

Glossary of CRM Terms

by Salesforce CRM Software

A list of terms and definitions that applies to Salesforce CRM Software

This glossary defines terms that appear throughout the Salesforce documentation suite.

A

Account

An *account* is an organization, company, or consumer that you want to track—for example, a customer, partner, or competitor.

Account Assignment Rule

A rule that automatically assigns accounts to territories, based on criteria you define.

Account Team

An account team is a team of users that work together on an account. For example, an account team may include an executive sponsor, dedicated support representative, or project manager.

Activity (Calendar Events/Tasks)

Planned task or event, optionally related to another type of record such as an account, contact, lead, opportunity, or case.

Administrator (System Administrator)

One or more individuals in your organization who can configure and customize the application. Users assigned to the System Administrator profile have administrator privileges.

Amount Without Adjustments

Applies to Collaborative Forecasts. The sum of all of a person's owned revenue opportunities and also his or her subordinates' opportunities, without adjustments. Subordinates include everyone reporting up to a person in the forecast hierarchy.

Amount Without Manager Adjustment

Applies to Collaborative Forecasts. The forecast number as seen by the forecast owner. This is the sum of the owner's revenue opportunities and his or her subordinates' opportunities, including adjustments made by the forecast owner on her or her own or

subordinates' forecasts. *It doesn't include adjustments made by forecast managers above the owner in the forecast hierarchy.*

Answers

Answers is a feature of the Community application that enables users to ask questions and have community members post replies.

Community members can then vote on the helpfulness of each reply, and the person who asked the question can mark one reply as the best answer.

Apex

Apex is a strongly typed, object-oriented programming language that allows developers to execute flow and transaction control statements on the Force.com platform server in conjunction with calls to the Force.comAPI. Using syntax that looks like Java and acts like database stored procedures, Apex enables developers to add business logic to most system events, including button clicks, related record updates, and Visualforcepages. Apex code can be initiated by Web service requests and from triggers on objects.

Apex Connector Framework

The Apex Connector Framework is a set of classes and methods in the `DataSource` namespace for creating your own custom Lightning Connect adapter. Create a custom adapter to connect to data that's stored outside your Salesforce organization when the other available Lightning Connect adapters aren't suitable for your needs.

App

Short for "application." A collection of components such as tabs, reports, dashboards, and Visualforce pages that address a specific business need. Salesforce provides standard apps such as Sales and Call Center. You can customize the standard apps to match the way you work. In addition, you can package an app and upload it to the AppExchange along with related components such as custom fields, custom tabs, and custom objects. Then, you can make the app available to other Salesforce users from the AppExchange.

App Menu

See Force.com App Menu.

AppExchange

The AppExchange is a sharing interface from Salesforce that allows you to browse and share apps and services for the Force.com platform.

Approval Action

See Workflow and Approval Actions.

Approval Process

An approval process is an automated process your organization can use to approve records in Salesforce. An approval process specifies

the steps necessary for a record to be approved and who must approve it at each step. A step can apply to all records included in the process, or just records that meet certain administrator-defined criteria. An approval process also specifies the actions to take when a record is approved, rejected, recalled, or first submitted for approval.

Article

Articles capture information about your company's products and services that you want to make available in your knowledge base.

Article Manager

Salesforce uses the term *article manager* to represent a specific type of user. Article managers can access the Article Management tab to create, edit, assign, publish, archive, and delete articles. Article managers are sometimes referred to as knowledge managers. Article managers require the “Manage Articles” user permission. The Article Management tab is not visible to users without “Manage Articles.”

Article Type

All articles in Salesforce Knowledge are assigned to an *article type*. An article's type determines the type of content it contains, its appearance, and which users can access it. For example, a simple FAQ article type might have two custom fields, Question and Answer, where article managers enter data when creating or updating FAQ articles. A more complex article type may require dozens of fields organized into several sections. Using layouts and templates, administrators can structure the article type in the most effective way for its particular content. User access to article types is controlled by permissions. For each article type, an administrator can grant “Create,” “Read,” “Edit,” or “Delete” permissions to users. For example, the article manager might want to allow internal users to read, create, and edit FAQ article types, but let partner users only read FAQs.

Asset

A specific model or type of product that a customer owns. Depending on how your organization uses assets, they can represent your products that the customer has purchased and installed or your competitor's products that the customer uses.

Assignment

An assignment is a draft article that has been assigned to another user for editing. Assignments may contain brief instructions and a due date.

@Mention

An @mention (or at mention) is the @ symbol followed by a person's or group's name, for example, **@Bob Smith** or **@DocTeam**. You can @mention people in Chatter posts and comments. When you

@mention someone, the @mention links to their profile, the post or comment displays in their feed, and they are emailed a notification.

Auto-Response Rule

A set of conditions for sending automatic email responses to case or lead submissions based on the attributes of the submitted record.

Applicable cases include those submitted through a Self-Service portal, a Customer Portal, a Web-to-Case form, an Email-to-Case message, or an On-Demand Email-to-Case message.

Applicable leads include those captured through a Web-to-Lead form.

B

Best Case Amount

Revenue projection in a forecast that identifies total “possible” revenue for a specific month or quarter. For managers, this should equal the total amount of revenue they and their entire team might possibly generate.

Best Answer

When a member of an answers community asks a question and other community members post a reply, the asker can mark one of the replies as the best answer. The best answer then appears directly under the question (above the other replies). Identifying the best answer helps other community members with the same question quickly find the most relevant, useful information.

Blank lookup

A lookup that is performed when the lookup field dialog does not have a search term.

Bucketing

A tool in the report builder that lets users categorize report records by field, without having to create a formula or a custom field.

Business Account

A company or organization that you want to track.

C

Campaign

A marketing initiative, such as an advertisement, direct mail, or conference, that you conduct in order to generate prospects and build brand awareness.

Campaign Hierarchy

A set of up to five campaigns organized into a hierarchy. A parent campaign can have several child campaigns, but a child campaign can have only one parent.

Campaign Member

Any lead or contact associated with a campaign.

Campaign ROI (Return On Investment)

The campaign ROI is the return on your marketing investment. Use the Campaign ROI Analysis Report to analyze the ROI. The ROI is calculated as the net gain (Total Value Won Opps – Actual Cost) divided by the Actual Cost. The ROI result is expressed as a percentage.

Case

Detailed description of a customer's feedback, problem, or question. Used to track and solve your customers' issues.

Category, Solutions

A label you can apply to a solution to group similar solutions together. Solution categories help customer support representatives find solutions faster when solving cases. If you use the Self-Service portal or public solutions, your customers can browse solutions by category to find what they need. See also Parent Category.

Category, Ideas

Categories are administrator-defined values that help organize ideas into logical sub-groups within a zone. The View Category drop-down list on the Ideas tab allows users to filter ideas by category, and the Categories picklist on the Post Ideas page lets users add categories to their ideas. For example, if your ideas zone has the focus "Improvements to our clothing line," then you might set up categories such as "Shirts," "Jackets," and "Slacks." Each organization has one common set of categories that can be added or removed from each zone. An administrator defines separate categories for their ideas and answers zones.

Category, Knowledge and Answers

See Data Category for Answers and Data Category for Articles.

Category Group for Answers

In an answers zone, a *category group* provides one or more categories that help organize questions for easy browsing. If the category group contains a hierarchy, only the first-level categories display on the Answers tab. For example, if you're a computer manufacturer you might create a Products category group for your Products zone that has four categories: Performance Laptops,

Portable Laptops, Gaming Desktops, and Enterprise Desktops. Zone members can choose one of the categories to assign to a question. Administrators create the category group and categories and then associate the category group with their answers zone. An administrator defines separate categories for their ideas and answers zones.

Category Group for Articles

In Salesforce Knowledge, a *category group* organizes data categories into a logical hierarchy. For example, to classify articles by sales regions and business units, create two category groups, Sales Regions and Business Units. The Sales Regions category group could consist of a geographical hierarchy, such as All Sales Regions as the top level, North America, Europe, and Asia at the second level, and so on up to five levels. When creating articles, authors assign the relevant categories to the article. End users searching for articles can search and filter by category.

Channel

A channel refers to the medium by which an article is available. Salesforce Knowledge offers four channels where you can make articles available.

- **Internal App:** Salesforce users can access articles in the Articles tab depending on their role visibility.
- **Customer:** Customers can access articles if the Articles tab is available in a community or Customer Portal. Customer users inherit the role visibility of the manager on the account. In a community, the article is only available to users with Customer Community or Customer Community Plus licenses.
- **Partner:** Partners can access articles if the Articles tab is available in a community or partner portal. Partner users inherit the role visibility of the manager on the account. In a community, the article is only available to users with Partner Community licenses.
- **Public Knowledge Base:** Articles can be made available to anonymous users by creating a public knowledge base using the *Sample Public Knowledge Base for Salesforce Knowledge* app from the AppExchange. Creating a public knowledge base requires Sites and Visualforce.
- **Your own website.** Articles can be made available to users through your company website.

Channel Manager

Channel managers are the internal users that manage your partners.

Chatter Answers

Chatter Answers is a self-service support community where users can post questions and receive answers and comments from other users or your support agents.

Chatter Feed

A list of recent activities in Salesforce. Chatter feeds display:

- On the Chatter or Home tab, where you can see your posts, posts from people you follow, and updates to records you follow, and posts to groups you're a member of
- On profiles, where you can see posts made by the person whose profile you're viewing
- On records, where you can see updates to the record you're viewing
- On Chatter groups, where you can see posts to the group you're viewing

Chatter Group

Chatter groups let you share information with specific people. For example, if you're working on a project and want to share information only with your team members, you can create a Chatter group for your team. Chatter groups include a list of members, a Chatter feed, and a photo. You can create the following types of Chatter groups:

- **Public:** Only group members can post, but anyone can see the posts and join the public group.
- **Private:** Only group members can post and see the posts. The group's owner or managers must add members.

Cloud Flow Designer

Cloud-based application that lets administrators create a flow for use in Salesforce.

Combination Chart

A combination chart plots multiple sets of data on a single chart. Each set of data is based on a different field, so values are easy to compare. You can also combine certain chart types to present data in different ways on a single chart.

Connection (for Salesforce to Salesforce)

A business partner that you invite to share data using Salesforce to Salesforce.

Community

Communities are customizable public or private spaces for employees, end-customers, and partners to collaborate on best practices and business processes.

Community Application

The Community application includes the ideas and answers features. The Community app is available in theForce.com app menu.

Community Expert

A community expert is a member of the community who speaks credibly and authoritatively on behalf of your organization. When

community experts post comments or ideas, a unique icon (🌟👤) displays next to their name. The Salesforce administrator can designate as many community experts as necessary.

Commit Amount

Amount entered in a forecast that an individual salesperson is reasonably confident of closing in a particular month or quarter. For managers, this should equal the amount that they and their team can confidently close.

Competitor

Related list that displays competitor names, strengths, and weaknesses entered for a specific opportunity.

Computer-Telephony Integration (CTI)

The linkage between a telephone system and a computer that facilitates incoming- and outgoing-call handling and control.

Connect for Office

Product that allows you to integrate Salesforce with Microsoft® Word and Excel.

Connect for Outlook

Connect for Outlook is retired. The product was our legacy sync add-in for Microsoft® Outlook® 2007 and earlier.

Connect Offline

Product that allows salespeople to use Salesforce to update their data remotely, anywhere, anytime—totally unplugged.

Connected User

When using the Salesforce adapter for Lightning Connect, the connected user is the user in the provider organization whose credentials are used to log in to the provider organization. The connected user's access to data in the provider organization affects which data can be accessed from within the subscriber organization.

Console Tab

A tab containing the Agent console, which combines related records into one screen with different frames so that users can view and edit information all in one place.

Contact

Contacts are the individuals associated with your accounts.

Contact Manager Edition

A Salesforce edition designed for small businesses that provides access to key contact management features.

Contact Role

The role that a contact plays in a specific account, contract, or opportunity, such as “Decision Maker” or “Evaluator.” You can mark one contact as the “primary” contact for the account, contract, or opportunity. A contact may have different roles in various accounts, contract, or opportunities.

Content Delivery

A file that has been converted into an optimized online format for distributions to leads, contacts, and colleagues.

Content Pack

A collection of related documents or files that are stored as a group in Salesforce CRM Content.

Contract

A *contract* is an agreement defining the terms of business between parties.

Contract Line Item

Contract line items are specific products covered by a service contract. They only display to users on the Contract Line Items related list on service contracts, not contracts.

Controlling Field

Any standard or custom picklist or checkbox field whose values control the available values in one or more corresponding dependent fields.

Convert

Button or link that allows you to change a qualified lead into an account, contact, and, optionally, an opportunity. Information from the lead fields is transferred into the appropriate account, contact, and opportunity fields.

CTI Adapter

A lightweight software program that controls the appearance and behavior of a Salesforce SoftPhone. The adapter acts as an intermediary between a third-party computer telephony integration (CTI) system, Salesforce, and a Salesforce CRM Call Center user. It must be installed on any machine that needs access to Salesforce CRM Call Center functionality.

Custom Console Component

A Visualforce page added to a Salesforce console by an administrator to customize, integrate, or extend the capabilities of the console.

Custom Field

A field that can be added in addition to the standard fields to customize Salesforce for your organization's needs.

Custom Help

Custom text administrators create to provide users with on-screen information specific to a standard field, custom field, or custom object.

Custom Links

Custom links are URLs defined by administrators to integrate your Salesforce data with external websites and back-office systems. Formerly known as Web links.

Custom Object

Custom records that allow you to store information unique to your organization.

Custom Report Type

See Report Type.

Custom S-Control

Note



S-controls have been superseded by Visualforce pages. After March 2010 organizations that have never created s-controls, as well as new organizations, won't be allowed to create them. Existing s-controls will remain unaffected, and can still be edited.

Custom Web content for use in custom links. Custom s-controls can contain any type of content that you can display in a browser, for example a Java applet, an Active-X control, an Excel file, or a custom HTML Web form.

Customizable Forecasting

A revised forecasting module that allows organizations to customize forecasts for their organization's business process.

Custom View

A display feature that lets you see a specific set of records for a particular object.

D

Dashboard

A *dashboard* shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or Visualforce pages. The components provide a snapshot of key metrics and performance indicators for your organization. Each dashboard can have up to 20 components.

Dashboard Builder

Dashboard builder is a drag-and-drop interface for creating and modifying dashboards.

Data Category for Answers

On the Answers tab, *data categories* allow users to classify questions in an answers zone. For example, if you have a zone for hardware products, your data categories may include laptops, desktops, and printers. Zone members can quickly browse within a specific category to find answers to their questions. Administrators can use data categories to control access to questions.

Data Category for Articles

In Salesforce Knowledge, *data categories* are a set of criteria organized hierarchically into category groups. Articles in the knowledge base can be classified according to multiple categories that make it easy for users to find the articles they need. For example, to classify articles by sales regions and business units, create two category groups, Sales Regions and Business Units. The Sales Regions category group could consist of a geographical hierarchy, such as All Sales Regions as the top level, North America, Europe, and Asia at the second level, and so on up to five levels. Authors assign categories to articles. Administrators can use data categories to control access to articles.

Database.com

Database.com is an enterprise cloud database from Salesforce.

Dated Exchange Rates

Dated exchange rates allow you to map a currency conversion rate to a specific date range. For example, the exchange rate on January 1 was 1 USD to 1.39 AUD, but on February 1, it changed to 1 USD to 1.42 AUD. Your opportunities that closed between January 1 and February 1 use the first exchange rate (1 = 1.39), while opportunities that closed after February 1 used the second exchange rate (1 = 1.42).

Demote

If you dislike an idea, you can click **demote** to subtract 10 points from its overall score and decrease the idea's overall popularity ranking. You cannot demote the same idea more than once, and after you demote an idea you cannot promote it. An idea can have negative overall points if more users demote the idea than promote it.

Dependent Field

Any custom picklist or multi-select picklist field that displays available values based on the value selected in its corresponding controlling field.

Detail

A page that displays information about a single object record. The detail page of a record allows you to view the information, whereas the edit page allows you to modify it.

A term used in reports to distinguish between summary information and inclusion of all column data for all information in a report. You can toggle the **Show Details/Hide Details** button to view and hide report detail information.

Detail View

The Agent console's center frame, which is the detail page view of any record selected from any of the console's other frames. The detail view displays the same page layouts defined for the object's detail pages. When a record is displayed in the detail view, it is highlighted in the list view.

Developer Edition

A free, fully-functional Salesforce organization designed for developers to extend, integrate, and develop with the Force.com platform. Developer Edition accounts are available on developer.salesforce.com.

Developer Pro Sandbox

Developer Pro sandboxes copy customization (metadata), but don't copy production data, into a separate environment for coding and testing. Developer Pro has more storage than a Developer sandbox. It includes a number of Developer sandboxes, depending on the edition of your production organization.

Developer Sandbox

Developer sandboxes copy customization (metadata), but don't copy production data, into a separate environment for coding and testing.

Document Library

A place to store documents without attaching them to accounts, contacts, opportunities, or other records.

Draft Article

Draft articles are in-progress articles that have not been published, which means they are not visible on the Articles tab (in any channel) or in a public knowledge base. Article managers can access draft articles on the Article Management tab by clicking the **Articles** tab in the View area and choosing **Draft Articles**. You can filter draft articles by those assigned to you or those assign to anyone (all draft articles for your organization). Draft articles can be assigned to any user involved in the editorial work.

Draft Translation

Draft translations are in-progress translations of articles into multiple languages. They have not been published, which means they are not visible on the Articles tab (in any channel) or in a public knowledge base. Article managers can access draft translations on the Articles Management tab by clicking the **Translation** tab in the View area and choosing **Draft Translations**. You can filter draft translations by those assigned to you, those assigned to a translation queue, or those assigned to anyone (all draft translations in your organization). Translations can be assigned to any user who can publish Salesforce Knowledge articles.

Dynamic Dashboard

A *dynamic dashboard* runs using the security settings of the user viewing the dashboard. Each user sees the dashboard according to his or her own access level. This approach helps administrators share one common set of dashboard components to users with different levels of access.

E

Email Alert

Email alerts are workflow and approval actions that are generated using an email template by a workflow rule or approval process and sent to designated recipients, either Salesforce users or others.

Email Template

A form email that communicates a standard message, such as a welcome letter to new employees or an acknowledgement that a customer service request has been received. Email templates can be personalized with merge fields, and can be written in text, HTML, or custom format.

Enterprise Edition

A Salesforce edition designed for larger, more complex businesses.

Entitlement

Entitlements help you determine if your customers are eligible for customer support so you can create cases for them. A customer may be eligible for support based on a particular asset, account, or service contract.

Entitlement Contact

Entitlement contacts are contacts specified to receive customer support—for example, a named caller. They're listed on an entitlement's Contacts related list or the contact's Entitlements related list. Entitlement contacts don't have page layouts, search layouts, buttons, links, or record types.

Entitlement Process

Entitlement processes are timelines that include all of the steps (milestones) that your support team must complete to resolve cases. Each process includes the logic necessary to determine how to enforce the correct service level for your customers.

Entitlement Template

Entitlement templates are predefined terms of customer support that you can quickly add to products. For example, you can create entitlement templates for Web or phone support so that users can easily add entitlements to products offered to customers.

External Data Source

An external data source specifies how to access an external system. Lightning Connect uses external data sources to access data that's stored outside your Salesforce organization. Files Connect uses external data sources to access third-party content systems. External data sources have associated external objects, which your users and the Force.com platform use to interact with the external data and content.

External Lookup Relationship

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.

External Object

External objects behave similarly to custom objects, except that they map to data that's stored outside your Salesforce organization. Each external object maps to a data table in a defined external data source, and each external object field maps to a table column. Users and the Force.com platform use external objects to interact with the external data.

External User

External users are users with Community, Customer Portal, or partner portal licenses.

F

Feed Attachment, Chatter

A feed attachment is a file or link that is attached to a post in a Chatter feed.

Feed Filter, Chatter

Feed filters display a subset of posts in your Chatter feed on the Chatter tab.

Feed Tracking, Chatter

Administrator settings that determine which records can be followed and which fields can be tracked in Chatterfeeds. Enabling an object for feed tracking allows people to follow records of that object type. Enabling fields for feed tracking allows users to see updates on the Chatter feed when those fields are changed on records they follow.

Field-Level Help

Custom help text that you can provide for any standard or custom field. It displays when users hover a mouse over the help icon adjacent to that field.

Field-Level Security

Settings that determine whether fields are hidden, visible, read only, or editable for users. Available in Enterprise, Unlimited, Performance, and Developer Editions only.

Field Sets

A field set is a grouping of fields. For example, you could have a field set that contains fields describing a user's first name, middle name, last name, and business title. Field sets can be referenced on Visualforcepages dynamically. If the page is added to a managed package, administrators can add, remove, or reorder fields in a field set to modify the fields presented on the Visualforce page without modifying any code.

Field Update

Field updates are workflow and approval actions that specify the field you want updated and the new value for it.

File Collaborator

Users with the “collaborator” permission can view, download, share, change permission, edit the file, and upload new versions of files in Chatter.

File Owner

You are the owner of a file when you upload the file in Chatter, attach the file to a Chatter feed, or upload the file in Salesforce CRM Content.

As the owner of the file you can view, edit, download, share, upload a new version, and delete the file, as well as make the file private and change the permission on the file.

File, Private

A private file in Chatter is indicated by the private icon (🔒) and is only available to the file owner and isn't shared with anyone. A private file is created when you upload a file on the Files tab or contribute a file to a Salesforce CRM Content personal library. You own files you upload or contribute.

File, Privately Shared

A privately shared file in Chatter is indicated by the privately shared icon (🔒) and is only available to the file owner and the specific people or groups it has been shared with.

File, Your Company

The your company icon (🏢) indicates a file that is shared with all Chatter users in your company. All Chatter users in your company can find and view this file.

File Viewer

Users with the “viewer” permission can view, download, and share files in Chatter.

Files Tab

A tab that lists a user's Chatter and Salesforce CRM Content files.

Filter Condition/Criteria

Condition on particular fields that qualifies items to be included in a list view or report, such as “State equals California.”

Fiscal Year

A period that an organization uses for financial planning purposes, such as forecasting, whose length is usually similar to the length of a calendar year. Fiscal years usually contain smaller fiscal periods, such as quarters or trimesters.

Flag

An icon that users can click on a question or reply to report it as spam, hateful, or inappropriate.

Folder

A *folder* is a place where you can store reports, dashboards, documents, or email templates. Folders can be public, hidden, or shared, and can be set to read-only or read/write. You control who has access to its contents based on roles, permissions, public groups, and license types. You can make a folder available to your entire organization, or make it private so that only the owner has access.

Follow

A subscription to a user or record that lets you see related updates in your Chatter feed. Follow a user to see the user's posts. Follow a record to see posts, comments, and field changes.

Follow, Chatter Answers

A subscription to a question that lets you receive emails when someone answers or comments on a specific question.

Force.com App Menu

A menu that enables users to switch between customizable applications (or “apps”) with a single click. TheForce.com app menu displays at the top of every page in the user interface.

Force.com Enterprise App

A custom app with up to eight (8) custom objects and eight (8) custom tabs, read-write access to accounts and contacts, and access to Sharing, Bulk API, or Streaming API.

Force.com Light App

A custom app with up to eight (8) custom objects and eight (8) custom tabs, read-only access to accounts and contacts, and no access to Sharing, Bulk API, or Streaming API.

Forecast Amount

Applies to Collaborative Forecasts. The revenue forecast from the forecast manager’s perspective and the sum of the owner’s and subordinates’ opportunities, including all forecast adjustments.

Forecast Category

Determines the category to which an opportunity is attributed in a forecast. The default category setting for an opportunity is tied to its stage, as set in the Stage picklist. To update the Forecast Category for a particular opportunity, you must edit that opportunity’s forecast.

Forecast Quantity

Applies to Collaborative Forecasts. The quantity forecast from the forecast manager’s perspective and the sum of the owner’s and subordinates’ opportunities, including all forecast adjustments.

Forecast User

A user who can see and work with forecasts below them in either the forecast hierarchy or territory hierarchy.

Forecasts

Projections of sales based on the organization's fiscal year.

Formula Field

A type of custom field. Formula fields automatically calculate their values based on the values of merge fields, expressions, or other values.

Full Sandbox

Full sandboxes copy your entire production organization and all its data, including standard and custom object records, documents, and attachments. Use the sandbox to code and test changes, and to train your team about the changes. You can refresh a Full sandbox every 29 days.

Global Search

Search more records and fields in Salesforce from the header search box. Global search keeps track of which objects you use and how often you use them, and arranges the search results accordingly. Search results for the objects you use most frequently appear at the top of the list.

Global Variable

A special merge field that you can use to reference data in your organization.

A method access modifier for any method that needs to be referenced outside of the application, either in the SOAP API or by other Apex code.

Group

A groups is a set of users. Groups can contain individual users, other groups, or the users in a role. Groups can be used to help define sharing access to data or to specify which data to synchronize in Salesforce for Outlook configurations or Exchange Sync configurations.

Users can define their own personal groups. Administrators can create public groups for use by everyone in the organization.

Group Edition

A product designed for small businesses and workgroups with a limited number of users.

Group Task

A task that was assigned to multiple users when it was created. Note that group tasks are independent records that are not linked; they can be edited, transferred, or deleted individually.

Guest User

Guest users can access public Site.com and Force.com sites, and public pages in Communities, via the Guest User license associated with each site or community. Guest users' access to objects and data is controlled by public access settings on the Guest User profile.

H

Half-life

The half-life setting determines how quickly old ideas drop in ranking on the Popular Ideas subtab, to make room for ideas with more recent votes. A shorter half-life moves older ideas down the page faster than a longer half-life. This setting affects all zones in your organization.

Highlights Panel

A customizable table of up to four columns and two rows that appears at the top of every primary tab in a Salesforce console. It lets you view key information about records at a glance.

High-Volume Portal Users

Limited-access users intended for organizations with many thousands to millions of portal users. Unlike other users, high-volume portal users don't have roles, which eliminates performance issues associated with role hierarchy calculations. High-volume portal users include both the High Volume Customer Portal User and Authenticated Website User license types.

Home Tab

Starting page from which users can choose sidebar shortcuts and options, view current tasks and activities, or select another tab.

Hover Detail

Hover details display an interactive overlay containing detailed information about a record when users hover the mouse over a link to that record in the Recent Items list on the sidebar or in a lookup field on a record detail page. Users can quickly view information about a record before clicking **View** for the record's detail page or **Edit** for the edit page. The fields displayed in the hover details are determined by the record's mini page layout. The fields that display in document hover details are not customizable.

Idea

Ideas are suggestions posted by the members of an ideas community and are organized by zones. For example, if the focus of a particular zone is “Ideas for car features,” an appropriate idea for that zone might have the title “Insulated cup holders that keep your beverage hot or cold.” Or, if the focus of a particular zone is “Ideas for our company's employee benefits,” an appropriate idea for that zone might have the title “On-site day care.”

Immediate Action

A workflow action that executes instantly when the conditions of a workflow rule are met.

Indirect Lookup Relationship

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.

Influence, Chatter

An indicator of a person's influence in Chatter. The number of posts and comments the person makes, and the number of comments and likes the person receives determine the level of influence.

- Top Influencers lead collaboration efforts by regularly sharing essential content.
- Active Influencers encourage others to get involved and share knowledge.
- Observers are quiet participants or just getting started in Chatter.

Interaction Log

An area in a Salesforce console where you can jot notes about the main record you're working on without clicking a button, viewing a new tab, or scrolling to the Notes & Attachments related list. Interaction logs are archived on the Activity History related list for easy review and retrieval. Administrators can customize interaction logs to include task fields.

J

Junction Object

A custom object with two master-detail relationships. Using a custom junction object, you can model a “many-to-many” relationship between two objects. For example, you may have 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.

K

Knowledge Agent

Salesforce uses the term *knowledge agent* to represent a specific type of user. Knowledge agents are article consumers in the internal Salesforce Knowledge app. These users can access the Articles tab to search for and view articles, but they cannot create, edit, or manage articles.

Knowledge Sidebar

A sidebar in a Salesforce console that displays titles of Salesforce Knowledge articles that may solve the case you're working on. It automatically searches and returns articles from your knowledge base that match any of the words you type in the Subject of a case. The sidebar only displays for Salesforce Knowledge users after administrators set it up.

L

Layout

See Page Layout.

Lead

A *lead* is a sales prospect who has expressed interest in your product or company.

Library

A file repository in Salesforce CRM Content.

Library Permission

A group of privileges that determines user access within a Salesforce CRM Content library.

Lightning Connect

Lightning Connect enables you to access records that are stored outside Salesforce, such as data in an enterprise resource planning (ERP) system. Salesforce represents the data in external objects and accesses the external data in real time via Web service callouts to external data sources.

Like

To show support for a post or comment in a Chatter feed. When you like a post or comment, you receive email notifications for subsequent comments.

Like, Chatter Answers

To show support or indicate quality or usefulness for a question, answer, or knowledge article.

List Price

The price of a product in a custom price book.

List View

A list display of items (for example, accounts or contacts) based on specific criteria. Salesforce provides some predefined views. In the Agent console, the list view is the top frame that displays a list view of records based on specific criteria. The list views you can select to display in the console are the same list views defined on the tabs of other objects. You cannot create a list view within the console.

Live Agent

Live Agent lets service organizations connect with customers or website visitors in real time through a Web-based, text-only live chat.

Live Agent Console

The Live Agent console is a dedicated console used by customer service agents to manage Live Agent chats. Agents can answer chat requests, conduct live chats, and interact with Salesforce records and Salesforce Knowledge articles.

Local Name

The value stored for the field in the user's or account's language. The local name for a field is associated with the standard name for that field.

Lookup Dialog

Popup dialog available for some fields that allows you to search for a new item, such as a contact, account, or user.

Lookup Field

A type of field that contains a linkable value to another record. You can display lookup fields on page layouts where the object has a lookup or master-detail relationship with another object. For example, cases have a lookup relationship with assets that allows users to select an asset using a lookup dialog from the case edit page and click the name of the asset from the case detail page.

Lookup Relationship

A relationship between two records so you can associate records with each other. For example, cases have a lookup relationship with assets that lets you associate a particular asset with a case. On one side of the relationship, a lookup field allows users to click a lookup icon and select another record from a popup window. On the associated record, you can then display a related list to show all of the records that have been linked to it. If a lookup field references a record that has been deleted, by default Salesforce clears the lookup field. Alternatively, you can prevent records from being deleted if they're in a lookup relationship.

M

Marketing User

One or more individuals in your organization who can manage campaigns. Administrators can designate someone as a Marketing User by selecting the Marketing User checkbox in the user's personal information.

Only marketing users can create, edit, and delete campaigns or configure advanced campaign setup.

To use the campaign import wizards, marketing users must also have the Marketing User profile or the "Import Leads" permission.

Master-Detail Relationship

A relationship between two different types of records that associates the records with each other. For example, accounts have a master-detail relationship with opportunities. This type of relationship affects

record deletion, security, and makes the lookup relationship field required on the page layout.

Master Picklist

A complete list of picklist values available for a record type or business process.

Matrix Report

Matrix reports are similar to summary reports but allow you to group and summarize data by both rows and columns. They can be used as the source report for dashboard components. Use this type for comparing related totals, especially if you have large amounts of data to summarize and you need to compare values in several different fields, or you want to look at data by date *and* by product, person, or geography.

Member Status

The status of a lead or contact in relation to a campaign. For example, a lead or contact could have a member status of “Planned,” “Sent,” or “Responded” at different stages of an email campaign.

Message, Chatter

A Chatter message is a private communication with other Chatter users. Use messages to send your manager a question privately, or to communicate with a few select people when a discussion isn't relevant to everyone you work with. Messages don't appear in your feed, your profile, or any other part of Chatter that's publicly visible.

Merge Field

A merge field is a field you can put in an email template, mail merge template, custom link, or formula to incorporate values from a record. For example, `Dear {!Contact.FirstName}`, uses a contact merge field to obtain the value of a contact record's First Name field to address an email recipient by his or her first name.

Milestone

Milestones are required steps in your support process. They're metrics that represent service levels to provide to each of your customers. Examples of milestones include First Response and Resolution Times on cases.

Milestone Actions

Milestone actions are time-dependent workflow actions that occur at every step (milestone) in an entitlement process. Examples of milestone actions include sending email alerts to specified users an hour before a first response is near violation or automatically updating certain fields on a case one minute after a first response successfully completes.

Mini Page Layout

A subset of the items in a record's existing page layout that administrators choose to display in the Agent console's Mini View and in Hover Details. Mini page layouts inherit record type and profile associations, related lists, fields, and field access settings from the page layout.

Mini View

The Agent console's right frame which displays the records associated with the record displayed in the detail view. The fields displayed in the mini view are defined in the mini page layouts by an administrator. The mini view does not display if the record in the detail view does not have any records associated with it.

Multi-Person Event

A planned event to which multiple users are invited, also referred to as a meeting. You can create multi-person events by inviting other users to any calendar event you create.

Multi-Select Picklist

See Picklist (Multi-Select).

My Settings

When the improved Setup user interface is enabled in an organization and the user has Salesforce Classic, personal settings are available from the My Settings menu under the user's name.

N

Named Credential

A named credential specifies the URL of a callout endpoint and its required authentication parameters in one definition. A named credential can be specified as an endpoint to simplify the setup of authenticated callouts.

Navigation Tab

A tab with a drop-down button in a Salesforce console that lets you select and view object home pages.

Nickname

A nickname is the name used to identify this user in a community. Up to 40 alphanumeric characters are allowed. Standard users can edit this field.

O

Object

An object allows you to store information in your Salesforce organization. The object is the overall definition of the type of information you are storing. For example, the case object allow you to store information regarding customer inquiries. For each object,

your organization will have multiple records that store the information about specific instances of that type of data. For example, you might have a case record to store the information about Joe Smith's training inquiry and another case record to store the information about Mary Johnson's configuration issue.

Object-Level Help

Custom help text that you can provide for any custom object. It displays on custom object record home (overview), detail, and edit pages, as well as list views and related lists.

OData Producer

An OData producer is a remote data service that uses the Open Data Protocol (OData) to expose data that's stored on an external server. With the Lightning Connect feature, you define external data sources to connect Salesforce to OData producers, and you define external objects to map to the external data.

Open CTI

An application programming interface that lets developers build CTI (computer-telephony integration) systems that integrate with Salesforce without the use of CTI adapters or client applications.

Operator

An operator is an item used to narrow or broaden a search. In most Salesforce searches, AND, OR, AND NOT, parentheses (), and quotation marks " " can be used as operators.

Opportunities

Opportunities track your sales and pending deals.

Opportunity Team

An opportunity team is a set of users that normally work together on sales opportunities. A typical opportunity team might include the account manager, the sales representative, and a pre-sales consultant. You can specify the opportunity team for each opportunity that you own.

Organic Search Leads

Organic search lead is a specific lead source indicating that the lead was generated when a user, who arrived at your website by way of an unpaid (organic) listing on a major search engine, filled out the Web-to-Lead form containing the Salesforce tracking code. The lead source details contain the search engine and the search phrase for each organic lead.

Organization

A deployment of Salesforce with a defined set of licensed users. An organization is the virtual space provided to an individual customer

of Salesforce. Your organization includes all of your data and applications, and is separate from all other organizations.

Organization-Wide Address

An organization-wide address allows you to associate a single email address as an alias for all users within a user profile.

Outbound Message

An outbound message is a workflow, approval, or milestone action that sends the information you specify to an endpoint you designate, such as an external service. Outbound messaging is configured in the Salesforce setup menu. Then you must configure the external endpoint. You can create a listener for the messages using the SOAP API.

Owner Only Amount

Applies to Collaborative Forecasts. The sum of all of a person's revenue opportunities, without adjustments.

Owner Only Quantity

Applies to Collaborative Forecasts. The sum of all of a person's quantity opportunities, without adjustments.

Salesforce for Outlook Configuration

Salesforce for Outlook configurations include settings for the data that Salesforce for Outlook users can sync between Microsoft® Outlook® and Salesforce. Administrators can create separate configurations for different types of users, and give users permission to edit some of their own settings. For example, an opportunity team might want to sync everything, while a manager might want to sync only events.

Owner

Individual user to which a record (for example, a contact or case) is assigned.

P

PaaS

See Platform as a Service.

Package

A group of Force.com components and applications that are made available to other organizations through the AppExchange. You use packages to bundle an app along with any related components so that you can upload them to AppExchange together.

Package Installation

Installation incorporates the contents of a package into your Salesforce organization. A package on the AppExchange can

include an app, a component, or a combination of the two. After you install a package, you may need to deploy components in the package to make it generally available to the users in your organization.

Page Layout

Page layout is the organization of fields, custom links, and related lists on a record detail or edit page. Use page layouts primarily for organizing pages for your users. In Enterprise, Unlimited, Performance, and Developer Editions, use field-level security to restrict users' access to specific fields.

Parent Account

An organization or company that an account is affiliated. By specifying a parent for an account, you can get a global view of all parent/subsidiary relationships using the **View Hierarchy** link.

Partial Copy Sandbox

A Partial Copy sandbox is a Developer sandbox plus the data that you define in a sandbox template.

Partner

Partners are the companies with which you collaborate to close your sales deals. For each opportunity or account you create, the Partners related list allows you to store information about your partners and the roles they play in the opportunity or account. A partner must be an existing account within Salesforce. Selecting a partner role automatically creates a reverse partner relationship with the associated account so that both accounts list the other account as a partner.

Partner Accounts

Partner accounts are Salesforce accounts that a channel manager uses to manage partner organizations, partner users, and activities when using the partner portal.

Partner Role

Selection for an account on the Partners related list of an individual account or opportunity that specifies the role that the account has in related sales deals.

Partner User

Partner users are Salesforce users with limited capabilities. They are external to your organization but sell your products or services through indirect sales channels. They are associated with a particular partner account, have limited access to your organization's data, and log in via a partner portal.

Partner Portal

Partner portal allows partner users to log in to Salesforce through a Web portal rather than through Salesforce.

Percent (%) Quota

For forecasting versions where quotas are available, this is the calculated value in forecasts that indicates what percentage of the quota a salesperson is confident of closing. This amount is the Commit Amount divided by the Quota.

Permission

A permission is a setting that allows a user to perform certain functions in Salesforce. Permissions can be enabled in permission sets and profiles. Examples of permissions include the “Edit” permission on a custom object and the “Modify All Data” permission.

Permission Set

A collection of permissions and settings that gives users access to specific tools and functions.

Person Account

A person account is an individual consumer with whom you do business, such as a financial services client, an online shopper, or a vacation traveler. Person accounts are applicable to organizations that operate on a business-to-consumer model as opposed to a business-to-business model.

Personal Edition

Product designed for individual sales representatives and single users.

Personal Settings

Settings and customization options to help users personalize their Salesforce experience. All Salesforce users can edit their own personal settings. Depending on an organization’s user interface settings, users can access their personal settings from the Personal Setup area of the Setup menu, or from the menu under their avatar or name.

Phrase Search

A type of full-text search that matches only items that contain a specified phrase, such as “customer relationship management.”

Picklist

Selection list of options available for specific fields in a Salesforce object, for example, the Industry field for accounts. Users can choose a single value from a list of options rather than make an entry directly in the field. See also Master Picklist.

Picklist (Multi-Select)

Selection list of options available for specific fields in a Salesforce object. Multi-select picklists allow users to choose one or

more values. Users can choose a value by double clicking on it, or choose additional values from a scrolling list by holding down the CTRL key while clicking a value and using the arrow icon to move them to the selected box.

Picklist Values

Selections displayed in drop-down lists for particular fields. Some values come predefined, and other values can be changed or defined by an administrator.

Pinned Lists

Lists that display at the top or on the left side of a Service Cloud console; they're always visible and let you see the list you're working from and a record's details at the same time. Pinned lists must be turned on by an administrator.

Pipeline

Calculated amount of open opportunities that have a close date within the quarter. Displays on forecast detail and edit pages. For managers, this amount includes open opportunities for them and their entire team.

Platform as a Service (PaaS)

An environment where developers use programming tools offered by a service provider to create applications and deploy them in a cloud. The application is hosted as a service and provided to customers via the Internet. The PaaS vendor provides an API for creating and extending specialized applications. The PaaS vendor also takes responsibility for the daily maintenance, operation, and support of the deployed application and each customer's data. The service alleviates the need for programmers to install, configure, and maintain the applications on their own hardware, software, and related IT resources. Services can be delivered using the PaaS environment to any market segment.

Popular Ideas

On the Popular Ideas subtab, ideas are sorted by an internal calculation that reflects the age of an idea's positive votes. Regardless of an idea's static total number of points, ideas with newer positive votes display higher on the page than ideas with older positive votes. This allows you to browse ideas that have most recently gained popularity, with less precedence given to long-established ideas that were positively voted on in the past.

Popular Questions

Each question's popularity is based on the number of users who **Like** it within a certain amount of time.

Post

A top-level comment in a Chatter feed.

Post Sharing

Lets you copy a public Chatter post and publish it to your profile or a group you're a member of. You can also share the post with other Chatter users by sending a link to the post in an email or instant message.

Price Book

A price book is a list of products that your organization sells. Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions only.

Primary Contact

Field in company information that lists the primary contact for your organization.

Also indicates the primary contact associated with an account, contract, or opportunity. Specified as a checkbox in the Contact Roles related list of an account, contract, or opportunity.

Primary Partner

Partner account designated as playing a key role in closing an opportunity. Specified as a checkbox in the Partners related list of an opportunity.

Primary Tab

A tab in a Salesforce console that displays the main item to work on, such as an account.

Process Visualizer

A tool that displays a graphical version of an approval process. The view-only diagram is presented as a flowchart. The diagram and an informational sidebar panel can help you visualize and understand the defined steps, rule criteria, and actions that comprise your approval process.

Professional Edition

A Salesforce edition designed for businesses who need full-featured CRM functionality.

Product Family

A picklist field on products that you can customize to categorize types of products.

Profile

Defines a user's permission to perform different functions within Salesforce. For example, the Solution Manager profile gives a user access to create, edit, and delete solutions.

Profile, Chatter

A personal page for each Salesforce user that includes contact information, following and followers lists, aChatter feed, and a photo.

Promote

If you agree with or like an idea, click **promote** to add 10 points to the idea. You cannot promote the same idea more than once and you cannot promote an idea that you have already demoted. Salesforce automatically adds your promote vote to any idea you post.

To migrate changes from one organization to another. See also Deploy and Migration.

Provider Organization

When using the Salesforce adapter for Lightning Connect, the provider organization stores the data that's accessed by the subscriber organization.

Public Calendar

A calendar in which a group of people can track events of interest to all of them (such as marketing events, product releases, or training classes) or schedule a common activity (such as a team vacation calendar). For example, your marketing team can set up an events calendar to show upcoming marketing events to the entire sales and marketing organization.

Push Notifications, Mobile

Push notifications are alerts that apps render on mobile device home screens when users aren't using the app. These alerts can consist of text, icons, and sounds, depending on the device type.

Push Notifications, Salesforce Console

Visual indicators in a Salesforce console that show when a record or field has changed during a user's session.

Push Upgrade

A method of delivering updates that sends upgrades of an installed managed package to all organizations that have installed the package.

Q

Quantity Schedule

A quantity schedule outlines the dates, number of units (i.e., quantity), and number of installments for billing or shipping a product. Your

organization can decide exactly how to use schedules. Available in Enterprise, Unlimited, Performance, and Developer Editions only.

Quantity Forecasting

Forecasting based on the projected number of units sold.

Quantity Without Adjustments

Applies to Collaborative Forecasts. The sum of a person's owned quantity opportunities and also his or her subordinates' opportunities, without adjustments. Subordinates include everyone reporting up to a person in the forecast hierarchy.

Quantity Without Manager Adjustment

Applies to Collaborative Forecasts. The forecast number as seen by the forecast owner. This is the sum of the owner's quantity opportunities and his or her subordinates' opportunities, including adjustments made on the subordinates' forecasts. *It doesn't include adjustments made by forecast managers above the owner in the forecast hierarchy.*

Question

An issue posted to an answers community. When a community member asks a question, other community members post replies to help resolve the question.

Question, Private

An issue posted to an answers community, but marked **Private** so that only support agents can view and respond to it.

Queue

A holding area for items before they are processed. Salesforce uses queues in a number of different features and technologies.

Quota

The sales goal assigned to a user on a monthly and quarterly basis. (If you use Collaborative Forecasts, it's the sales goal assigned to a user on a monthly basis.) A manager's quota should equal the amount she and her team are expected to generate together.

Quote

A record showing proposed prices for products and services. Quotes can be created from opportunities and emailed as PDFs to customers.

R

Recent Activity

Your Recent Activity page contains a summary of all the recent activity that relates to your participation within a zone. For example, this page lists all the ideas and comments you have posted to a zone as well as the ideas you have voted on. You can view your Recent

Activity page by clicking your nickname located on the right side of the Ideas tab.

Recent Items

List of links in the sidebar for most recently accessed records. Note that not all types of records are listed in the recent items.

Record

A single instance of a Salesforce object. For example, “John Jones” might be the name of a contact record.

Record Type

A record type is a field available for certain records that can include some or all of the standard and custom picklist values for that record. You can associate record types with profiles to make only the included picklist values available to users with that profile.

Record Update

A post in a Chatter feed that is the result of a field change on a record that is being followed.

Related List

A section of a record or other detail page that lists items related to that record. For example, the Stage History related list of an opportunity or the Open Activities related list of a case.

Related List Hover Links

A type of link that allows you to quickly view information on a detail page about related lists, by hovering your mouse over the link. Your administrator must enable the display of hover links. The displayed text contains the corresponding related list and its number of records. You can also click this type of link to jump to the content of the related list without having to scroll down the page.

Related Object

Objects chosen by an administrator to display in the Agent console's mini view when records of a particular type are shown in the console's detail view. For example, when a case is in the detail view, an administrator can choose to display an associated account, contact, or asset in the mini view.

Relationship

A connection between two objects, used to create related lists in page layouts and detail levels in reports. Matching values in a specified field in both objects are used to link related data; for example, if one object stores data about companies and another object stores data about people, a relationship allows you to find out which people work at the company.

Relationship Group

Custom object records used to store collections of accounts.

Relationship Group Member

The accounts that you add to relationship groups are called *relationship group members*.

Report

A *report* returns a set of records that meets certain criteria, and displays it in organized rows and columns. Report data can be filtered, grouped, and displayed graphically as a chart. Reports are stored in folders, which control who has access. See Tabular Report, Summary Report, and Matrix Report.

Report Builder

Report builder is a visual editor for reports.

Report Type

A *report type* defines the set of records and fields available to a report based on the relationships between a primary object and its related objects. Reports display only records that meet the criteria defined in the report type. Salesforce provides a set of pre-defined standard report types; administrators can create custom report types as well.

Requested Meeting

A meeting that a Salesforce user requests with a contact, lead or person account. When a meeting is requested, Salesforce creates a unique Web page for the meeting that displays the proposed meeting times. When invitees visit the page, they select the times they can meet and send a reply. Salesforce tracks all the responses so the organizer can confirm the best time to meet.

Once a requested meeting is confirmed, it becomes a *multi-person event*.

Reporting Snapshot

A reporting snapshot lets you report on historical data. Authorized users can save tabular or summary report results to fields on a custom object, then map those fields to corresponding fields on a target object. They can then schedule when to run the report to load the custom object's fields with the report's data.

Reporting Snapshot Running User

The user whose security settings determine the source report's level of access to data. This bypasses all security settings, giving all users who can view the results of the source report in the target object access to data they might not be able to see otherwise.

Resource Calendar

A calendar in which multiple people can coordinate their usage of a shared resource such as a conference room or printer.

Revenue Forecasting

Forecasting based on projected revenue amounts.

Revenue Schedule

A revenue schedule outlines the dates, revenue amounts, and number of installments for billing or recognizing revenue from a product. Your organization can decide exactly how to use schedules. Available in Enterprise, Unlimited, Performance, and Developer Editions only.

Role

Assigned responsibility of a user, partner account, or contact for specific accounts and opportunities. Administrators can define user roles in Setup. Individual users can assign specific partner and contact roles for accounts and contacts.

Running User

Each dashboard has a *running user*, whose security settings determine which data to display in a dashboard. If the running user is a specific user, all dashboard viewers see data based on the security settings of that user—regardless of their own personal security settings. For dynamic dashboards, you can set the running user to be the logged-in user, so that each user sees the dashboard according to his or her own access level.

S

S-Control

Note



S-controls have been superseded by Visualforce pages. After March 2010 organizations that have never created s-controls, as well as new organizations, won't be allowed to create them. Existing s-controls will remain unaffected, and can still be edited.

Custom Web content for use in custom links. Custom s-controls can contain any type of content that you can display in a browser, for example a Java applet, an Active-X control, an Excel file, or a custom HTML Web form.

Sales Price

The price of a product on an opportunity. This can be different than the product's standard or list price.

Salesforce Console

The Salesforce console is designed for users in fast-paced environments who need to find, update, and create records quickly. It

improves upon the Agent Console in the Console tab by displaying records and related items as tabs on one screen.

Salesforce Console Integration Toolkit

An API that uses browsers as clients to display pages as tabs in a Salesforce console; it provides developers with programmatic access to the console so that administrators can extend it to meet your business needs.

Salesforce CRM Call Center

A Salesforce feature that seamlessly integrates Salesforce with third-party computer-telephony integration (CTI) systems.

Salesforce CRM Content

An on-demand, content-management system that allows you to organize, share, search, and manage content within your organization and across key areas of the Salesforce application. Content can include all file types, from traditional business documents such as Microsoft PowerPoint presentations to audio files, video files, and Web pages.

Salesforce for Outlook

Salesforce for Outlook, a Microsoft® Outlook® integration application that you install, syncs contacts, events, and tasks between Outlook and Salesforce. In addition to syncing these items, you can add Outlook emails, attachments, events, and tasks to multiple Salesforce contacts, and view Salesforce records related to the contacts and leads in your emails and events—all directly in Outlook.

Depending on your organization, you may be able to customize what you sync and the sync directions between Outlook and Salesforce. Your administrator determines the level at which you can customize these settings in Salesforce.

Salesforce for Outlook Configuration

Salesforce for Outlook configurations include settings for the data that Salesforce for Outlook users can sync between Microsoft® Outlook® and Salesforce. Administrators can create separate configurations for different types of users, and give users permission to edit some of their own settings. For example, an opportunity team might want to sync everything, while a manager might want to sync only events.

Salesforce Classic Mobile

Salesforce Classic Mobile is a Salesforce feature that enables users to access their Salesforce data from mobile devices running the mobile client application. The Salesforce Classic Mobile client application exchanges data with Salesforce over wireless carrier networks, and stores a local copy of the user's data in its own database on the mobile device. Users can edit local copies of their Salesforce records when a wireless connection is unavailable,

and transmit those changes when a wireless connection becomes available.

Salesforce Office Toolkit

A plug-in makes it easy for developers to access the SOAP API directly from within Microsoft Office products, simplifying the creation of new integrations and Office-based solutions.

Schedule

See Quantity Schedule and Revenue Schedule.

Screen Pop

Page that displays for an inbound call to a Salesforce CRM Call Center.

Search

Feature that lets you search for information that matches specified keywords. If you have sidebar search, enter search terms in the Search section of the sidebar or click **Advanced Search...** for more search options. If you have global search, enter search terms in the search box in the header.

Search Layout

The organization of fields included in search results, in lookup dialogs, and in the key lists on tab home pages.

Service

A service is an offering of professional assistance. Services related to Salesforce and the Force.com platform, such as enhanced customer support or assistance with configuration can be listed on the AppExchange.

Service Cloud Portal

The Service Cloud portal is the Customer Portal intended for many thousands to millions of users. After you purchase Service Cloud portal licenses, you can assign them to Customer Portal-enabled contacts so that large numbers of users can log in to a Customer Portal without affecting its performance.

Setup

A menu where administrators can customize and define organization settings and Force.com apps. Depending on your organization's user interface settings, Setup may be a link in the user interface header or in the drop-down list under your name.

Share Group

A set of Salesforce users who can access records owned by high volume portal users. Each Customer Portal has its own share group.

Shared Activities

A feature that allows users to relate as many as 10 contacts to a single non-recurring and non-group task, or to a single non-recurring event. One contact is the primary contact; all others are secondary contacts.

Sharing

Allowing other users to view or edit information you own. There are different ways to share data:

- **Sharing Model**—defines the default organization-wide access levels that users have to each other's information and whether to use the hierarchies when determining access to data.
- **Role Hierarchy**—defines different levels of users such that users at higher levels can view and edit information owned by or shared with users beneath them in the role hierarchy, regardless of the organization-wide sharing model settings.
- **Sharing Rules**—allow an administrator to specify that all information created by users within a given group or role is automatically shared to the members of another group or role.
- **Manual Sharing**—allows individual users to share records with other users or groups.
- **Apex-Managed Sharing**—enables developers to programmatically manipulate sharing to support their application's behavior. See Apex-Managed Sharing.

Sharing Model

Behavior defined by your administrator that determines default access by users to different types of records.

Sharing Rule

Type of default sharing created by administrators. Allows users in a specified group or role to have access to all information created by users within a given group or role.

Sidebar

Column appearing on the left side of each page that provides links to recent items and other resources.

Sites

Force.com Sites enables you to create public websites and applications that are directly integrated with your Salesforce organization—without requiring users to log in with a username and password.

Social Accounts and Contacts

A feature that allows you to view your accounts', contacts', and leads' social network profiles and other social information directly in Salesforce, so you can get deeper insights into your existing and potential customers' needs and issues.

Social Key

Social Key works with Social Accounts and Contacts and Data.com Clean to make it easier to follow your contacts and leads on social networks. From Social Accounts and Contacts, select the social networks you want. Automated Clean jobs provide the links. From a contact or lead's detail page, you can quickly view their profile on a social network site.

SoftPhone

The telephone interface that a Salesforce CRM Call Center user sees in either the sidebar of Salesforce pages or the footer of the Salesforce console.

SoftPhone Connector

A component of a Computer Telephony Integration (CTI) adapter that converts SoftPhone XML into HTML and distributes it to a Salesforce CRM Call Center user's browser.

SoftPhone CTI Adapter

A computer-telephony integration (CTI) adapter is a light-weight software program that controls the appearance and behavior of a Salesforce SoftPhone. The adapter acts as an intermediary between a third-party CTI system, Salesforce, and a Salesforce CRM Call Center user. It must be installed on any machine that needs access to Salesforce CRM Call Center functionality.

Software as a Service (SaaS)

A delivery model where a software application is hosted as a service and provided to customers via the Internet. The SaaS vendor takes responsibility for the daily maintenance, operation, and support of the application and each customer's data. The service alleviates the need for customers to install, configure, and maintain applications with their own hardware, software, and related IT resources. Services can be delivered using the SaaS model to any market segment.

Solution Manager

One or more individuals in your organization who can review, edit, publish, and delete solutions. Typically, these individuals are product experts with excellent written communication skills and advanced knowledge in a particular area of your product. When creating or editing users, assign the Solution Manager profile to give users this privilege.

Source Report

A custom report scheduled to run and load data as records into a target object for an reporting snapshot.

Stage Duration

In opportunity reports, the number of days the opportunity was in the stage listed in the Stage column.

Stage History

Related list on an opportunity detail page that lists changes in status and stage for the opportunity.

Standard Price

Price for a product that is included in the Standard Price Book.

Standard Price Book

Automatically generated price book containing all your products and their standard prices.

Status

An idea's status helps zone members track the progress of the idea. For example, “Under Review”, “Reviewed”, “Coming Soon”, and “Now Available” are common status values an administrator can define and assign to ideas. An idea's status appears next to the idea's title for all zone members to see.

Stemming

The process of reducing a word to its root form. In searches, stemming matches expanded forms of a search term. For example, when a search uses stemming, a search for `run` matches items that contain *run*, *running*, and *ran*.

Subflow

A subflow element references another flow, which it calls at run time. The flow that contains the subflow element is referred to as the master flow.

Subscriber Organization

When using the Salesforce adapter for Lightning Connect, the subscriber organization accesses data that's stored in another (provider) Salesforce organization. The subscriber organization contains the external data source definition and the external objects that map to the provider organization's objects.

Summary Field

A summary field is a numerical report column with one of the following summaries applied: sum, average, largest value, smallest value. Users can define custom summary formulas to extend these

options. In addition to showing summarized information, summary fields can be used to define charts and reporting snapshots.

Summary Report

Summary reports are similar to tabular reports, but also allow users to group rows of data, view subtotals, and create charts. They can be used as the source report for dashboard components. Use this type for a report to show subtotals based on the value of a particular field or when you want to create a hierarchical list, such as all opportunities for your team, subtotaled by Stage and Owner.

Syndication Feeds

Give users the ability to subscribe to changes within Force.com sites and receive updates in external news readers.

T

Tag

In Salesforce, a word or short phrases that users can associate with most records to describe and organize their data in a personalized way. Administrators can enable tags for accounts, activities, assets, campaigns, cases, contacts, contracts, dashboards, documents, events, leads, notes, opportunities, reports, solutions, tasks, and any custom objects (except relationship group members) Tags can also be accessed through the SOAP API.

Tag Cloud

In Salesforce CRM Content, a way of showing you how the content in your libraries has been tagged. Tag names increase in size within the tag cloud according to popularity, meaning that the largest tags have been assigned to the most files or Web links. You can choose to sort the tags alphabetically or by popularity. The tag cloud contains the 30 most popular tags.

Task

Assigns a task to a user you specify. You can specify the Subject, Status, Priority, and Due Date of the task. Tasks are workflow and approval actions that are triggered by workflow rules or approval processes.

For Calendar-related tasks, see Activity (Calendar Events/Tasks).

Task Bar Links

Links on tabbed pages that provide quick access to the most common operations available for a particular page, for example, creating a new account.

Territory

For forecasting versions where territories are used, this is a collection of accounts and users that generates a forecast.

Time-Dependent Workflow Action

A workflow action that executes when the conditions of a workflow rule and an associated time trigger are met.

Top All Time Ideas

On the Top All-Time subtab, ideas are sorted from most number of points to fewest. This allows you to see the most popular ideas in the history of your Ideas zone.

Topics

When you post or comment in Chatter, you can associate your post or comment with all other posts and comments on the same subject by adding a topic. A topic is a way to categorize your post or comment so other people can find it more easily. Topics also help you discover people and groups that are knowledgeable and interested in the same topics.

Topics, Chatter Answers

The sidebar that lists data categories from which your customers can browse questions and replies. For example, if you have a zone for hardware products, your topics may include laptops, desktops, and printers.

Translation Workbench

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

Trending Topics

The Trending Topics area on the Chatter tab shows the topics being discussed right now in Chatter. The more frequently people add a specific topic to their posts and comments and comment on or like posts with the same topic over a short period of time, the more likely it is to become a trending topic. For example, if your coworkers are attending the upcoming Dreamforce conference and have started discussing it in Chatter, you may see a trending topic for Dreamforce. A trending topic is not solely based on popularity and usually relates to a one-time or infrequent event that has a spike in activity, such as a conference or a project deadline. For privacy reasons, Trending Topics don't include topics used solely in private groups or record feeds.

Truncate

Truncating a custom object allows you to remove all of the object's records, while keeping the object and its metadata.

U

Unlimited Edition

Unlimited Edition is Salesforce's solution for maximizing your success and extending that success across the entire enterprise through the Force.com platform.

Usage-based Entitlement

A usage-based entitlement is a limited resource that your organization can use on a periodic basis—such as the allowed number of monthly logins to a Partner Community or the record limit for Data.com list users.

V

Visualforce

A simple, tag-based markup language that allows developers to easily define custom pages and components for apps built on the platform. Each tag corresponds to a coarse or fine-grained component, such as a section of a page, a related list, or a field. The components can either be controlled by the same logic that is used in standard Salesforce pages, or developers can associate their own logic with a controller written in Apex.

Vote, Idea

In an ideas community, a vote means you have either promoted or demoted an idea. After you vote on an idea, your nickname displays at the bottom of the idea's detail page to track that your vote was made. You can use your Recent Activity page to see a list of all the ideas you have voted on.

Vote, Reply

In an answers community, a vote means you either like or dislike a reply to a question.

W

Web Direct Leads

Web direct leads is a specific lead source indicating that the lead was generated when a user, who has bookmarked your website or directly typed the URL of your website into a browser, filled out the Web-to-Lead form containing the Salesforce tracking code.

Web Links

See Custom Links.

Web Referral Leads

Web referral lead is a specific lead source indicating that the lead was generated when a user navigated to your website using a referring link on another site and filled out the Web-to-Lead form containing the Salesforce tracking code. For example, if a user is browsing your partner's website and clicks on a link to your website, then fills out

your Web-to-Lead form, a Web referral lead is generated. The lead source details include the referring URL for each Web referral lead.

Web-to-Case

Functionality that lets you gather customer support issues and feedback on your company's website and then generate cases using that data.

Web-to-Lead

Functionality that lets you gather registration or profile information on your company's website and then generate leads using that data.

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.

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.

X

No Glossary items for this entry.

Y

No Glossary items for this entry.

Z

Zone

Zones organize ideas and questions into logical groups, with each zone having its own focus and unique ideas and questions.