Navigation & Search

Overview

In this section, you will find basic information about the Salesforce interface, search function, objects and records, etc. The aim is to help you get familiar with the system and easily find the information you are looking for.

To know more, watch the following videos!

- 'Search in Salesforce'
- 'How to change your personal settings in Salesforce'

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Step By Step

How to log into Salesforce?

Terminology

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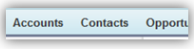
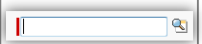
Screenshot	Terminology	Description
	**Tab**	Tabs are used to organize all the information stored in bridge Front Office , so that it is easier for you to find similar types of data
	App	Apps contain a collection of Tabs. Users must have at least one App assigned to their Profile.
	Record	A Record contains all the information about a row of information you see displayed in a Tab. Similar records are stored in an Object (Table of data)
	Related list	A Related List sits below the Record Detail page. It contains further useful information about other Records that are related to the selected Record.
	**Field**	A Record holds a number of fields, all describing attributes of that Record. When you edit a Record, you can see that there are many different types of field e.g. Text, Numeric, Lookup, List, and Check Box.
	Link	A link is simply a hyperlink, which may open another Record, a report or indeed another web site

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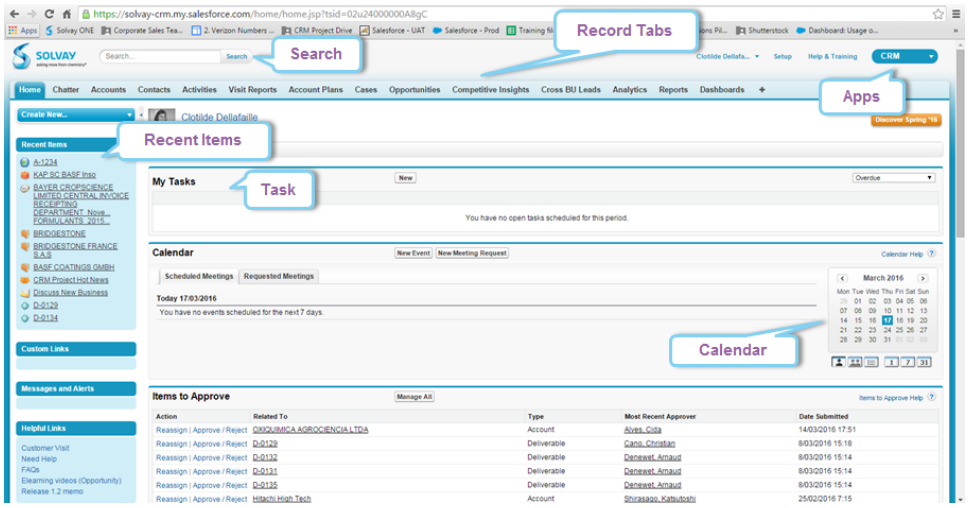
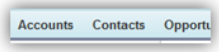
Icon	Terminology	Des
	Account	The object "Account" is used for capturing an
	Contact	The object "Contact" is an individual who wor
	Opportunity	The object "Opportunity" is used for capturing
	Reports	A Report is a way to summarize your data
	Dashboards	A dashboard is a group of charts that graphic pipeline information
	Activities	Activities facilitate collaboration by assigning and others of actions for an opportunity
	Quote	The object 'Quote' allows to create, manage (growth or recurrent business)
	Cases (Complaint, Sample, Customer Request)	Cases are objects allowing to create and mar and sample requests.
	Competitor	The object 'competitor' is used to manage inf
	Cross-BU lead	The object 'cross BU lead' is used to share w during an interaction with the market and that the Group.
	Competitive insights	With the object 'competitive insights', you can from customers as a result of ongoing negotia
	Market segmentation	With market segmentation object, you can de your sales and get more insights into your ma

Home Page



Search functions

Salesforce.com offers advanced search functionalities to help you easily find information within CRM. When searching for information related to a specifi

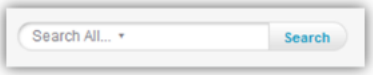


, which enables you to interact with that object database. You can then perform your search with the help of 'Views' (some a

Besides, to find information, you can rely on the search functions.

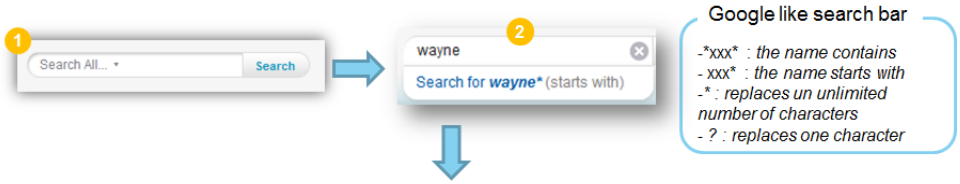
There are 2 types of search functions, for which different search principles apply:

1.The global search (on top of the Salesforce page)

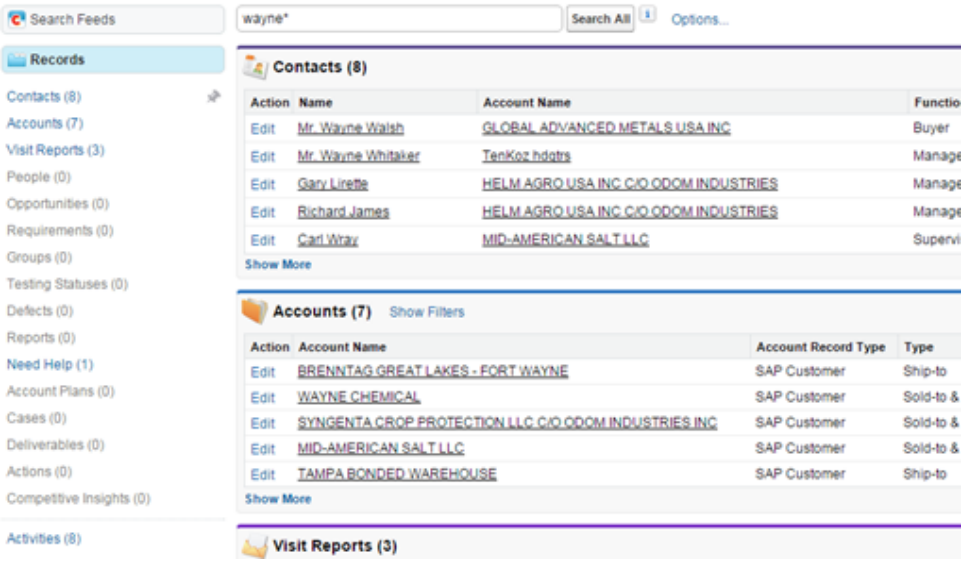


2.The lookups search functions embedded in the interface to find a specific pre-defined object, for example to find a Corporate Group

1. The Global Search



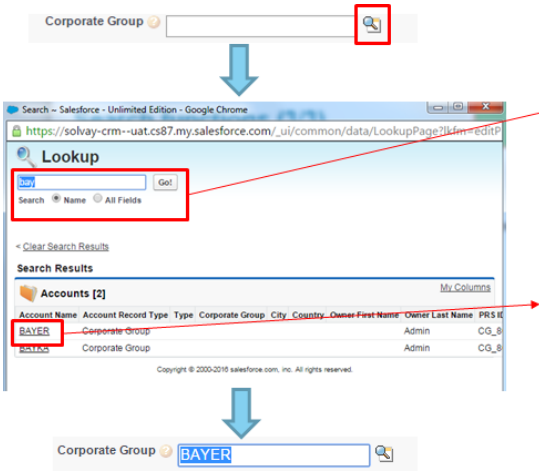
You find search results for all the objects you most work with that are related to your search criteria "Wayne"; the object you most work with can be accounts, contacts, visit reports, etc. where the word 'Wayne' appears' in the specific record itself and/or in the attachment related to these records. Besides, search results are ordered according to the items you work with most.



2. The Lookup Search

Lookup search are used to search for information that is related to another object in the CRM.

A. **You can enter your search** directly in the box and click on the 'lookup' glass to view the choices OR directly click on the 'lookup' glass to start your s



B. You can search either by :

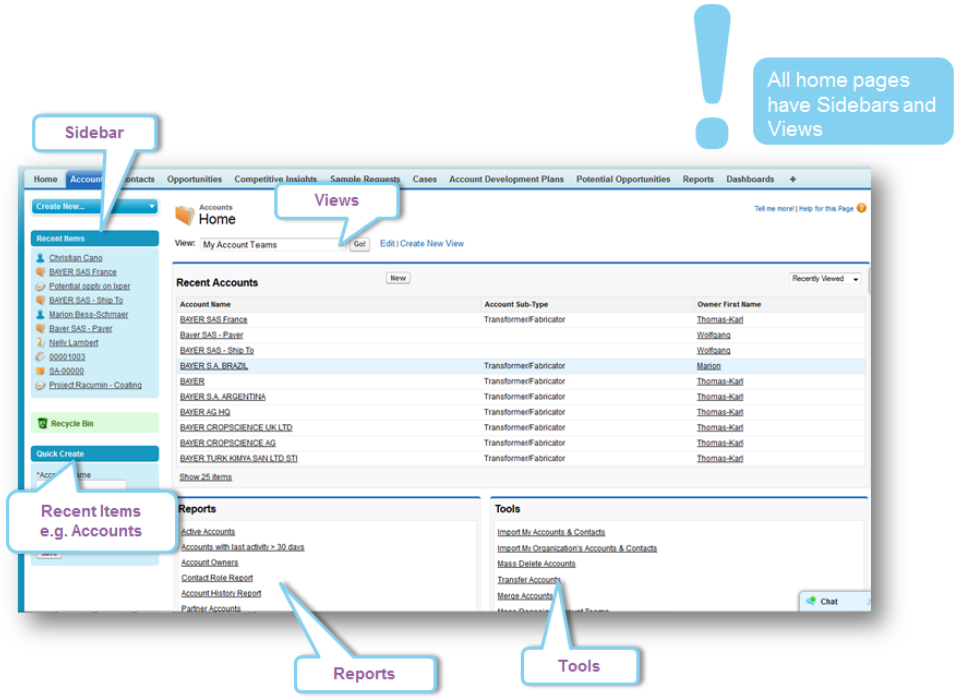
- **'Name':** on the specific object you are looking for (in this example; the Corporate Group)
- **'All Fields':** it will search and filter on all fields (name + other columns)

*-*xxx* : the name contains*
- xxx : the name starts with*
- ? : replaces one character

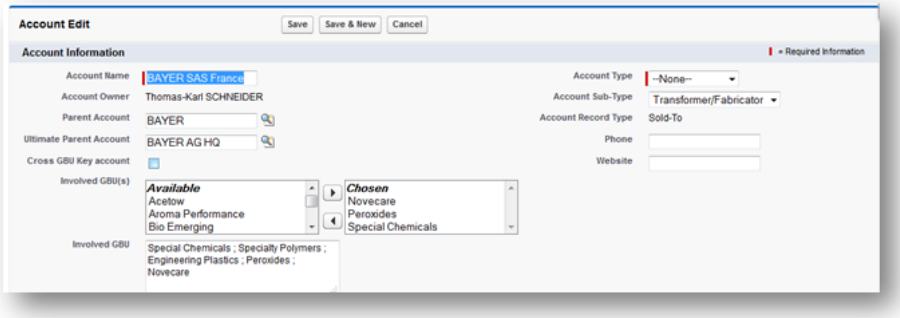
C. Click on the value ('name') you'd like to select

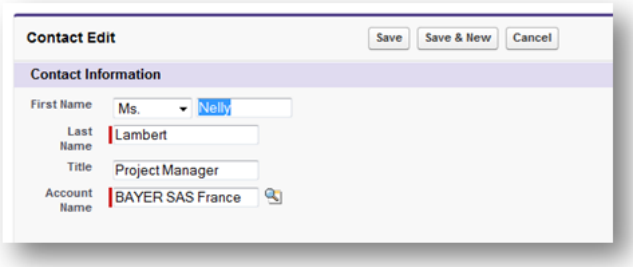
D. Your value is now selected!

Record Page



Mandatory Fields





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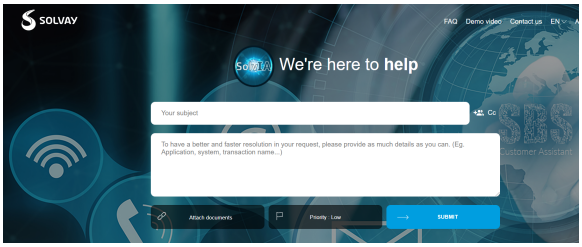
Related articles

- Chatter

Need help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : https://solvia.solvay.com/



you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example