



SETTING UP SALESFORCE GROUP EDITION

Summary

With Group Edition, it's fast and easy for your team to get started. As your team's Salesforce administrator, you can set up and configure the system to maximize your team's productivity.

Creating and Managing Users

After you sign up for Group Edition, the first step in setting up your organization is to create usernames for the team members (including yourself) who will be using Salesforce.

1. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.
2. Click **New User**, and fill in the user's information.
3. Make sure the `Generate new password and notify user immediately` checkbox is selected so the user will receive an email with their new username and password.
4. Click **Save** to finish. Your team members can now log in to Salesforce.

Customizing Salesforce for Your Organization

You can customize Group Edition to help your team more effectively track and manage the information that is critical to your success. All customization options are available from Setup by going to the object management settings for an object, like accounts. If you're using Lightning Experience, see the Object Manager. If you're using Salesforce Classic, enter the object name in the `Quick Find` box.

Editing Standard Picklist Values

For example, you may want to change the `Lead Source` values for contacts.

1. To customize the standard picklist values, from the object management settings for contacts, go to Fields.
2. Click **Edit** next to a field name to modify the available values.
3. Click **Save** to finish. The values are instantly modified for all users.

Creating Custom Fields to Track Data

For example, you can create a field to track products on opportunities.

1. To create new custom fields, from the object management settings for opportunities, go to Fields.
2. Click **New**.
3. Follow the steps in the custom field wizard to create the new field.

Configuring Page Layouts

For example, you may want to mark certain account fields as required.

1. To customize the page layout for a tab, from the object management settings for accounts, go to Page Layouts.
2. Modify the page layout for your entire team. You can mark fields as "required" or "read only" and modify the display of other page components.

Displaying Dashboards on your Home Page

You may want to display the top row of your dashboard on the home page so that your team members can quickly view important statistics.

1. From Setup, enter `Home` in the `Quick Find` box, then select **Home Page Layouts**.

2. Click the **Edit** link next to the Dashboard Home Page Default layout.
3. Select the `Dashboard Snapshot` checkbox and click **Next**.
4. Select where you want it to display, then click **Save & Assign**.
5. Select the profiles to which you want to assign this layout, then click **Save**.

Creating Customized Templates for Email or Mail Merge

You may want to create customized email or mail merge templates to help standardize communication for your team. Email templates can be used when sending email through the **Send Email** button in the Activity History related list. Mail merge templates can be used to create documents through the **Mail Merge** button in the Activity History related list.

- From Setup, enter *Templates* in the `Quick Find` box, then select the appropriate option.
- Individual users can also create personal email templates through their personal settings.

Importing Your Organization's Data

To ease your team's transition to Salesforce, you can import your existing data from popular contact managers such as Outlook, ACT!, GoldMine, or an Excel spreadsheet.

1. Export each of your team members' data from the contact manager.
2. Merge all of the data into a single CSV (comma separated values) file.
3. Open the file in Excel, and add a `Record Owner` column containing the Salesforce username of the team member who owns each row of data.
4. From Setup, enter *Data Import Wizard* in the `Quick Find` box, then select **Data Import Wizard**.
5. Follow the steps in the wizard to import all of your team's data.

Setting Up Queues

Queues are repositories for unassigned records. They can help your team manage their workload. You can create queues for leads, cases, or custom objects. To set up queues, from Setup, enter *Queues* in the `Quick Find` box, then select **Queues**.