

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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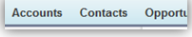
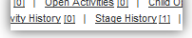
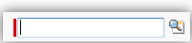
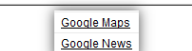
Concerned profiles:

ALL

Step By Step

How to log into Salesforce?	
UAT environment https://solvay-crm--uat.cs88. my.salesforce.com	PROD environment https://solvay-crm.my.sale sforce.com
Terminology	

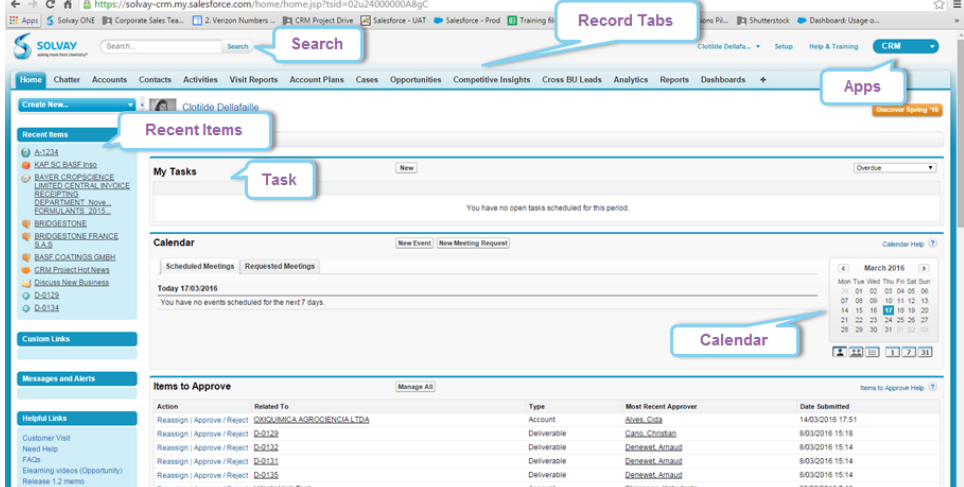
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Screenshot	Terminology	Description
	Tab	Tabs are used to organize all the information stored in bridge Front Office, so that it is easier for you to find similar types of data
	App	Apps contain a collection of Tabs. Users must have at least one App 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	Description
	Account	The object "Account" is used for capturing and managing information about a company or organization.
	Contact	The object "Contact" is an individual who works for a company or organization.
	Opportunity	The object "Opportunity" is used for capturing and managing information about a potential sale.
	Reports	A Report is a way to summarize your data.
	Dashboards	A dashboard is a group of charts that graphically represent pipeline information.
	Activities	Activities facilitate collaboration by assigning and tracking actions for an opportunity.
	Quote	The object "Quote" allows to create, manage, and track sales opportunities.
	Cases (Complaint, Sample, Customer Request)	Cases are objects allowing to create and manage customer issues and sample requests.
	Competitor	The object "competitor" is used to manage information about your competitors.
	Cross-BU lead	The object "cross BU lead" is used to share leads between different business units.
	Competitive insights	With the object "competitive insights", you can gain insights into your competitors.
	Market segmentation	With market segmentation object, you can define your sales and get more insights into your market.

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 specific

Accounts Contacts Opportu

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

View: Corporate Group not validated Go! Clone | Create New View

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

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

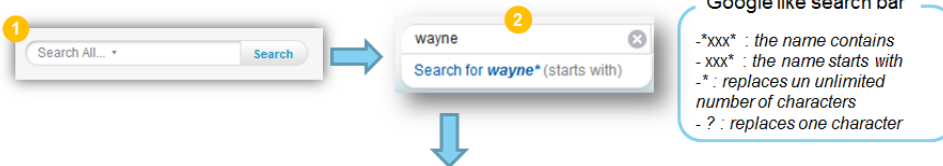
1. The [global search](#) (on top of the Salesforce page)

Search All... Search

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

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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.

Search Feeds wayne* Search All Options...

Records

Contacts (8)

Action	Name	Account Name	Function
Edit	Mr. Wayne Walsh	GLOBAL ADVANCED METALS USA INC	Buyer
Edit	Mr. Wayne Whitaker	TenKor hdqts	Manage
Edit	Gary Lirette	HELM AGRO USA INC C/O ODOM INDUSTRIES	Manage
Edit	Richard James	HELM AGRO USA INC C/O ODOM INDUSTRIES	Manage
Edit	Carl Wray	MID-AMERICAN SALT LLC	Supervi

Show More

Accounts (7) Show Filters

Action	Account Name	Account Record Type	Type
Edit	BRENTAG GREAT LAKES - FORT WAYNE	SAP Customer	Ship-to
Edit	WAYNE CHEMICAL	SAP Customer	Sold-to &
Edit	SYNGENTA CROP PROTECTION LLC C/O ODOM INDUSTRIES INC	SAP Customer	Sold-to &
Edit	MID-AMERICAN SALT LLC	SAP Customer	Sold-to &
Edit	TAMPA BONDED WAREHOUSE	SAP Customer	Ship-to

Show More

Visit Reports (3)

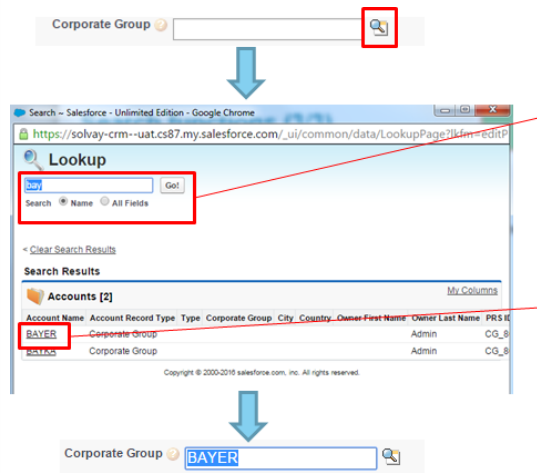
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2. The Lookup Search

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 search



B. You can search either by :

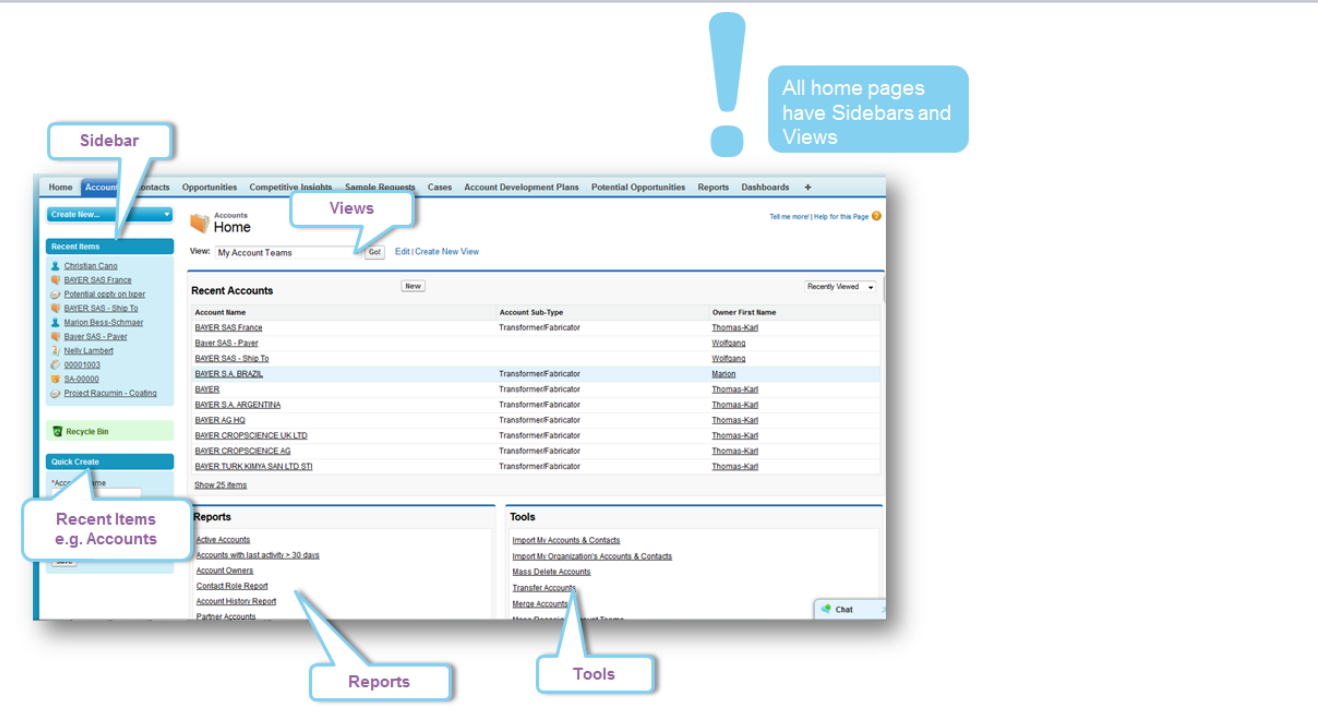
- 'Name': on the specific object you are looking for (in this example; the Corporate Group)
- 'All Fields': it will search and filter on all fields (name + other columns)

- *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



! All home pages have Sidebars and Views

Sidebar

Views

Recent Items e.g. Accounts

Reports

Tools

Mandatory Fields

Account Edit [Save] [Save & New] [Cancel]

Account Information ! * Required information

Account Name	BAYER SAS France	Account Type	--None--
Account Owner	Thomas-Karl SCHNEIDER	Account Sub-Type	Transformer/Fabricator
Parent Account	BAYER	Account Record Type	Sold-To
Ultimate Parent Account	BAYER AG HQ	Phone	
Cross GBU Key account	☐	Website	

Involved GBU(s)

Available	Chosen
Acetow	Novocare
Aroma Performance	Peroxides
Bio Emerging	Special Chemicals

Involved GBU

Special Chemicals ; Specialty Polymers ;
Engineering Plastics ; Peroxides ;
Novocare

Contact Edit [Save] [Save & New] [Cancel]

Contact Information

First Name Ms. Nelly

Last Name Lambert

Title Project Manager

Account Name BAYER SAS France

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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