they are tracked by default. The "Account" object is highlighted, showing it is tracked by 2 fields. To the right, the "Fields in accounts" section allows users to select up to 20 fields to track. The "Enable Feed Tracking" checkbox is checked. A blue arrow points from the "Account Owner" field in the configuration to a Chatter feed entry. The Chatter feed shows a post by a user (represented by a blue robot icon) with the text "updated this record." and a dropdown arrow. Below the post, there is a search bar, a "Like" button, a "Comment" button, and a text input field for writing a comment.

| Object | Tracked |
|--------------------|----------|
| Account | 2 Fields |
| Asset | |
| Asset Relationship | |
| Bot Command | |
| Broker | |
| Campaign | |
| Case | 2 Fields |
| Coaching | 0 Fields |
| Contact | 3 Fields |
| Content Document | 0 Fields |
| Contract | |
| Dashboard | |
| Event | |
| Favorite | |
| Feedback Request | 0 Fields |

Fields in accounts

Save Cancel ☒ Enable Feed Tracking

You can select up to 20 fields.

| | |
|---------------------|-------------------------------------|
| Account Name | <input checked="" type="checkbox"/> |
| Account Owner | <input checked="" type="checkbox"/> |
| Account Site | <input type="checkbox"/> |
| Active | <input type="checkbox"/> |
| Billing Address | <input type="checkbox"/> |
| Customer Priority | <input type="checkbox"/> |
| D-U-N-S Number | <input type="checkbox"/> |
| Description | <input type="checkbox"/> |
| Fax | <input type="checkbox"/> |
| NAICS Code | <input type="checkbox"/> |
| Number of Locations | <input type="checkbox"/> |

Chatter Feed

ACTIVITY CHATTER

Post Questi... Poll

Share an update... Share

Search this feed...

updated this record.

Just Now

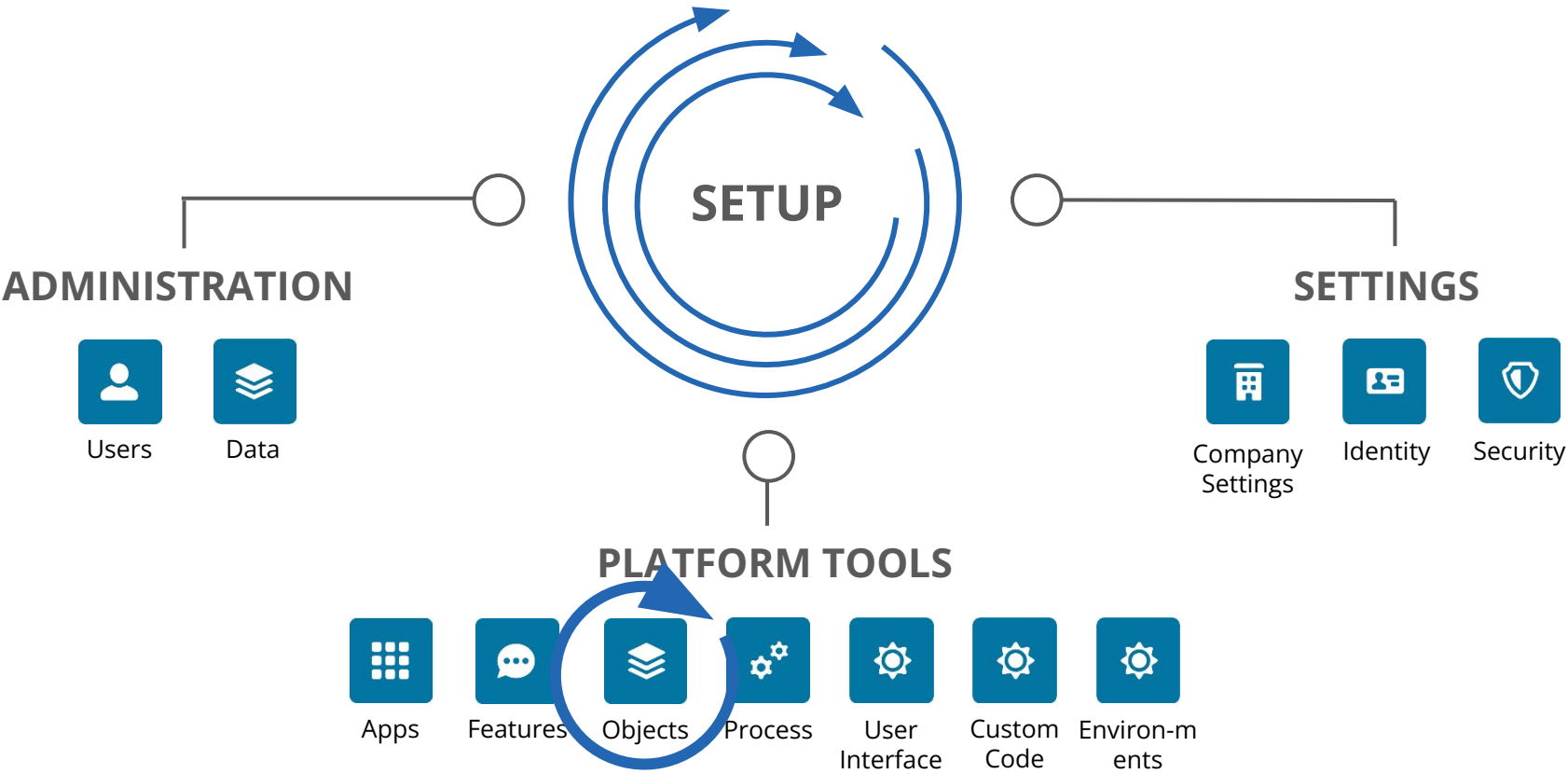
Account Owner

Like Comment

Write a comment...

Setup

Overview

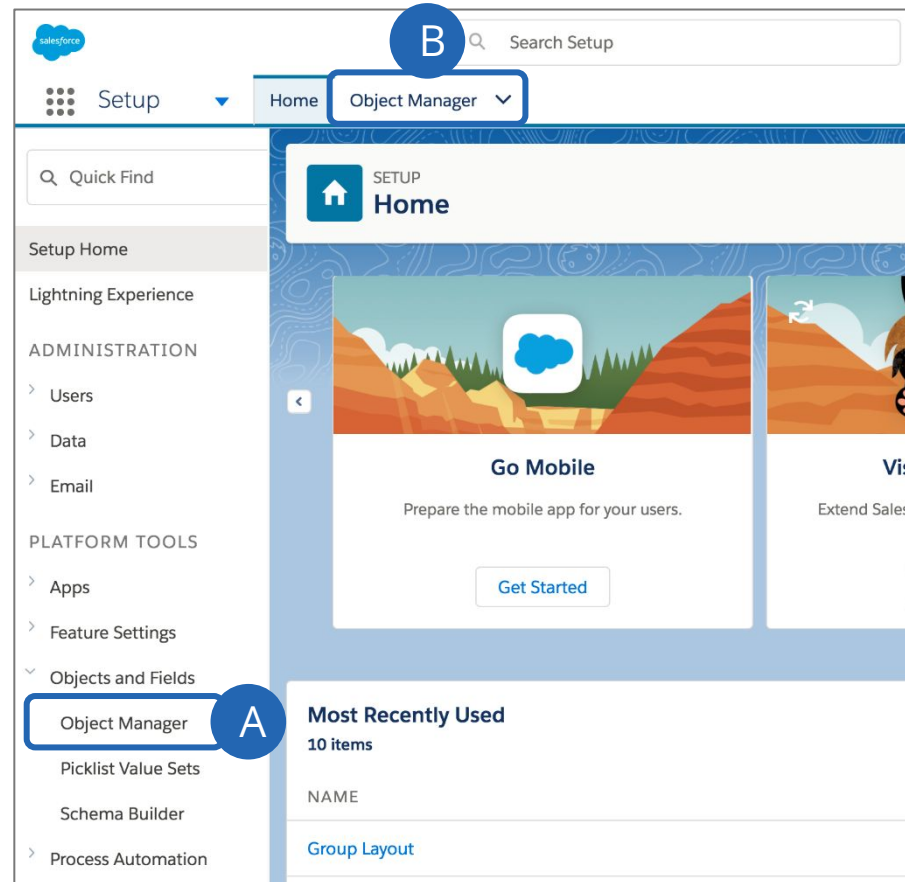


Object Manager

Setup | Objects and Fields | Object Manager

Access Object Manager

- A. Access the object manager by clicking the menu item Object Manager in the setup tree
- B. You can also always simply access the object manager by clicking on the tab Object Manager on the top of your setup page. There you can always change between the normal setup settings in Home, and the object manager in Object Manager



Object Manager

Setup | Objects and Fields | Object Manager

Overview

The Object Manager is a tool that lets admins customize standard objects as well as custom objects. Object management settings include customizations for fields, page layouts, compact layouts, record types and validation rules

- 1. See all your standard and custom objects alphabetically in one list
- 2. Search for a particular object if needed
- 3. Create a new custom object

SETUP

Object Manager

37 Items, Sorted by Label

2

Find in page

Schema Builder

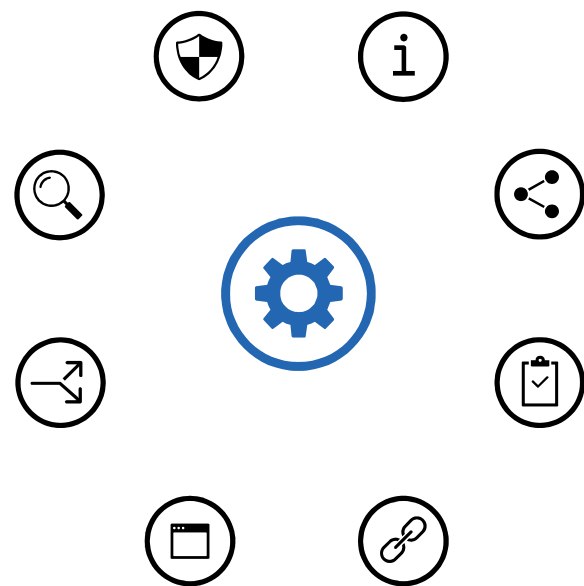
Create

Custom Object3

| LABEL | API NAME | DESCRIPTION | LAST MODIFIED | DEPLOYED | CUSTOM |
|--------------------|-------------------|-------------|---------------|----------|--------|
| Account | Account | | | | |
| Activity | Activity | | | | |
| Asset1 | Asset | | | | |
| Asset Relationship | AssetRelationship | | | | |
| Bot Command | Bot_Command__c | | 11.10.2017 | ✓ | ✓ |
| Broker | Broker__c | | 11.10.2017 | ✓ | ✓ |
| Campaign | Campaign | | | | |
| Campaign Member | CampaignMember | | | | |

Object Customization

Overview



| | | |
|--|-----------------------------------|--|
|  | Details | Description, Label, API Name, Allow Reports, Edit and Delete (Custom Object) |
|  | Fields & Relationships | Create new fields, add field dependencies, set history tracking, click on a particular field to set field-level security |
|  | Page Layouts | Create new page layouts, rearrange fields on layout, add fields, buttons, actions and related lists, set page layout assignments |
|  | Button, Links, Actions | Create new buttons, links or actions, edit existing ones |
|  | Compact Layouts | Create new compact layouts, select fields to display, set layout assignments |
|  | Record Types | Create new record types, enable for profiles and make default if necessary, assign page layouts for record types |
|  | Search Layouts | Set layouts for searches and recently viewed-list views |
|  | Validation Rules | Create new validation rules, access and edit existing ones |

Field History Tracking

Setup | Objects and Fields | Object Manager

Set Field History

- Select certain fields to track and display the field history in the History related list of an object. The field history data is retained for up to 18 months
- Modifying any of the selected fields adds an entry to the History related list. All entries include the date, time, nature of the change, and who made the change. Not all field types are available for historical trend reporting. Certain changes, such as case escalations, are always tracked

SETUP > OBJECT MANAGER

Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Triggers

Fields & Relationships

34+ Items, Sorted by Field Label

FIELD LABEL

FIELD NAME

DATA TYPE

CONTROLLING...

INDEXED

Account Name

Account Number

Account Owner

Account Record Type

Account Site

Account Source

Active

Annual Revenue

Billing Address

Find in page

New

Field Dependencies

Set History Tracking

Account Field History

☒ Enable Account History

This page allows you to select the fields you want to track on the Account History below, the old and new field values are added to the History related list as well. Note that multi-select picklist and large text field values are tracked as edited; t

Save

Cancel

Deselect all fields

Track old and new values

Account Name

Account Owner

Account Site

Active

☒

☒

☐

☐

Account History (1)

DATE

FIELD

USER

ORIGINAL VALUE

NEW VALUE

04.12.2017 1...

Account Owner

Validation Rules

Setup | Object Manager | [select Object] | Validation Rules

Validation Rules

- Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record
- A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of “True” or “False”
- Do not forget to set the validation rule to active

Account Validation Rule

[Help for this Page](#)

[Back to Account Validation Rules](#)

Validation Rule Detail

Edit

Clone

| | | | |
|-------------------------|---|----------------|---|
| Rule Name | International_Phone_Number_PHONE | Active | <input checked="" type="checkbox"/> |
| Error Condition Formula | \$User.Ignore_Validation_Rules__c = FALSE && NOT(ISBLANK (Phone)) && NOT(REGEX (Phone, "^\\+([0-9 -().)]{6,20})") | | |
| Error Message | Please start with "+" and use the international phone number format for the Phone (eg: +43...) | Error Location | Top of Page |
| Description | The Phone Number mit be entered in the international Format | | |
| Created By | Christian Eichhorn , 06.09.2017 15:57 | Modified By | Nikolaus Günzl , 23.10.2017 09:29 |

Edit

Clone

Picklist Value Sets

Setup | Objects and Fields | Picklist Value Sets

Global Picklists

- Use global picklist value sets to share values across objects and custom picklist fields, and to restrict the picklists to only the values that you specify
- A custom picklist is tied to a particular object as a field on the object. Unlike a custom picklist field, a global picklist exists independently as a global picklist value set. Its values are shared with any picklist that's based on it

Picklist Value Sets

[Help for this Page](#)

Global picklist value sets let you share the values across objects. Base custom picklist fields on a global value set to inherit its values. The value set is restricted so users can't add unapproved values through the API.

View: All [Create New View](#)

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

Global Value Sets

[New](#)

| Label ↑ | Description |
|---|-------------|
| No records to display. | |
| Deleted Global Value Sets (0) | |

Information

Label

Name [i](#)

Description

Enter values, with each value separated by a new line

Values

Schema Builder

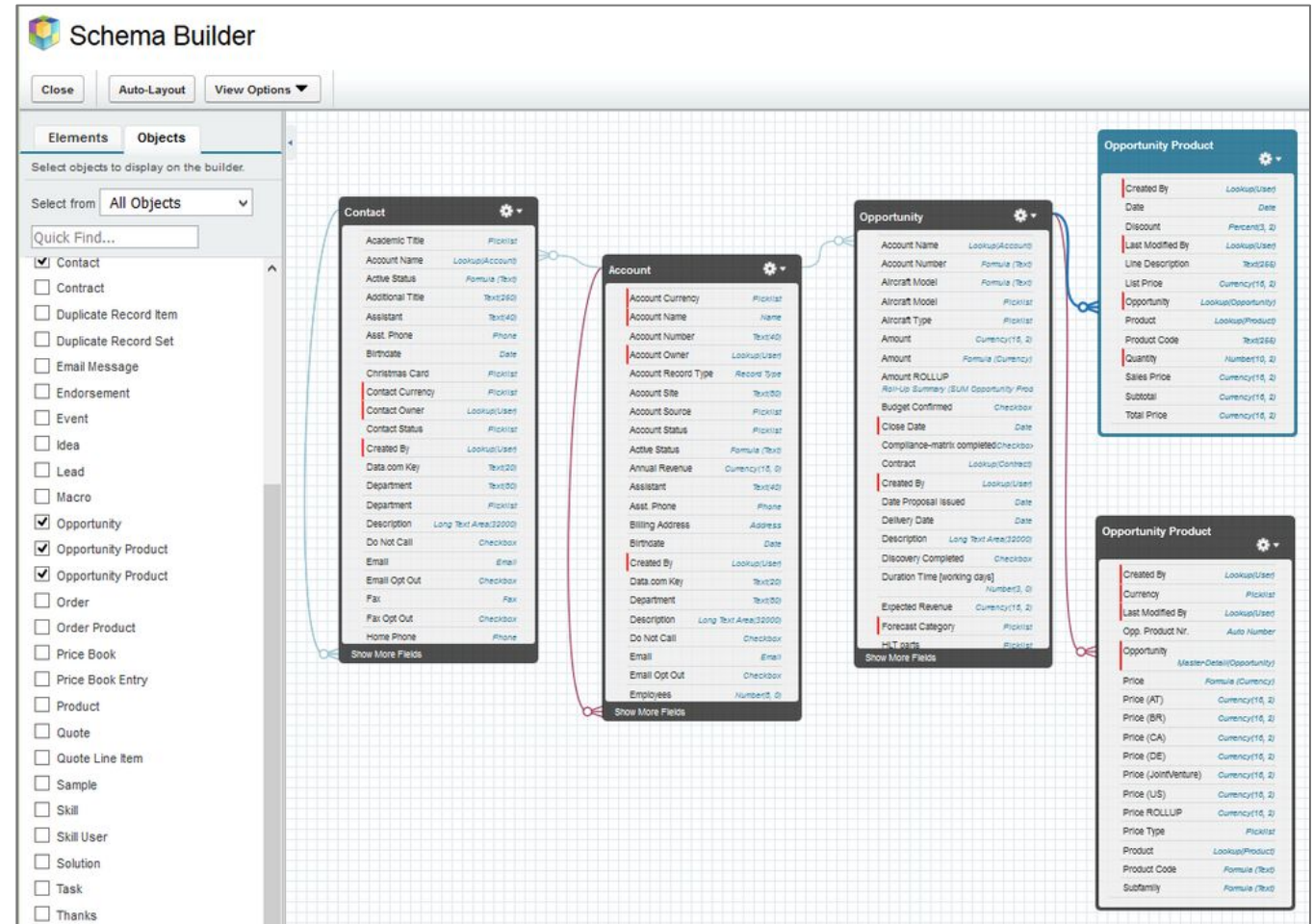
Setup | Objects and Fields | Schema Builder

Viewing objects and relationships

Schema Builder provides a dynamic environment for viewing and modifying all the objects and relationships in your app. This greatly simplifies the task of designing, implementing, and modifying your data model, or schema

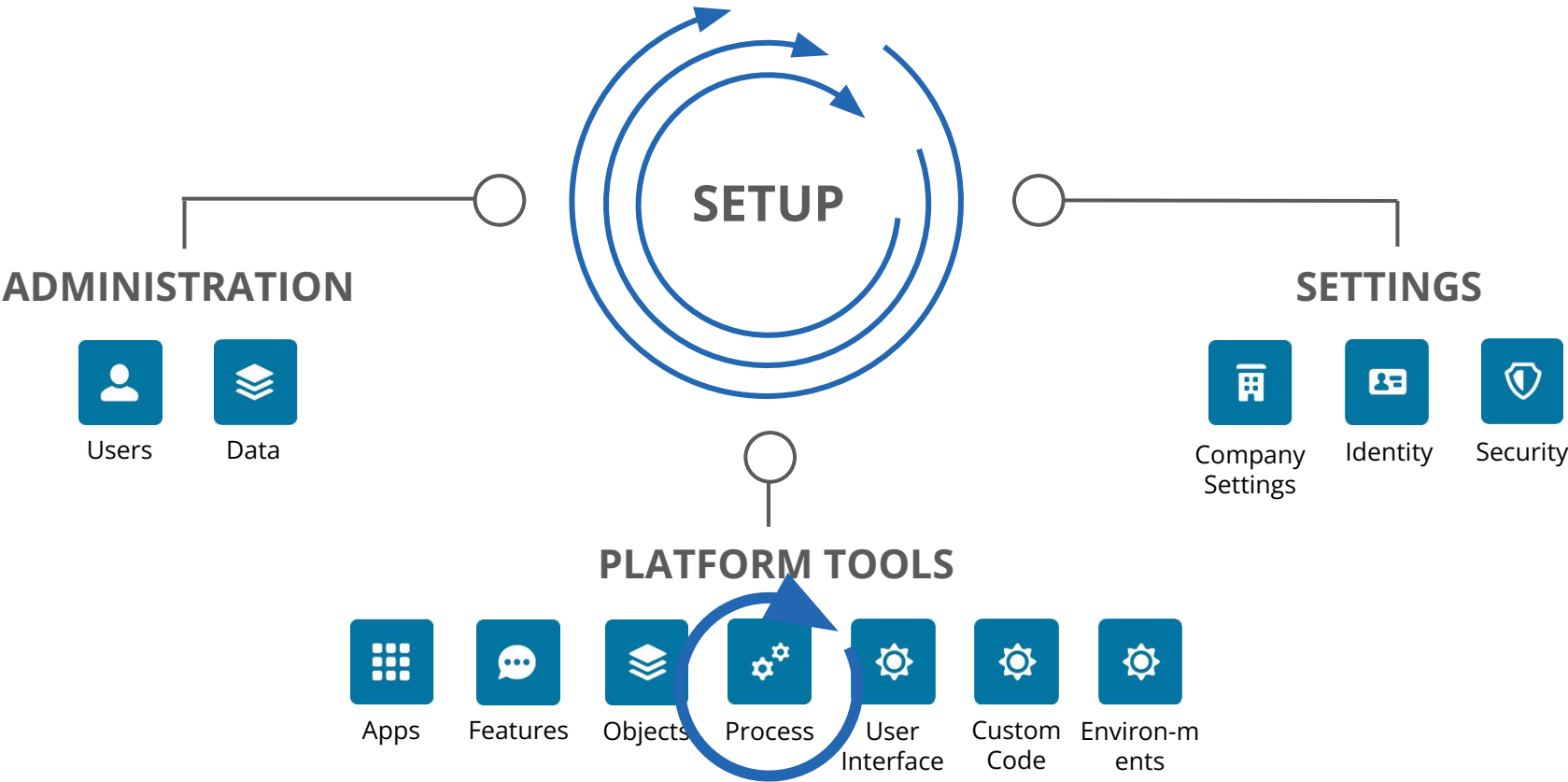
Schema Builder lets you add the following to your schema:

- Custom objects
- Lookup relationships
- Master-detail relationships
- All custom fields except: Geolocation



Setup

Overview



Process Builder

Setup | Process Automation | Process Builder

Processes

- The Process Builder is a workflow tool that helps you easily automate your business processes by providing a powerful and user-friendly visual representation of your process as you build it
- Many of the tasks you normally assign, the emails you regularly send, and other record updates are vital parts of your organization's standard processes
- Instead of doing this repetitive work manually, you can configure processes to do it automatically

Process Builder

← Back To Setup

?

Help

My Processes

5 items

New

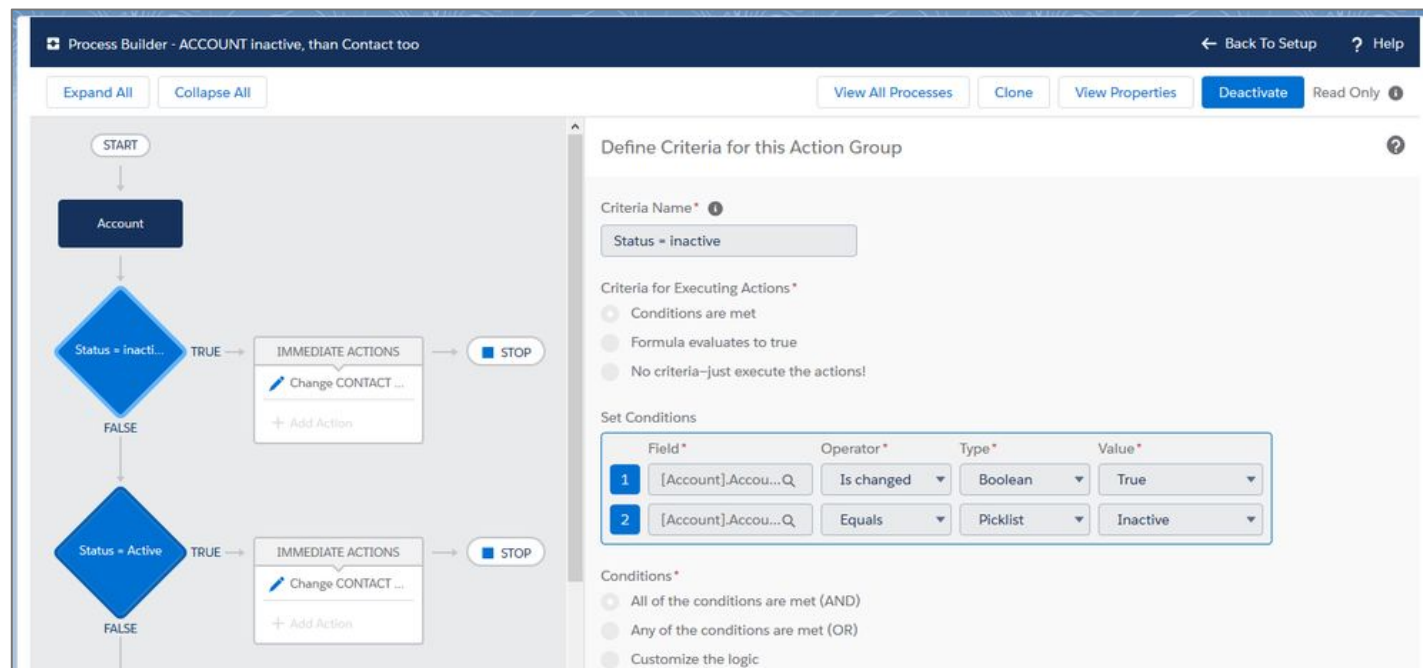
| PROCESS ▲ | DESCRIPTION | OBJECT | PROCESS TYPE | LAST MODIFIED | STATUS | ACTIONS |
|---|-------------|---------------------|--------------|---------------|----------|---------|
| ▼ ACCOUNT inactive, than Contact too | | | | | | |
| Version 6: ACCOUNT inactive, than Contact too | | Account | | 08.09.2017 | Active | |
| Version 5: ACCOUNT inactive, than Contact too | | Account | | 06.09.2017 | Inactive | Delete |
| > CONTACT active / inactive | | Contact | | 06.09.2017 | Active | |
| > Opp. Price PB | | Opportunity Product | | 12.09.2017 | Active | |
| > Opp. Standard Amount Trigger | | Opportunity | | 12.09.2017 | Active | |
| > Sample Email | | Sample | | 09.10.2017 | Active | |

Process Builder

Setup | Process Automation | Process Builder

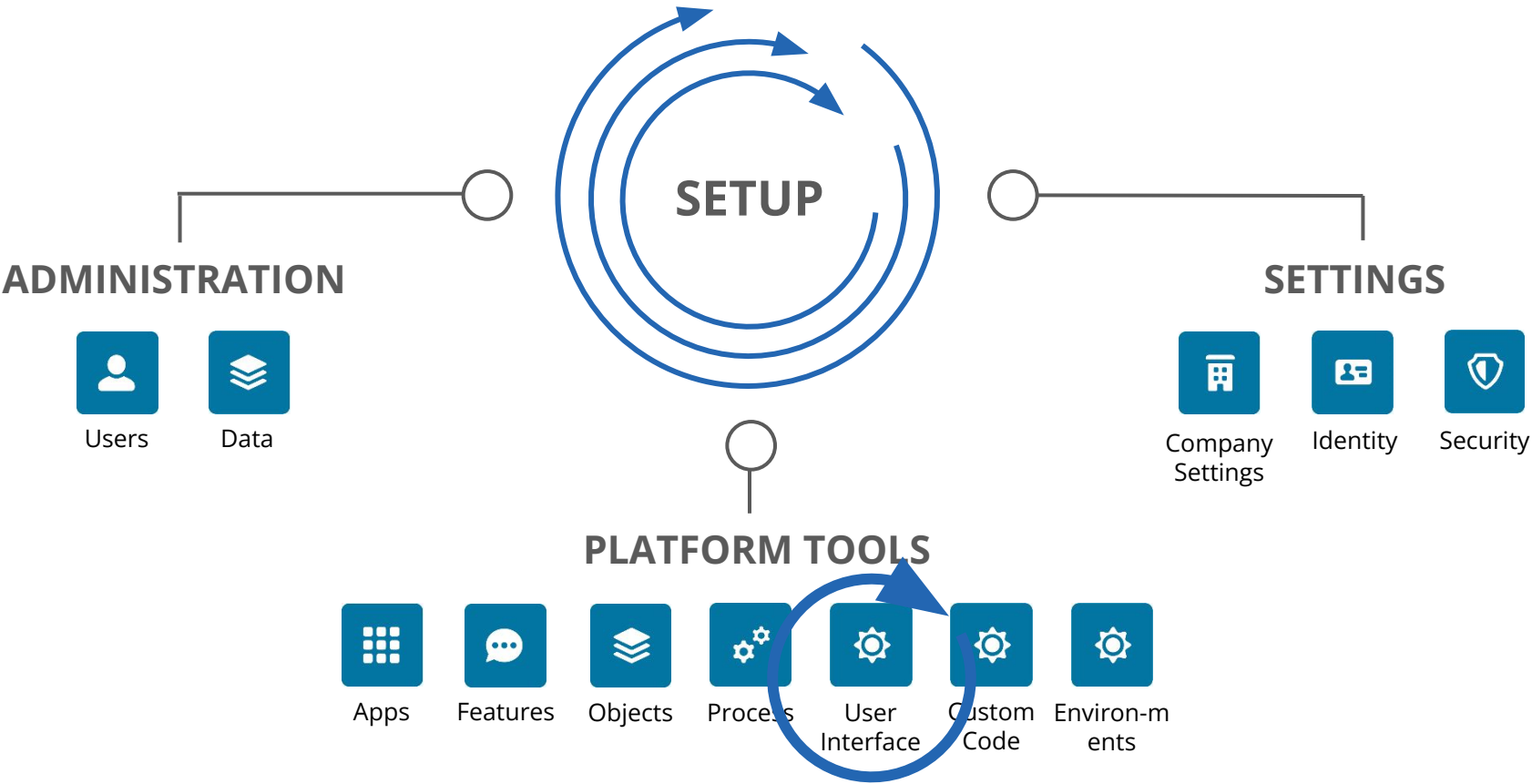
Building a Process

1. **Define the Process Properties** - The process properties uniquely identify your process
2. **Configure the Process Trigger** - Every process includes a trigger, which tells the process when to start. How you configure that trigger depends on what type of process you're creating
3. **Add Process Criteria** - Define the criteria that must be true before the process can execute the associated actions.
4. **Add Actions to Your Process** - After you define a criteria node, define the actions that are executed when the criteria are met. Actions are executed in the order in which they appear in the Process Builder
5. **Execute Actions on More Than One Criteria** - Choose whether to stop or continue your process after specific criteria are met and associated actions execute



Setup

Overview

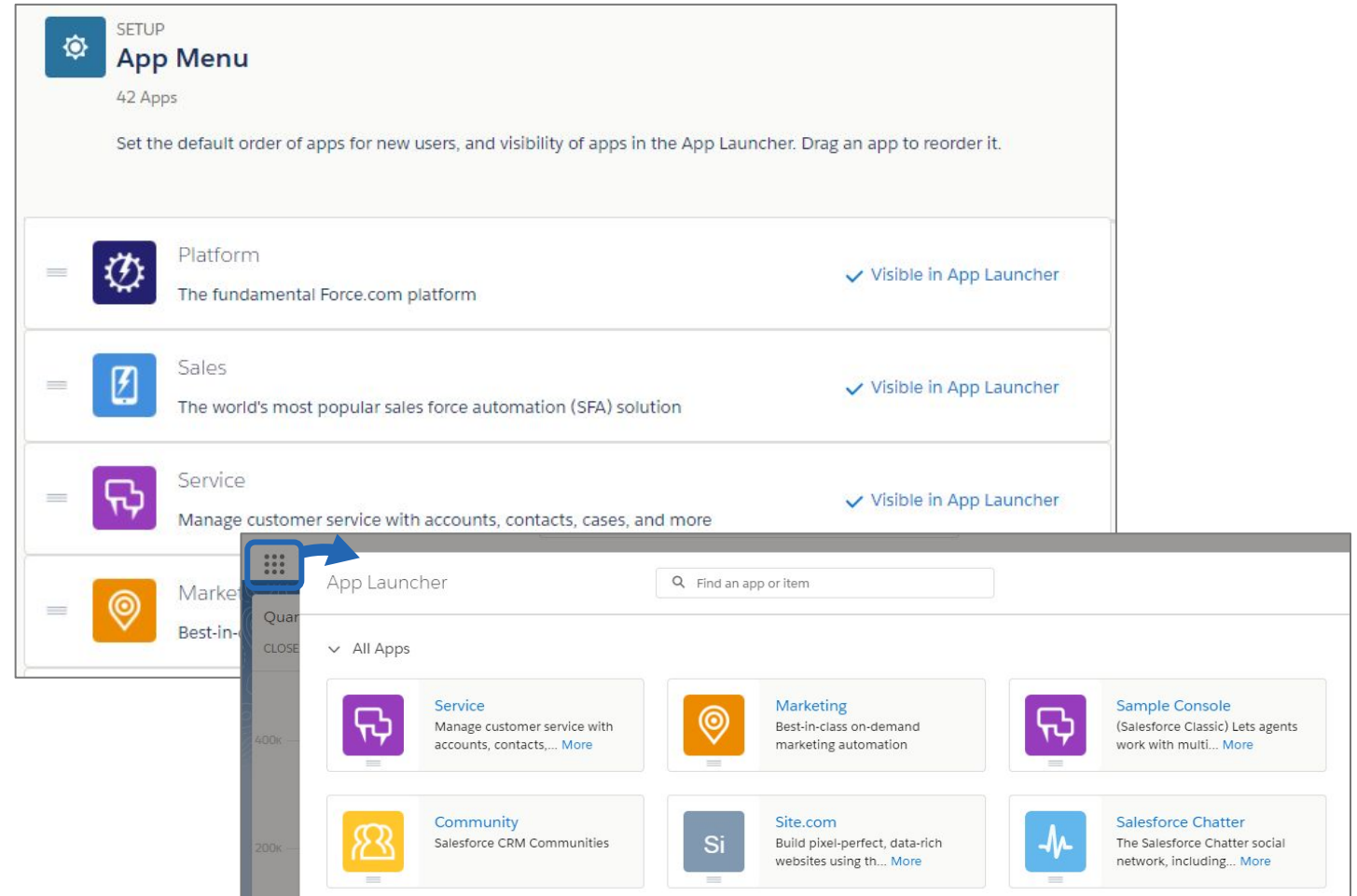


App Menu

Setup | User Interface | App Menu

Apps

- All apps installed in the org appear on the app menu items list. However, the apps that users see in their app menu and App Launcher vary depending on each app's visibility settings and the user's permissions
- Users see only the apps that they are authorized to see according to their profile or permission sets
- From the list of app menu items, drag the apps to change their order. Changes take effect immediately
- Optionally, click Visible in App Launcher or Hidden in App Launcher to show or hide individual apps from the App Launcher for all users in the org



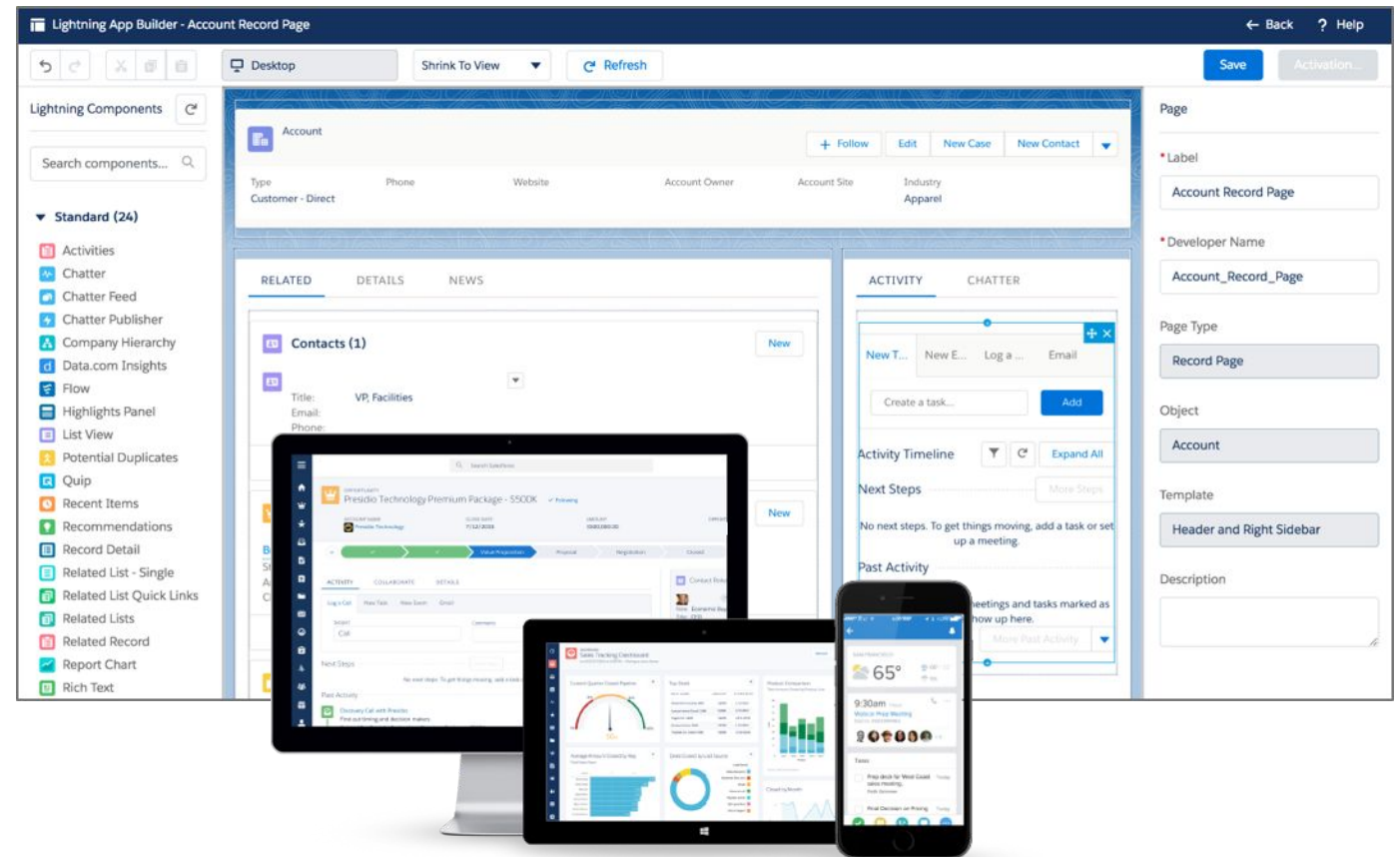
Lightning App Builder

Setup | User Interface | Lightning App Builder

Lightning Apps

The Lightning App Builder is a point-and-click tool that makes it easy to create custom pages for the Salesforce app and Lightning Experience. You can combine various components on a single page to give your users what they need all in one place. With the Lightning App Builder, you can build:

- Single-page apps that drill down into standard pages
- Dashboard-style apps, such as apps to track top sales prospects or key leads for the quarter
- “Point” apps to solve a particular task, such as an expense app for users to enter expenses and monitor expenses they’ve submitted
- Custom record pages for your objects, tailored to the needs of your users
- Custom Home pages containing the components and features that your users use most

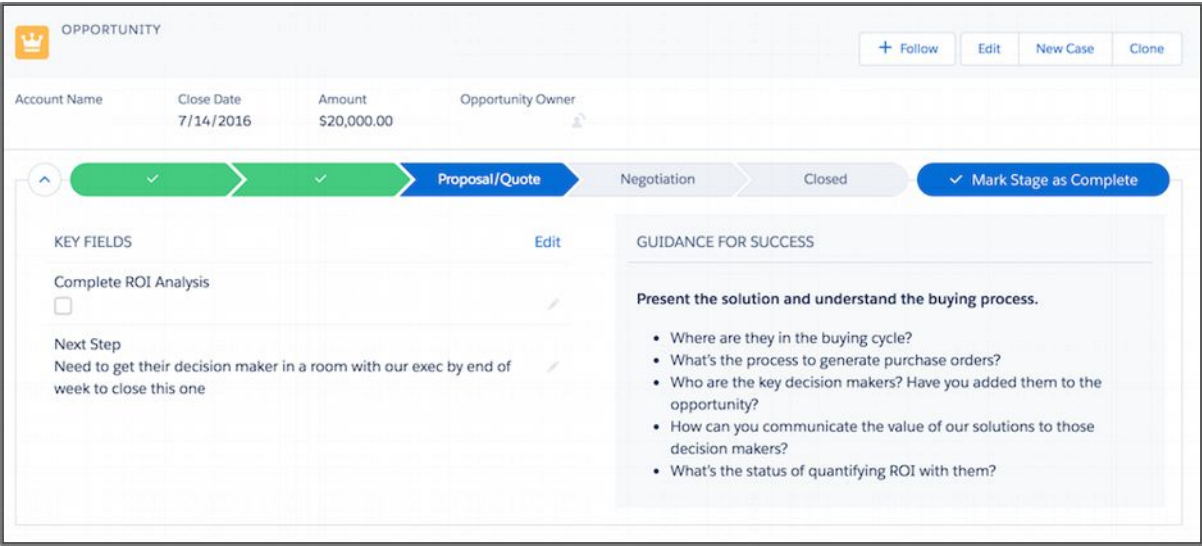


Path Settings

Setup | User Interface | Path Settings

Path

- Use the Path component on opportunity, lead, campaigns, contracts, orders, and custom object detail pages in communities to show various stages of a business process
- The Path component is intended for a wide-column layout. Add it to columns that are at least 50% wide, though full columns are best



Path

Keep users focused on what's most important to complete processes fast. By guiding users to the right fields and content at the right time, Path enforces and ensures adoption of your company's process. When you create paths, you choose:

- Which fields and content appear for your users at each step in the process.
- What good advice, helpful reminds, useful links, and best practices to include at each step.
- How many different paths to provide to your users. For example, you might provide different paths for inside sales and outside sales, or different paths for delivery status of different products or services.
- When paths are available to your users.

New Path

| Path Name | Active | Object | Record Type | Action |
|-----------|-------------------------------------|-------------|-------------|--|
| Default | <input checked="" type="checkbox"/> | Opportunity | --Master-- | Delete Edit Deactivate |
| Default | <input checked="" type="checkbox"/> | Lead | --Master-- | Delete Edit Deactivate |

Tabs

Setup | User Interface | Tabs

Custom Tabs

- Custom tabs let you display custom object data or other web content in Salesforce. When you add a custom tab to an app in Lightning Experience, it displays as an item in the app's navigation bar
- When creating a tab for a custom object, select an icon to display, which profile should access the tab and in which app you want to include the tab

Custom Tabs




[Help for this Page](#)

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

[New](#) [What Is This?](#)

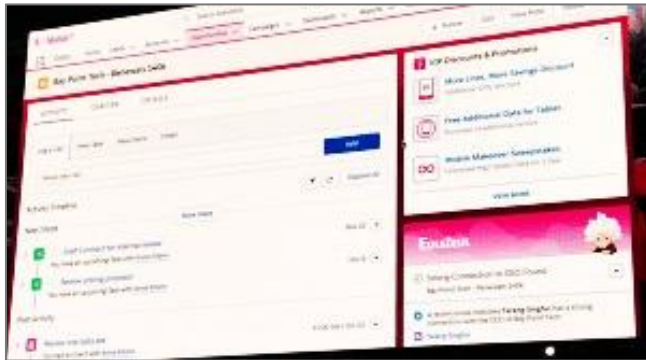
| Action | Label | Tab Style | Description |
|--|----------------------|--|-------------|
| Edit Del | Aircraft |  Airplane | |
| Edit Del | Opportunity Products |  Desk | |
| Edit Del | Samples |  Building Block | |

Themes and Branding

Setup | User Interface | Themes and Branding

Branding

- Salesforce has improved readability, information density, and color contrast in Lightning Experience. These refinements are now built-in
- In a future release, you'll be able to define a custom theme that matches your company's branding (available early 2018)



SETUP

Themes and Branding

Salesforce has improved readability, information density, and color contrast in Lightning Experience. These refinements are now built-in. In a future release, you'll be able to define a custom theme that matches your company's branding.

Hide background images in Lightning Experience



Show

Rename Tabs and Labels

Setup | User Interface | Rename Tabs and Labels

Rename

With Rename Tabs and Labels you can change the name of almost any object, field, or tab in Salesforce

1. Select a language on the top of the page in which you want to make changes and click on an object
2. Enter a new tab name or click next to make changes on field names

Rename Tabs and Labels

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

Select Language English

Standard Tabs

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

Step 1. Enter the new tab names

Step 1 of 2

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

| Tab | Accounts |
|-------------------------|---------------------------------------|
| Language | English |
| Singular | <input type="text" value="Account"/> |
| Plural | <input type="text" value="Accounts"/> |
| Starts with vowel sound | <input checked="" type="checkbox"/> |

| | Singular | Plural |
|------------------|---|---|
| Account Division | <input type="text" value="Account Division"/> | |
| Account Name | <input type="text" value="Account Name"/> | <input type="text" value="Account Names"/> |
| Account Number | <input type="text" value="Account Number"/> | |
| Account Owner | <input type="text" value="Account Owner"/> | <input type="text" value="Account Owners"/> |
| Account Site | <input type="text" value="Account Site"/> | <input type="text" value="Account Sites"/> |
| Account Source | <input type="text" value="Account Source"/> | |
| Address | <input type="text" value="Address"/> | |

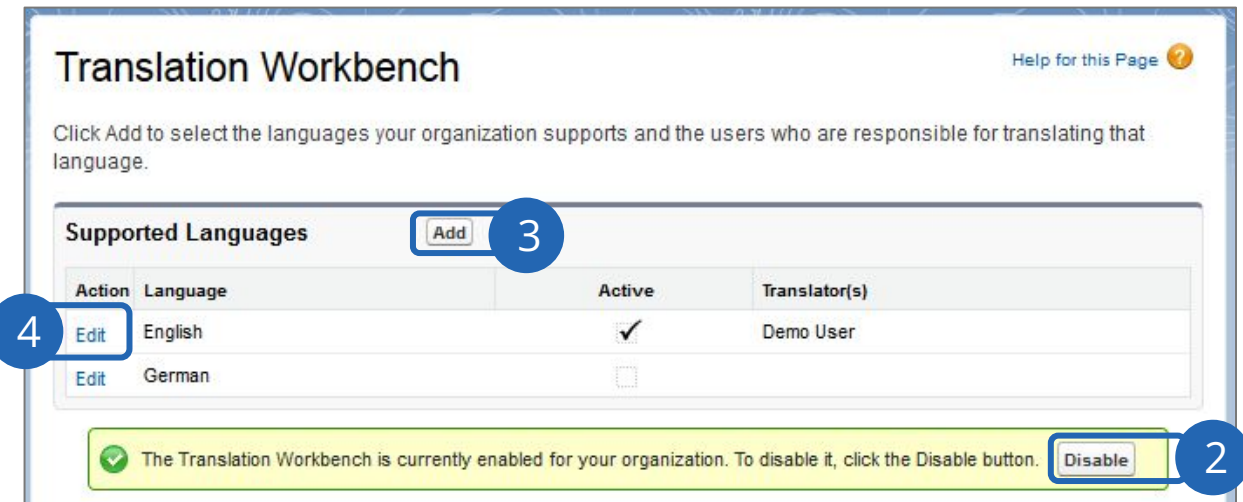
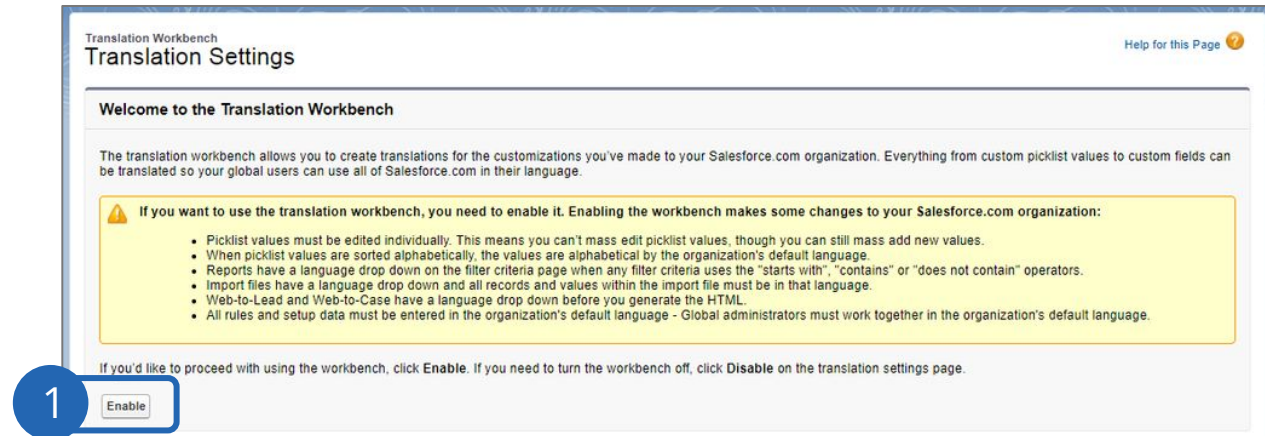
Translation Workbench

Setup | User Interface | Translation Workbench | Translation Settings

Translation

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.

1. On the welcome page, click Enable.
2. To disable the Translation Workbench, from Setup, enter Translation Settings in the Quick Find box, select Translation Settings, and then click Disable.
3. To add new Languages click Add Button and select from all available Languages.
 - More Languages can be activated via Setup | Company Setting | Language Settings
4. Click on the Edit Link next to the Language to adjust the Translation of the specific Language.



Translation Workbench

Setup | User Interface | Translation Workbench | Translate

Translation

- Select the Language you're translating into.
- Select a Setup Component. Click the pull-down menu to select from the list of translatable customizations. See [Translatable Customizations](#) for a complete list of possible customizations.
- Depending on the setup component, select the next options.
The aspect is a part of the setup component that you can translate. For example:
 - Workflow tasks have an object (Account, Contact, etc.) and aspect (Subject or Comment).
 - Flows have a flow type (Flow and Autolaunched Flow), a flow name, and a flow component (Definition, Version, Screen Info, Screen Field, and Choice). Flow components can have a flow version, screen, or aspect.
- Double click in the translation column to enter new values. You can press TAB to advance to the next editable field or SHIFT-TAB to go to the previous editable field. .

Translation Workbench
Translate

To get started in the Translation Workbench:

1. Select a language (if you're a translator for more than one language).
2. Select a setup component.
3. If necessary, select an object and aspect. For example, a workflow task has an object (Account, Contact, etc.) and aspect (Subject or Comment) to filter for translatable terms.
4. Double click in the translation column to enter new values. You can tab to jump to the next row.

Select the filter criteria:

Language: German
Setup Component: Picklist Value
Object: Contact
Show Inactive Values: ☐

Save Cancel

| Master Picklist Value Label | Picklist Value Label Translation | Out of Date |
|-----------------------------|----------------------------------|--------------------------|
| Name | | |
| Dr. | Dr. | <input type="checkbox"/> |
| Mr. | Hr. | <input type="checkbox"/> |
| Mrs. | Frl. | <input type="checkbox"/> |
| Ms. | Fr. | <input type="checkbox"/> |
| Prof. | Prof. | <input type="checkbox"/> |

1-5 of 5
Previous Next
Page 1 of 1

Translation Workbench

Setup | User Interface | Translation Workbench | Export

Translation

- Create files that contain your org's translatable metadata, such as custom fields, report types, and picklist values. Send these files to your outside translators or translation agency for bulk translation activities, then use **Import** to update your labels.

- Select which labels you want to export.

Source—Used as the initial source for creating new translations.

Creates a single file that contains a list of all your translatable customizations. Typically, the content is in your organization's default language.

Untranslated—Used to make updates.

Creates a set of files that contain only customizations that have not been translated, including new and modified customizations. One file is created for each language. These files are then compressed into .zip files.

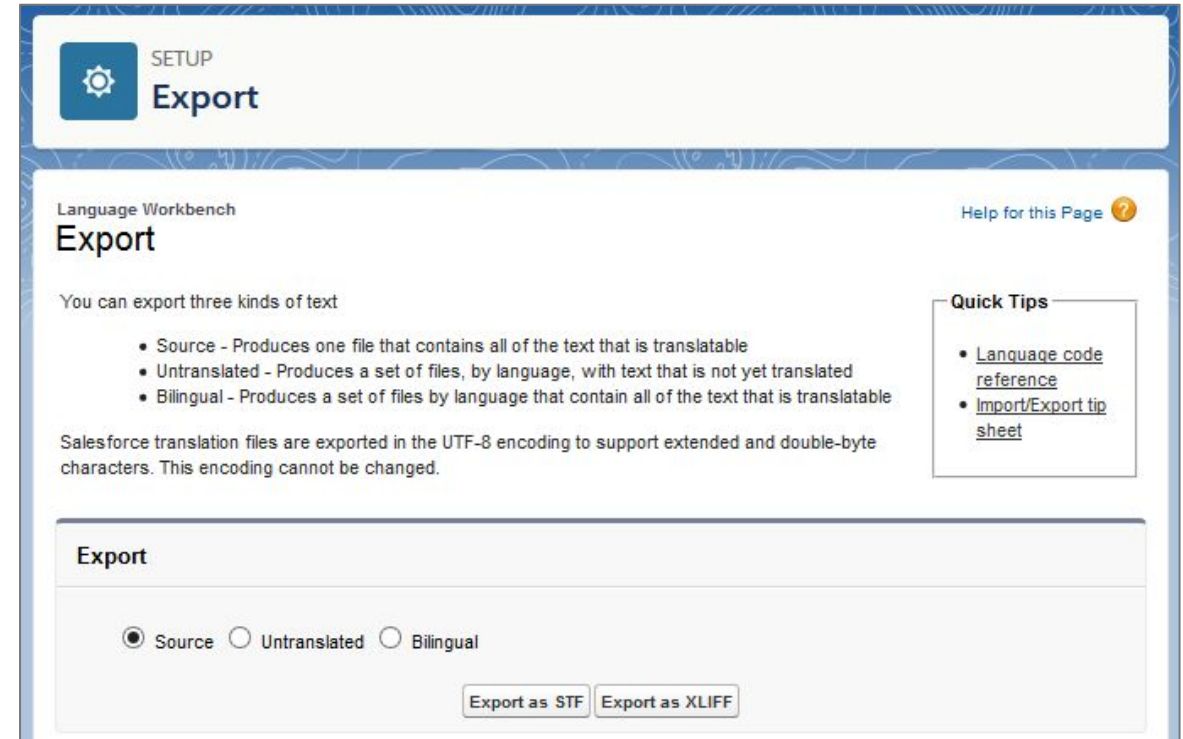
Bilingual—Used for reference and reviewing all your untranslated and translated customizations.

Creates a list of all the translatable labels in their current translated or untranslated state.

One file is created for each language. These files are then compressed into .zip files.

- Click Export. A status message tells you that the export is being processed. When the export is complete an email is sent to the email address specified in your profile.

Locate the exported .stf, .xlf, or .zip file.



Translation Workbench

Setup | User Interface | Translation Workbench | Import

Translation

- Import and update the translations for your org's metadata, such as custom fields, report types, and picklist values. Typically, the original files are exported from Salesforce, then sent to your outside translators or translation agency for bulk translation activities and returned to you for importing.
- Click Browse to locate and select the file you want to import.
- Click Import.
- After the import is complete:
 - The labels are updated with the translations.
 - A confirmation email is sent to the email address specified in your profile.
- Verify the imported changes have been implemented. You can:
 - Check labels in your Salesforce organization.
 - Check labels through the Translation Workbench.

The screenshot shows the 'Import' page in the Salesforce Translation Workbench. At the top, there's a 'SETUP Import' header with a gear icon. Below this, the page is titled 'Language Workbench Import'. A 'Help for this Page' link with a question mark icon is in the top right. A 'Quick Tips' box on the right lists two links: 'Language code reference' and 'Import/Export tip sheet'. The main content area is titled 'Import' and contains four steps: 1. 'Prepare the translated Tab Separated File' with instructions on file format and encoding; 2. 'Zip your files (Optional)' with a note on uploading multiple files; 3. 'Select and upload your file(s)' with a file selection interface showing 'Durchsuchen...' and 'Keine Datei ausgewählt.'; 4. 'Import your files' with an 'Import' button.

SETUP
Import

Language Workbench
Import

Help for this Page ?

Quick Tips

- [Language code reference](#)
- [Import/Export tip sheet](#)

Import

Step 1. Prepare the translated Tab Separated File

Before importing your translated tab separated file, please make sure of the following:

1. Create a separate file for each language you would like to import that contains only the key and the translation.
2. The language attribute at the top of each file is required. The language attribute looks like this: Language = "en_US" and contains a [valid language reference](#)
3. To ensure correct handling of extended and double-byte characters, make sure your import files are saved in UTF-8 encoding before importing.

Step 2. Zip your files (Optional)

If you are uploading multiple language files you can zip all of them together for easier import.

Step 3. Select and upload your file(s)

Zip or individual file

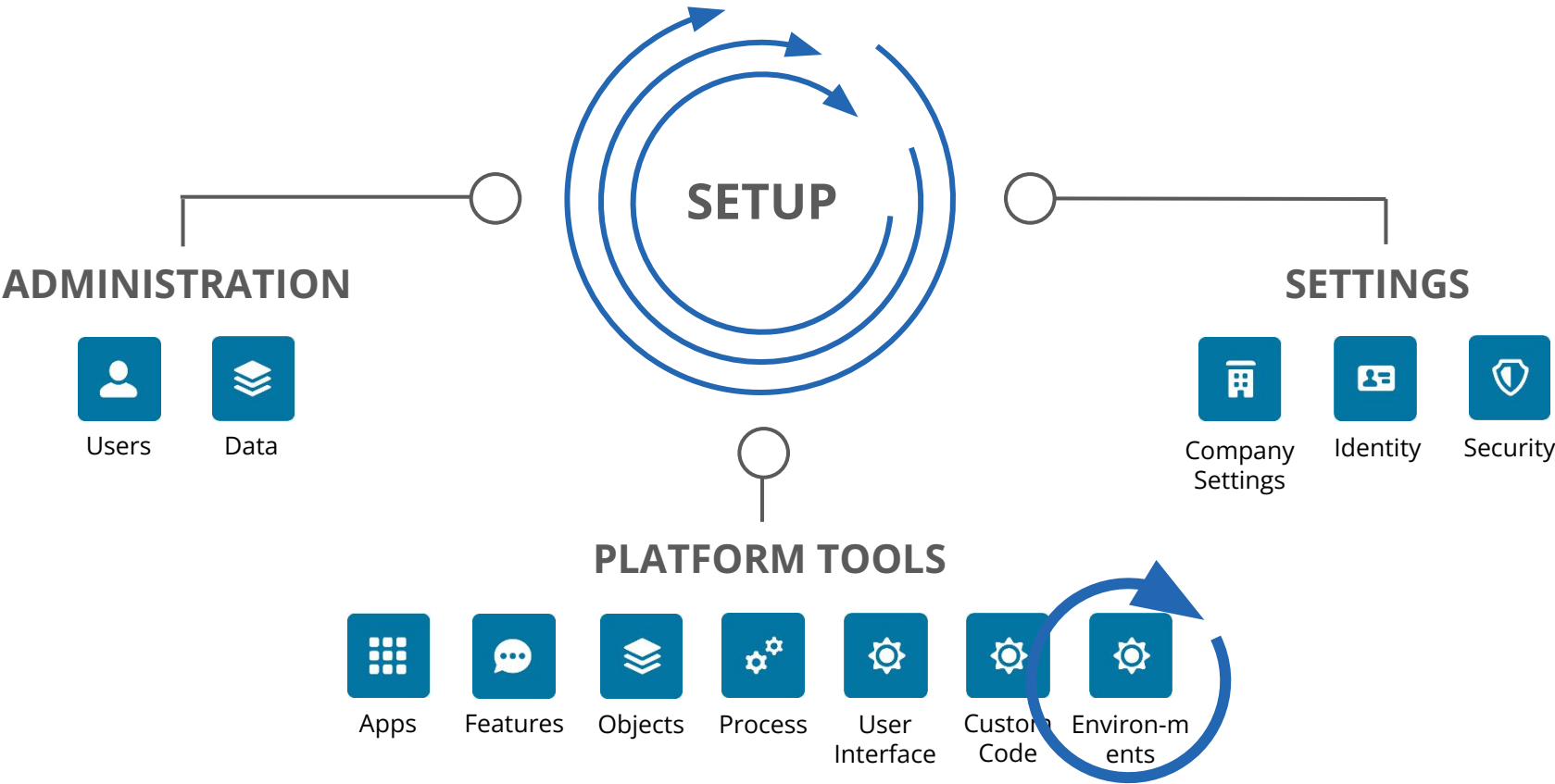
Durchsuchen... Keine Datei ausgewählt.

Step 4. Import your files

Import

Setup

Overview



Sandboxes

Setup | Environments | Sandboxes

Sandboxes

- Sandboxes are isolated from your production org, so operations that you perform in your sandboxes don't affect your production org. There are different types of sandboxes:
 - Developer Sandbox
 - Developer Pro Sandbox
 - Partial Copy Sandbox
 - Full Sandbox
- Log in to your sandbox by clicking on the link beside your sandbox name (only the creator of the Sandbox can see this link) or use the URL: <https://test.salesforce.com>
- If you want to give other users access to your sandbox, you must update their usernames in the Sandbox first

Sandboxes

[Help for this Page](#)

Sandboxes are special organizations that are used to test changes or new apps without risking damage to your production data or configuration. Sandbox Templates are used to create new Sandboxes containing specific data sets.

Available Sandbox Licenses

| Developer | Developer Pro | Partial Copy | Full |
|------------------------|------------------------|------------------------|------------------------|
| 8 Available (2 in use) | 0 Available (0 in use) | 0 Available (0 in use) | 0 Available (0 in use) |

Sandboxes

Sandbox History

New Sandbox

| Action | Name | Type | Status | Location | Current Org Id | Completed On | Description |
|--|----------------------------|-----------|-----------|----------|------------------|------------------|-------------|
| Del Refresh Log In | Dev | Developer | Completed | CS88 | 00D5E00000000D5 | 16.11.2017 13:57 | |
| Del Refresh Log In | Developmen | Developer | Completed | CS88 | 00D0E00000000D0E | 04.10.2017 00:22 | |

Deployment Settings

Setup | Environments | Deploy | Deployment Settings

Deployment

- A deployment connection enables customizations to be copied from one Salesforce org to another
- The deployment connections list shows which orgs are authorized to upload changes to this org, and which orgs allow this org to upload changes to them
- **On Production Org:** Activate Checkbox to authorize inbound deployment
- **On Sandbox:** Activate Checkbox to authorize outbound deployment

Deployment Connection

Video Tutorial | Help for this Page ?

Dev

Each organization controls which organizations can upload changes to it. Select Allow Inbound Changes to authorize the connected organization to upload changes to your organization. To authorize changes from your organization to another organization, contact the administrator responsible for deployment connections on the target organization.

This Organization:

Deployment Connection Detail

Save

Cancel

| | |
|-------------|-----------|
| Name | Dev |
| Description | |
| Type | Developer |

Upload Authorization Direction

Allow Inbound Changes ? ☐

Accept Outbound Changes ? ☐

Save

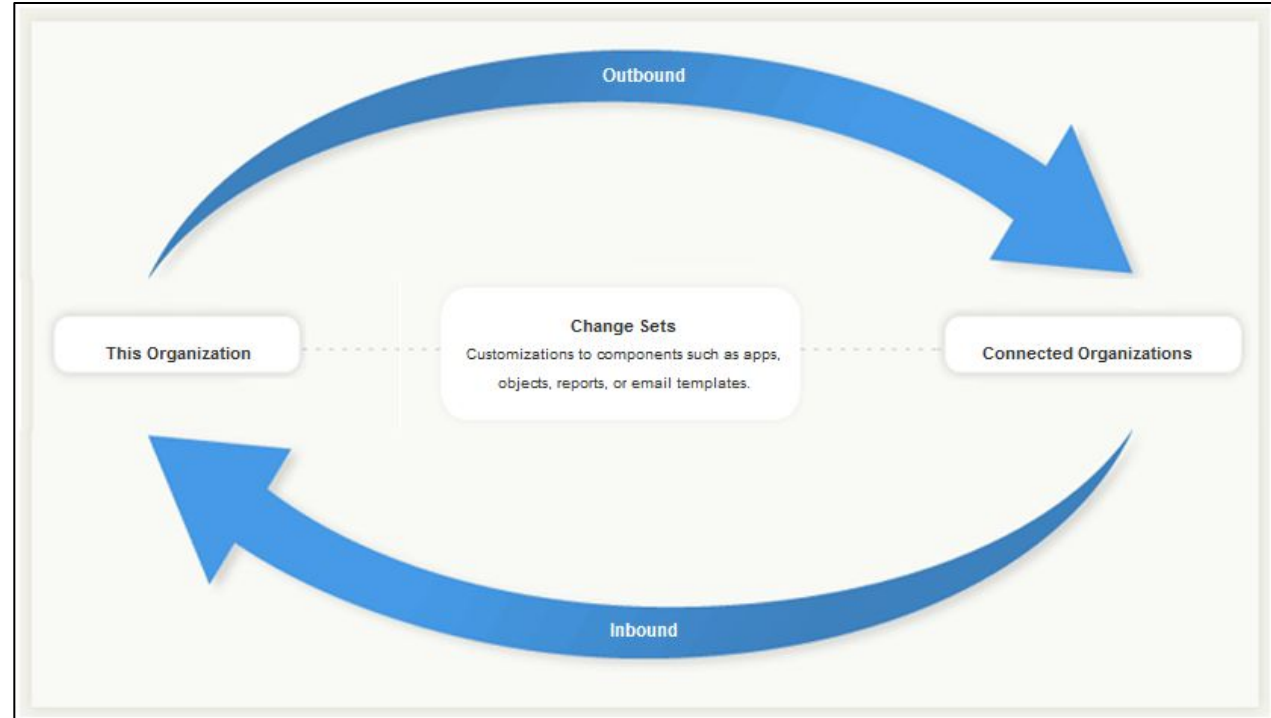
Cancel

Inbound & Outbound Change Sets

Setup | Environments | Change Sets | Inbound & Outbound Change Sets

Change Sets

- Use change sets to send customizations from one Salesforce org to another
- When you are on a Sandbox, use Outbound Change Sets to send Change Sets to your Production Org
- When you are on the Production Org., use Inbound Change Sets to see all received change sets
- All Change Sets have to be validated before those will be deployed on Production. You can validate a change set without deploying changes, change sets that have been successfully validated might qualify for a quick deployment

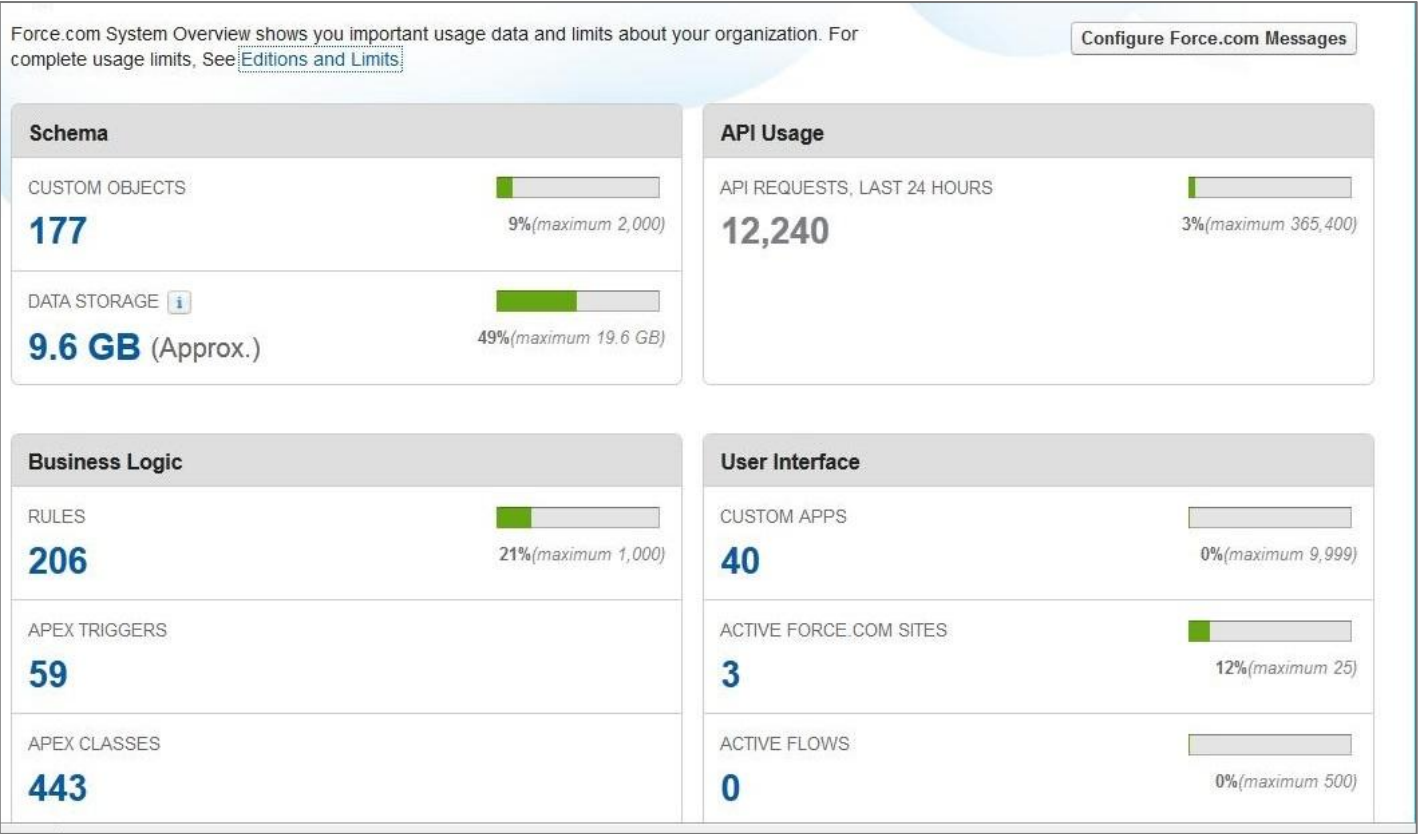


System Overview

Setup | Environments | System Overview

Overview

- The system overview page shows usage data and limits for your organization, and displays messages when you reach 95% of your limit (75% of portal roles)
- Click the numbers under each metric to get more details about your usage. If it's available, use Checkout to increase usage limits for your organization
- For example, if your organization reaches the limit for custom objects, the system overview page notifies you with a message link. Click the link to clean up any unused objects, or visit Checkout to increase your limit for objects

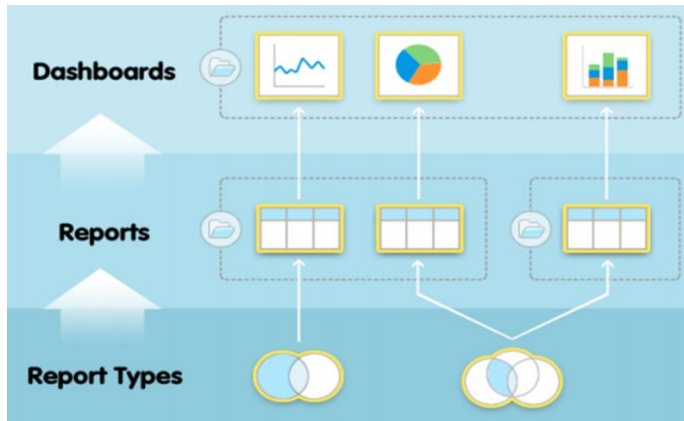




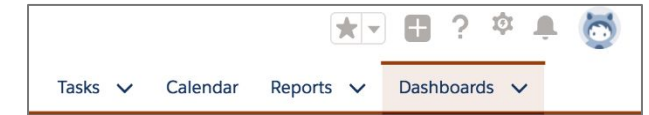
Reports & Dashboards

Reports & Dashboards

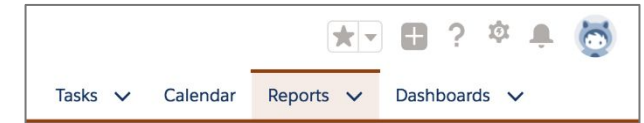
Learn how to use Reports & Dashboards



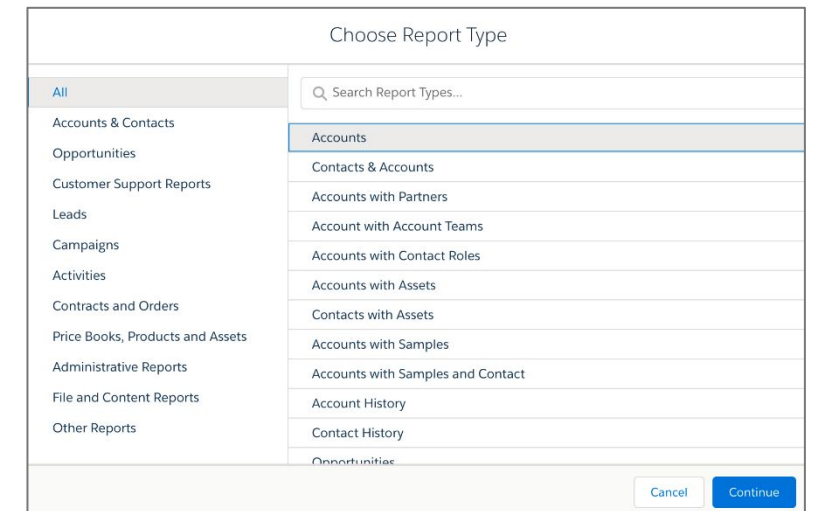
Dashboards represent data of a report via graphics, which allow users to see key metrics and performances quickly and comprehensively



Reports help you to access data quickly and comprehensively and is a resource component for building dashboards

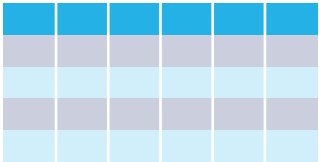
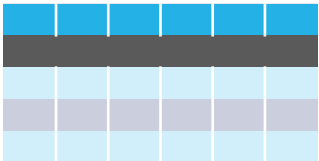
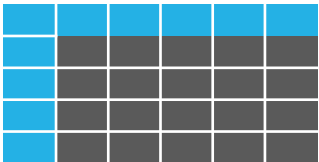


Report types are templates for report creation



Reports

Report Formats

| Format | Description | Example | Illustrative |
|---------|--|--|--|
| Tabular | Tabular reports are the simplest and fastest way to look at data. Similar to a spreadsheet, they simply consist of an ordered set of fields in columns. Tabular reports are best for creating lists of records over a list with a single grand total. | Customer Visits this month |  |
| Summary | Summary reports are similar to tabular reports, but also allow users to group rows of data, view subtotals, and create charts. They can be used as the source report for dashboard components. | Customer Visits this month grouped by sales Rep. |  |
| Matrix | Matrix reports are similar to summary reports but allow the user to group and summarize data by both rows and columns. Matrix reports have some similarities with Pivot Tables in Excel. They can be used as the source report for dashboard components. | Customer Visit count grouped by sales Rep. and account |  |

Reports

Landing page

Overview

1. **New Report** - Create a new report. (Click on “New Report (Salesforce Classic)” to create a new report on the old classic layout)
2. **New Folder** - Create a new report folder. This Folder will appear in the folder list “Created by Me”
3. **Lists of Reports and Folders** - Access predefined lists of reports and folders
4. **Reports** - By default, this section shows all recent reports. Depending on which list you choose in the left sidebar (3), the respective reports will show up here

The screenshot shows the Salesforce Reports interface. At the top right, there are three buttons: 'New Report' (callout 1), 'New Report (Salesforce Classic)' (callout 2), and 'New Folder'. On the left, a sidebar contains a 'REPORTS' section with 'Recent' selected (callout 3), and a 'FOLDERS' section with 'Created by Me' selected. The main area displays a table of reports (callout 4) with columns for Report Name, Description, Folder, Last Modified By, and Subscribed.

| REPORT NAME | DESCRIPTION | FOLDER | LAST MODIFIED BY | SUBSCRIBED |
|------------------------|--|----------------------------|------------------|--------------------------|
| Win Ratio | | Sales & Marketing Dashb... | | <input type="checkbox"/> |
| Visit Planing | Report for visit-planing | Sales and Marketing Rep... | | <input type="checkbox"/> |
| Trend of Cases Cre... | Case creation trend | Service Dashboards Repo | | <input type="checkbox"/> |
| Trend of Cases Clos... | | Service Dashboards Repo | | <input type="checkbox"/> |
| Trend of Case Reso... | | Service Dashboards Repo | | <input type="checkbox"/> |
| Top 10 Cases by Age | | Service Dashboards Repo | | <input type="checkbox"/> |
| Sample Report: Pip... | What did the pipeline look like as of... | Public Reports | | <input type="checkbox"/> |
| Sales Person Open ... | | Sales and Marketing Rep... | | <input type="checkbox"/> |
| Sales Person MTD ... | Month to Date sales | Sales and Marketing Rep... | | <input type="checkbox"/> |
| Sales Person Curre... | | Sales and Marketing Rep... | | <input type="checkbox"/> |
| Sales Person Activity | | Sales and Marketing Rep... | | <input type="checkbox"/> |

Reports

Create a new report

Report Builder

1. **Fields Pane** - Lists all accessible fields in the selected report type
2. **Filters and Outline Pane** - Select filters to limit the data shown in the report. Add groupings and choose which fields to display
3. **Preview Pane** - Contains a dynamic report preview, which allows the user to customize the report and see the immediate effect. The preview shows only a limited number (50) of records. Run the report to see all your results
4. **Save & Run** the report

The screenshot shows the Report Builder interface with four numbered callouts:

- 1** Points to the **Fields Pane** on the left, which lists fields under "Contact: General (24)" and "Contact: Address (10)".
- 2** Points to the **Filters and Outline Pane** in the middle, showing the **OUTLINE** and **FILTERS** sections.
- 3** Points to the **Preview Pane** on the right, which displays a table of report data.
- 4** Points to the **Save & Run** buttons at the top right of the interface.

The preview table shows data for "Aircraft (13)", "Yacht (1)", "Hochbau (1)", and "Other (5)" categories, with columns for Industry, Christmas Card, Account Name, First Name, Last Name, Mailing Country (text only), and Account Owner.

| Industry | Christmas Card | Account Name | First Name | Last Name | Mailing Country (text only) | Account Owner |
|---------------|----------------|--|------------|-----------|-----------------------------|---------------|
| Aircraft (13) | Postally | Techno Aerospace | | | United States | |
| | Postally | Techno Aerospace | | | United States | |
| | Postally | Acme (Sample) | | | United States | |
| | Postally | Cheryl Pelly Design | | | United States | |
| | Postally | General Aerospace GmbH | | | Germany | |
| | Postally | Pierrejean Design Studio | | | France | |
| | Postally | B/E Aerospace | | | United States | |
| | Postally | Embraer Executive Jets | | | Germany | |
| | Postally | EMBRAER - Empresa Brasileira de Aeronautica S.A. | | | Brazil | |
| | Postally | EMBRAER - Empresa Brasileira de Aeronautica S.A. | | | Brazil | |
| | Postally | M&R associates design | | | Switzerland | |
| | Postally | J u. A. Frischeis GmbH | | | Austria | |
| | Postally | Rippert Anlagentechnik GmbH | | | Austria | |
| Subtotal | | | | | | |
| Yacht (1) | Postally | Alberto Pinto | | | France | |
| Subtotal | | | | | | |
| Hochbau (1) | Postally | Global Media (Sample) | | | Canada | |
| Subtotal | | | | | | |
| Other (5) | Postally | ERSTE GROUP Bank AG | | | Austria | |
| | Postally | AF Travel Management | | | Austria | |
| | Postally | Raiffeisenlandesbank Niederösterreich-Wien AG | | | Austria | |
| | Postally | BANK AUSTRIA UNICREDIT GROUP | | | Austria | |
| | Postally | ERSTE GROUP Bank AG | | | Austria | |
| Subtotal | | | | | | |
| Total (20) | | | | | | |

Reports

Subscribe to reports

Subscribe Reports

1. On the report tab, click on the dropdown of the report you want to subscribe and click on "Subscribe"
2. Select the frequency of your scheduled run, the days and the time
3. If needed, choose other users who should receive the report. Also choose a user who should be the running user
4. Click "Save" to complete the process

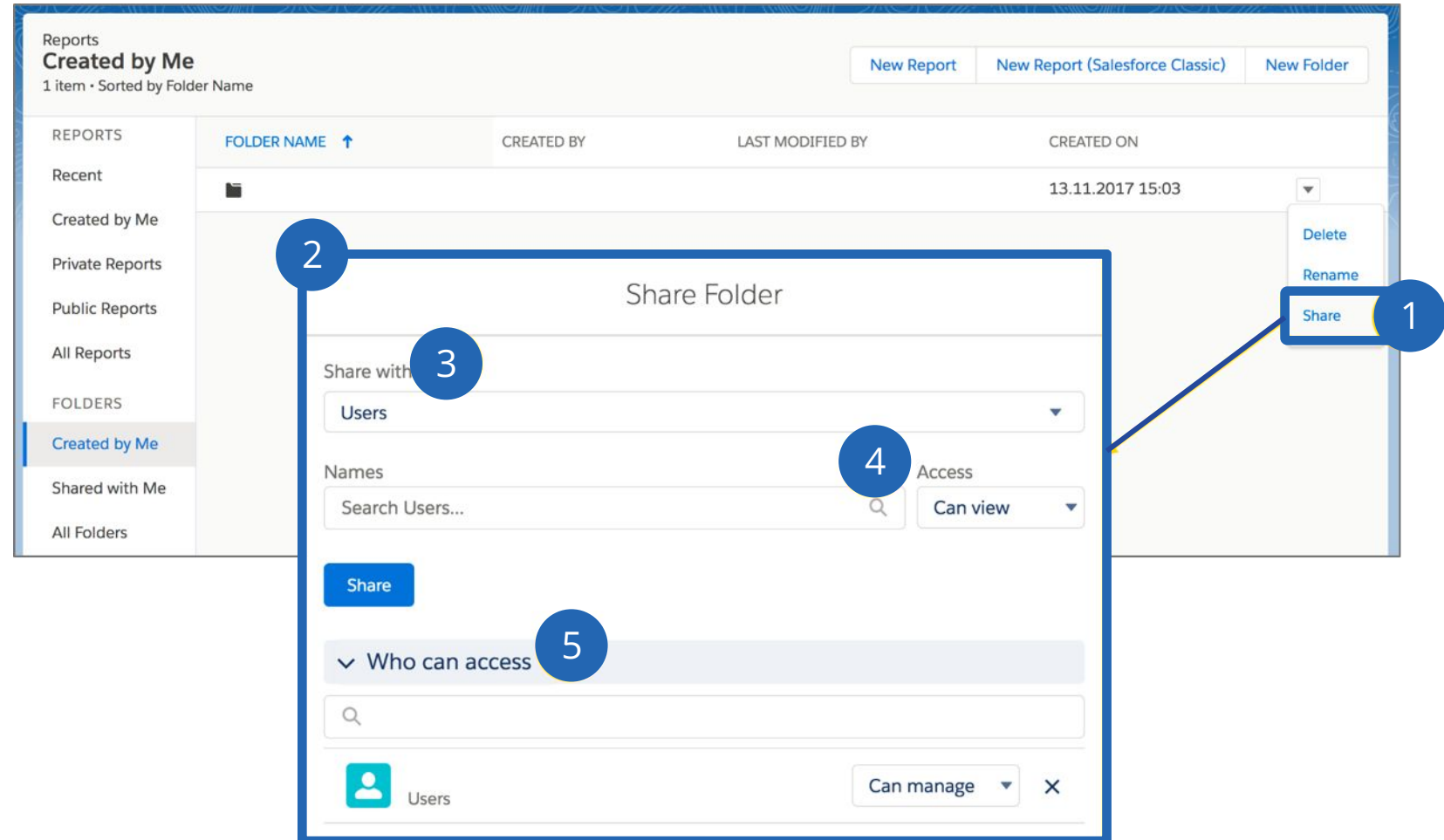
The screenshot displays the Salesforce Reports interface. At the top, there's a header with 'Reports Created by Me >' and buttons for 'New Report', 'New Report (Salesforce Classic)', and 'New Folder'. Below this is a table with columns: REPORT NAME, DESCRIPTION, FOLDER, LAST MODIFIED BY, and SUBSCRIBED. The first row shows a report named 'Christmas Card per Industry'. A dropdown menu is open for this report, showing options: Run, Edit, Edit (Salesforce Classic), **Subscribe** (highlighted with a blue box and callout 1), Export, and Delete. An 'Edit Subscription' dialog box is overlaid on the table. It has a 'Schedule' section with 'Frequency' (Daily, **Weekly** (callout 2), Monthly), 'Days' (MON (callout 2), TUE, WED, THU, FRI, SAT, SUN), and 'Time (Europe/Paris)' (16:00). The 'Email Results' section has 'Send To' (Me (selected), Select People (callout 3)) and 'Run Report As' (Me (selected), Another Person). A note at the bottom says 'After subscribing, you'll receive refreshed report results by email.' At the bottom right of the dialog are 'Cancel' and 'Save' (callout 4) buttons.

Reports

Sharing of Reports

Sharing

1. Reports in Salesforce are shared through folders. Click on the button on the right side of the folder you want to share. Click on "Share". (Different groups of users can be given different access rights to the same folder)
2. Define your sharing settings in the window that popped up
3. Sharing can be done based on individual Users, Roles, Roles and Subordinates or Public Groups
4. Search the Users, Roles or Public Groups in the Names section and select an access type. After that click on "Share"
5. View who can access the report in the "Who can access" section

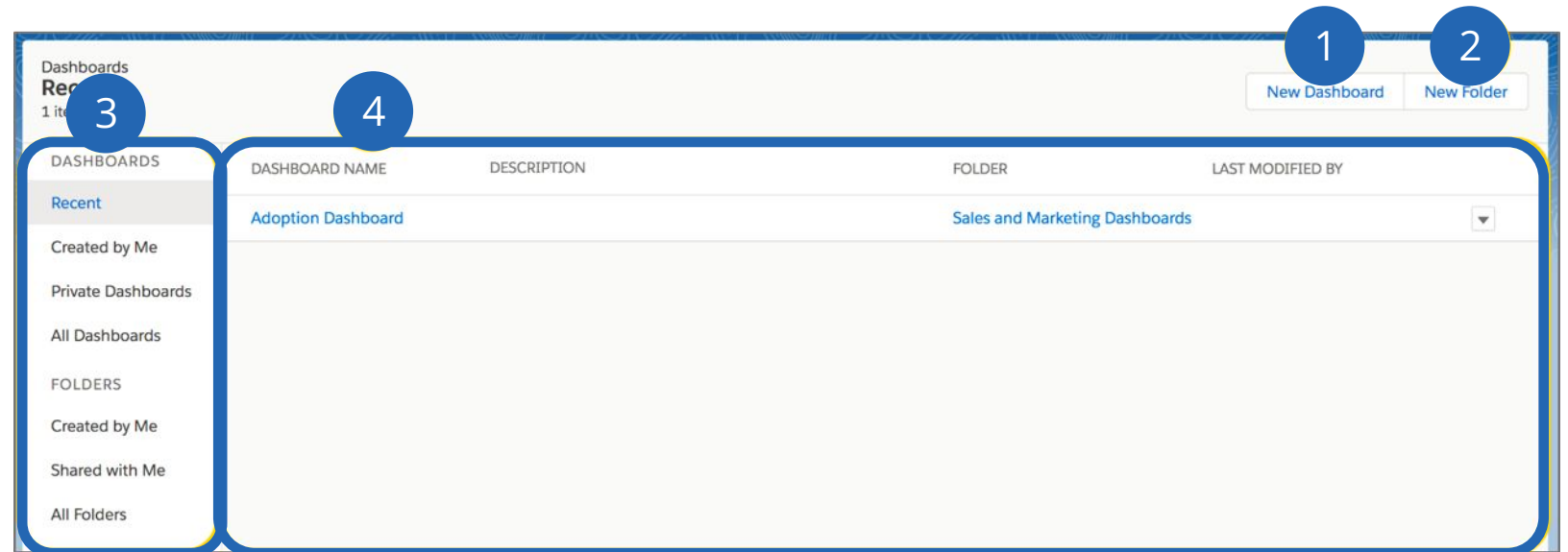


Dashboards

Landing page

Overview

1. **New Dashboard** - Create a new Dashboard
2. **New Folder** - Create a new dashboard folder. This Folder will appear in the folder list "Created by Me"
3. **Lists of Dashboards and Folders** - Access predefined lists of dashboards and folders
4. **Dashboards** - By default, this section shows all recent dashboards. Depending on which list you choose in the left sidebar (3), the respective dashboards will show up here



Dashboards

Dashboards chart types

| Funnel | Donut | Metric | Gauge | | | | | | | | | | | | | | |
|--|---------------------|---------|---|---------------|---------------------|---------|----------------|---------|---------------|---------|---------------|---------|---------------|---------|---------------|---------|---------------|
| | | |  | | | | | | | | | | | | | | |
| Line | Bar | Scatter | Table | | | | | | | | | | | | | | |
|  | | | <table><tr><th>FISCAL PERIOD</th><th>SUM OF AMOUNT (...)</th></tr><tr><td>Q3-2015</td><td>EUR 237.500,00</td></tr><tr><td>Q2-2015</td><td>EUR 86.000,00</td></tr><tr><td>Q1-2015</td><td>EUR 75.000,00</td></tr><tr><td>Q4-2014</td><td>EUR 63.000,00</td></tr><tr><td>Q3-2014</td><td>EUR 60.000,00</td></tr><tr><td>Q4-2015</td><td>EUR 27.000,00</td></tr></table> | FISCAL PERIOD | SUM OF AMOUNT (...) | Q3-2015 | EUR 237.500,00 | Q2-2015 | EUR 86.000,00 | Q1-2015 | EUR 75.000,00 | Q4-2014 | EUR 63.000,00 | Q3-2014 | EUR 60.000,00 | Q4-2015 | EUR 27.000,00 |
| FISCAL PERIOD | SUM OF AMOUNT (...) | | | | | | | | | | | | | | | | |
| Q3-2015 | EUR 237.500,00 | | | | | | | | | | | | | | | | |
| Q2-2015 | EUR 86.000,00 | | | | | | | | | | | | | | | | |
| Q1-2015 | EUR 75.000,00 | | | | | | | | | | | | | | | | |
| Q4-2014 | EUR 63.000,00 | | | | | | | | | | | | | | | | |
| Q3-2014 | EUR 60.000,00 | | | | | | | | | | | | | | | | |
| Q4-2015 | EUR 27.000,00 | | | | | | | | | | | | | | | | |

Dashboards

Create a new dashboard

Add components

1. **New component** - Add a new component (Report plus chart type) to your dashboard
2. **Add report** - Select a report you want to add to your component
3. **Select** - Click on Select to be redirected to choosing chart types
4. **Chart type** - Choose a chart type for your report to visualize your data. Below, define axis, sort rows and add titles
5. **Add your component** to the dashboard

The screenshot illustrates the process of adding a new component to a Salesforce dashboard. It features five numbered callouts corresponding to the steps in the adjacent list:

- 1**: A blue box highlights the '+ Component' button in the top navigation bar of the dashboard.
- 2**: A blue circle highlights the 'Christmas card Report' in the 'Select Report' dialog's 'Recent' list.
- 3**: A blue circle highlights the 'Select' button at the bottom right of the 'Select Report' dialog.
- 4**: A blue circle highlights the 'Bar' chart type icon in the 'Display As' section of the 'Add Component' dialog.
- 5**: A blue circle highlights the 'Add' button at the bottom right of the 'Add Component' dialog.

The 'Add Component' dialog shows a preview of the 'Christmas card Report' as a horizontal bar chart. The data is as follows:

| Industry | Record Count |
|----------|--------------|
| Aircraft | 252 |
| Other | 39 |
| Hochbau | 4 |
| Yacht | 4 |

Trailhead

d

The fun way to learn Salesforce



Reports & Dashboards

https://trailhead.salesforce.com/en/content/learn/modules/lex_implementation_reports_dashboards



Project: Quickstart Reports & Dashboards

<https://trailhead.salesforce.com/projects/quickstart-reports>



Create Reports and Dashboards for Sales and Marketing Managers

<https://trailhead.salesforce.com/en/projects/create-reports-and-dashboards-for-sales-and-marketing-managers>



Thank you.

Helpful Links



View and Manage Users

https://help.salesforce.com/articleView?id=admin_users.htm&type=0

Add a Single User

https://help.salesforce.com/articleView?id=adding_new_users.htm&type=5

User Management

https://help.salesforce.com/articleView?id=users_mgmt_overview.htm&type=5

Helpful Links



Manage Profile Lists

https://help.salesforce.com/articleView?id=users_profiles_view.htm&type=0

Clone Profiles

https://help.salesforce.com/articleView?id=users_profiles_cloning.htm&type=5

Profiles

https://help.salesforce.com/articleView?id=admin_userprofiles.htm&type=5

Helpful Links



User Role Hierarchy

https://help.salesforce.com/articleView?id=admin_roles.htm&type=0

Assign Users to Roles

https://help.salesforce.com/articleView?id=assigning_users_to_roles.htm&type=5

Guidelines for Success with Roles

https://help.salesforce.com/articleView?id=setup_roles_guidelines.htm&type=5

Helpful Links



Permission Sets

https://help.salesforce.com/articleView?id=perm_sets_overview.htm&type=5

Create Permission Sets

https://help.salesforce.com/articleView?id=perm_sets_create.htm&type=5

Assign Permission Sets to a Single User

https://help.salesforce.com/articleView?id=perm_sets_assigning.htm&type=5

Helpful Links



What Is a Group?

https://help.salesforce.com/articleView?id=user_groups.htm&type=0

Create and Edit Groups

https://help.salesforce.com/articleView?id=creating_and_editing_groups.htm&type=5

Public Group Considerations

https://help.salesforce.com/articleView?id=user_groups_considerations.htm&type=5

Helpful Links



Data Import Wizard

https://help.salesforce.com/articleView?id=data_import_wizard.htm&type=0

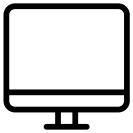
Import Data with the Data Import Wizard

https://help.salesforce.com/articleView?id=import_with_data_import_wizard.htm&type=5

Choosing a Method for Importing Data

https://help.salesforce.com/articleView?id=import_which_data_import_tool.htm&type=5

Helpful Links



Export Backup Data from Salesforce

https://help.salesforce.com/articleView?id=admin_exportdata.htm&type=0

Delete Multiple Records and Reports

https://help.salesforce.com/articleView?id=admin_massdelete.htm&type=0

Monitor Data and Storage Resources

https://help.salesforce.com/articleView?id=admin_monitorresources.htm&type=0

Helpful Links



Things to Know About Duplicate Rules

https://help.salesforce.com/articleView?id=duplicate_rules_overview.htm&type=0

Create or Edit Duplicate Rules

https://help.salesforce.com/articleView?id=duplicate_rules_create.htm&type=5

Matching Criteria for Matching Rules

https://help.salesforce.com/articleView?id=matching_rule_matching_criteria.htm&type=5

Helpful Links



Set Up Your Company in Salesforce

https://help.salesforce.com/articleView?id=admin_profile.htm&type=0

Feature Licenses Overview

https://help.salesforce.com/articleView?id=users_understanding_feature_licenses.htm&type=5

Language Settings Overview

https://help.salesforce.com/articleView?id=setting_your_language.htm&type=0

Manage Multiple Currencies

https://help.salesforce.com/articleView?id=admin_currency.htm&type=0

Helpful Links



Monitor Login History

https://help.salesforce.com/articleView?id=users_login_history.htm&type=0

Identity Verification History

https://help.salesforce.com/articleView?id=security_verification_history.htm&type=5

Set Trusted IP Ranges for Your Organization

https://help.salesforce.com/articleView?id=security_networkaccess.htm&type=0

Restrict Where and When Users Can Log In to Salesforce

https://help.salesforce.com/articleView?id=admin_loginrestrict.htm&type=5

Helpful Links



Sharing Settings

https://help.salesforce.com/articleView?id=managing_the_sharing_model.htm&type=0

Organization-Wide Sharing Defaults

https://help.salesforce.com/articleView?id=security_sharing_owd_about.htm&type=5

Sharing Rules

https://help.salesforce.com/articleView?id=security_about_sharing_rules.htm&type=5

Helpful Links



Passwords

https://help.salesforce.com/articleView?id=security_overview_passwords.htm&type=5

Set Password Policies

https://help.salesforce.com/articleView?id=admin_password.htm&type=0

Expire Passwords for All Users

https://help.salesforce.com/articleView?id=expiring_passwords.htm&type=0

Helpful Links



Modify Session Security Settings

https://help.salesforce.com/articleView?id=admin_sessions.htm&type=0

Session Security

https://help.salesforce.com/articleView?id=security_overview_sessions.htm&type=5

Manage Installed Packages

https://help.salesforce.com/articleView?id=distribution_managing_packages.htm&type=0

View Installed Package Details

https://help.salesforce.com/articleView?id=distribution_package_detail.htm&type=5

Helpful Links



Create Lightning Apps

https://help.salesforce.com/articleView?id=dev_apps_lightning_create.htm&type=5

Salesforce App Considerations

https://help.salesforce.com/articleView?id=dev_apps_considerations.htm&type=5

Lightning Apps

https://help.salesforce.com/articleView?id=dev_apps_lightning.htm&type=5

Create and Edit a Custom Lightning Console App

https://help.salesforce.com/articleView?id=console_lex_create_custom.htm&type=5

Helpful Links



Your Org's Branding in the Salesforce App

https://help.salesforce.com/articleView?id=customize_sf1_branding.htm&type=0

Customize Branding of the Salesforce App

https://help.salesforce.com/articleView?id=customize_sf1_branding_edit.htm&type=5

Salesforce App Navigation Menu

https://help.salesforce.com/articleView?id=sf1_navigation_menu_about.htm&type=5

Helpful Links



Set Up a Custom Report Type

https://help.salesforce.com/articleView?id=reports_report_type_setup.htm&type=0

Create a Custom Report Type

https://help.salesforce.com/articleView?id=reports_defining_report_types.htm&type=5

Add Child Objects To Your Custom Report Type

https://help.salesforce.com/articleView?id=reports_report_type_objects.htm&type=5

Helpful Links



Feed Tracking

https://help.salesforce.com/articleView?id=collab_feed_tracking_overview.htm&type=5

Customize Chatter Feed Tracking

https://help.salesforce.com/articleView?id=collab_feed_tracking.htm&type=5

Chatter Feeds Overview

https://help.salesforce.com/articleView?id=collab_feed_overview.htm&type=5

Helpful Links



Find Object Management Settings in Lightning Experience

https://help.salesforce.com/articleView?id=extend_click_find_objectmgmt_lex.htm&type=5

Create Custom Fields

https://help.salesforce.com/articleView?id=adding_fields.htm&type=5

Page Layouts

https://help.salesforce.com/articleView?id=customize_layout.htm&type=5

Create Record Types

https://help.salesforce.com/articleView?id=creating_record_types.htm&type=5

Compact Layouts

https://help.salesforce.com/articleView?id=compact_layout_overview.htm&type=5

Helpful Links



Validation Rules

https://help.salesforce.com/articleView?id=fields_about_field_validation.htm&type=5

Define Validation Rules

https://help.salesforce.com/articleView?id=fields_defining_field_validation_rules.htm&type=5

Validation Rule Considerations

https://help.salesforce.com/articleView?id=fields_validation_considerations.htm&type=5

Tips for Writing Validation Rules

https://help.salesforce.com/articleView?id=fields_validation_rules_tips.htm&type=5

Trailhead - Create Validation Rules

https://trailhead.salesforce.com/en/modules/point_click_business_logic/units/validation_rules

Helpful Links



Schema Builder

https://help.salesforce.com/articleView?id=schema_builder_working.htm

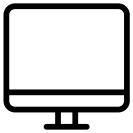
Schema Builder Custom Object Definition

https://help.salesforce.com/articleView?id=schema_builder_elements_objects_ref.htm

Trailhead – Data Modeling

https://trailhead.salesforce.com/modules/data_modeling

Helpful Links



Process Management

https://help.salesforce.com/articleView?id=schema_builder_working.htm

Create a Process

https://help.salesforce.com/articleView?id=process_create.htm&type=5

Trailhead - Process Automation

https://trailhead.salesforce.com/en/modules/business_process_automation

Helpful Links



Lightning App Builder

https://help.salesforce.com/articleView?id=lightning_app_builder_overview.htm

Build Apps Visually with Lightning App Builder

<https://developer.salesforce.com/events/webinars/Lightning-App-Builder>

Create an App Home Page with the Lightning App Builder

https://help.salesforce.com/articleView?id=lightning_app_builder_create_app_page.htm

Trailhead - Lightning App Builder

https://trailhead.salesforce.com/en/modules/lightning_app_builder

Helpful Links



Path

https://help.salesforce.com/articleView?id=rss_sales_path.htm

Guide Users with Path

https://help.salesforce.com/articleView?id=path_overview.htm

Trailhead - Path & Workspaces

https://trailhead.salesforce.com/en/modules/sales_admin_optimize_salesforce_for_selling

Helpful Links



Rename Object, Tab, and Field Labels

https://help.salesforce.com/articleView?id=customize_rename.htm

Enable and Disable the Translation Workbench

https://help.salesforce.com/articleView?id=customize_wbench.htm

Translate Terms

https://help.salesforce.com/articleView?id=entering_translated_terms.htm

Translation Files

https://help.salesforce.com/articleView?id=translation_file_description.htm

Exporting & Importing Translation Files

https://help.salesforce.com/articleView?err=1&id=workbench_export.htm

https://help.salesforce.com/articleView?id=workbench_import.htm

Helpful Links



Sandbox Types

https://help.salesforce.com/articleView?id=create_test_instance.htm

Sandbox Licenses and Storage by Type

https://help.salesforce.com/articleView?id=data_sandbox_environments.htm

Trailhead - Application Lifecycle Management

https://trailhead.salesforce.com/modules/alm_deployment

Helpful Links



Change Sets

<https://help.salesforce.com/articleView?id=changesets.htm>

Change Sets Best Practices

https://help.salesforce.com/articleView?id=changesets_best_practices.htm

Deploy Inbound Change Sets

https://help.salesforce.com/articleView?id=changesets_about_inbound.htm

Upload Outbound Change Sets

https://help.salesforce.com/articleView?id=changesets_about_outbound.htm

Trailhead - Change Management

https://trailhead.salesforce.com/modules/app_deployment

Helpful Links



The System Overview Page

https://help.salesforce.com/articleView?err=1&id=dev_force_com_system_overview_page.htm

The system overview page displays usage for:

- [Schema](#)
- [API usage](#)
- [Business logic](#)
- [User interface](#)
- [Most used licenses](#)
- [Portal roles](#)

Further Links

- [System Overview: Schema](#)
- [System Overview: API Usage](#)
- [System Overview: Business Logic](#)
- [System Overview: User Interface](#)
- [System Overview: Most Used Licenses](#)
- [System Overview: Portal Roles](#)