

7. JULY 2021

# Salesforce Admin Training



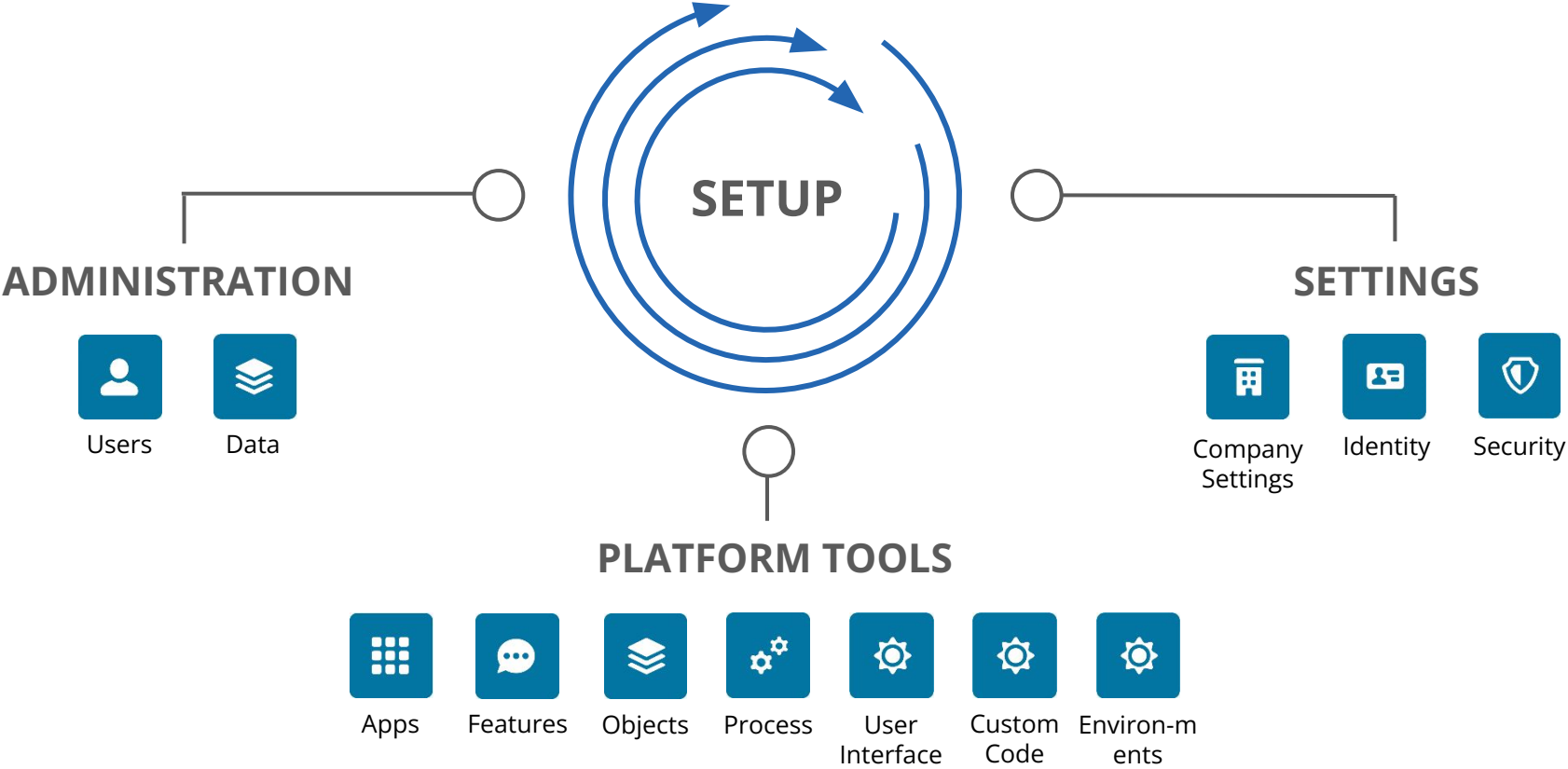
# Agenda



- 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

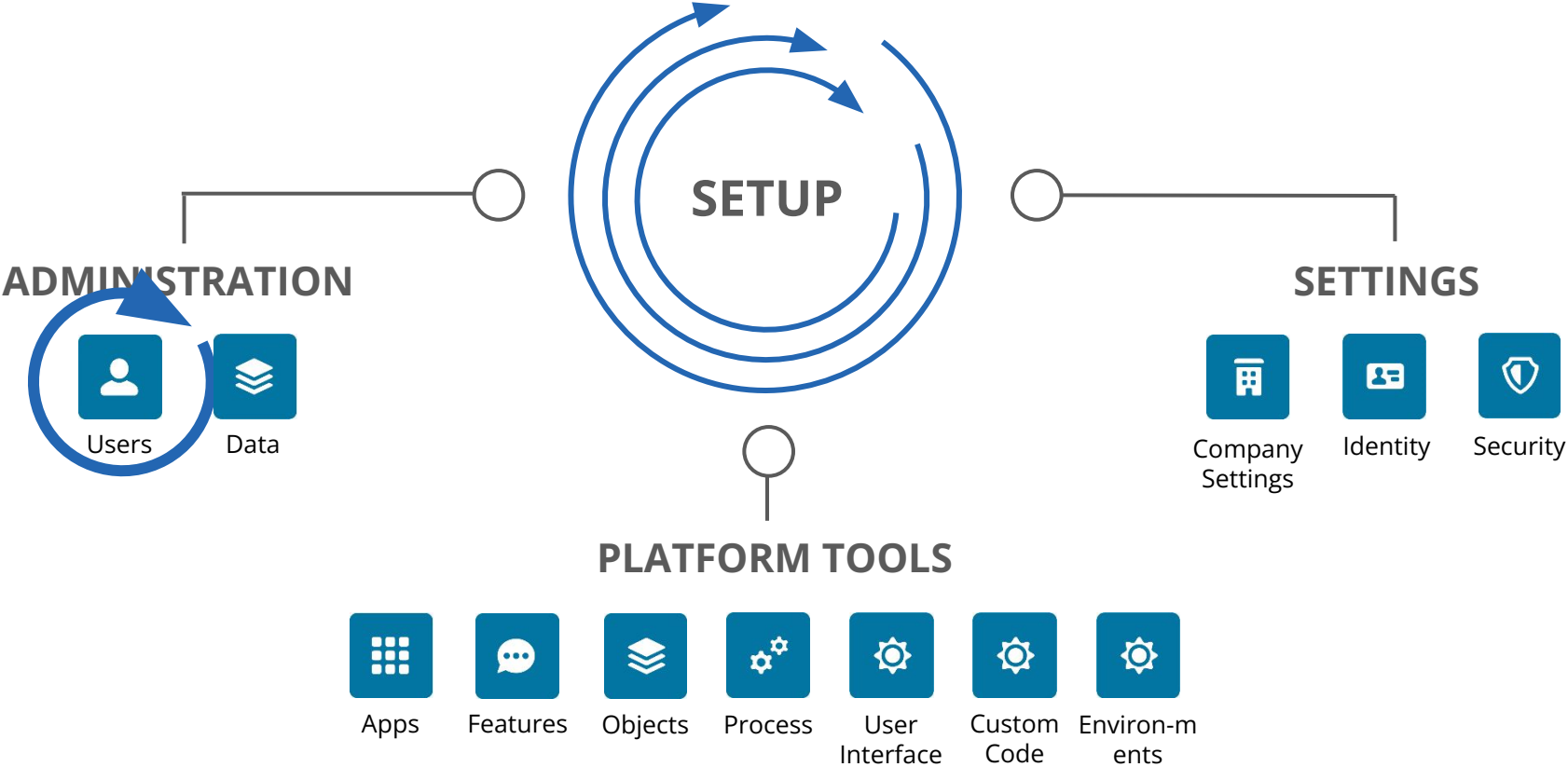
The screenshot shows the Salesforce Setup interface. Callout 1 points to the gear icon in the top right corner. Callout 2 points to the 'Setup' link in the top navigation bar. Callout 3 points to the 'Quick Find' search bar. Callout 4 points to the 'Object Manager' link in the top navigation bar. The main content area features a 'SETUP Home' header, a carousel of cards for 'Go Mobile', 'Visit AppExchange', and 'Click to Customize', and a 'Most Recently Used' table.

NAME	TYPE	OBJECT
	User	
<a href="#">Process Automation Home</a>	Lightning Page	
<a href="#">HeatMap</a>	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](#)

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

**New User** **Reset Password(s)** **Add Multiple Users**

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
<a href="#">Edit</a>						<input checked="" type="checkbox"/>	Chatter Free User	
<a href="#">Edit</a>				20.11.2017 16:43	CEO	<input checked="" type="checkbox"/>	System Administrator	
<a href="#">Edit</a>					Director, Direct Sales	<input checked="" type="checkbox"/>	Custom: Sales Profile	

**User Detail** **Edit** **Sharing** **Reset Password** **Freeze**

Name		Role	Director, Direct Sales
Alias		User License	Salesforce
Email		Profile	Custom: Sales Profile
Username		Active	<input checked="" type="checkbox"/>
Nickname		Marketing User	<input type="checkbox"/>
Title	Key Account Manager	Offline User	<input type="checkbox"/>
Company	CRM	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

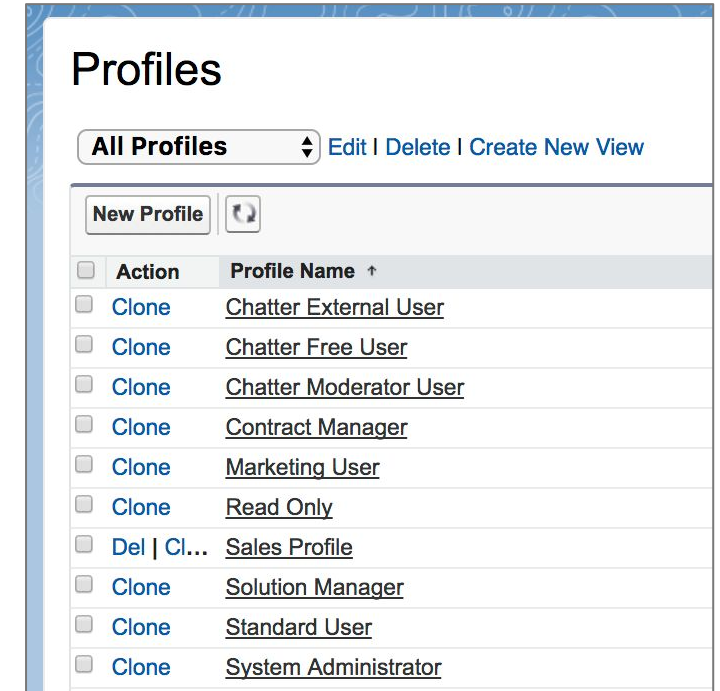
- When creating a user, a profile must be assigned. Each user can have one profile
- Standard profiles are available, custom profiles can be created
- Tipp: Clone a standard profile and adjust it to your needs

## 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



# 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

The screenshot shows the Salesforce 'Profiles' setup page. At the top, there's a search bar labeled 'Find Settings...' with a magnifying glass icon and a close button. To the right of the search bar are buttons for 'Clone', 'Delete', and 'Edit Properties'. Below the search bar is the 'Profile Overview' section, which includes a tab for 'Assigned Users' (highlighted with a blue circle '2'). The overview shows the profile name 'Sales Profile', user license 'Salesforce', and creation details: 'Created By: Christian Eichhorn, 05.09.2017 21:00' and 'Last Modified By: Nikolaus Günzl, 21.11.2017 10:23'. Below the overview is the 'Apps' section, which lists various permission categories like 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings' (highlighted with a blue circle '3'), 'App Permissions', 'Apex Class Access', 'Visualforce Page Access', 'External Data Source Access', 'Named Credential Access', and 'Custom Permissions'. A blue box highlights the 'Object Settings' section, which contains a table titled 'All Object Settings'. This table has two columns: 'Object Name' and 'Object Permissions'. The 'Accounts' object is selected, and its permissions are shown in a sub-table titled 'Object Permissions'. This sub-table has two columns: 'Permission Name' and 'Enabled'. The permissions listed are Read, Create, Edit, Delete, View All, and Modify All. The 'Edit' permission is highlighted with a blue circle '4'.

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

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 all profiles for 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"/> <a href="#">i</a>	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

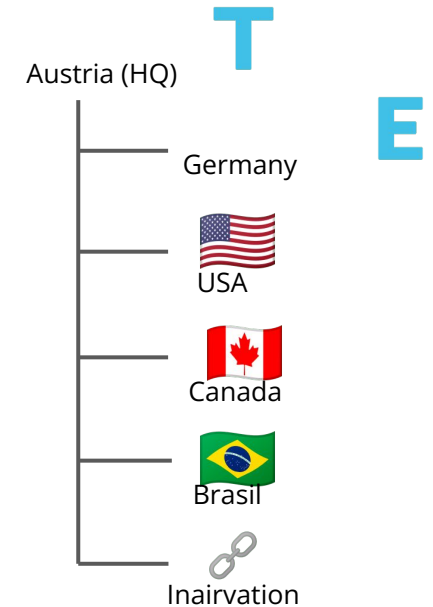
Setup | Users | Roles

## 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

The screenshot displays the Salesforce 'Permission Sets' management interface. At the top, there's a title 'Permission Sets' and a 'Help for this Page' link. Below the title, a brief description states: '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](#)'. Navigation options include 'All', 'Edit', 'Delete', and 'Create New View'. A table lists permission sets with columns for 'Action', 'Permission Set Label', 'Description', and 'License'. One set is visible: 'Salesforce Console User' with the description 'Enable Salesforce Console User' and license 'Sales Console User'. A blue arrow points from the 'Clone' action to a detailed 'Permission Set Overview' panel. This panel includes a search bar, action buttons ('Clone', 'Delete', 'Edit Properties', 'Manage Assignments'), and a table with fields: 'Description' (Opens\_Access\_to\_Reports), 'License', 'API Name', 'Namespace Prefix', 'Session Activation Required' (checkbox), 'Created By' (Nikolaus Günzl, 21.11.2017 15:09), and 'Last Modified By' (Nikolaus Günzl, 21.11.2017 15:09). Below the overview, there's an 'Apps' section with several categories: '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), and 'External Data Source Access' (Permissions to authenticate against external data sources). A 'Learn More' link is provided at the bottom left of the overview section.

# 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 is a title 'Public Groups' and a 'Help for this Page' link. Below the title is a descriptive paragraph: '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.' There are view controls: 'View: All' (selected), 'Edit', and 'Create New View'. A navigation bar contains letters A through Z and 'Other', with 'All' selected. A 'New' button is visible above a table of groups.

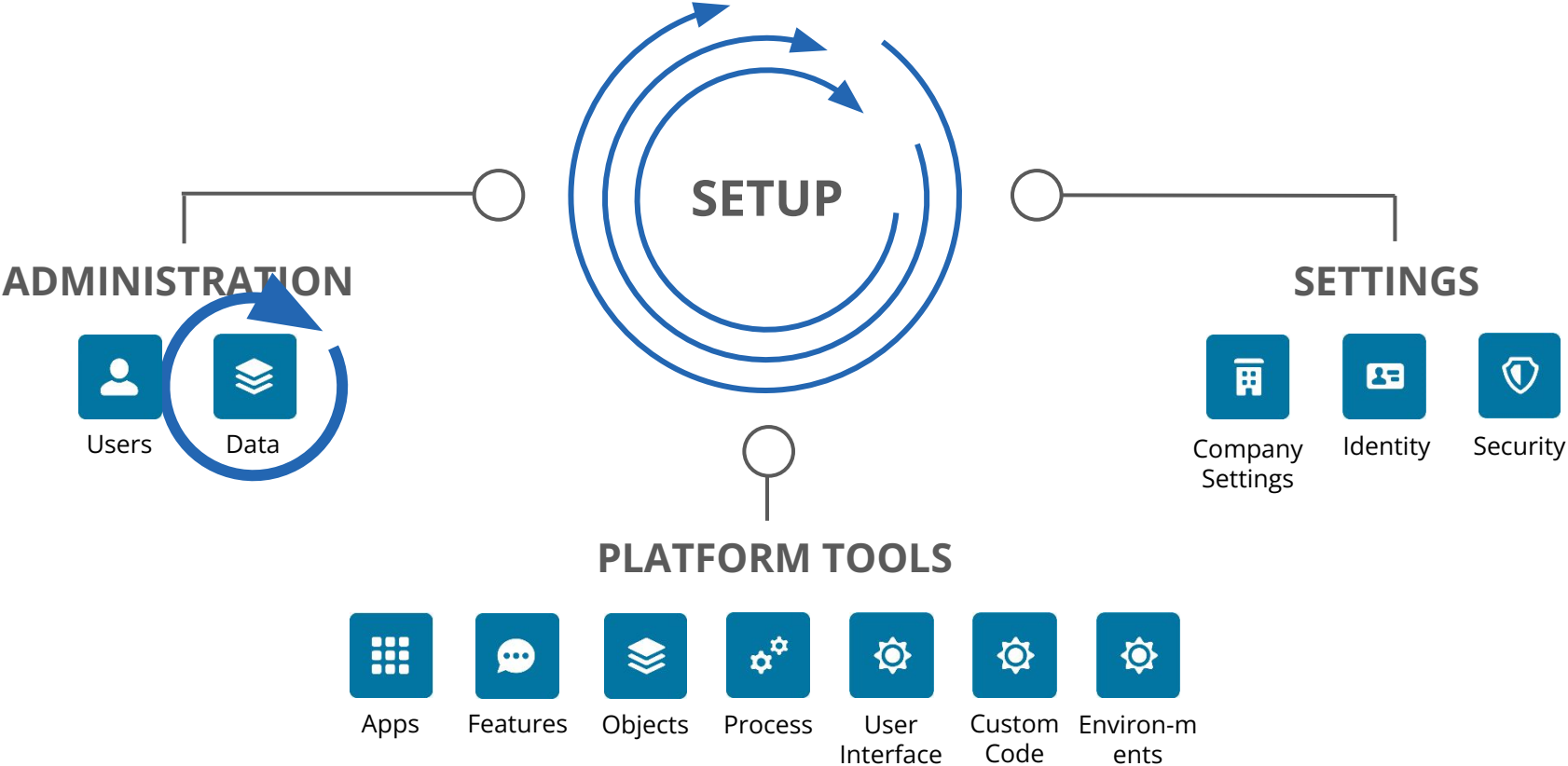
Action	Label	Group Name	Created By	Created Date
<a href="#">Edit</a>   <a href="#">Del</a>	Salesforce Administrators	Salesforce Administrators	Eichhorn, Christian	08.09.2017 06:25

An inset window titled 'Group Membership New Group' is shown, which is a form for creating a new public group. It includes a 'Group Information' section with 'Save' and 'Cancel' buttons. The form fields include 'Label', 'Group Name', and a checked checkbox for 'Grant Access Using Hierarchies'. There is a search section with a dropdown menu currently open, showing options: 'Public Groups' (checked), 'Roles', 'Roles and Subordinates', and 'Users'. Below the search is a 'Selected Members' section with a '--None--' option and an 'Add' button.



# 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](#).



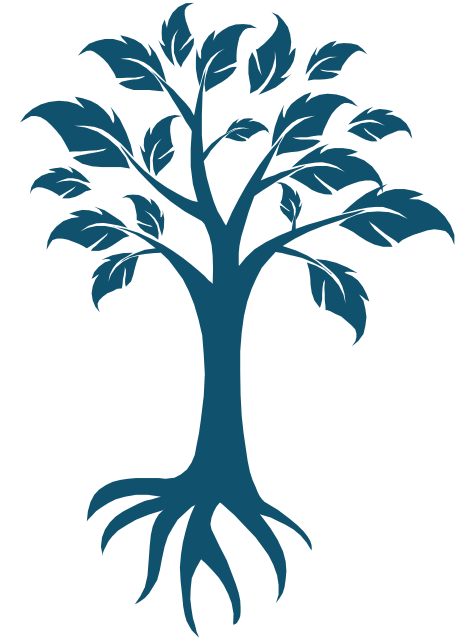
## 2. Start the wizard

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)
--------	--------	-----------------	-----------------	----------------	------------	----------------------

**Before you import your data . . .**

- Clean up your data import file**  
You'll have fewer errors to resolve if your data file is clean and free of duplicates. [Watch video](#)
- Make sure your field names match Salesforce field names**  
You'll be required to map your data fields to Salesforce. Unmapped fields is not imported. [View a list of Salesforce field names](#)
- 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, so use caution.

**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 main window is titled 'Duplicate Rule Edit' and has buttons for 'Save', 'Save & New', and 'Cancel'. It is divided into several sections:

- Rule Details:** Contains fields for 'Rule Name', 'Description', 'Object' (set to 'Account'), and 'Record-Level Security' (with radio buttons for 'Enforce sharing rules' and 'Bypass sharing rules').
- Actions:** Contains 'Action On Create' and 'Action On Edit' (each with 'Allow' dropdown and 'Alert'/'Report' checkboxes), and an 'Alert Text' field with the text 'Use one of these records?'.
- Matching Rules:** Contains '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'). It also has 'Add Rule' and 'Remove Rule' buttons.

A blue arrow points from the 'Matching Rule' dropdown in the 'Matching Rules' section to a detailed view of a matching rule. This detailed view is titled 'Rule Details' and includes:

- Object:** Account
- Rule Name:** Account Matching Rule
- Unique Name:** Account\_Matching\_Rule
- Description:** Matching rule for account records
- Matching Criteria:** A table for defining comparison fields and methods.

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"/>	

At the bottom of the detailed view, there is a link for '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

## Mass Transfer Records

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

► **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--	↕		AND

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

► **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 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--	↕		AND

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.

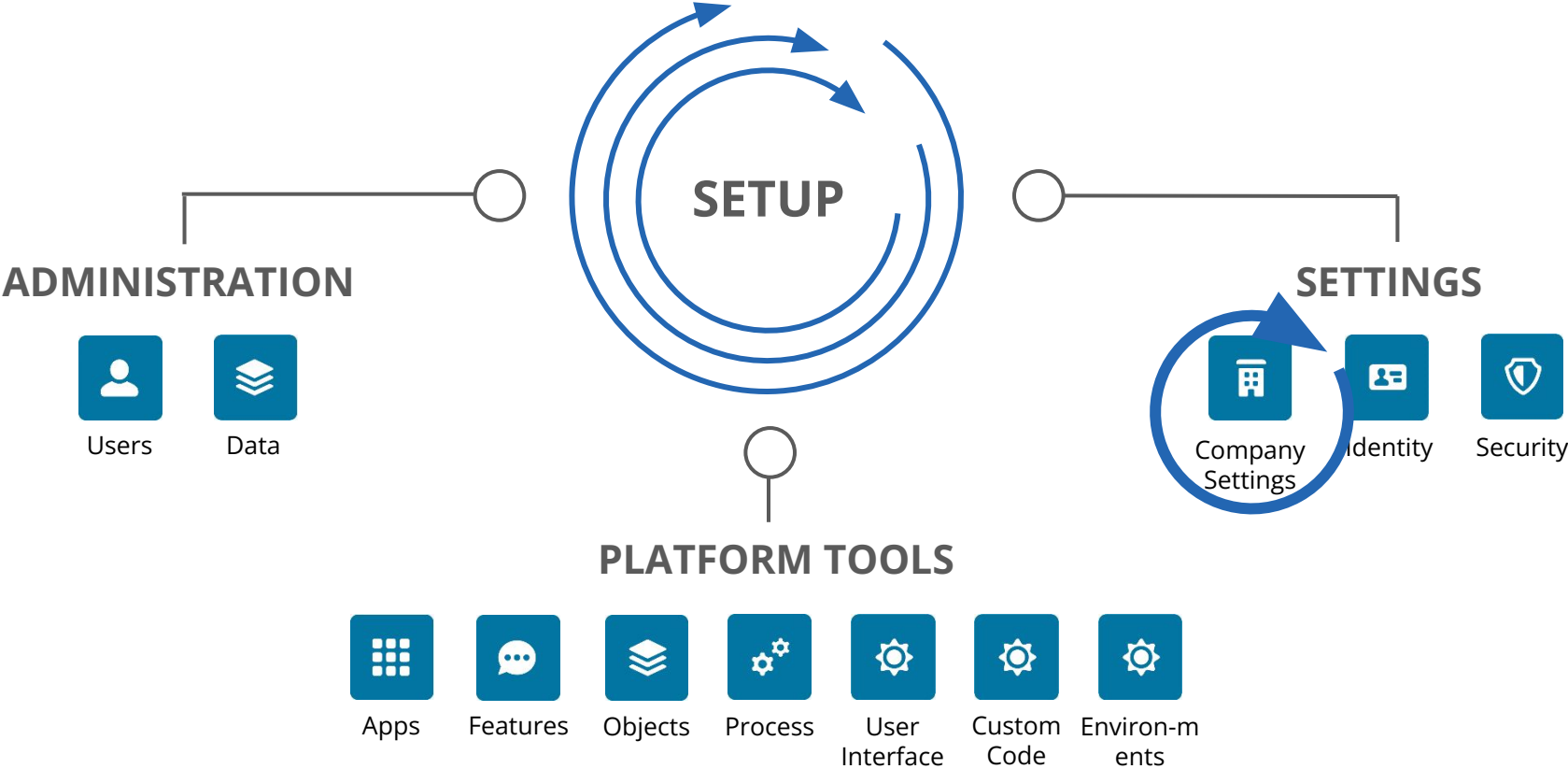
Storage Type	Limit	Used	Percent Used
Data Storage	5,0 MB	400 KB	8%
File Storage	20,0 MB	41 KB	0%
Big Object Storage	1.000.000	0	0%

#### 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

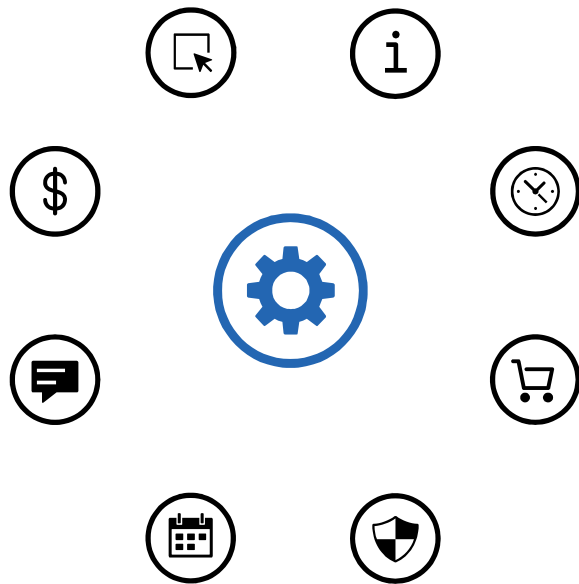
Overview













# Company Settings

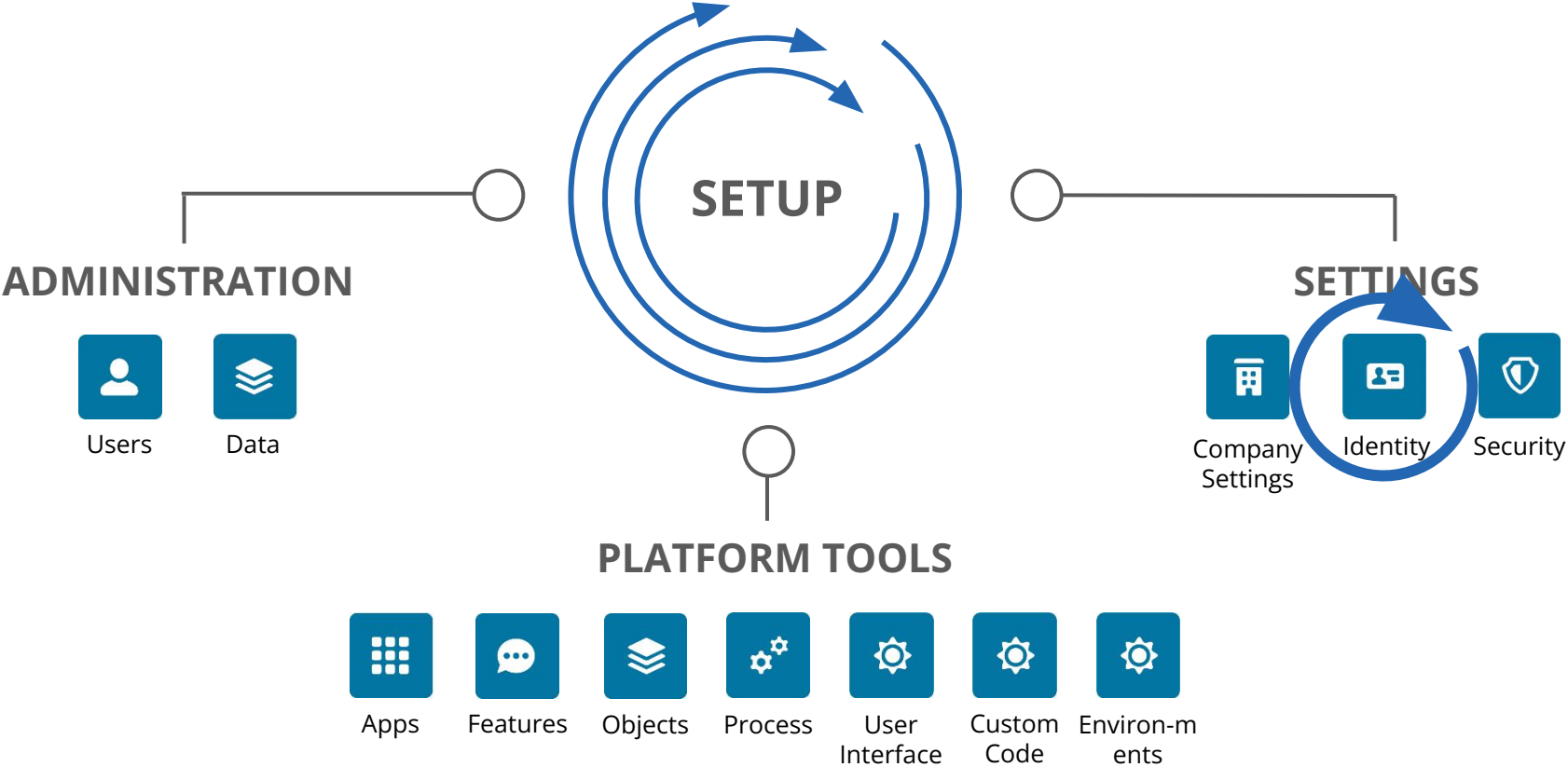
Overview



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

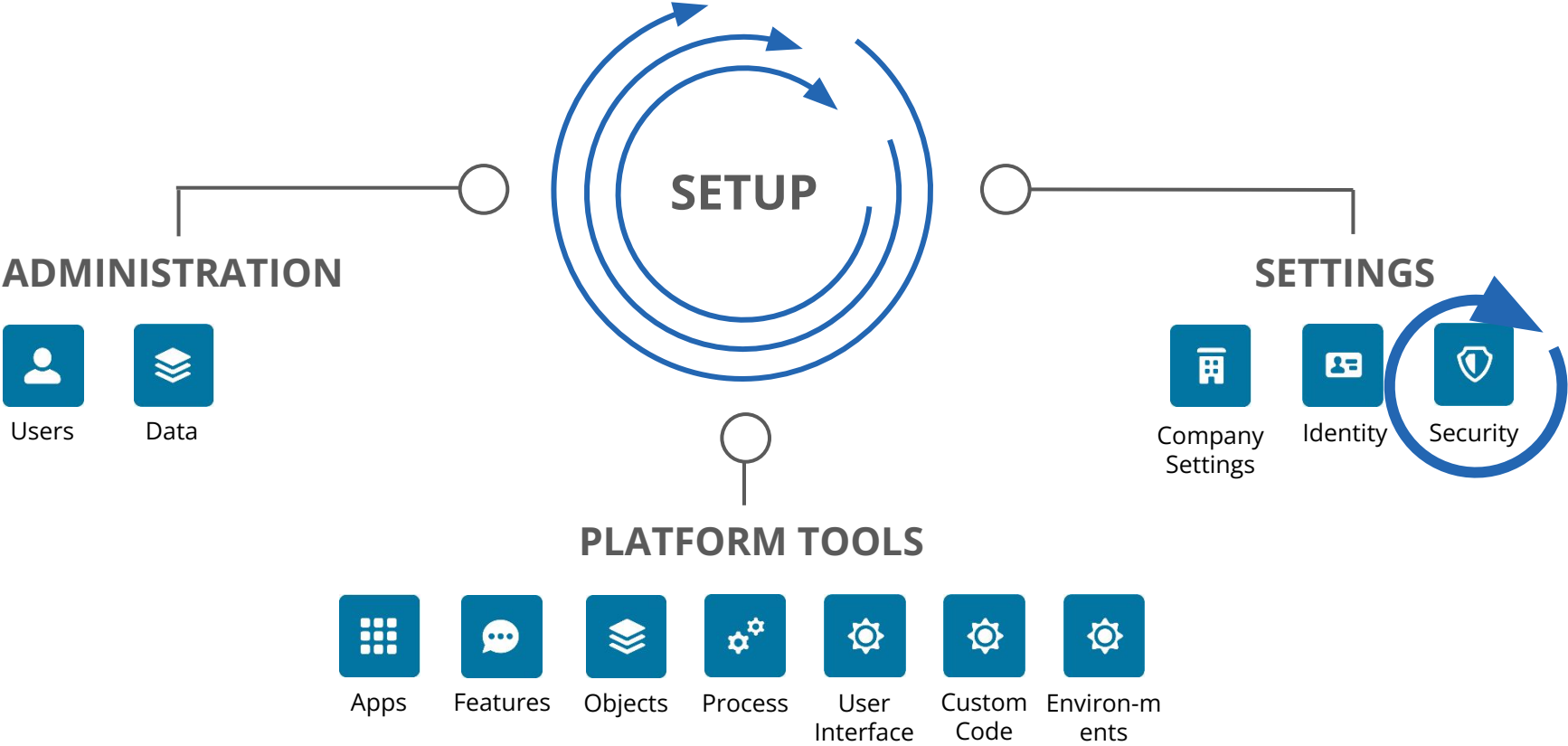
Want to see who's using Salesforce Authenticator and other identity verification methods? Go to the [Identity Verification Methods](#) report.

View:  All  Create New View

Time	Verification Attempt	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

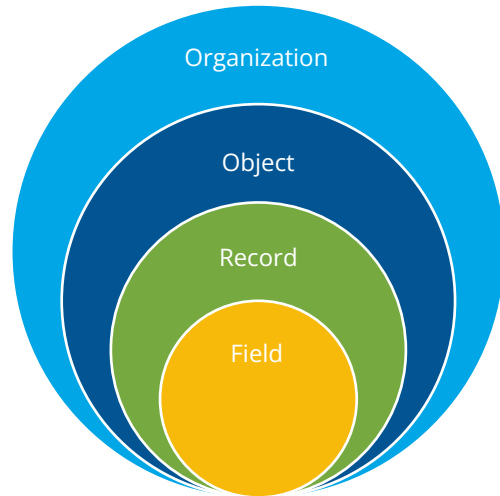
# Setup

Overview



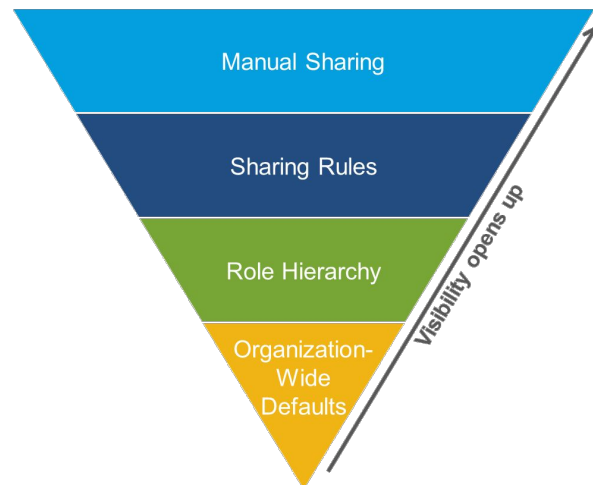
# Levels of Data Access

Overview



<b>Organization</b>	Maintain a list of authorized users, set password policies, and limit logins to certain hours and locations
<b>Object</b>	By setting permissions on an object, a group of users can be prevented from creating, viewing, editing, or deleting any records of that object
<b>Record</b>	Particular users can be allowed to view an object, but then restrict the individual object records they're allowed to see
<b>Field</b>	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



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



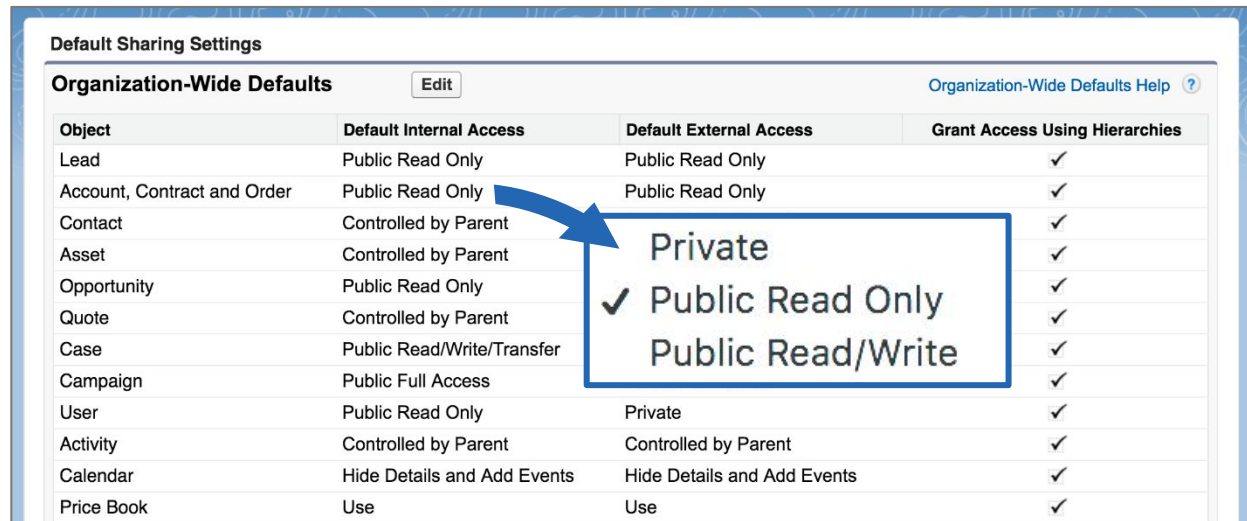
# Organization-Wide Defaults

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	Private	✓
Asset	Controlled by Parent	✓ Public Read Only	✓
Opportunity	Public Read Only	Public Read/Write	✓
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	✓

# 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 is divided into sections for Lead, Account, Opportunity, Case, Campaign, and User Sharing Rules. The Account Sharing Rules section is active, showing a table with one rule. A modal dialog is open over the Account Sharing Rules section, displaying the configuration for a rule named 'Account access in part'.

Action	Criteria	Shared With	Account and Contract	Opportunity	Case
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in Role and Subordinates: Channel Sales Team	Role and Subordinates: Channel Sales Team	Read/Write	Private	Private

<b>Label</b>	Account access in part
<b>Rule Name</b>	Account_access_in_part <a href="#">i</a>
<b>Description</b>	Account sharing rule for sales role
<b>Account: owned by members of</b>	Role and Subordinates: Channel Sales Team
<b>Share with</b>	Role and Subordinates: Channel Sales Team
<b>Default Account and Contract Access</b>	Read/Write <a href="#">v</a>
<b>Opportunity Access</b>	Private <a href="#">v</a>
<b>Case Access</b>	Private <a href="#">v</a>
<b>Created By</b>	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

**Network Access** [Help for this Page](#) ?

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.

**Trusted IP Ranges** [New](#)

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

**Network Access** [Help for this Page](#) ?

### Trusted IP Range Edit

Enter the range of valid IP addresses from which user logins are trusted. Users logging in from trusted IP addresses are not asked to activate their computers and may use their user password instead of a security token to log in to the API or a desktop client such as Connect for Outlook, Connect Offline, Connect for Office, Connect for Lotus Notes, or the Data Loader.

**Please specify IP range** | = Required Information

Start IP Address  End IP Address

Description

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

# 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	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input checked="" type="checkbox"/>
Allow use of setPassword() API for self-resets	<input checked="" type="checkbox"/>

# 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

### Session Settings

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

#### 1 Session Timeout

Timeout Value

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 ⓘ

#### 2 Session Security Levels

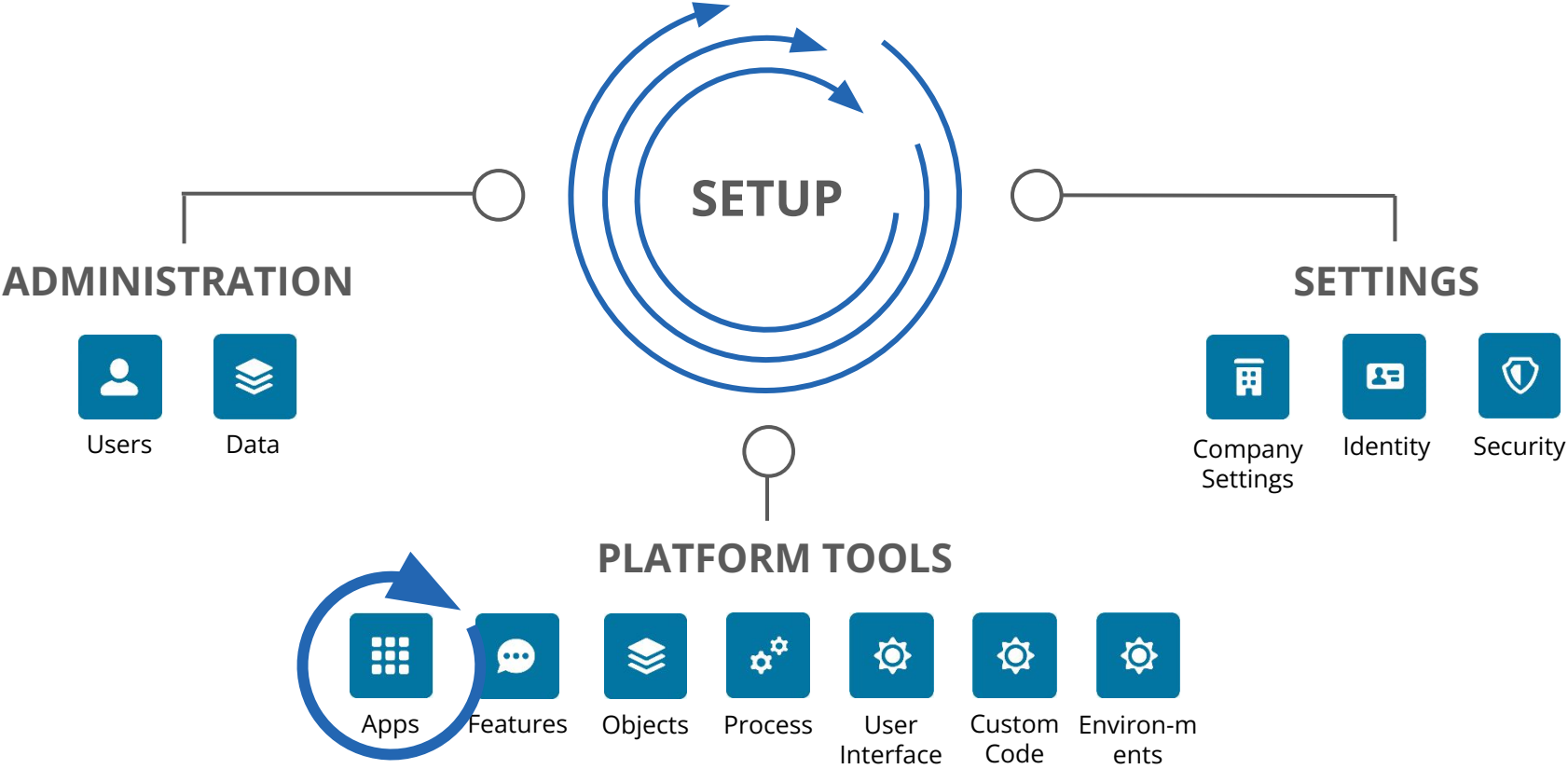
Standard	High Assurance
<ul style="list-style-type: none"><li>Username Password</li><li>Delegated Authentication</li><li>Activation</li><li>Lightning Login</li></ul>	<ul style="list-style-type: none"><li>Two Factor Authentication</li></ul>

Add

Remove

# 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 and filtered by TabSet Type. The table has columns for App Name, Developer Name, Description, Last Modified, and App Type. A blue arrow points from the 'App Launcher' row in the table to a detailed view 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: salesforce (with Clear button)
- Primary Color Hex Value: #0070C

**App Launcher Preview**

The preview shows a navigation bar with the Salesforce logo and the app name 'Sales App' and '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


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**.

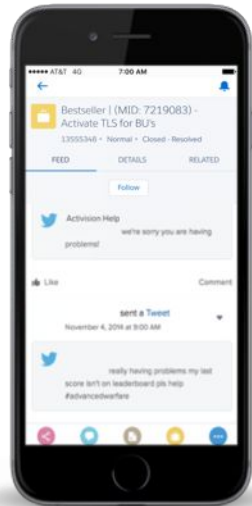
[Help for this Page](#)

  
[Visit AppExchange »](#)

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects
<a href="#">Uninstall</a>	<a href="#">Salesforce Connected Apps</a> <b>Description</b> This package contains Connected Applications for all the officially supported Salesforce client applications such as Touch, Salesforce for Outlook, Sa...	Salesforce.com	1.7	sf_com_apps	17.11.2017 17:41	<input checked="" type="checkbox"/>	0	0	0
<a href="#">Uninstall</a>	<a href="#">Salesforce.com CRM Dashboards</a> <b>Description</b> Salesforce.com CRM Dashboards	salesforce.com	1.0		28.08.2017 11:47	<input checked="" type="checkbox"/>	0	0	0
<a href="#">Uninstall</a>	<a href="#">Salesforce and Chatter Apps</a> <b>Description</b> This package contains Connected Applications for the officially supported Salesforce apps for iOS and Android and Chatter applications on your desktop...	Salesforce.com	1.15	sf_chtrr_apps	25.10.2017 10:43	<input type="checkbox"/>	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

<input checked="" type="checkbox"/> Enable in-app notifications <a href="#">i</a>
<input checked="" type="checkbox"/> Enable push notifications <a href="#">i</a>
<input type="checkbox"/> Enable full content in push notifications <a href="#">i</a>

## 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](#)

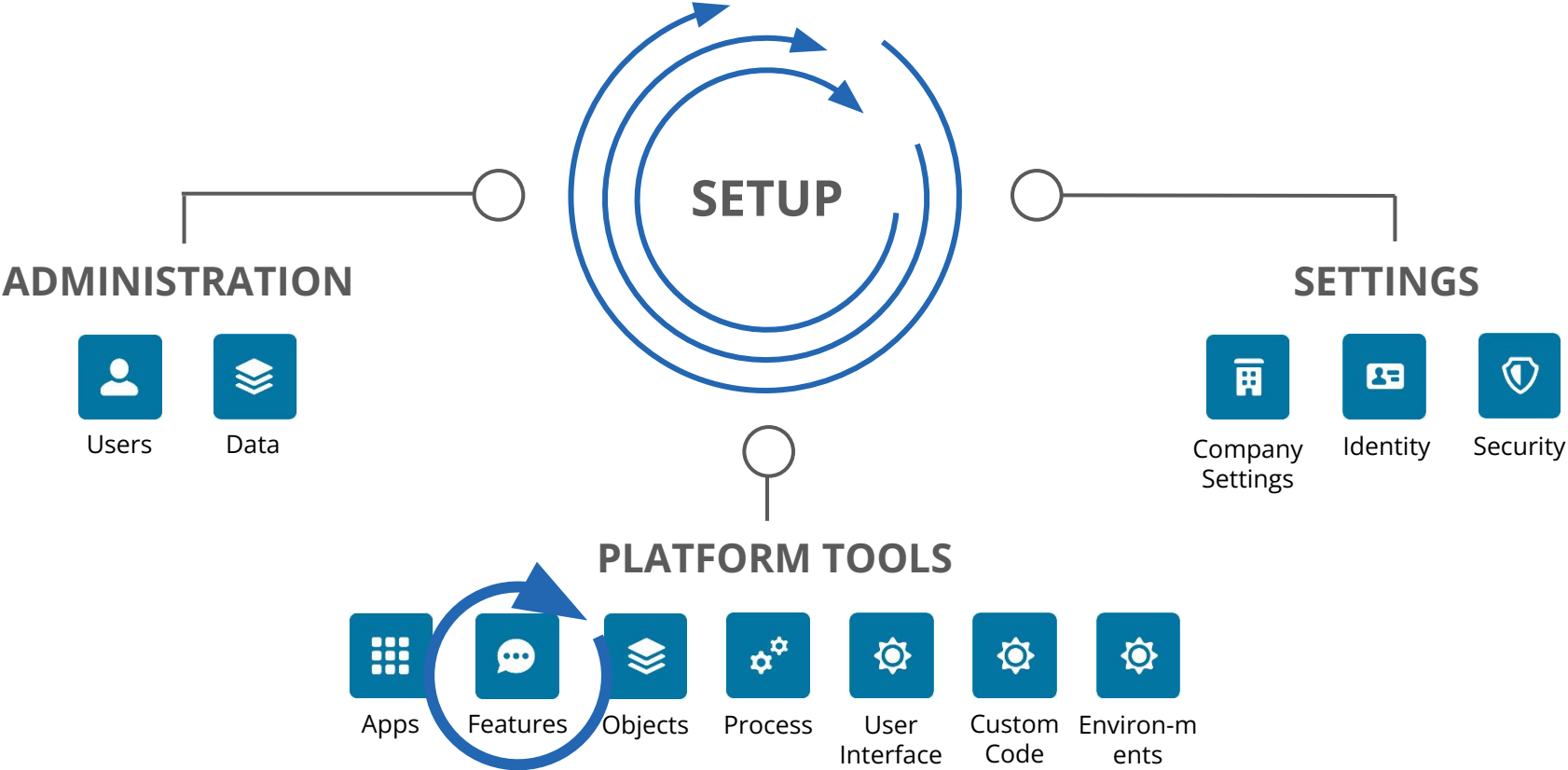
## Navigation

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	Add ↓ Remove	Dashboards
Einstein Vision		Tasks
Heat Map		Smart Search Items
House Explorer		MyData
Property Explorer		People
		Groups
		Reports
		Events
		Approvals
		Paused Flow Interviews

# Setup

Overview



# Custom Report Types

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

## Create Custom 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:

1. Choose which objects to display to users creating and customizing reports
2. Define the relationships between objects displayed to users creating and customizing reports
3. Select which objects' fields can be used as columns in reports

### 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**

### Identification

**Report Type Label**

**Report Type Name**  ⓘ  
*Note: Description will be visible to users who create reports.*

**Description**

**Store in Category**

### Deployment

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

**Deployment Status**  In Development  Deployed

### Relationship Configuration

**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.

(Click to relate another object)

# 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 two screenshots from Salesforce. The top screenshot is the 'Feed Tracking' configuration page. It has a title 'Feed Tracking' and a 'Help for this Page' link. Below the title is a description: 'Enable feed tracking for objects so users can follow records of that object type. Select fields to track so users can see feed updates when those fields are changed on records they follow.' There are two main sections: a table of objects and a 'Fields in accounts' configuration area.

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

The 'Fields in accounts' section has a 'Save' button, a 'Cancel' button, and a checked 'Enable Feed Tracking' checkbox. Below this, it says 'You can select up to 20 fields.' and lists various fields with checkboxes:

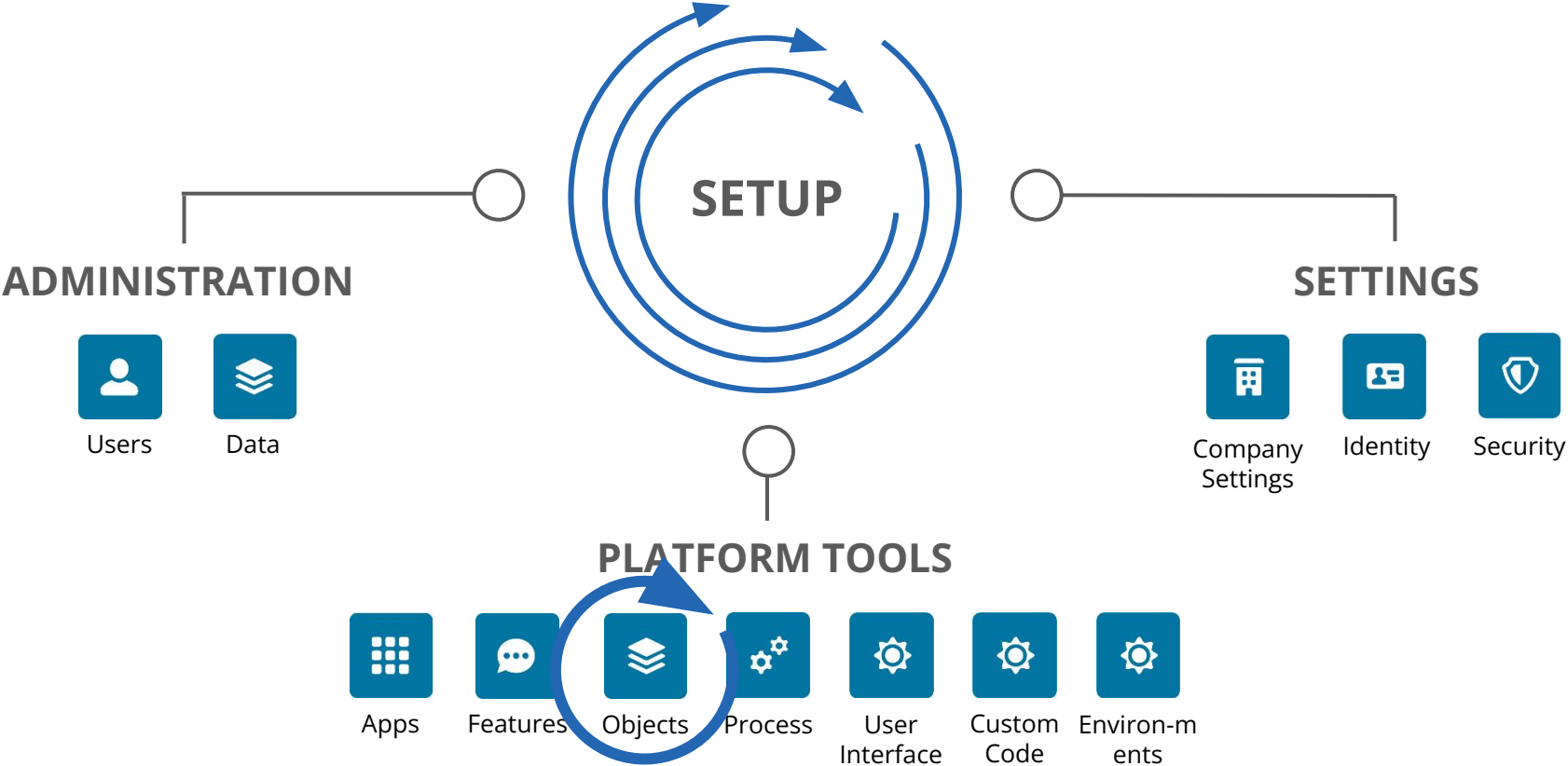
- Account Name
- Account Owner
- Account Site
- Active
- Billing Address
- Customer Priority
- D-U-N-S Number
- Description
- Fax
- NAICS Code
- Number of Locations

The bottom screenshot shows a Chatter feed update. It has tabs for 'ACTIVITY' and 'CHATTER'. Below the tabs are options for 'Post', 'Questi...', and 'Poll'. There is a text input field 'Share an update...' and a 'Share' button. Below that is a search bar 'Search this feed...' and a refresh icon. The main feed item shows a user profile icon, the text 'updated this record.', a dropdown arrow, and the text 'Just Now' and 'Account Owner'. At the bottom, there are 'Like' and 'Comment' buttons, and a text input field 'Write a comment...'.



# Setup

Overview

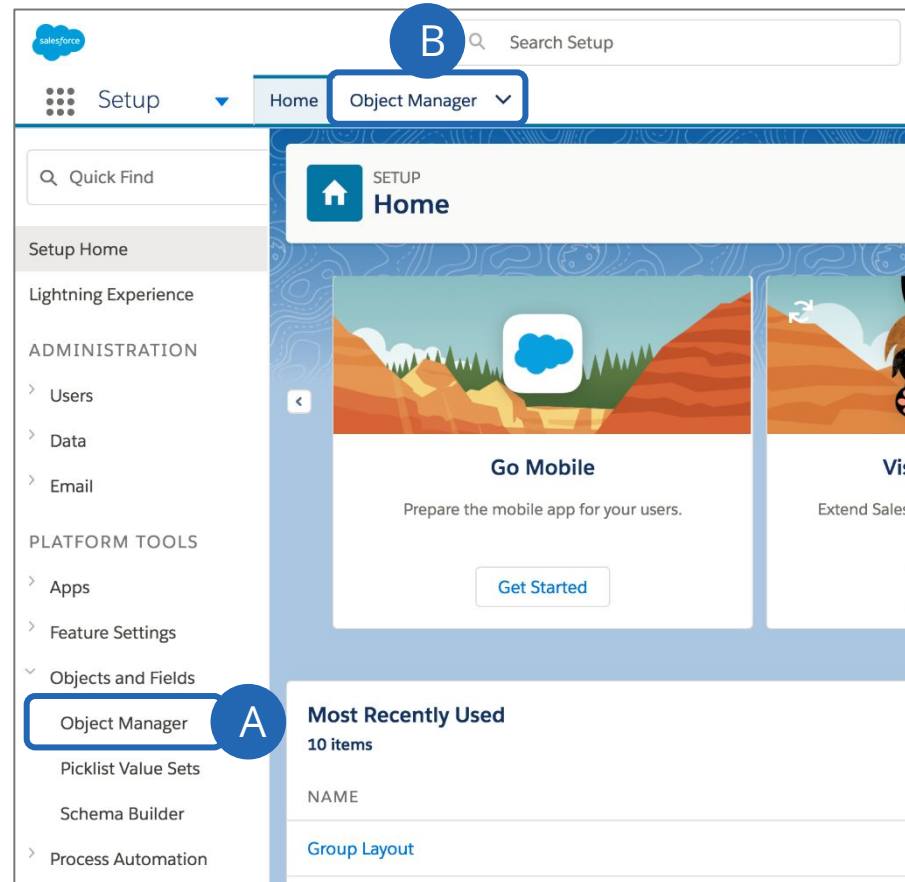


# Object Manager

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

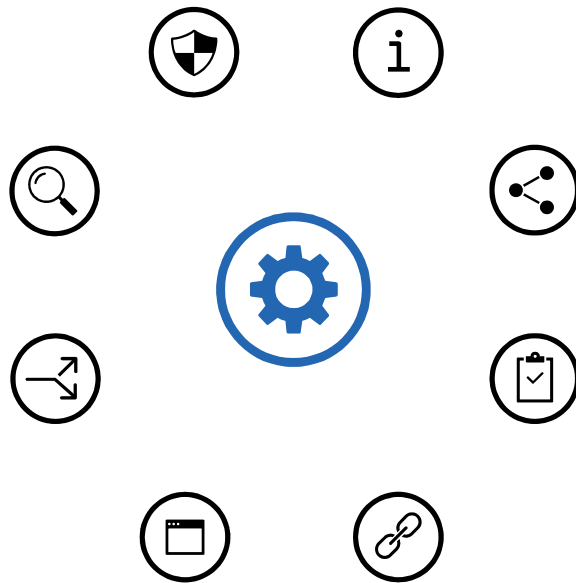
The Object Manager is a tool that lets admins customize standard objects as well as custom objects. Object management settings include customizations for fields, page layouts, compact layouts, record types and validation rules







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

LABEL	API NAME	DESCRIPTION	LAST MODIFIED	DEPLOYED	CUSTOM
Account	Account				
Activity	Activity				
Asset	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



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

**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	<input checked="" type="checkbox"/>
Account Owner	<input checked="" type="checkbox"/>
Account Site	<input type="checkbox"/>
Active	<input type="checkbox"/>

**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

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

The screenshot displays the 'Picklist Value Sets' page in Salesforce. At the top, there's a title 'Picklist Value Sets' and a 'Help for this Page' link. Below the title, a descriptive paragraph explains that global picklist value sets allow sharing values across objects and restrict values added via the API. A 'View' dropdown is set to 'All', with a 'Create New View' link. A navigation bar contains letters A through Z and 'Other', with 'All' selected. The main content area shows a table for 'Global Value Sets' with columns for 'Label' and 'Description'. The table is currently empty, displaying 'No records to display.' and a link for 'Deleted Global Value Sets (0)'. A 'New' button is visible above the table. An 'Information' modal window is open, showing fields for 'Label' (Business Unit), 'Name' (Business\_Unit), and 'Description'. Below these fields, there's a section for 'Values' with the instruction 'Enter values, with each value separated by a new line'. The values listed are 'Products', 'Innovation', 'Services', and 'Customer Segment'. A blue arrow points from the 'New' button to the 'Information' modal.

# 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:

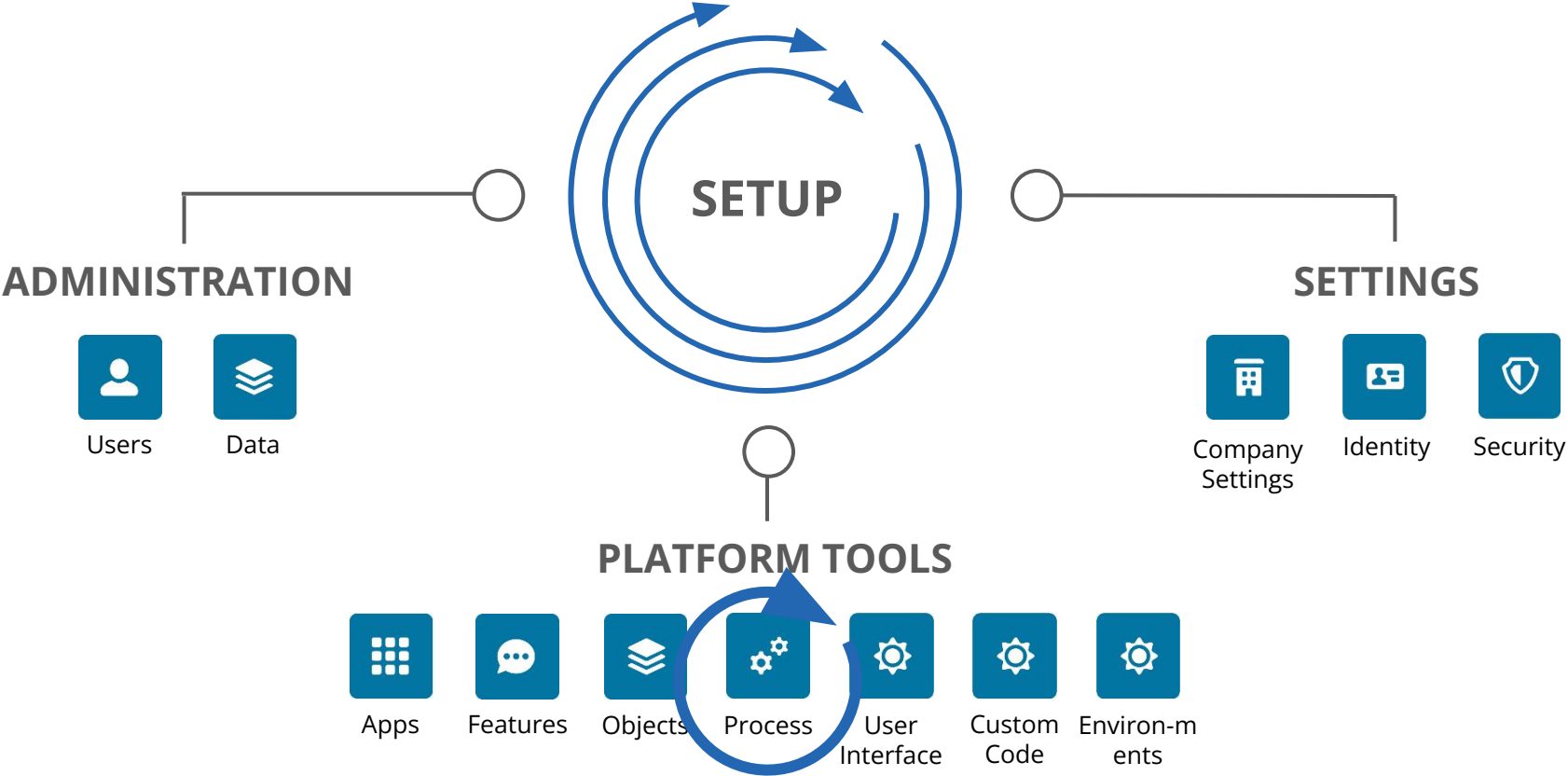
- Custom objects
- Lookup relationships
- Master-detail relationships
- All custom fields except: Geolocation

The screenshot displays the Schema Builder interface. On the left, a sidebar lists various objects with checkboxes. The 'Objects' tab is active, showing a list of objects including Contact, Account, Opportunity, and Opportunity Product. The main workspace shows a grid of objects with their fields and relationships. The 'Contact' object is connected to the 'Account' object, and the 'Account' object is connected to the 'Opportunity' object. The 'Opportunity' object is connected to the 'Opportunity Product' object. The 'Opportunity Product' object is also connected to the 'Opportunity' object. The interface includes a 'Quick Find...' search bar, a 'Select from' dropdown, and a 'Show More Fields' button for each object.

Object	Field	Type	
Contact	Academic Title	Picklist	
	Account Name	Lookup(Account)	
	Active Status	Formula (Text)	
	Additional Title	Text(255)	
	Assistant	Text(40)	
	Asst. Phone	Phone	
	Birthdate	Date	
	Christmas Card	Picklist	
	Contact Currency	Picklist	
	Contact Owner	Lookup(User)	
	Contact Status	Picklist	
	Created By	Lookup(User)	
	Data.com Key	Text(20)	
	Department	Text(50)	
	Department	Picklist	
Description	Long Text Area(2000)		
Do Not Call	Checkbox		
Email	Email		
Email Opt Out	Checkbox		
Fax	Fax		
Fax Opt Out	Checkbox		
Home Phone	Phone		
Account	Account Currency	Picklist	
	Account Name	Name	
	Account Number	Text(40)	
	Account Owner	Lookup(User)	
	Account Record Type	Record Type	
	Account Site	Text(50)	
	Account Source	Picklist	
	Account Status	Picklist	
	Active Status	Formula (Text)	
	Annual Revenue	Currency(15, 0)	
	Assistant	Text(40)	
	Asst. Phone	Phone	
	Billing Address	Address	
	Birthdate	Date	
	Created By	Lookup(User)	
Data.com Key	Text(20)		
Department	Text(50)		
Description	Long Text Area(2000)		
Do Not Call	Checkbox		
Email	Email		
Email Opt Out	Checkbox		
Employees	Number(0)		
Opportunity	Account Name	Lookup(Account)	
	Account Number	Formula (Text)	
	Aircraft Model	Formula (Text)	
	Aircraft Model	Picklist	
	Aircraft Type	Picklist	
	Amount	Currency(15, 2)	
	Amount	Formula (Currency)	
	Amount ROLLUP	Rollup Summary (SUM Opportunity Price)	
	Budget Confirmed	Checkbox	
	Close Date	Date	
	Compliance-matrix completed	Checkbox	
	Contract	Lookup(Contract)	
	Created By	Lookup(User)	
	Date Proposal Issued	Date	
	Delivery Date	Date	
Description	Long Text Area(2000)		
Discovery Completed	Checkbox		
Duration Time [working days]	Number(0, 0)		
Expected Revenue	Currency(15, 2)		
Forecast Category	Picklist		
HIT Leads	Picklist		
Opportunity Product	Created By	Lookup(User)	
	Date	Date	
	Discount	Percent(3, 2)	
	Last Modified By	Lookup(User)	
	Line Description	Text(255)	
	List Price	Currency(15, 2)	
	Opportunity	Lookup(Opportunity)	
	Product	Lookup(Product)	
	Product Code	Text(255)	
	Quantity	Number(10, 2)	
	Sales Price	Currency(15, 2)	
	Subtotal	Currency(15, 2)	
	Total Price	Currency(15, 2)	
	Opportunity Product	Created By	Lookup(User)
		Currency	Picklist
Last Modified By		Lookup(User)	
Opp. Product Nr.		Auto Number	
Opportunity		Master-Detail(Opportunity)	
Price		Formula (Currency)	
Price (AT)		Currency(15, 2)	
Price (BR)		Currency(15, 2)	
Price (CA)		Currency(15, 2)	
Price (DE)		Currency(15, 2)	
Price (JointVenture)		Currency(15, 2)	
Price (US)		Currency(15, 2)	
Price ROLLUP		Currency(15, 2)	
Price Type		Picklist	
Product		Lookup(Product)	
Product Code	Formula (Text)		
Subfamily	Formula (Text)		

# Setup

Overview

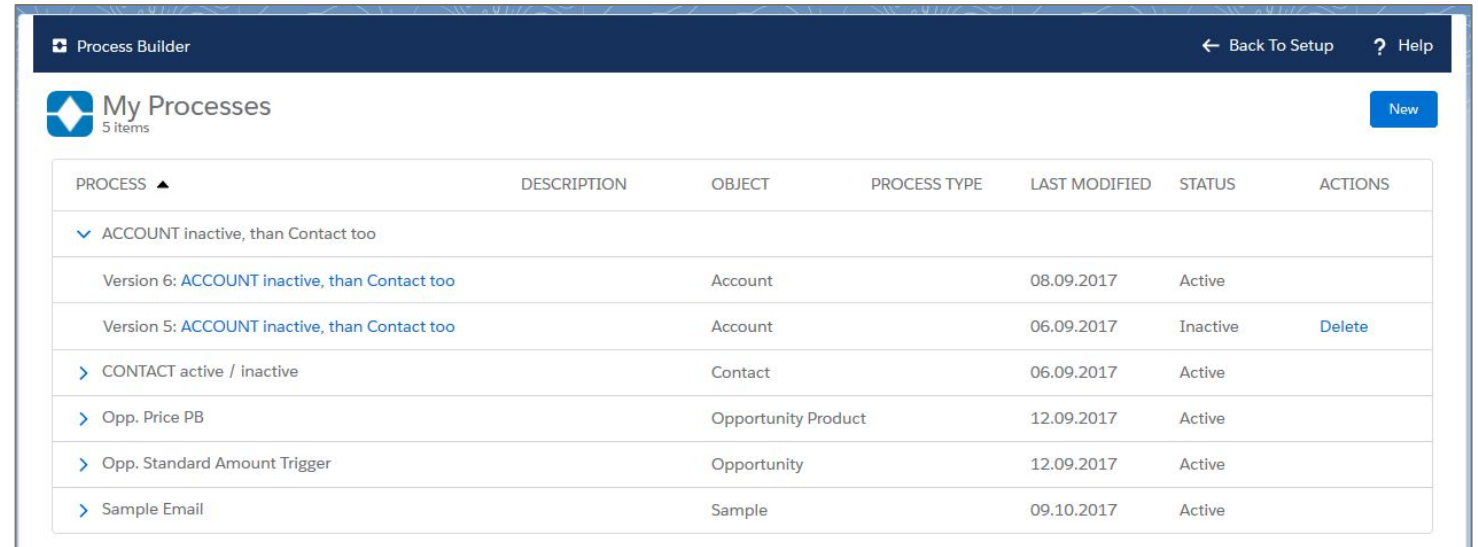


# Process Builder

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



The screenshot shows the Salesforce Process Builder interface. At the top, there is a dark blue header with the text "Process Builder" and navigation links for "Back To Setup" and "Help". Below the header, there is a section titled "My Processes" with a sub-header "5 items" and a "New" button. The main content is a table with the following columns: PROCESS, DESCRIPTION, OBJECT, PROCESS TYPE, LAST MODIFIED, STATUS, and ACTIONS.

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

The screenshot displays the Salesforce Process Builder interface for a process named "ACCOUNT inactive, than Contact too". The process flow starts with a "START" node, followed by an "Account" trigger. A decision diamond labeled "Status = inacti..." has two paths: "TRUE" leading to "IMMEDIATE ACTIONS" (Change CONTACT ...) and "FALSE" leading to another decision diamond "Status = Active". The "Status = Active" diamond also has "TRUE" and "FALSE" paths leading to "IMMEDIATE ACTIONS" (Change CONTACT ...) and "STOP" nodes respectively.

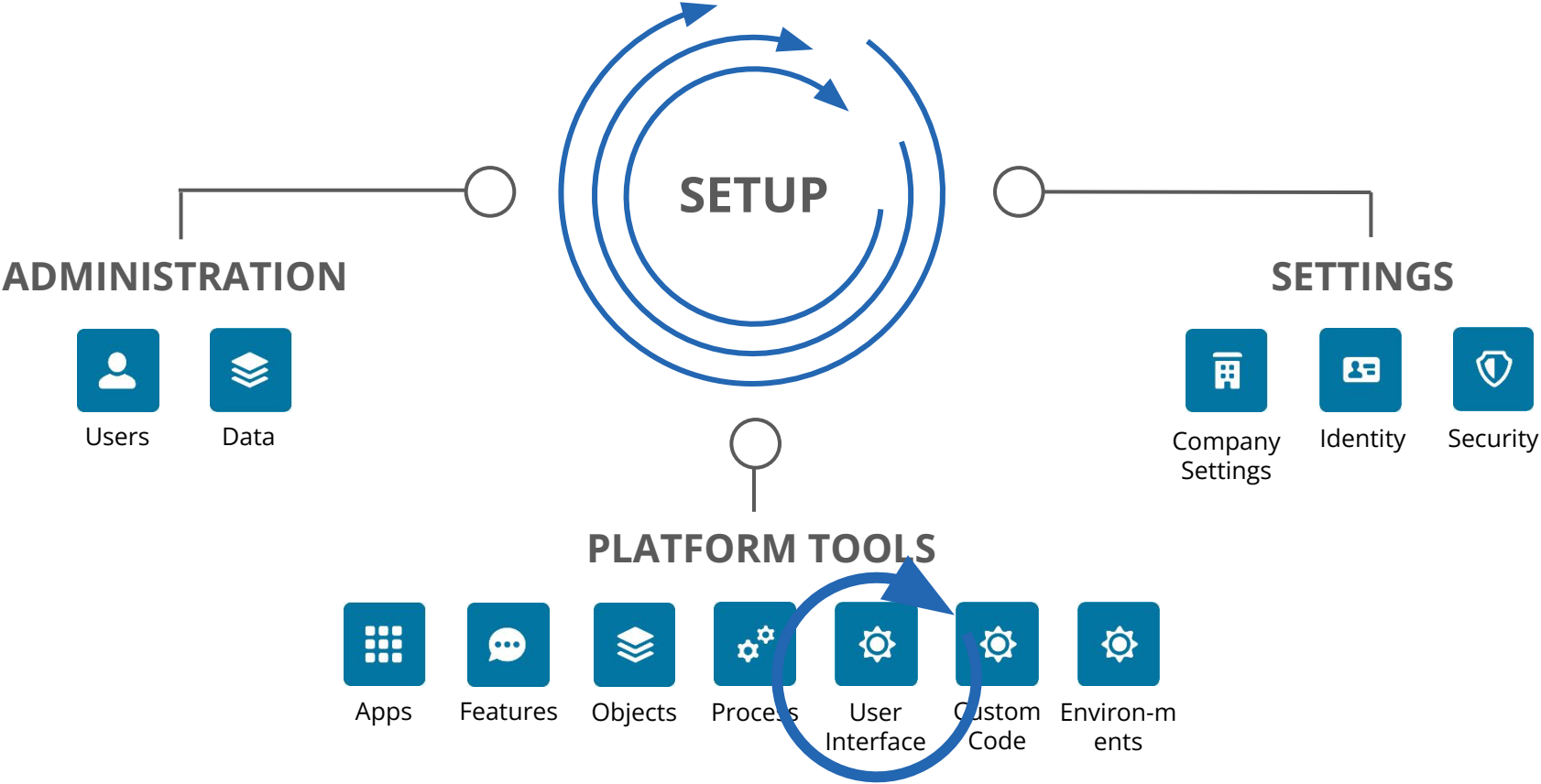
The right-hand panel, titled "Define Criteria for this Action Group", shows the configuration for the criteria. The "Criteria Name" is "Status = inactive". Under "Criteria for Executing Actions", the "No criteria—just execute the actions!" option is selected. The "Set Conditions" section contains two conditions:

Field *	Operator *	Type *	Value *
1 [Account].Accou...Q	Is changed	Boolean	True
2 [Account].Accou...Q	Equals	Picklist	Inactive

Under "Conditions", the "All of the conditions are met (AND)" option is selected.

# 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

The image shows two overlapping screenshots from the Salesforce user interface. The top screenshot is the 'App Menu' configuration page in Setup. It features a 'SETUP App Menu' header with a gear icon and '42 Apps' listed below. A descriptive text reads: 'Set the default order of apps for new users, and visibility of apps in the App Launcher. Drag an app to reorder it.' Below this are four app entries, each with a hamburger menu icon on the left and a 'Visible in App Launcher' checkbox on the right. The entries are: Platform (The fundamental Force.com platform), Sales (The world's most popular sales force automation (SFA) solution), Service (Manage customer service with accounts, contacts, cases, and more), and Marketing (Best-in-class on-demand marketing automation). The bottom screenshot is the 'App Launcher' interface. It has a search bar at the top with the placeholder text 'Find an app or item'. Below the search bar is a 'CLOSE' button and a 'All Apps' dropdown menu. The main area displays a grid of app tiles, each with an icon, the app name, a brief description, and a 'More' link. The visible tiles include: Service (Manage customer service with accounts, contacts, ... More), Marketing (Best-in-class on-demand marketing automation), Sample Console (Salesforce Classic) Lets agents work with multi... More, Community (Salesforce CRM Communities), Site.com (Build pixel-perfect, data-rich websites using th... More), and Salesforce Chatter (The Salesforce Chatter social network, including... More). A blue arrow points from the 'App Launcher' search bar area back to the 'App Menu' configuration page, indicating the relationship between the two views.





# 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

The screenshot shows a Salesforce Opportunity record. At the top, there's a header with a crown icon and the word "OPPORTUNITY". Below that are buttons for "+ Follow", "Edit", "New Case", and "Clone". The record details include "Account Name", "Close Date" (7/14/2016), "Amount" (\$20,000.00), and "Opportunity Owner". A path component is displayed below the details, showing a sequence of stages: "Proposal/Quote" (active), "Negotiation", and "Closed". A "Mark Stage as Complete" button is also present. Below the path, there are two sections: "KEY FIELDS" with an "Edit" button and "GUIDANCE FOR SUCCESS" with a list of bullet points.

## 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--	<a href="#">Delete</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>
Default	<input checked="" type="checkbox"/>	Lead	--Master--	<a href="#">Delete</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>

# 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
<a href="#">Edit</a>   <a href="#">Del</a>	Aircraft	 Airplane	
<a href="#">Edit</a>   <a href="#">Del</a>	Opportunity Products	 Desk	
<a href="#">Edit</a>   <a href="#">Del</a>	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** [Help for this Page](#)

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

Select Language

**Standard Tabs** [Standard Tabs Help](#)

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

**Step 1. Enter the new tab names** Step 1 of 2

	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"/>	

Tab: Accounts  
Language: English  
Singular:   
Plural:   
Starts with vowel sound:



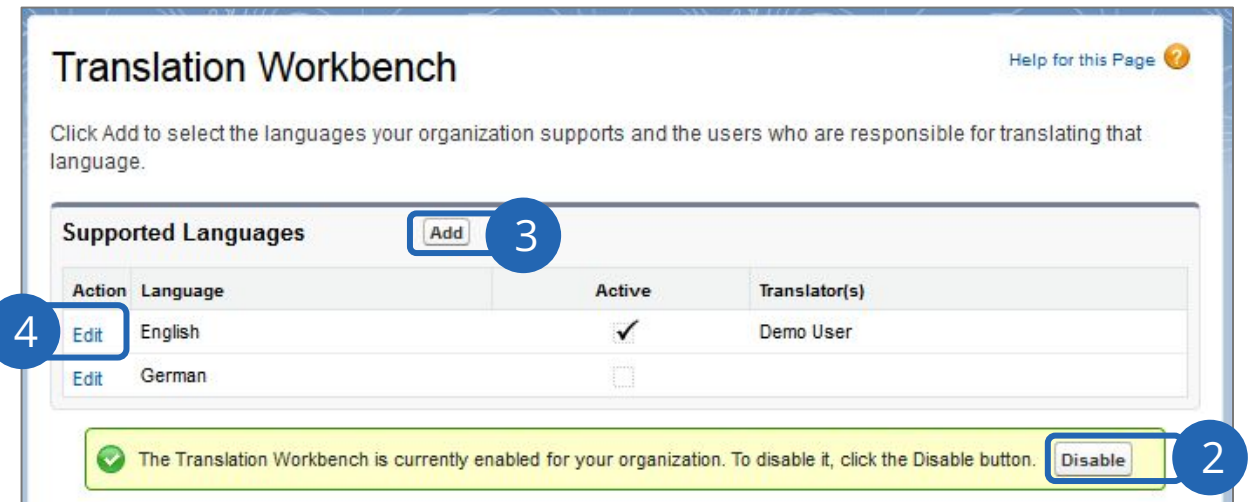
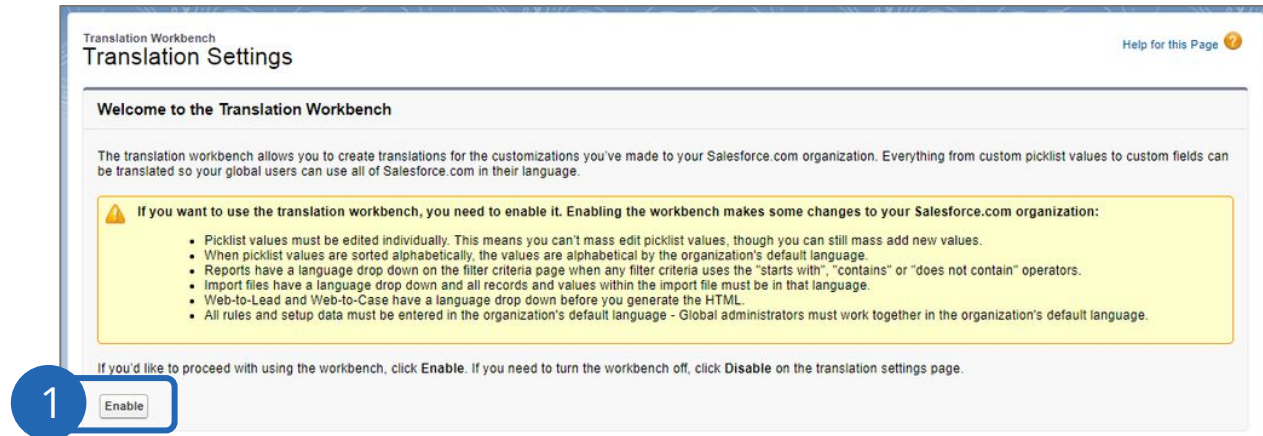
# Translation Workbench

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 Help for this Page ?

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.

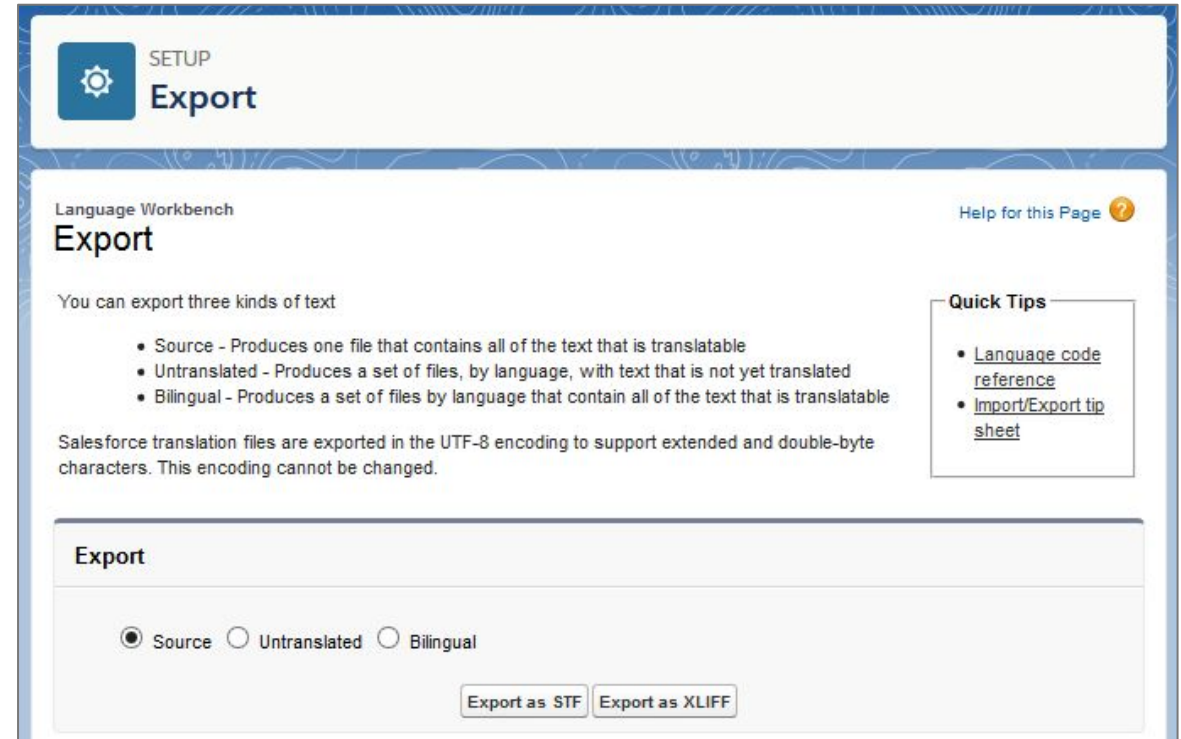
**Bilingual**—Used for reference and reviewing all your untranslated and translated customizations.

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

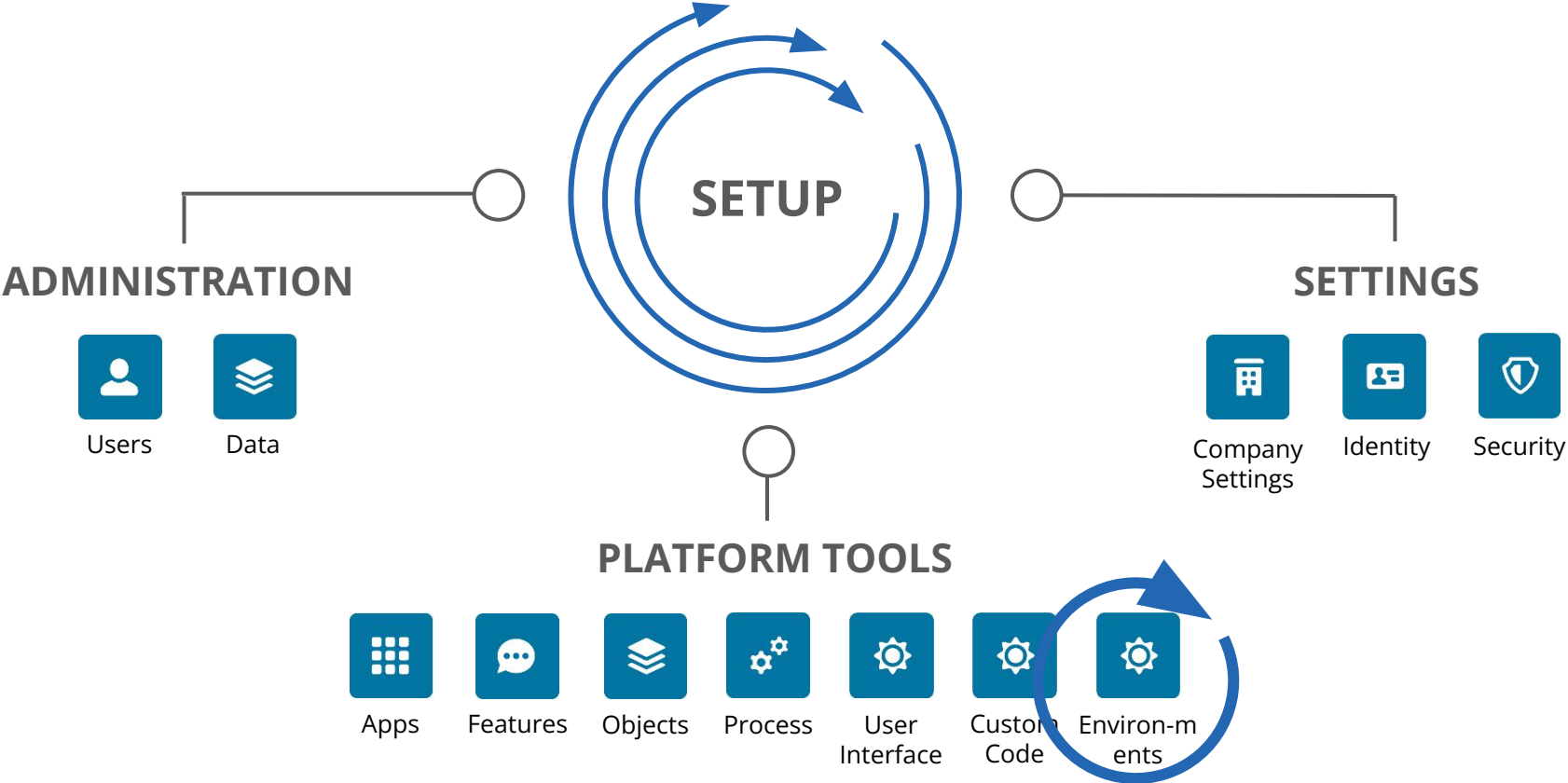
## Translation

- 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 is a 'SETUP Import' header with a gear icon. Below this, the page title is 'Language Workbench Import' with a 'Help for this Page' link. A 'Quick Tips' box on the right contains links for '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, 2. Zip your files (Optional), 3. Select and upload your file(s), and 4. Import your files. Step 1 includes instructions on file naming and encoding. Step 3 features a file selection interface with a 'Durchsuchen...' button and the text 'Keine Datei ausgewählt.' At the bottom, there is an 'Import' button.

# 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
<a href="#">Del</a>   <a href="#">Refresh</a>   <a href="#">Log In</a>	<a href="#">Dev</a>	Developer	Completed	CS88	00D5E00000000D5	16.11.2017 13:57	
<a href="#">Del</a>   <a href="#">Refresh</a>   <a href="#">Log In</a>	<a href="#">Developmen</a>	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	
Name	Dev
Description	
Type	Developer

**Upload Authorization Direction**

Allow Inbound Changes  Accept Outbound Changes

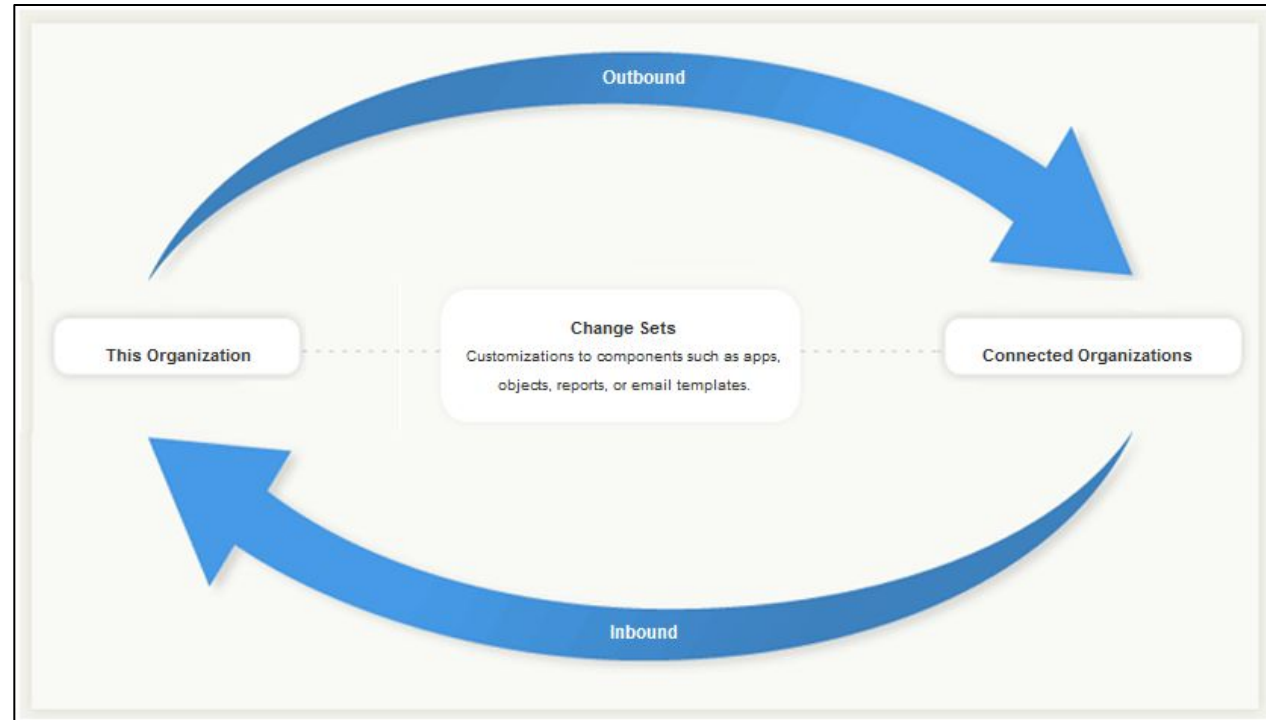
Save Cancel

# 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



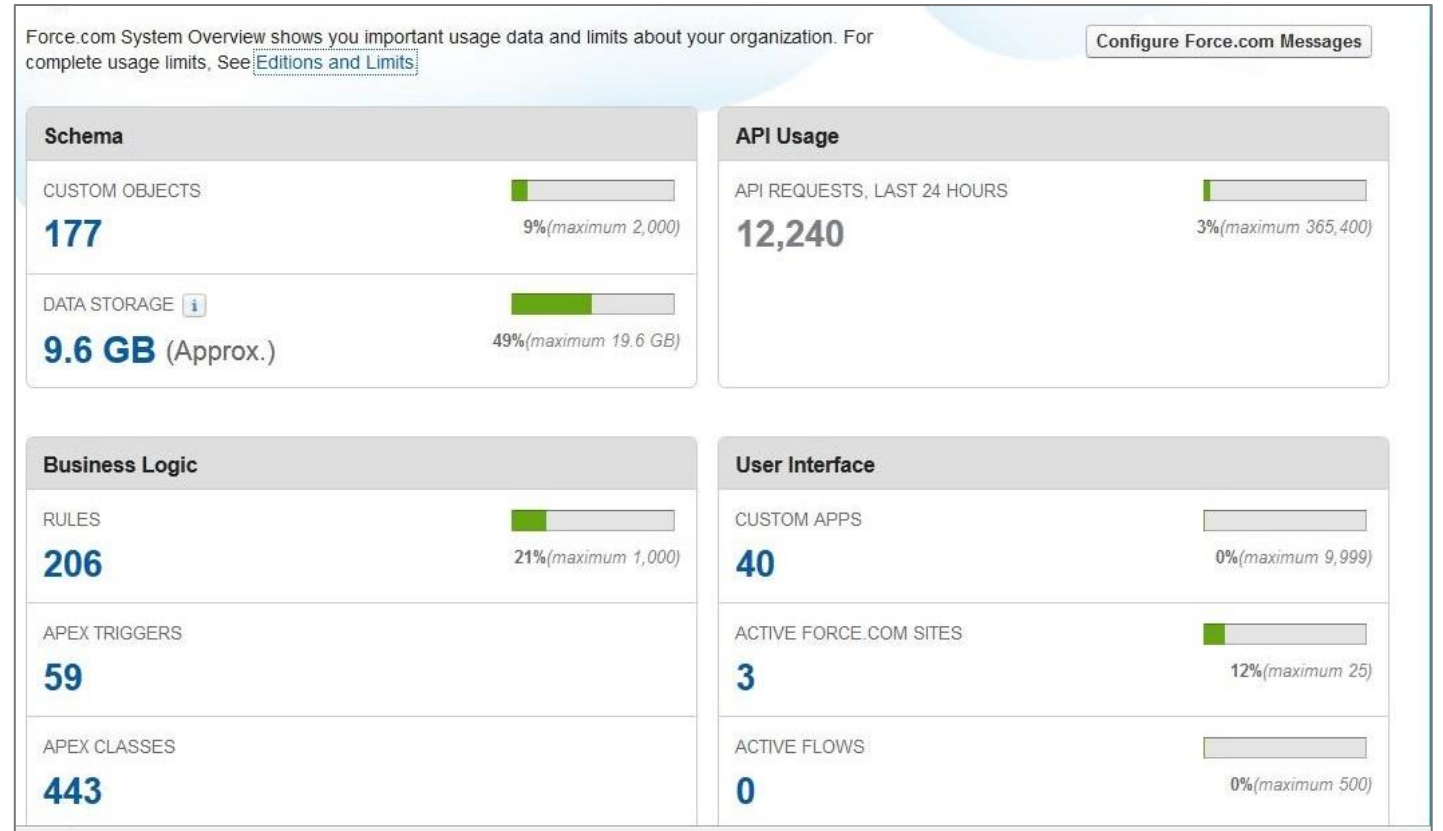


# System Overview

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



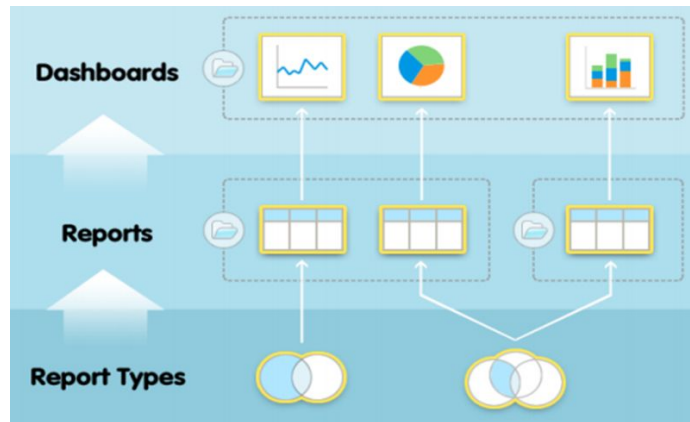




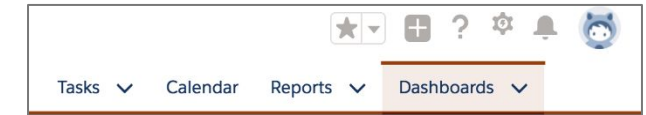
# Reports & Dashboards

# Reports & Dashboards

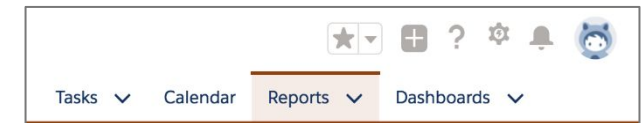
Learn how to use Reports & Dashboards



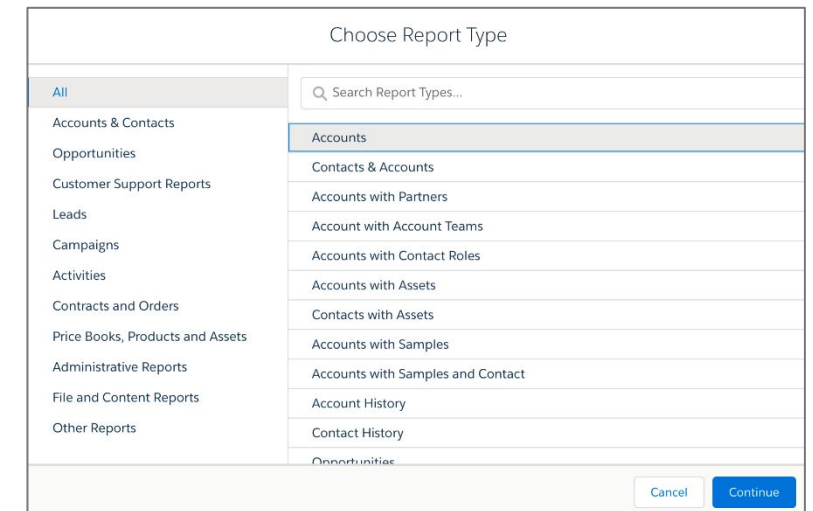
**Dashboards** represent data of a report via graphics, which allow users to see key metrics and performances quickly and comprehensively



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

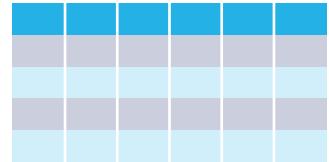
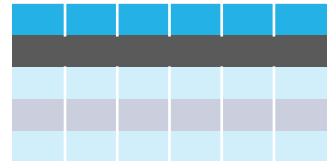
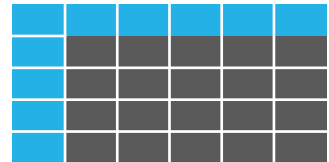


**Report types** are templates for report creation



# 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' (1), 'New Report (Salesforce Classic)', and 'New Folder' (2). On the left, a sidebar lists report categories: 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS', 'Created by Me', 'Shared with Me', and 'All Folders'. The 'Recent' category is selected (3). The main area displays a table of reports (4) with columns: REPORT NAME, DESCRIPTION, FOLDER, LAST MODIFIED BY, and SUBSCRIBED. The table lists various reports such as 'Win Ratio', 'Visit Planing', 'Trend of Cases Cre...', 'Trend of Cases Clos...', 'Trend of Case Reso...', 'Top 10 Cases by Age', 'Sample Report: Pip...', 'Sales Person Open ...', 'Sales Person MTD ...', 'Sales Person Curre...', and 'Sales Person Activity'.

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 Repc...		<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 Repc...		<input type="checkbox"/>
Sales Person MTD ...	Month to Date sales	Sales and Marketing Repc...		<input type="checkbox"/>
Sales Person Curre...		Sales and Marketing Repc...		<input type="checkbox"/>
Sales Person Activity		Sales and Marketing Repc...		<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 displays the Report Builder interface for 'Contacts & Accounts'. It is divided into four main sections, each highlighted with a blue circle and a number:

- 1. Fields Pane:** A list of fields categorized by report type. Under 'Contact: General (24)', fields include Contact Owner, Contact Owner Alias, Created By, Created Alias, Last Modified By, Last Modified Alias, Salutation, First Name, Last Name, Contact: Is Person Account, Job Title, Department, Owner Role Display, Owner Role Name, Last Activity, Description, Contact Currency, Last Modified Date, Created Date, Contact ID, Reports To, Last Stay-in-Touch Request Date, Last Stay-in-Touch Save Date, and Data.com Key. Under 'Contact: Address (10)', fields include Mailing Street, Mailing Address Line 1, Mailing Address Line 2, and Mailing Address Line 3.
- 2. Filters and Outline Pane:** Contains an 'OUTLINE' section with 'GROUP ROWS' (Add group...) and 'GROUP COLUMNS' (Add group...). Below is a 'Columns' section with 'Add column...' and a list of selected columns: Christmas Card, Account Name, First Name, Last Name, Mailing Country (text only), and Account Owner.
- 3. Preview Pane:** Shows a table of data with columns: Industry, Christmas Card, Account Name, First Name, Last Name, Mailing Country (text only), and Account Owner. The table is grouped by 'Industry' and includes subtotals. A message at the top reads: 'Previewing a limited number of records. Run the report to see everything.'
- 4. Save & Run:** Buttons for 'Got Feedback?', 'Add Chart', 'Save & Run', 'Save', and 'Run'.

At the bottom of the interface, there are checkboxes for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total', all of which are checked.

# 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 are buttons for 'New Report', 'New Report (Salesforce Classic)', and 'New Folder'. Below this is a table with columns for 'REPORT NAME', 'DESCRIPTION', 'FOLDER', 'LAST MODIFIED BY', and 'SUBSCRIBED'. A report titled 'Christmas Card per Industry' is listed. A dropdown menu is open for this report, showing options: 'Run', 'Edit', 'Edit (Salesforce Classic)', 'Subscribe', 'Export', and 'Delete'. A blue circle with the number '1' highlights the 'Subscribe' option. An 'Edit Subscription' dialog box is overlaid on the report. It has a 'Schedule' section with 'Frequency' (Daily, Weekly, Monthly) and 'Days' (MON, TUE, WED, THU, FRI, SAT, SUN) options. A blue circle with the number '2' highlights the 'Weekly' frequency and 'MON' day. The 'Time (Europe/Paris)' is set to '16:00'. The 'Email Results' section has 'Send To' (Me, Select People) and 'Run Report As' (Me, Another Person) options. A blue circle with the number '3' highlights the 'Me' option for 'Send To'. At the bottom of the dialog, there are 'Cancel' and 'Save' buttons. A blue circle with the number '4' highlights the 'Save' button. A line connects the 'Subscribe' option in the dropdown to the 'Edit Subscription' dialog.

# 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

The screenshot displays the Salesforce Reports interface. At the top, there are buttons for 'New Report', 'New Report (Salesforce Classic)', and 'New Folder'. Below these, a table lists reports with columns: 'FOLDER NAME', 'CREATED BY', 'LAST MODIFIED BY', and 'CREATED ON'. A folder named 'Created by Me' is highlighted. A 'Share Folder' dialog box is open over this folder. The dialog includes a 'Share with' dropdown menu set to 'Users', a 'Names' search field with a magnifying glass icon, and an 'Access' dropdown menu set to 'Can view'. A blue 'Share' button is located below the search field. At the bottom of the dialog, there is a section titled 'Who can access' with a search field and a list of users. One user is listed with the access level 'Can manage'. The dialog box is annotated with numbered circles: 1 points to the 'Share' button in the top right corner of the dialog; 2 points to the top border of the dialog; 3 points to the 'Share with' dropdown; 4 points to the 'Access' dropdown; and 5 points to the 'Who can access' section.

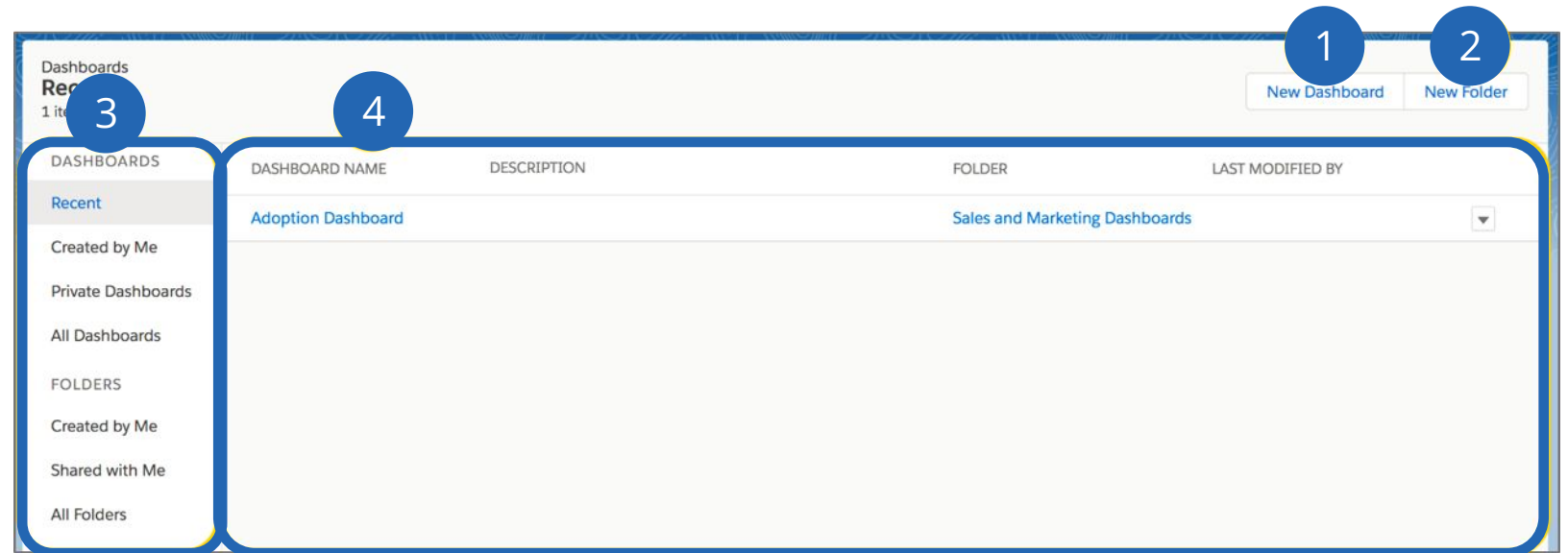


# Dashboards

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 border="1"><thead><tr><th>FISCAL PERIOD</th><th>SUM OF AMOUNT (...)</th></tr></thead><tbody><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></tbody></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 (...)																
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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 component to a Salesforce dashboard. It shows the 'My personal dashboard' page with a '+ Component' button highlighted by a blue box and a '1' callout. A 'Select Report' dialog is open, showing a list of reports with 'Christmas card Report' selected, indicated by a '2' callout. A 'Select' button is highlighted with a '3' callout. An 'Add Component' dialog is also open, showing the 'Christmas card Report' selected, a bar chart preview, and configuration options for 'Display As', 'Y-Axis', 'X-Axis', and 'Sort Rows By'. A '4' callout points to the 'Display As' options, and a '5' callout points to the 'Add' button.

Industry	Record Count
Aircraft	252
Other	39
Hochbau	4
Yacht	4

# Trailhea

# d

The fun way to learn Salesforce



## Reports & Dashboards

[https://trailhead.salesforce.com/en/content/learn/modules/lex\\_implementation\\_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](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](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](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](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](https://help.salesforce.com/articleView?id=users_profiles_cloning.htm&type=5)

## **Profiles**

[https://help.salesforce.com/articleView?id=admin\\_userprofiles.htm&type=5](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](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](https://help.salesforce.com/articleView?id=adding_fields.htm&type=5)

## **Page Layouts**

[https://help.salesforce.com/articleView?id=customize\\_layout.htm&type=5](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](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](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](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](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](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](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](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](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](https://help.salesforce.com/articleView?id=schema_builder_elements_objects_ref.htm)

## **Trailhead - Data Modeling**

[https://trailhead.salesforce.com/modules/data\\_modeling](https://trailhead.salesforce.com/modules/data_modeling)

# Helpful Links



## **Process Management**

[https://help.salesforce.com/articleView?id=schema\\_builder\\_working.htm](https://help.salesforce.com/articleView?id=schema_builder_working.htm)

## **Create a Process**

[https://help.salesforce.com/articleView?id=process\\_create.htm&type=5](https://help.salesforce.com/articleView?id=process_create.htm&type=5)

## **Trailhead - Process Automation**

[https://trailhead.salesforce.com/en/modules/business\\_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](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](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](https://trailhead.salesforce.com/en/modules/lightning_app_builder)

# Helpful Links



## **Path**

[https://help.salesforce.com/articleView?id=rss\\_sales\\_path.htm](https://help.salesforce.com/articleView?id=rss_sales_path.htm)

## **Guide Users with Path**

[https://help.salesforce.com/articleView?id=path\\_overview.htm](https://help.salesforce.com/articleView?id=path_overview.htm)

## **Trailhead - Path & Workspaces**

[https://trailhead.salesforce.com/en/modules/sales\\_admin\\_optimize\\_salesforce\\_for\\_selling](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](https://help.salesforce.com/articleView?id=customize_rename.htm)



## **Enable and Disable the Translation Workbench**

[https://help.salesforce.com/articleView?id=customize\\_wbench.htm](https://help.salesforce.com/articleView?id=customize_wbench.htm)



## **Translate Terms**

[https://help.salesforce.com/articleView?id=entering\\_translated\\_terms.htm](https://help.salesforce.com/articleView?id=entering_translated_terms.htm)

## **Translation Files**

[https://help.salesforce.com/articleView?id=translation\\_file\\_description.htm](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?err=1&id=workbench_export.htm)

[https://help.salesforce.com/articleView?id=workbench\\_import.htm](https://help.salesforce.com/articleView?id=workbench_import.htm)

# Helpful Links



## **Sandbox Types**

[https://help.salesforce.com/articleView?id=create\\_test\\_instance.htm](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](https://help.salesforce.com/articleView?id=data_sandbox_environments.htm)



## **Trailhead - Application Lifecycle Management**

[https://trailhead.salesforce.com/modules/alm\\_deployment](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](https://help.salesforce.com/articleView?id=changesets_best_practices.htm)



## **Deploy Inbound Change Sets**

[https://help.salesforce.com/articleView?id=changesets\\_about\\_inbound.htm](https://help.salesforce.com/articleView?id=changesets_about_inbound.htm)

## **Upload Outbound Change Sets**

[https://help.salesforce.com/articleView?id=changesets\\_about\\_outbound.htm](https://help.salesforce.com/articleView?id=changesets_about_outbound.htm)

## **Trailhead - Change Management**

[https://trailhead.salesforce.com/modules/app\\_deployment](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](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](#)