Enhance Your Sales Cloud Implementation

Salesforce, Spring '24

@salesforcedocs

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INTRODUCTION

Next Steps With Salesforce

Even the most basic Salesforce organization helps your company work smarter, connect better with customers, sell more, and grow your business faster. But you can help your company do even more by implementing a few additional features.

Salesforce offers a customizable platform that can grow with your business. Salesforce stores critical information about your customers and helps you connect and close deals with new customers. You can modify the Salesforce platform as needed to best reflect how your company does business, and you'll add new features as your grow, so that your information system is always the right size for your business.

This guide is designed to help Salesforce administrators set up and customize a new sales organization. We assume you're familiar with common office programs such as Microsoft® Excel® and know at least a little about computer systems. You don't have to be a Salesforce expert to get started. You'll learn much of what you need to know as you work in Salesforce.

How to Use This Guide

We've arranged the information in this guide in the order you'll need it.

1. Secure Users and Data

Protect your company's business records by reviewing and modifying the settings that determine who can view and edit records and reports.

2. Set Up a User Hierarchy

The role hierarchy supplements basic sharing and security by organizing users into levels. Where each user lands in the role hierarchy determines how much data they can see.

3. Customize Existing Objects

Because each business is unique, you may find that Salesforce doesn't have a place for every bit of data you need to collect. Add new fields or change the page layout to make Salesforce better suit your business needs.

4. Add New Objects

Salesforce provides you with standard objects that help you capture most common types of sales data. If your company has data that doesn't fit into an existing object, you can create a custom object to store it.

5. Automate Basic Sales Processes

Streamline records management by setting up Salesforce to automatically act when your users make certain changes to your records.

6. Roll It Out

Finally, we'll provide some tips on how to roll out Salesforce to your users. Your roll-out strategy will drive how quickly and happily your users adopt Salesforce. We'll also show you where you can learn more about other existing features and keep up-to-date with the latest Salesforce products and features.

Before You Get Started

If your company is already using Salesforce, carefully plan when and how you'll implement changes. You may need to make some updates at a time when other users don't need to access Salesforce. Before you jump in, make a schedule and communicate with your users about how and when you'll be making changes, and what they should or shouldn't do to ensure that their work isn't interrupted.

How to Get Help

As you set up Salesforce, you may find that you have questions that aren't answered in this guide, or that your organiztion has special requirements that aren't discussed here. Here's where you can go for help.

Salesforce Online Help

Salesforce online help offers explanations and instructions on hundreds of topics. Search for topics of interest at https://help.salesforce.com/

Getting Started Trailblazer Community

Salesforce Success Communities are the place to go to ask questions and get help from other admins and Salesforce experts. Visit the Getting Started Trailblazer Community for help while implementing Salesforce.

Key Concepts and Terms

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

Concepts

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

Terms

Term	Definition
App	Short for *application*. A collection of components such as tabs, reports, dashboards, and Visualforce pages that address specific business needs. Salesforce provides standard apps, which you can customize, such as Sales and Service. You can customize the standard apps to match the way you work.

Term	Definition
Edition	One of several bundles of Salesforce products and services, each geared toward a different set of business needs. All Salesforce editions share the look and feel, but they vary by feature, functionality, and pricing.
Object	A definition of a specific type of information you can store in Salesforce. For example, the Case object lets you store information about customer inquiries. For each object, your organization has multiple, specific records. Salesforce comes with lots of standard objects, but you can create custom objects, as well.
Organization	A deployment of Salesforce that has a defined set of licensed users. Your organization includes all your data and applications.
Record	A collection of fields that store information about a specific item of a specific type. A record is an object, such as a contact, an account, or an opportunity. For example, you can have a contact record to store information about Joe Smith, and a case record store information about his training inquiry.
Release	Salesforce releases new products and features three times per year, and we identify releases by season—Winter, Spring, and Summer—along with the calendar year. *Example:* Winter '15. For every Salesforce release, the Salesforce release notes include new features and products that are generally available or in beta release. They also describe all changes to existing features and products. You can find the release notes when you search for "Release Notes" in the Salesforce Help.
Salesforce	The name of the Salesforce cloud computing CRM service and the company name.

Standard Objects

Concept	Definition
Account	An organization, individual, or company that you want to track in Salesforce. An account can include customers, competitors, partners, or any other entity that makes sense for your business. An account contains records--or connects to--all information about your interactions with the company, such as points of contact, in-progress and completed opportunities, and records of past interactions.
Contact	A person who works at an organization represented by an account. A contact record contains information such as phone numbers, titles, and the person's role in the deal. With contacts, you can capture all the personal information you need to develop the relationships that are so important in sales. When a lead is converted, the information in the lead is automatically transferred into the contact. As your engagement with the company widens and your reps meet more people, they can keep creating additional contacts associated with the corresponding account.
Lead	A lead is a potential customer: any person who may be interested in your products and services. For example, this could include someone you met at a conference or who filled out a form on your website. If a rep qualifies a lead and decides to pursue it, the lead is "converted", which automatically transfers the lead's data into three objects: an account, a contact, and an opportunity.
Opportunity	An opportunity is a deal you're working on, and the opportunity object in Salesforce tracks all the information you're tracking about the deal, such as size and expected close date. The opportunity object

Concept	Definition
	is at the core of your sales process. By adding an opportunity, you build a “pipeline” you can use for forecasting.

SET UP BASIC SHARING AND SECURITY

Learning About Basic Sharing and Security

Take advantage of basic sharing and security in Salesforce, and learn how you can customize sharing and security to meet the specific needs of your organization.

You may find that the basic sharing and security functions in Salesforce work well for you and your organization's needs. But if you don't, you can customize the way sharing and security works.

Learn how you can control who sees what data in your organization.

Who Sees What: Overview (English only)

SET UP YOUR ROLE HIERARCHY

Create a User Role

Salesforce offers a user role hierarchy that you can use with sharing settings to determine the levels of access that users have to your Salesforce org's data. Roles within the hierarchy affect access on key components such as records and reports.

For information on designing your sharing setup to improve performance and speed up sharing changes, see the Designing Record Access for Enterprise Scale guide.

Users at any role level can view, edit, and report on all data that's owned by or shared with users below them in their role hierarchy. If your org's sharing model specifies different sharing access for an object, then sharing defers to the OWD settings. Specifically, in the Organization-Wide defaults related list, you can disable the **Grant Access Using Hierarchies** option for a custom object. When disabled, only the record owner and users who are granted access by the organization-wide defaults receive access to the object's records.

1. From Setup, in the Quick Find box, enter `Roles`, then select **Roles**.
2. If the "Understanding Roles" page is displayed, click **Set Up Roles**.
3. Find the role under which you want to add the new role. Click **Add Role**.
4. Add a Label for the role. The Role Name field autopopulates.
5. Specify who the role reports to. The field is already populated with the role name under which you added the new role, but you can also edit the value here.
6. Optionally, specify how the role name is displayed in reports. If the role name is long, consider using an abbreviation for reports.
7. Specify the role's access to contacts, opportunities, and cases.

   For example, you can set the contact access so that users in a role can edit all contacts associated with accounts that they own. This access applies regardless of who owns the contacts. And you can set the opportunity access so that users in a role can edit all opportunities associated with accounts that they own. This access also applies regardless of who owns the opportunities.
8. Click **Save**.

   Portal user roles aren't included on the role hierarchy setup page.

When you edit groups, roles, and territories, sharing rules are recalculated to add or remove access as needed.

Depending on the nature of your updates and your org's setup, these sharing calculations can take a while to complete. If you experience sharing evaluations or timeouts, consider deferring sharing calculations before making large-scale updates, and then restart and recalculate sharing at a later time. For more information, see Defer Sharing Calculations in Salesforce Help.

Note: After you share a folder with a role, it's visible only to users in that role, not to superior roles in the hierarchy.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To view roles and role hierarchy:
- View Roles and Role Hierarchy

To create, edit, and delete roles:
- Manage Roles

To assign users to roles:
- Manage Internal Users

Guidelines for Success with Roles

Understand key rule behaviors, and apply best practices for success with roles.

For best practices on designing record access in a large organization, see Designing Record Access for Enterprise Scale.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

- To simplify user management in Salesforce orgs with large numbers of users, enable delegated administrators to manage users in specified roles and all subordinate roles.
- In Salesforce orgs created in Spring '21 or later, you can create up to 5,000 roles. In orgs created before Spring '21, you can create up to 500 roles and can contact Salesforce Customer Support to increase this limit.
- Every user must be assigned to a role, or their data won't display in opportunity reports, forecast roll-ups, and other displays based on roles.
- Put all users that require visibility to the entire org at the highest level in the hierarchy.
- Don't create individual roles for each title at your company. Instead, define a hierarchy of roles to control access of information entered by users in lower-level roles.
- Create roles only for your current requirements. Don't create temporary placeholder roles in anticipation of future needs.
- Don't use reporting requirements to determine what hierarchy levels you need.
- When you change a user's role, the sharing rules for the new role are applied.
- Salesforce Knowledge users can modify category visibility settings on the role detail page.
- When an account owner isn't assigned a role, the sharing access for related contacts is Read/Write, provided the organization-wide default for contacts isn't Controlled by Parent. Sharing access on related opportunities and cases is No Access.
- If your organization uses Territory Management, forecasts are based on the territory hierarchy rather than the role hierarchy.
- To prevent disruptions, avoid changing the role hierarchy during business hours.

Performance

- To avoid performance issues, we recommend that no single user owns more than 10,000 records of an object. For users who must own more than that number of objects, don't assign them a role or place them in a separate role at the top of the hierarchy. It's also important to keep that user out of public groups potentially used as the source for sharing rules.
- To improve performance, minimize the number of levels in your role hierarchy. Eliminate roles that aren't needed, and delete sharing rules that grant access to records already shared via the role hierarchy.

Assign Users to Roles

Quickly assign users to a particular role.

1. From Setup, in the Quick Find box, enter `Roles`, then select **Roles**.
2. Click **Assign** next to the name of the desired role.

   Note: You can also access this page by clicking **Assign Users to Role** on the role's detail page. Large organizations should consider assigning roles via the SOAP API for efficiency.
3. Make a selection from the dropdown list to show the available users.
4. Select a user on the left, and click **Add** to assign the user to this role.
5. Click **Save**.

Note: Removing a user from the Selected Users list deletes the role assignment for that user.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To assign users to roles:
- Manage Internal Users

ADD NEW FIELDS, OBJECTS, AND TABS

Create Custom Fields

Capture your unique business data by storing it in custom fields. When you create a custom field, you configure where you want it to appear and optionally control security at the field level.

Important: Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Watch a Demo: How to Create a Custom Field in Salesforce

Want to customize Salesforce so it captures all your business data? This short video walks you through how to create a custom picklist field, from choosing the correct field type to applying field level security.

Watch a Demo: How to Add a Custom Field in Salesforce (Lightning Experience)

Want to add and arrange a new field while viewing an individual record for an object? This short video walks you through creating a picklist field while viewing a contact, and then changing the page layout for the field.

Before you begin, determine the type of field you want to create.

Note: When you're close to the limit of 800 custom fields and you delete or create fields, field creation can fail. The physical delete process reclaims and cleans fields, making them count temporarily toward the limit. The delete process runs only when the queue is full, so it can take days or weeks to start. In the meantime, the deleted fields are still counted as part of the limit. To request immediate deletion of fields, contact Salesforce Support.

1. From the management settings for the object you want to add a field to, go to Fields. Custom task and event fields are accessible from the object management settings for Activities.
2. Click **New**.

   Tip: On custom objects, you can also set field dependencies and field history tracking in this section.

3. Choose the type of field and click **Next**. Note these considerations.
   - Some data types are available for certain configurations only. For example, the `Master-Detail Relationship` option is available for custom objects only when the custom object doesn't already have a master-detail relationship.
   - Custom settings and external objects allow only a subset of the available data types.
   - You can't add a multi-select picklist, rich text area, or dependent picklist custom field to opportunity splits.
   - Relationship fields count toward custom field limits.
   - Additional field types can appear if an AppExchange package using those field types is installed.
   - The `Roll-Up Summary` option is available only on certain objects.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Contact Manager**, **Group**, **Essentials**, **Starter**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, **Developer**, and **Database.com** Editions

Salesforce Connect external objects are available in: **Developer** Edition and for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

Custom fields aren't available on Activities in **Group** Edition

Custom settings aren't available in **Professional** Edition

Layouts aren't available in **Database.com**

USER PERMISSIONS

To create or change custom fields:
- Customize Application

To add field-level security to profiles or permission sets:
- Manage Profiles and Permission Sets

- Field types correspond to API data types.
- If your org uses Shield Platform Encryption, ensure that you understand how to encrypt custom fields using the Shield Platform Encryption offering.

4. For relationship fields, associate an object with the field and click **Next**.
5. For indirect lookup relationship fields, select a unique, external ID field on the parent object, and then click **Next**. The parent field values are matched against the values of the child indirect lookup relationship field to determine which records are related to each other.
6. To base a picklist field on a global picklist value set, select the value set to use.
7. Enter a field label.

   Salesforce populates `Field Name` using the field label. This name can contain only underscores and alphanumeric characters and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. Use the field name for merge fields in custom links, custom s-controls, and when referencing the field from the API.

   Tip: Ensure that the custom field name and label are unique for that object.

   - If standard and custom fields have identical names or labels, the merge field displays the custom field value.
   - If two custom fields have identical names or labels, the merge field can display an unexpected value.

   If you create a field label called *`Email`* and a standard field labeled `Email` exists, the merge field is unable to distinguish between the fields. Adding a character to the custom field name makes it unique. For example, *`Email2`*.

8. To specify whether the field must be populated and what happens if the record is deleted, enter field attributes and select the appropriate checkboxes.
9. For master-detail relationships on custom objects, optionally select **Allow reparenting** to allow a child record in the master-detail relationship to be reparented to a different parent record.
10. For relationship fields, optionally create a lookup filter to limit search results for the field. Not available for external objects.
11. Click **Next**.
12. In Enterprise, Unlimited, Performance, and Developer Editions, specify the field's access settings for each profile or permission set, and click **Next**.

    Note: To specify the field's access settings for permission sets instead of profiles, enable **Field-Level Security for Permission Sets during Field Creation** on the User Management Settings page.

    If you specify access for permission sets, select **Permission sets with object permissions** to filter the list to permission sets that have Create, Read, Edit, or Delete access on the field's object. To show all permission sets, deselect this option. If no permission sets have object permissions for the field's object, the list contains all permission sets.

Access Level	Enabled Settings (Profiles)	Enabled Settings (Permission Sets)
Users can read and edit the field.	**Visible**	**Edit Access** (**Read Access** is selected automatically)
Users can read but not edit the field.	**Visible** and **Read-Only**	**Read Access**
Users can't read or edit the field.	None	None

When you create a custom field, by default the field isn't visible or editable for portal profiles, unless the field is universally required.

13. To show the editable field, choose the page layouts and click **Next**.

Field	Location on Page Layout
Normal	Last field in the first two-column section.
Long text area	End of the first one-column section.
User	Bottom of the user detail page.
Universally required	Can't remove it from page layouts or make read only.

14. For relationship fields, optionally click **Related List Label** and enter a new name to create an associated records related list, then add it to page layouts for that object. To add the related list to customized page layouts, select `Append related list to users' existing personal customizations`.

15. Click **Save** to finish or **Save & New** to create more custom fields.

Note: Creating fields can require changing a large number of records at once. If your request is queued to process these changes efficiently, you receive an email notification when the process has completed.

SEE ALSO:

Salesforce Help: Find Object Management Settings

Store Information That's Unique to Your Organization

Create custom objects to store information that's unique to your organization. Choose whether your custom objects are searchable, support sharing, or include access to the Bulk API and Streaming API.

Every custom object is classified as either an *Enterprise Application object* or a *Light Application object*. The difference between these two categories is that Light Application objects don't support sharing, access to the Bulk API, or access to the Streaming API.

By default, all custom objects are Enterprise Application objects. To make your custom object a Light Application object, disable **Allow Sharing**, **Allow Bulk API Access**, and **Allow Streaming API Access** on the object's detail page.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Object Relationships Overview

Create relationships to link objects with each other, so that when your users view records, they can also see related data. For example, link a custom object called Bugs to cases to track product defects that are associated with customer cases.

Important: Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

You can define different types of relationships by creating custom relationship fields on an object. Before you begin creating relationships, determine the type of relationship that suits your needs.

Different types of relationships between objects in Salesforce determine how they handle data deletion, sharing, and required fields in page layouts. Let's review the types of relationships.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Master-detail

Closely links objects together such that the master record controls certain behaviors of the detail and subdetail record. For example, you can define a two-object master-detail relationship, such as Account—Expense Report that extends the relationship to subdetail records, such as Account—Expense Report—Expense Line Item. You can then perform operations across the master—detail—subdetail relationship.

Tip: Create a master-detail relationship before a custom object contains data.

Behaviors of master-detail relationships:

- Deleting a detail record moves it to the Recycle Bin and leaves the master record intact; deleting a master record also deletes related detail and subdetail records. Undeleting a detail record restores it, and undeleting a master record also undeletes related detail and subdetail records. However, if you delete a detail record and later separately delete its master record, you can't undelete the detail record, as it no longer has a master record to relate to.
- By default, records can't be reparented in master-detail relationships. Administrators can, however, allow child records in master-detail relationships on custom objects to be reparented to different parent records by selecting the **Allow reparenting** option in the master-detail relationship definition.
- The Owner field on the detail and subdetail records isn't available and is automatically set to the owner of the master record. Custom objects on the detail side of a master-detail relationship can't have sharing rules, manual sharing, or queues, as these require the Owner field.
- Detail and subdetail records inherit security settings and permissions from the master record. You can't set permissions on the detail record independently.
- The master-detail relationship field (which is the field linking the objects) is required on the page layout of the detail and subdetail records.
- The master object can be a standard object, such as Account or Opportunity, or a custom object.
- As a best practice, don't exceed 10,000 child records for a master-detail relationship.
- Each custom object can have up to two master-detail relationships and up to 40 total relationships.
- The Related To entry can't be changed after you save the relationship.
- A profile or a permission set can have an entity, such as Account, with a master-detail relationship. A broken permission dependency exists if the child entity has permissions that the parent should have. Salesforce updates the parent entity for a broken permission dependency on the first save action for the profile or permission set.

If the child entity has these permissions	These permissions are enabled on the parent entity
Modify All OR View All	View All
View All OR Read	Read

- When you create a draft Knowledge Article version from a published version, the Roll Up Summary field on the draft article carries forward the Roll Up Summary field values of the published article. As per design, when you edit an article, a new draft version is created and custom field values from the published version are carried over to the new draft version. However, custom object records associated with a KnowledgeArticleVersion (published article) are not carried over or attached to the new draft version.

Many-to-many

You can use master-detail relationships to model *many-to-many* relationships between any two objects. A many-to-many relationship allows each record of one object to be linked to multiple records from another object and vice versa. For example, you create a custom object called Bug that relates to the standard case object such that a bug could be related to multiple cases and a case could also be related to multiple bugs.

Lookup

Links two objects together. Lookup relationships are similar to master-detail relationships, except they don't support sharing or roll-up summary fields. With a lookup relationship, you can:

- Link two different objects.
- Link an object with itself (except for the user object; see the Hierarchical section in this topic). For example, link a custom object called Bug with itself to show how two different bugs are related to the same problem.

Note: Lookup relationships from objects related to the campaign member object aren't supported; however, you can create lookup relationships from the campaign member object related to other objects.

When you create a lookup relationship, you can set these options:

- Make the lookup field required for saving a record, requiring it on the corresponding page layout as well.
- If the lookup field is optional, you can specify one of three behaviors to occur if the lookup record is deleted:
  - **Clear the value of this field** This is the default. Clearing the field is a good choice when the field doesn't have to contain a value from the associated lookup record.
  - **Don't allow deletion of the lookup record that's part of a lookup relationship** If you have dependencies built on the lookup relationship, such as a workflow rule, this option doesn't allow the lookup record to be deleted.

    Note: Deleting a record that has child records isn't allowed, except when the child records are soft-deleted (sent to the Recycle Bin). If all the child records of a parent record are soft-deleted, then the parent record is deleted. Furthermore, any soft-deleted children are then removed from the recycle bin and permanently deleted.

  - **Delete this record also** Available only if a custom object contains the lookup relationship, not if it's contained by a standard object. However, the lookup object can be either standard or custom. Choose when the lookup field and its associated record are tightly coupled and you want to completely delete related data. For example, say that you have an expense report record with a lookup relationship to individual expense records. When you delete the report, you probably want to delete all the expense records, too.

Warning: Choosing **Delete this record also** can result in a cascade-delete. A cascade-delete bypasses security and sharing settings, which means users can delete records when the target lookup record is deleted even if they don't have access to the records. To prevent records from being accidentally deleted, cascade-delete is disabled by default. Contact Salesforce to get the cascade-delete option enabled for your org.

Cascade-delete and its related options aren't available for lookup relationships to business hours, network, lead, price book, product, or user objects.

When you define a lookup relationship, you can include a lookup field on the page layouts for that object and create a related list on the associated object's page layouts. For example, if you have a custom object called PTO Requests and you want your users to link a PTO request with the employee submitting the request, create a lookup relationship from the PTO Request custom object with the user object.

If the parent record in a lookup relationship is deleted, the field history tracking for the child record doesn't record the deletion. For example, if a parent account is deleted, the Account History related list for the child account doesn't show the deletion.

You can't delete an object or record in a lookup relationship if the combined number of records between the two linked objects is more than 100,000. To delete an object or record in a lookup relationship, first delete an appropriate number of its child records.

When you delete an object used by a lookup field, delete the field, too. To delete both the object and the field, use the Metadata API with a delete manifest that uses `purgeOnDelete`. Or, use Setup in the UI to delete the field first. Otherwise, the object can't be deleted.

External lookup

An external lookup relationship links a child standard, custom, or external object to a parent external object. When you create an external lookup relationship field, the standard External ID field on the parent external object is matched against the values of the child's external lookup relationship field. External object field values come from an external data source.

Indirect lookup

An indirect lookup relationship links a child external object to a parent standard or custom object. When you create an indirect lookup relationship field on an external object, you specify the parent object field and the child object field to match and associate records in the relationship. Specifically, you select a custom unique, external ID field on the parent object to match against the child's indirect lookup relationship field, whose values come from an external data source.

Hierarchical

A special lookup relationship available for only the user object. It lets users use a lookup field to associate one user with another that doesn't directly or indirectly refer to itself. For example, you can create a custom hierarchical relationship field to store each user's direct manager.

Tip: When creating a hierarchical field in Personal, Contact Manager, Group, and Professional Editions, you can select the Restricted Field checkbox so that only users with the Manage Internal Users permission can edit it. In Professional, Enterprise, Unlimited, Performance, and Developer Edition, use field-level security instead.

Create a Custom Object

Track and store data that's unique to your organization. Follow different steps, depending on which Salesforce experience you're using.

IN THIS SECTION:

Create a Custom Object in Lightning Experience

Track and store data that's unique to your organization.

If you see the App Launcher icon ( ) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.

1. From the top-right corner of any page in Setup, click **Create** > **Custom Object**.
2. Complete the fields for your custom object and configure its features.
3. If you want to create a custom tab for the object immediately after you save it, select **Launch New Custom Tab Wizard after saving this custom object**.

   To create the custom object tab later, from Setup in the Quick Find box, enter `Tabs`, and then click **Tabs**.
4. Save the new object.
5. In the Object Manager, click **Fields & Relationships**, and create the custom fields that your object needs.

Tip: If you don't want your users to see the new custom object while you design and test it, to hide it, set the deployment status to In Development.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To create and edit custom objects:
- Customize Application

Create a Custom Object in Salesforce Classic

Track and store data that's unique to your org.

1. From Setup, enter `Objects` in the Quick Find box, then select **Objects**.
2. Click **New Custom Object**.
3. Follow the wizard to complete the fields for your custom object.
4. Save the new object.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

USER PERMISSIONS

To create and edit custom objects:
- Customize Application

Fields Required for Creating Custom Objects

When you create a custom object, several fields are required to define how you can access the object.

Important: Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Note: If an administrator created a tab without including help, contact your administrator if you need help with how a custom object works.

Field	Description
Label	This name is used to refer to the object in a user interface page.
Plural Label	The plural name of the object. If you create a tab for this object, this name is used for the tab.
Gender	If it's appropriate for your org's default language, specify the gender of the label. This field appears if the org-wide default language expects gender. Your personal language preference setting doesn't affect whether the field appears. For example, if the org's default language is English and your personal language is French, you aren't prompted for gender when creating a custom object.
Starts with a vowel sound	If it's appropriate for your org's default language, indicate whether "an" or "a" precedes the label.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

Field	Description
Object Name	A unique name used to refer to the object when using the API. In managed packages, this name prevents naming conflicts with package installations. Use only alphanumeric characters and underscores. The name must begin with a letter and have no spaces. It can't end with an underscore nor have two consecutive underscores.
Description	An optional description of the object. A meaningful description helps you remember the differences between objects when you're viewing them in a list.
Context-Sensitive Help Setting	Defines the URL that displays when a user clicks **Help for this Page** from the object record's home (overview), edit, and detail pages, list views, and related lists. This setting doesn't affect the Help link at the top of a page. That link always opens the Help window. • To display the standard Salesforce Help available for any custom object record, select **Open the standard Salesforce Help & Training window**. • To display custom object-level help for your custom object, select **Open a window using a Visualforce page** and then select the Visualforce page to use as the target of the context-sensitive help link from that custom object's pages.
Record Name	The name used in page layouts, list views, related lists, and search results. If you select the Auto Number data type, there could be issues when inserting a high volume of records, for example, via the API. If you anticipate a high volume of record inserts, use the Text data type.
Data Type	The type of field (text or auto-number) for the record name. Records that have unique IDs instead of names are auto-numbered and are always a read-only field.
Display Format	For an auto-numbered record name, enter the display format. You can have up to two sets of curly braces.
Starting Number	For an auto-numbered record name, enter the number to use when creating your first record for this custom object.
Allow Reports	Makes the data in the custom object records available for reporting purposes. To create reports on custom objects, choose the **Other Reports** report type category, unless the custom object has a relationship with a standard object. When the custom object has a master-detail relationship with a standard object or is a lookup object on a standard object, select the standard object for the report type category instead.

Field	Description
	You can still create and run reports without selecting **Allow Reports**; however, the custom report type isn't visible.
Allow Activities	Allows users to associate tasks and scheduled calendar events related to the custom object records.
Allow in Chatter Groups	Allows users to add records of this custom object type to Chatter groups. When `true`, users with permissions can create records of this object type using the group publisher. The created record is associated with the group and appears in the group record list. When `false`, users with permissions can use the group publisher to create records of this object type, but the record isn't associated with the group.
Enable Divisions	If your org has divisions enabled, select this option to enable the custom object for divisions. A division groups records for simplified search results, list views, reports, and other areas within Salesforce. Salesforce adds a Division field to the custom object. If the custom object is the master in a master-detail relationship, custom objects on the detail side also get the Division field and inherit their division from the master record.
Available for Customer Portal	Makes the custom object available to all portal users. This option is available only if your org has a customer portal. If you enable Digital Experiences in your org, this option no longer appears, and all custom objects are available in your Experience Cloud sites. If before enabling, you had a Customer Portal and custom objects without this option selected, those objects become available in your Customer Portal.
Track Field History	Enables your org to track changes to fields on the custom object records. For example, it tracks who changed the field value and when, what the value was before the edit, and what it was changed to. History data is available for reporting, so users can easily create audit trail reports when this feature is enabled.
Allow Sharing	When this setting is enabled, the custom object is an Enterprise Application object. When this setting isn't enabled, the custom object is a Light Application object. When this setting is enabled, you must also enable **Allow Bulk API Access** and **Allow Streaming API Access**.
Allow Bulk API Access	When this setting is enabled, the custom object is an Enterprise Application object. When this setting isn't enabled, the custom object is a Light Application object.

Field	Description
	When this setting is enabled, you must also enable **Allow Sharing** and **Allow Streaming API Access**.
Allow Streaming API Access	When this setting is enabled, the custom object is an Enterprise Application object. When this setting isn't enabled, the custom object is a Light Application object. When this setting is enabled, you must also enable **Allow Bulk API Access** and **Allow Sharing**.
Deployment Status	Indicates whether the custom object is visible to other users.
Allow Search	To allow your users to find a custom object's records when they search, create a custom tab set to **Default On** or **Default Off**. Creating a custom tab enables the custom object's **Allow Search** setting.
Add Notes & Attachments...	Allows users to attach notes and attachments to custom object records. You can attach external documents to any object record in much the same way that you can add a PDF file or photo as an attachment to an email. This option is available only when you're creating an object.
Launch the New Custom Tab Wizard	Starts the custom tab wizard after you save the custom object.

Considerations for Creating Custom Objects

Before you create a custom object, make sure that you review these considerations.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Object Creation

- Establish object relationships first, before adding all custom fields, page layouts, and related lists.
- The standard Name field is required on custom object related lists and page layouts.
- Provide meaningful names for your custom objects. The plural label of the custom object is used as the label of the custom tab based on that object.
- When you create a custom object, you specify the data type of the Record Name field: Auto Number or Text. If you select the Auto Number data type, there could be issues when inserting a high volume of records, for example, via the API. If you anticipate a high volume of record inserts, use the Text data type.
- When creating an object from a spreadsheet:
  - Skipping the import step creates an empty custom object that uses the fields in the spreadsheet as a template.
  - You can click to preview the object data. Only the first 24 rows of data are displayed in preview.
  - These field types aren't supported:

- Auto Number
- Formula
- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Text Area (Rich)
- Text (Encrypted)
- Time

Object Permissions

In Enterprise, Unlimited, Performance, Professional, and Developer editions, when you create a custom object, the Read, Create, Edit, and Delete permissions for that object are disabled for profiles that have View All Data or Modify All Data disabled. Enable access to custom objects in permission sets or custom profiles, and assign them to the users who need access.

In Contact Manager and Group editions, when you create a custom object, the Read, Create, Edit, and Delete permissions for that object are enabled for all profiles.

Sharing Model

An org-wide default setting controls the data sharing model for custom objects. For more information, see Custom Object Security.

Delegating Custom Object Administration

After you create a custom object, you can delegate its administration to non-admin users.

Queues

After you create a custom object, you can define queues to distribute ownership of custom object records to your users.

Manage Custom Objects

Create, customize, edit, delete, or truncate custom objects to extend the functionality that standard objects, like accounts and contacts, provide.

Note: Your administrator may have created a tab without any help. If you need help to understand how a tab for a custom object works, contact your administrator.

Your object management settings list the custom objects that are defined for your organization. From this list, you can:

- Define a custom object.
- Display detailed information about a custom object.

  Optional features you can customize include enabling search and reports, tracking activities, tracking field history, and making the object available for the Salesforce Customer Portal.
- To update the custom object definition, click **Edit** and update the desired fields.

  Note: The Allow Reports, Allow Activities, and Allow Search fields aren't locked in Managed - Released and can be changed by the developer in future releases of a managed package.
- To delete a custom object, click **Del**.
- To truncate a custom object, click **Truncate**.
- To view deleted custom objects, click the **Deleted Objects** link. The total number of deleted custom objects for your organization is listed in parentheses.

The detail page of the custom object provides information about various characteristics of the object, including standard fields, custom fields, field history tracking, relationships, custom links, search layouts, page layouts, and object limits. You can:

- Click individual items to display additional detail.
- To delete a custom field, click **Del** next to its name in the Custom Fields & Relationships section.
- Click **More** at the bottom of the page or **View More** below a related list to display more items.
- Click **New** to directly add new items.

Note: The object limit percentages are truncated, not rounded. For example, if your org uses 95.55% of the limit for a particular customization, the object limit displays 95%.

SEE ALSO:

Salesforce Help: Find Object Management Settings

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, **Developer**, and **Database.com** editions

Managed Packages aren't available in **Database.com**.

USER PERMISSIONS

To create and edit custom objects:

- Customize Application

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 Salesforce Classic, it appears as a tab. When you add a custom tab to an app in Lightning Experience, it appears as an item in the app's navigation bar and in the App Launcher.

Custom tabs show custom object data or other web content embedded in the app. You can create any of these types of custom tabs.

- Custom Object Tabs: Custom object tabs (available only at an app level and not on subtab apps) show the data of your custom object. Custom object tabs look and function just like standard tabs.
- Web Tabs: Custom web tabs show any external web-based application or web page. You can design web tabs to include the sidebar or span the page without the sidebar.
- Visualforce Tabs: Visualforce tabs show data from a Visualforce page. Visualforce tabs look and function just like standard tabs.
- Lightning Component Tabs: Lightning component tabs make Lightning components available in the Salesforce mobile apps and in Lightning Experience. Lightning components aren't supported in Salesforce Classic.
- Lightning Page Tabs: Lightning page tabs let you add Lightning app pages to the Salesforce mobile app and Lightning Experience navigation bars.

  In Salesforce Classic, Lightning page tabs don't appear on the All Tabs page when you click . Lightning page tabs also don't appear in the Available Tabs list when you customize the tabs for your apps.

Subtab apps support only web tabs and Visualforce tabs.

Delegated administrators who can manage specified custom objects can also create and customize tabs for those custom objects.

In Lightning Experience, Lightning page tabs, Visualforce tabs, and Lightning component tabs have a fixed, friendly URL structure of `/lightning/n/customTabDevName`.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Custom Object Tabs and Web Tabs available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Visualforce Tabs available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Lightning Page Tabs available in: **All** Editions except **Database.com**

USER PERMISSIONS

To create and edit custom tabs:

- Customize Application

Require Field Input to Ensure Data Quality

Improve the quality of data that users enter in Salesforce by creating universally required fields.

A universally required field is a custom field. It must have a value whenever a record is saved within Salesforce, the Lightning Platform API, Connect Offline, Salesforce for Outlook, the Self-Service portal, or automated processes, such as Web-to-Lead and Web-to-Case. Making a field required on a page layout or through field-level security ensures that users must enter a value. Making a field required universally gives you a higher level of data quality beyond the presentation level of page layouts.

You can make these types of custom fields universally required:

- Currency
- Date
- Date/Time
- Email
- Master-Detail Relationship (always required)
- Number
- Percent
- Phone
- Picklist
- Text
- Text Area
- URL

To make a custom field universally required, select the **Required** checkbox when defining the custom field.

Note: You must specify a default value for required campaign member custom fields.

If you make a user field universally required, you must specify a default value for that field.

Relationship group members don't support universally required fields.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Connect Offline, Salesforce for Outlook, the Self-Service portal, Web-to-Lead, and Web-to-Case aren't available in **Database.com**

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SET UP PAGE LAYOUTS AND INTERACTIONS FOR CRM OBJECTS

Ways to Control User Access to Fields

Use field-level security to control user access to fields. Use page layouts to control the layout and organization of detail and edit pages in Salesforce, the Self-Service Portal, and the Salesforce Customer Portal.

Important: When you use page layouts to hide fields from detail and edit pages, users can still see these fields via reports, search results, list views, and the API. To restrict field access, use field-level security. Search doesn't return results for records with fields protected by field level security. In some rare situations, when search terms match field values protected by field-level security, the associated records are returned but without the protected fields and their values.

Don't use page layouts to secure data. For example, removing the Edit button from a page layout doesn't prevent users from using inline editing. To prevent users from editing data, use sharing rules, field-level security, page layout field properties, validation rules, object permissions, and Visualforce pages.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Page layouts and search layouts available in: **All** Editions

Field-level security available in: **Enterprise**, **Performance**, **Unlimited**, **Developer**, and **Database.com** Editions

Field-Level Security

- Restrict users' access to view and edit fields. For example, restrict access in reports, search results, list views, related lists, email, and mail merge templates, custom links, Connect Offline. Also restrict API access and when synchronizing data or importing personal data.
- Override less-restrictive field access settings in page layouts and mini page layouts. For example, if a page layout requires a field that's read-only in field-level security settings, the field remains read-only for the user.
- Override less-restrictive field settings in search layouts. For example, if a field is visible in the search layout but hidden via field-level security settings, the field remains hidden.

Page Layouts

- Control the layout and organization of detail and edit pages.
- Control which fields, related lists, and custom links users see, on detail and edit pages only.
- Control which standard and custom buttons display on detail pages and related lists.
- Determine whether fields are visible, read only, or required, on detail and edit pages only.
- Determine the fields that users can import data into.
- In Personal, Contact Manager, Group, and Professional Editions, page layouts control which fields users can access in:
  - related lists and list views
  - reports
  - Connect Offline
  - email and mail merge templates

  - custom links

  Page layouts also control field access when synchronizing data.
- In Professional, Enterprise, Unlimited, Performance, and Developer Editions, determine aspects of mini page layouts, including:
  - record type
  - profile associations
  - related lists
  - fields and field access settings

  The visible fields and related lists of the mini page layout can be further customized. But other items inherited from the associated page layout can't be changed on the mini page layout. Mini page layouts display selected fields and related lists of records in the mini view of the console.

Tip: To automatically add a field to all page layouts and make it visible and required everywhere regardless of field-level security, make it a universally required field.

Page Layouts

Page layouts control the layout and organization of buttons, fields, s-controls, Visualforce, custom links, and related lists on object record pages. They also help determine which fields are visible, read only, and required. Use page layouts to customize the content of record pages for your users.

Page layouts can include s-controls and Visualforce pages that are rendered within a field section when the page displays. You can control the size of the s-controls and Visualforce pages, and determine whether a label and scroll bars display.

Salesforce has two drag-and-drop tools for editing page layouts: the original page layout editor and an enhanced page layout editor. The enhanced page layout editor is enabled by default, and provides all the functionality of the original editor, as well as additional functionality and an easier-to-use interface.

You can enable the original page layout editor in the User Interface settings. Your Salesforce org can use only one page layout editor at a time.

From within a page layout, you can access a mini page layout. The mini page layout defines the hover details that display when you mouse over a field on an object's detail page in the Agent console or in the Recent Items section of the sidebar in Salesforce Classic.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Page layouts available in: all editions

Creation and deletion of page layouts available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Salesforce automatically creates a default page layout when you create a custom object. If you don't use any page layout with your custom object, you can still interact with it by using the Lightning Platform API to manage custom data or build a custom user interface.

Create Page Layouts

With the enhanced page layout editor, you can tailor record page layouts to the needs of your users.

1. From the management settings for the object that you want to edit, go to **Page Layouts**.
2. Create a page layout in one of these ways.
   - Click **New** from the Page Layouts list page.
   - Clone an existing layout by clicking **New** from the Page layouts list page, then selecting a layout from the Existing Page Layout menu that you want to base the new layout on.
   - Clone an existing layout by using Save As inside the enhanced page layout editor.
3. Give the layout a name.
4. Click **Save**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create page layouts:
- Customize Application

Custom Button and Link Considerations

Keep these considerations in mind when working with custom buttons and links.

Implementation Tips

- Custom buttons display at the top and bottom of the detail page to the right of all standard buttons.
- Custom buttons aren't distinguished from standard buttons in any graphical way. However, you can recognize them by their location on the right of all standard buttons.
- If the button bar gets too wide on the detail page layout, the browser displays a horizontal scroll bar. If the button bar gets too wide on the list view, search result, tagging result, or related list layouts, the buttons wrap.
- Custom buttons are available for activities under the individual setup links for tasks and events. To add a custom button to an activity list view or search layout, first create a custom list button in tasks or events. Next, add it to your activity list view or search result layouts. You can override a button that applies to both tasks and events.
- Person Account records use the custom buttons and links you have made for accounts.
- If your organization uses the Console tab, list buttons are available in Mass Action. List buttons don't display in the mini page layouts. Pages that display due to custom buttons and links display in the console without the header or sidebar.
- If you get an error message when overriding a button that appears in a list, try calling the s-control using the URLFOR function.
- When creating custom buttons, be aware of any validation rules your organization has for records on that object. For example, some custom list buttons that change case status conflict with a case validation rule. In this scenario, Salesforce displays the error message for the validation rule when users click the custom button.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Custom buttons and links are available in: **All** Editions

Visualforce pages and s-controls are available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or change custom buttons or links:
- Customize Application

- To replace a standard button with a custom button, first define the custom button, then customize the page layout to hide the standard button and display the custom one in its place.
- Visualforce pages used as custom buttons or links on detail pages must specify a standard controller of the same object.
- Visualforce pages used as custom list buttons must use a standard list controller of the same object.
- A web tab or custom link could display a blank page if the embedded site:
  - Has been set to deny the loading of its content in a frame.
  - Has been set to allow the loading of its content in a frame only if the same site is delivering the content.
  - Contains a mix of secure and unsecure content, and the user's browser has been configured to block mixed active content.

  To resolve this issue, try these workarounds.
  - Set your custom link to either open in a new window or display in the existing window without the sidebar or header.
  - Move the URL from a web tab into a custom link instead. Set the URL to either open in a new window or display in the existing window without the sidebar or header.
  - If the site you're embedding has an HTTP prefix and mixed active content, try changing the prefix to HTTPS. If the embedded site has a valid security certificate and it hasn't blocked itself from being displayed in frames, using HTTPS as the prefix allows the site to display.

Best Practices

- Use formula functions in custom buttons with caution. Because functions run on the server before your HTML or JavaScript is passed to the browser, they can only evaluate information that exists at that time. Don't use functions like IF to evaluate conditions that only exist when the code reaches the browser, such as the value of a JavaScript variable that your code returns.
- Use relative or absolute URLs as the content source for custom buttons or links to ensure that they're rendered correctly.
- To prevent a user from performing a particular action, such as creating or editing, change the user's permissions rather than hiding the standard button. Hiding a standard button removes it from a page layout, but the link is still available and users can navigate to the new or edit page manually.
- Use global variables to access special merge fields for components like custom buttons, links, and s-controls. For example, the `$Request` global variable allows you to access query parameters inside a snippet, s-control, or custom button.
- When you create a custom list button, select **Display Checkboxes (for Multi-Record Selection)** only if your list button requires users to select individual records in a list. If your list button doesn't require users to select individual records, don't select this option. Don't select **Display Checkboxes (for Multi-Record Selection)** if your list button links to a URL that doesn't support POST operations, such as a URL that links to a Lightning component.
- In Lightning Experience, when you select **Display Checkboxes (for Multi-Record Selection)**, the related list type must be set to **Enhanced List**. You can set the related list type from the Related List–Single component or Related Lists component on a record page in the Lightning App Builder.
- If you create multiple custom list buttons on a list and select `Display Checkboxes (for Multi-Record Selection)` for at least one of the list buttons, checkboxes appear next to records in the list. But those checkboxes aren't activated for custom list buttons without `Display Checkboxes (for Multi-Record Selection)` selected.

Considerations for the Salesforce Mobile App

- Custom buttons that are added to the Button section of a page layout and that define the content source as *`URL`* or *`Visualforce`* are supported in the Salesforce mobile app. Remember that Visualforce pages must be enabled for use in the Salesforce mobile app.

  Custom links, custom buttons that are added to list views, and custom buttons that define the content source as *`OnClick JavaScript`* aren't available in the Salesforce mobile app.

- Using custom URL buttons to pass parameters to standard pages in Salesforce Classic—such as prepopulating fields when creating a record—doesn't work in the Salesforce mobile app.
- Custom images used for action icons must be less than 1 MB in size.

Define Custom Buttons and Links

Define the action that occurs when a user clicks a custom button or link. Custom buttons and links can streamline actions within Salesforce or integrate Salesforce data with external URLs, applications, or systems.

Watch a Demo (English only)

If you want the button or link to launch a custom page or other code, consider a Visualforce page.

1. From the management settings for the object that you want to edit, go to Buttons, Links, and Actions.

   Note: Custom buttons aren't available on the User object or custom home pages. Custom buttons and links are available for activities under the individual object management settings for tasks and events. To override a standard button that applies to both tasks and events, go to the object management settings for activities.

2. Click **New Button or Link**. Or, to add a predefined custom link, click **Default Custom Links**.
3. For **Display Type**, select **Detail Page Link**, **Detail Page Button**, or **List Button**.

   If you select **List Button**, and your list button requires users to select individual records in a list, then select **Display Checkboxes (for Multi-Record Selection)**. When you select this option, a checkbox appears next to each list item to let users select records, and the list button action is applied to those records. Don't select **Display Checkboxes (for Multi-Record Selection)** if your list button doesn't require users to select individual records in the list. For example, your list button links to a URL that doesn't support POST operations, such as a URL that links to a Lightning component.

   In Lightning Experience, when you select **Display Checkboxes (for Multi-Record Selection)**, the related list type must be set to **Enhanced List**. You can set the related list type from the Related List–Single component or Related Lists component on a record page in the Lightning App Builder.

4. Enter the button or link attributes.

   Here's an example of the attributes for a button that performs a web search for an account's name.

EDITIONS

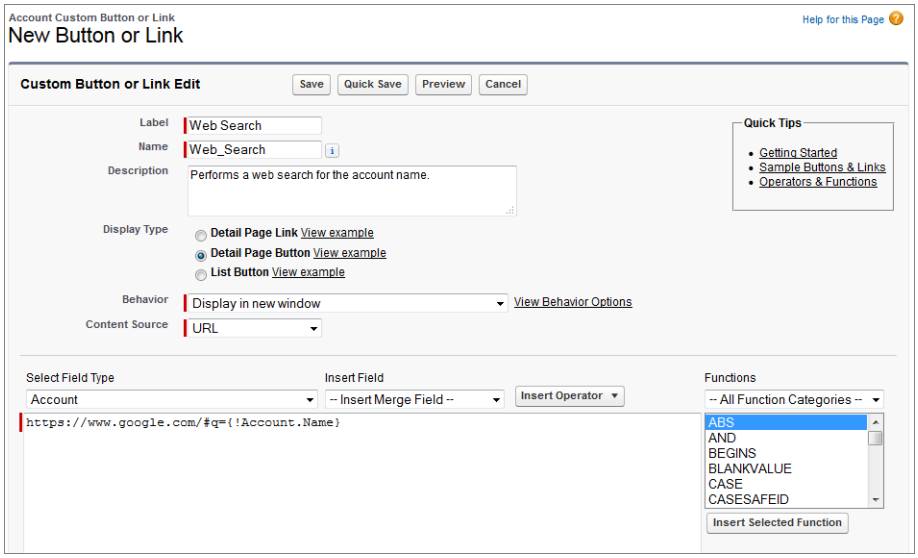
Available in: Salesforce Classic (not available in all orgs)

Custom buttons and links are available in: **All** Editions

Visualforce pages and s-controls are available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or change custom buttons or links:
- Customize Application

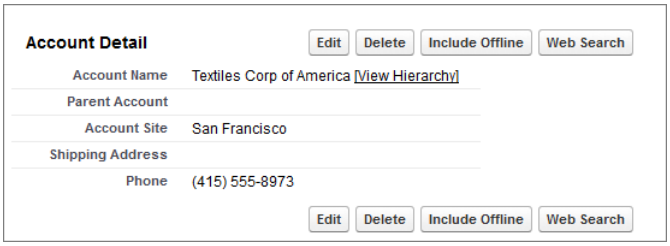


5. To validate all Salesforce merge fields and functions, click **Check Syntax**.
6. Click **Save** when you're finished, or click **Quick Save** to save and continue editing. If you set the content source to URL, saving validates the URL you defined.
7. To open a button or link using settings other than the user's default browser settings, click **Window Open Properties** on the button or link's detail page.
8. To view all references to the new button or link, click **Where is this used?** on its detail page.

   Custom links for users are automatically added to the Custom Links section of the user detail page. You can add page buttons only to the Button section of a page layout.

Note: A link URL can be up to 2,048 bytes. When data is substituted for the tokens in the URL, the link can exceed 3,000 bytes. Some browsers enforce limits on the maximum URL length.

Before you can use your custom buttons and links, add them to an object's page layout. You can then see and use the button or link on a record detail page.



Custom Button and Link Samples

Use samples of custom Salesforce buttons and links to determine whether they can work for you.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Custom buttons and links are available in: **All** Editions

Visualforce pages and s-controls are available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or change custom buttons or links:

- Customize Application

AUTOMATE BASIC SALES PROCESSES

Workflow and Approvals Overview

Your sales team operates more efficiently with standardized internal procedures and automated business processes. Many of the tasks that you normally assign, the emails that you regularly send, and other record updates are part of an organization's standard processes. Instead of doing this work manually, you can configure workflow and approvals to do it automatically.

Workflow rules automate actions, such as task assignment, notifications, and field updates. They help make sure that your sales team doesn't miss any of the critical information that they need to satisfy customers issues and close sales.

Approval processes automate the process by which you approve records in Salesforce. An approval process specifies the steps that are necessary for a record to be approved, who must approve it at each step, and the actions to take when a record is approved, rejected, recalled, or first submitted.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Workflow Overview

Workflow rules automate actions, such as task assignment, notifications, and field updates. They help make sure that your sales team doesn't miss any of the critical information they need to satisfy customers issues and close sales.

Each workflow rule consists of:

- Criteria that determine when Salesforce executes the workflow rule. Any change that causes a record to match this criteria can trigger the workflow rule—even changes to hidden fields.
- Immediate actions to take when the workflow rule executes. For example, Salesforce can automatically send an email that notifies the opportunity team when a new high-value opportunity is created.
- Time-dependent actions that Salesforce queues when the workflow rule executes. For example, Salesforce can automatically send an email reminder to the account team if a high-value opportunity is still open 10 days before the specified close date. When Salesforce triggers a workflow rule that has time-dependent actions, you can use the workflow queue to monitor and cancel pending actions.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

Workflow automates the following types of actions:

Email Alerts
Send an email to one or more recipients. For example, automatically send sales management an email alert when a sales representative qualifies a large deal.

Tasks
Assign a new task to a user, role, or record owner. For example, automatically assign follow-up tasks to a support representative one week after a case is updated.

Field Updates
Update the value of a field on a record. For example, automatically change the `Owner` field on a contract three days before it expires.

Flow Triggers
Launch an autolaunched flow. The pilot program for flow trigger workflow actions is closed. If you've already enabled the pilot in your org, you can continue to create and edit flow trigger workflow actions. If you didn't enable the pilot in your org, use Flow Builder to create a record-triggered flow, or use Process Builder to launch a flow from a process.

Outbound Messages
Send a secure configurable API message (in XML format) to a designated listener. For example, automatically initiate the reimbursement process for an approved expense report by triggering an outbound API message to an external HR system.

Workflow Terminology

These terms are used when describing workflow features and functionality.

EDITIONS

Available in: both Lightning Experience and Salesforce Classic

Flow triggers are available in: Salesforce Classic

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

Outbound messages available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Email alerts are available in: **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Workflow Rule

A workflow rule sets workflow actions into motion when its designated conditions are met. You can configure workflow actions to execute immediately when a record meets the conditions in your workflow rule, or set time triggers that execute the workflow actions on a specific day. If a workflow action hasn't executed yet, you can view and modify it in the workflow queue.

Workflow Action

A workflow action, such as an email alert, field update, outbound message, or task, fires when the conditions of a workflow rule are met.

Email Alert

Email alerts are actions that send emails, using a specified email template, to specified recipients. Workflow alerts can be sent to any user or contact, as long as they have a valid email address.

Field Update

A field update is an action that automatically updates a field with a new value.

Flow

A *flow* is an application that can execute logic, interact with the Salesforce database, call Apex classes, and collect data from users. You can build flows by using Flow Builder.

Flow Trigger

A *flow trigger* is a workflow action that launches a flow. With flow triggers, you can automate complex business processes—create flows to perform logic, and have events trigger the flows via workflow rules—without writing code.

The pilot program for flow trigger workflow actions is closed. If you've already enabled the pilot in your org, you can continue to create and edit flow trigger workflow actions. If you didn't enable the pilot in your org, use Flow Builder to create a record-triggered flow, or use Process Builder to launch a flow from a process.

Outbound Message

An outbound message sends information to a designated endpoint, like an external service. Outbound messages are configured from Setup. You must configure the external endpoint and create a listener for the messages using SOAP API.

Create Workflow Rules

Automate your organization's standard processes by configuring workflow rules.

Watch a Demo: Creating a Workflow Rule (Salesforce Classic)

Note: You can find examples of some common workflow rules by searching the Salesforce Help for "Examples of Workflow Rules." Just modify the sample settings to create the workflow rules that you need to make your business run smoothly.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

IN THIS SECTION:

Select the Object for Your Workflow Rule
Get started with creating a workflow rule by selecting the object the rule relates to.

Set the Criteria for Your Workflow Rule
Get started with creating a workflow rule by selecting the object the rule relates to and configuring its criteria.

Add Automated Actions to Your Workflow Rule
After you've set the criteria for your workflow rule, identify what to do when that criteria are met.

Activate Your Workflow Rule
Salesforce doesn't trigger a workflow rule until you activate it.

Select the Object for Your Workflow Rule

Get started with creating a workflow rule by selecting the object the rule relates to.

1. From Setup, enter *Workflow Rules* in the Quick Find box, then select **Workflow Rules**.
2. On the workflow rules list page, click **New Rule**.
3. Choose an object to which you want this workflow rule to apply.

   Note:

   - If you have a workflow action that updates a field on a related object, that target object isn't the one that's associated with the workflow rule.
   - To create workflow rules based on new case comments or incoming email messages that automatically update fields on their associated cases, choose Case Comment or Email Message. See Workflow Considerations for more information.
   - To create a site usage rule, select the Organization, Site, or User License object. For more information, see Use Workflow for Salesforce Sites.

     The Organization and Site objects are only available if Salesforce Sites is enabled for your organization. The User License object isn't dependent on sites, and is only available if you have Customer Portals or partner portals enabled for your organization.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

USER PERMISSIONS

To create or change workflow rules and actions:
- Customize Application

- This release contains a beta version of workflow on the User object that is production quality but has known limitations.

4. Click **Next**.

Set the Criteria for Your Workflow Rule

Get started with creating a workflow rule by selecting the object the rule relates to and configuring its criteria.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

USER PERMISSIONS

To create or change workflow rules and actions:
- Customize Application

1. From Setup, enter *Workflow Rules* in the Quick Find box, then select **Workflow Rules**.
2. Click **New Rule**.
3. Choose the object to which you want this workflow rule to apply.

   Note:
   - If you have a workflow action that updates a field on a related object, that target object isn't the one that's associated with the workflow rule.
   - To create workflow rules based on new case comments or incoming email messages that automatically update fields on their associated cases, choose Case Comment or Email Message. See Workflow Considerations for more information.
   - To create a site usage rule, choose one of the following:
     - Organization (for monthly page views allowed and monthly page views used fields)
     - Site (for site detail, daily bandwidth and request time, monthly page views allowed, and other fields)
     - User License (for the monthly logins allowed and monthly logins used fields)

     The Organization and Site objects are only available if Salesforce Sites is enabled for your organization. The User License object isn't dependent on sites, and is only available if you have Customer Portals or partner portals enabled for your organization.
   - This release contains a beta version of the workflow on the User object that is production quality but has known limitations.

4. Click **Next**.
5. Give the rule a name and description.
6. Set the evaluation criteria. For example:

Evaluate the rule when a record is:	Description
created	Evaluate the rule criteria each time a record is created. If the rule criteria is met, run the rule. Ignore all updates to existing records. With this option, the rule never runs more than one time per record.

Evaluate the rule when a record is:	Description
created, and every time it's edited	Evaluate the rule criteria each time a record is created or updated. If the rule criteria is met, run the rule. With this option, the rule repeatedly runs every time a record is edited as long as the record meets the rule criteria. If you select this option, you can't add time-dependent actions to the rule.
created, and any time it's edited to subsequently meet criteria	(Default) Evaluate the rule criteria each time a record is created or updated. • For a new record, run the rule if the rule criteria is met. • For an updated record, run the rule only if the record is changed from not meeting the rule criteria to meeting the rule criteria. With this option, the rule can run multiple times per record, but it doesn't run when the record edits are unrelated to the rule criteria. For example, suppose that for an opportunity record to meet the rule criteria, the opportunity probability must be greater than 50%. If you create an opportunity with a probability of 75%, the workflow rule runs. If you edit that opportunity by changing the probability to 25%, the edit doesn't cause the rule to run. If you then edit that opportunity by changing the probability from 25% to 75%, the edit causes the rule to run. With this last edit, the rule runs, because the record is changed from not meeting the rule criteria to meeting the rule criteria.

7. Enter your rule criteria. For example:
   - Choose `criteria are met` and select the filter criteria that a record must meet to trigger the rule. For example, set the filter to "Opportunity: Amount greater than 5000" if you want opportunity records with an amount greater than $5,000 to trigger the rule. If your organization uses multiple languages, enter filter values in your individual language. You can add up to 25 filter criteria, of up to 255 characters each.
   - Choose `formula evaluates to true` and enter a formula that returns a value of "True" or "False." Salesforce triggers the rule if the formula returns "True."

     Examples of useful workflow formulas include:
     - If the number of filled positions equals the number of total positions on a job, update the `Job Status` field to "Filled."
     - If mileage expenses associated with visiting a customer site are 35 cents per mile and exceed a $1,000 limit, automatically update the `Approval Required` field to "Required."
     - If a monthly subscription-based opportunity amount is greater than $10,000, create a task for an opportunity owner to follow up 60 days after the opportunity is closed.

     The `$Label` variable isn't supported in workflow rule formulas. Also, some functions aren't available in workflow rule formulas.

     Tip: You can use merge fields for directly related objects in workflow rule formulas.

8. Click **Save & Next**.

Add Automated Actions to Your Workflow Rule

After you've set the criteria for your workflow rule, identify what to do when that criteria are met.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

USER PERMISSIONS

To create or change workflow rules and actions:
- Customize Application

Activate Your Workflow Rule

Salesforce doesn't trigger a workflow rule until you activate it.

To activate a workflow rule, click **Activate** on the workflow rule detail page. Click **Deactivate** to prevent a rule from triggering or if you want to edit the time-dependent actions and time triggers that are associated with the rule.

You can deactivate a workflow rule at any time. However, if you deactivate a rule that has pending actions, Salesforce completes those actions as long as the record that triggered the rule isn't updated.

Note:
- You can't delete a workflow rule that has pending actions in the workflow queue. Wait until pending actions are processed, or use the workflow queue to cancel the pending actions.
- You can't add time-dependent workflow actions to active workflow rules. Deactivate the workflow rule first, add the time-dependent workflow action, and reactivate the rule.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

USER PERMISSIONS

To create or change workflow rules and actions:
- Customize Application

Approval Processes

It's likely that you're familiar with process automation in the form of workflow rules. Approval processes take automation one step further, letting you specify a sequence of steps that are required to approve a record.

An approval process automates how records are approved in Salesforce. An approval process specifies each step of approval, including from whom to request approval and what to do at each point of the process.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Example: Your org has a three-tier process for approving expenses. This approval process automatically assigns each request to right person in your org, based on the amount requested.

If an expense record is submitted for approval, lock the record so that users can't edit it and change the status to Submitted.

If the amount is $50 or less, approve the request. If the amount is greater than $50, send an approval request to the direct manager. If the amount is greater than $5,000 and the first approval request is approved, send an approval request to the vice president.

If all approval requests are approved, change the status to Approved and unlock the record. If any approval requests are rejected, change the status to Rejected and unlock the record.

Approval Process Terminology

Salesforce uses this terminology for approval processes.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Approval Actions

An approval action occurs when all required approvers approved a step.

Approval Process

An approval process automates how records are approved in Salesforce. An approval process specifies each step of approval, including from whom to request approval and what to do at each point of the process.

Approval Request

An approval request is an email, Salesforce app notification, Lightning Experience notification, or Chatter post. The approval request notifies the recipients that a record was submitted for them to approve.

Approval Steps

Approval steps define the chain of approval for a particular approval process. Each step determines:

- Which records can advance to that step
- To whom to assign approval requests
- Whether to let each approver's delegate respond to the requests

The first step specifies what to do if a record doesn't advance to that step. Later steps specify what happens if an approver rejects the request.

Assigned Approver

The assigned approver is the user responsible for responding to an approval request.

Delegated Approver

A delegated approver is someone appointed by an assigned approver as an alternate for approval requests.

Note: Internal Salesforce users are listed by and can be added using the Delegated Approver lookup field. Use Data Loader and a comma-delineated (CSV) file to add users with communities licenses as Delegated Approvers. The CSV uses the `CommunityUserId` rather than the `UserId` for `DelegatedApproverId`. Communities licenses are used with Experience Cloud sites and legacy portals.

Email Approval Response

Email approval response lets users respond to approval requests by replying to an email notification.

Initial Submission Actions

An initial submission action occurs when a user first submits a record for approval. By default, the record is locked.

Final Approval Actions

Final approval actions occur when all required approvals were obtained.

Final Rejection Actions

A final rejection action occurs when an approver rejects the request and it moves to the final rejection state.

Outbound Message

An outbound message sends information to a designated endpoint, like an external service. You can configure outbound messages from Setup. Configure the external endpoint and use SOAP API to create a listener for the messages.

Process Instance

A process instance represents one instance of an approval process. A new process instance is created each time a record is submitted for approval.

Process Instance Node

A process instance node represents an instance of an approval step. The system creates a process instance node each time a record enters a step in an approval process. The system doesn't create a process instance node when the record doesn't meet the step criteria, or the approval process instance is completed without entering the step.

Recall Actions

A recall action occurs when a submitted approval request is recalled. By default, the record is unlocked.

Record Locking

Record locking prevents users from editing a record, regardless of field-level security or sharing settings. By default, Salesforce locks records that are pending approval. Only admins can edit locked records.

Create Approval Processes

To get started creating approval processes, you can create a basic approval process by using a wizard and add approval steps and actions to fully automate a process with any level of complexity.

Before creating an approval process, take a few minutes to think about what you want the process to do, and who will interact with it. You might also need to set up templates, such as an email template to notify approvers who need to approve or reject a step in the approval process.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create approval processes:
- Customize Application

IN THIS SECTION:

Set Up Basic Approval Processes

The Approval Process Jump Start Wizard simplifies and streamlines the creation of basic approval processes. Approval processes that are created by using the Jump Start Wizard initially have just one step, but you can add more later. To simplify the creation of approval processes, the Jump Start Wizard automatically chooses some default options for you.

1. Start the Jump Start Wizard.
   a. From Setup, enter *Approval Processes* in the `Quick Find` box, then select **Approval Processes**.
   b. Select the object that your approval process relates to.
   c. Click **Create New Approval Process** and select **Use Jump Start Wizard**.
2. Create an approval process.

a. Enter a name for the approval process that will help users find it. Salesforce will generate a unique name for your process, which is required for the API.

b. Optionally, you can designate an email template for Salesforce to use when approvals are assigned and add the Approval History related list to pages on the object.

c. To apply the process to only some records, create crtiteria by which records are selected into this approval process.

d. Choose how an approver will be selected for this process.

Modify Basic Details of an Approval Process

You can modify the basic definition for an approval process by using the Standard Wizard for approval processes or by editing each part of the basic definition on the approval process's detail page.

- To modify an approval process by using the Standard Wizard interface, from Setup, enter *Approval Processes* in the Quick Find box, then select **Approval Processes**. From the Inactive Approval Processes related list, click **Edit** next to the approval process that you'd like to modify.
- To modify an approval process from the detail page for the approval process, from Setup, enter *Approval Processes* in the Quick Find box, then select **Approval Processes**, and then select the name of the approval process. On the approval process detail page, click **Edit**, and then select the part of the process that you'd like to modify.

Add Steps to an Approval Process

Each step in an approval process specifies which records the step applies to, who can approve or reject the record at that step, and, optionally, what to do if the record is rejected or approved during the step.

The first approval step in a process specifies what happens to a record if it doesn't meet the entry criteria for the step. Subsequent steps specify what happens to the record at each step if it's approved or rejected during that step. Each approval process can have up to 30 steps.

1. From Setup, enter *Approval Processes* in the Quick Find box, then select **Approval Processes**.
2. Select the object that you'd like to create an approval process for, and then click the name of the approval process.
3. Click **New Approval Step** from the Approval Steps related list.
4. Enter a name, unique name, and description for this step, and a step number. The step number determines the order of this step related to other steps in the process.
5. Determine which records this step applies to, and what happens to records that don't enter it.
6. Specify who will review records that enter the step and which reviewers must give approval.
7. Optionally, specify what happens to the record if it's rejected during this step. If you don't specify a rejection path, you'll need to add a step to handle rejected records.
8. Optionally, add one or more rejection or approval actions.

Create New Approval Actions

As part of an approval process, Salesforce performs automatic actions. Actions can include assigning tasks to users, sending email by using a specified template, updating a field, or sending a message to a designated address. After you've created an action, you can use it as part of a step or designate it as an initial, final, or recall action.

After they're created, approval actions can be used by any approval process, so be sure to give each action a clear name or description.

Within each approval process, you can add up to 40 actions—10 of each type—for Salesforce to perform when a record initially enters an approval process, at final approval, at final rejection, or if a submitted approval request is recalled. You can also add up to 40 actions—10 of each type—to each step in an approval process.

1. From the approval process detail page, select the type of action you'd like to create.
   - In the Initial Submissions Action related list, Final Approval actions related list, Final Rejection Actions related list, or Recall Actions related list, click **Add New**.
   - In the Approval Steps related list, click **Show Actions**, and then click **Add New** in the Approval Actions or Rejection Actions related lists.
2. Select the type of action that you'd like to add.
3. Configure the action, and then save it.

Add an Existing Action to an Approval Process

Any action can be added to an approval process step, including actions that are created as part of a workflow rule, or for another approval process, as long as they relate to the same record type.

Rather than creating a new action that duplicates an action that you've already created for a workflow rule or different approval process, you can add an existing action.

For example, suppose you've created a workflow rule that includes an email alert that notifies the account owner when a contact's information is updated. Now you need to create an approval process related that's to contacts, and at the end of the process, you want to notify the account owner about a change to a contact. You can reuse the email alert that you originally created as part of a workflow rule as an action in your workflow process. You don't need to create multiple identical email alerts in separate places.

1. On the approval process detail page, do one of the following.
   - Click **Add Existing** in the Initial Submissions Action related list, Final Approval actions related list, Final Rejection Actions related list, or Recall Actions related list.
   - In the Approval Steps related list, click **Show Actions**, and then click **Add Existing** in the Approval Actions or Rejection Actions related lists.
2. Choose an action type.
3. In the Available Actions box, select the action you'd like to add, and then click the **Add** button to move it into the Selection Actions box. You can add up to 10 actions of a particular type to each action or step.

Activate an Approval Process

Activate an approval process when it's ready to be used.

Note: After an approval process is activated, you can't add, delete, or change the order of the steps, or change it's reject or skip behavior, even if you deactivate the process.

1. From Setup, enter *Approval Processes* in the Quick Find box, then select **Approval Processes**.
2. Select the object that you'd like to create an approval process for, and then click the name of the approval process.
3. Next to the approval process that you'd like to activate, click **Activate**. You can deactivate the approval process in the same place.

ROLL SALESFORCE OUT

Best Practices for a Successful Rollout

For a successful Salesforce implementation, it's important to plan your rollout to users. Here are some general guidelines.

Communicate Your Schedule

Communicate your roll-out plans and go-live date to your users, so they know what to expect.

Train Your Users

Set up a time to train your users. You may need to prepare different training for each type of user. Your users will feel more comfortable with new features you've set up in Salesforce after you've shown them how to complete each of their critical job functions. But remember, changes your users make during training are real changes to your data, so plan ahead to ensure that training activities don't impact your business.

Provide Users With Resources

Handy resources for users may include Salesforce Help articles, videos, workbooks, online training, and success communities. Point your users to these resources so they can learn on their own. See the Resources list for some ideas.

Gather Feedback

Once your users start to use Salesforce, they may have suggestions or requests. Let your users know how you prefer to have them communicate these issues to you.

AFTER YOU IMPLEMENT SALESFORCE

Stay Current with Salesforce

What It Is	Why You Need It	Where to Find It
Release Notes & Release Resources	Salesforce typically releases software updates and new features about three times annually, in the spring, summer, and winter.	View the most recent Salesforce release notes at http://docs.releasenotes.salesforce.com/
Salesforce Online Help	Online help is updated with each release to ensure that you can always find the most current information about features and services you use.	https://help.salesforce.com
Salesforce Success Communities	Success Communities connect you with other Salesforce customers, partners, and experts. Here, you can ask and answer questions about Salesforce, or review past questions and discussions for tips, tricks, and answers to make better use of Salesforce.	Visit http://w.salesforce.com and click Community.
Salesforce Trailhead	Trailhead provides administrators and developers with self-paced guided learning pathways through the key features of Salesforce using a set of online, interactive tutorials. New trails are added frequently.	Visit https://trailhead.salesforce.com
Training Classes	Salesforce University offers training classes to help you and your users develop expertise and expand knowledge in administering and using Salesforce.	Visit https://help.salesforce.com and click Help & Training.
Dreamforce	Want to know where the industry is headed and how your company can use Salesforce to get there first? Dreamforce is four high-energy days of innovation, fun, and giving back. It's your chance to learn from industry visionaries, product experts, and world leaders who can help you transform your business and your life.	https://dreamforce.salesforce.com

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