

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'](#)

Table of content

- [Step By Step](#)
 - [How to log into Salesforce?](#)
 - [Terminology](#)
 - [Home Page](#)
 - [Search functions](#)
 - [Record Page](#)
 - [Mandatory Fields](#)
- [Related articles](#)
- [Need help?](#)

Concerned profiles:

ALL

Step By Step

How to log into Salesforce?

UAT
environment

[https://solvay-crm--uat.cs88.
my.salesforce.com](https://solvay-crm--uat.cs88.my.salesforce.com)

PROD
environment

[https://solvay-crm.my.sale
sforce.com](https://solvay-crm.my.salesforce.com)

Terminology

1

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

2

Icon	Terminology	Description
	Account	The object "Account" is used for capturing an
	Contact	The object "Contact" is an individual who works
	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 manage and sample requests.
	Competitor	The object 'competitor' is used to manage information
	Cross-BU lead	The object 'cross BU lead' is used to share work 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 negotiations
	Market segmentation	With market segmentation object, you can define your sales and get more insights into your market

Home Page

The screenshot shows the Salesforce CRM Home Page for user Clotilde DellaFalle. Key features are highlighted with callouts:

- Search:** Located at the top of the page.
- Record Tabs:** Located in the top navigation bar.
- Apps:** Located in the top right corner.
- Recent Items:** A list of recently accessed records on the left sidebar.
- Task:** A section for managing tasks, currently showing no open tasks.
- Calendar:** A calendar view for March 2016, showing no events scheduled.

At the bottom, there is a table titled "Items to Approve":

Action	Related To	Type	Most Recent Approver	Date Submitted
Reassign Approve Reject	COMUNICA AGRICOLA LTDA	Account	Aves_Gota	14/03/2016 17:51
Reassign Approve Reject	D-0129	Deliverable	Carlo_Cornabai	8/03/2016 15:18
Reassign Approve Reject	D-0132	Deliverable	Daniela_Ambud	8/03/2016 15:14
Reassign Approve Reject	D-0131	Deliverable	Daniela_Ambud	8/03/2016 15:14
Reassign Approve Reject	D-0135	Deliverable	Daniela_Ambud	8/03/2016 15:14
Reassign Approve Reject	HINCHI High Tech	Account	Shiragap_Kahutopi	25/02/2016 17:15

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 Opport

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

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:

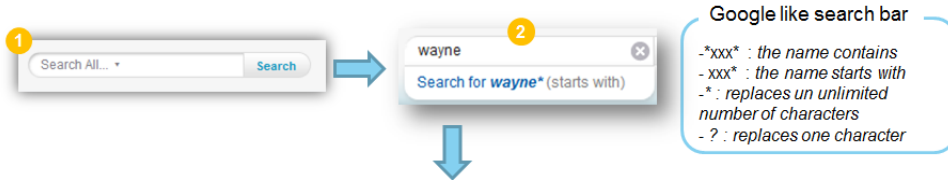
1. The global search (on top of the Salesforce page)



2. The lookup 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.

Search Feeds wayne* Search All Options...

Records

- Contacts (8)
- Accounts (7)
- Visit Reports (3)
- People (0)
- Opportunities (0)
- Requirements (0)
- Groups (0)
- Testing Statuses (0)
- Defects (0)
- Reports (0)
- Need Help (1)
- Account Plans (0)
- Cases (0)
- Deliverables (0)
- Actions (0)
- Competitive Insights (0)
- Activities (8)

Contacts (8)

Action	Name	Account Name	Function
Edit	Mr. Wayne Walsh	GLOBAL ADVANCED METALS USA INC	Buyer
Edit	Mr. Wayne Whitaker	TenKoz 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)

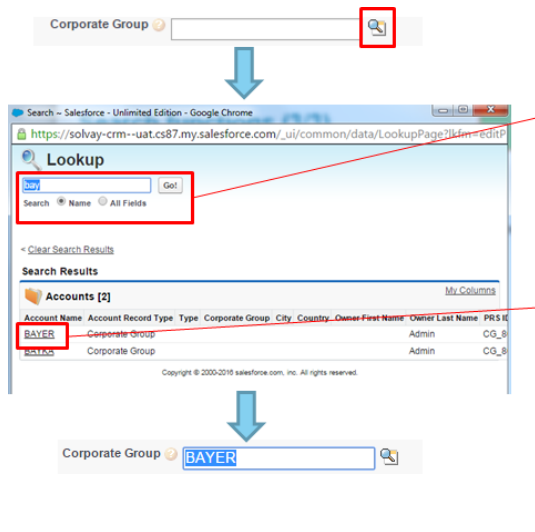
If r se:

Yo clic

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 :

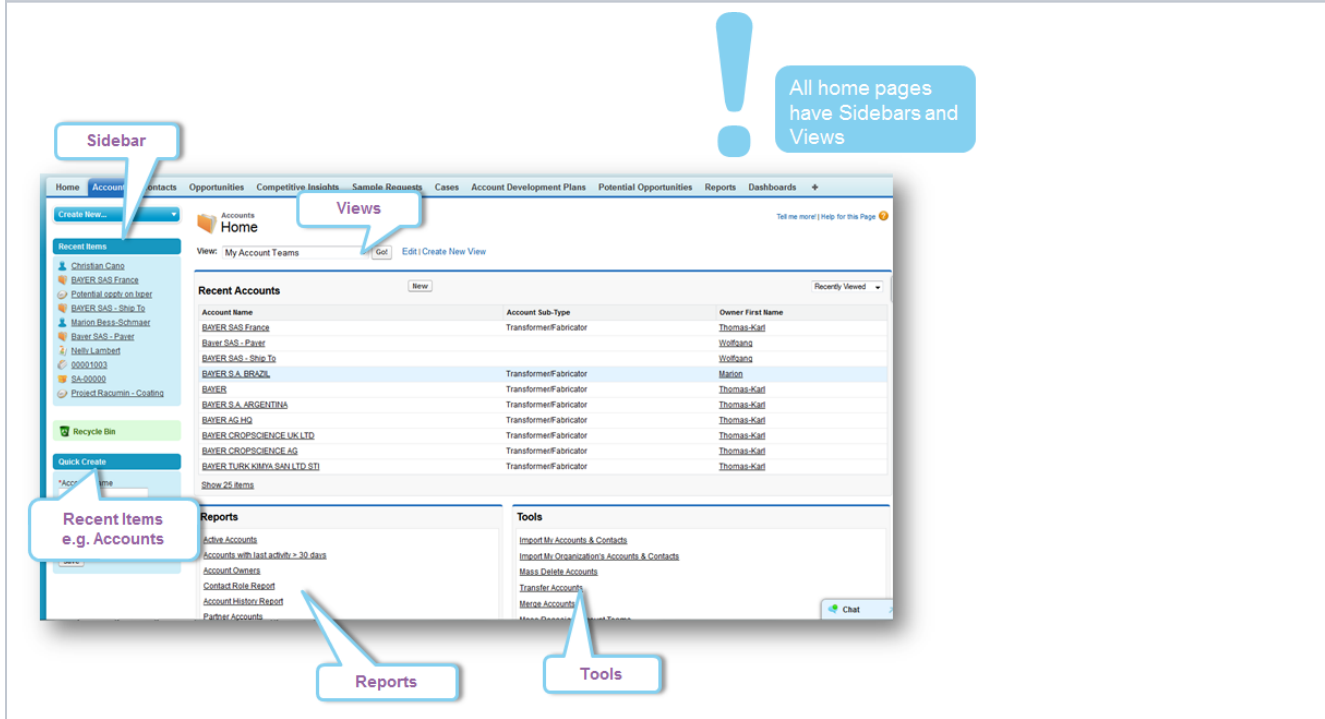
- 'Name': on the specific object you are looking for (in this example; the Corporate Group)
- 'All Fields': it will search and filter on all fields (name + other columns)

*-*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



Sidebar

Views

Recent Items e.g. Accounts

Reports

Tools

All home pages have Sidebars and Views

Account Name	Account Sub-Type	Owner First Name
BAUER SAS France	Transformer/Fabricator	Thomas-Karl
Bayer SAS - Payer		Wolfgang
BAUER SAS - Ship To		Wolfgang
BAUER S.A. BRAZIL	Transformer/Fabricator	Marcelo
BAUER	Transformer/Fabricator	Thomas-Karl
BAUER S.A. ARGENTINA	Transformer/Fabricator	Thomas-Karl
BAUER JG HQ	Transformer/Fabricator	Thomas-Karl
BAUER CROPSCIENCE UK LTD	Transformer/Fabricator	Thomas-Karl
BAUER CROPSCIENCE AG	Transformer/Fabricator	Thomas-Karl
BAUER TURK KIMYA SAN LTD STI	Transformer/Fabricator	Thomas-Karl

Mandatory Fields

Account Edit Save Save & New Cancel

Account Information Required Information

Account Name: BAYER SAS France
 Account Owner: Thomas-Karl SCHNEIDER
 Parent Account: BAYER
 Ultimate Parent Account: BAYER AG HQ
 Cross GBU Key account:

Account Type: --None--
 Account Sub-Type: Transformer/Fabricator
 Account Record Type: Sold-To
 Phone:
 Website:

Involved GBU(s):
 Available: Acetow, Aroma Performance, Bio Emerging
 Chosen: Novicare, Peroxides, Special Chemicals

Involved GBU: Special Chemicals ; Specialty Polymers ; Engineering Plastics ; Peroxides ; Novicare

Contact Edit Save Save & New Cancel

Contact Information

First Name: Ms. Nelly
 Last Name: Lambert
 Title: Project Manager
 Account Name: BAYER SAS France

[Back to the top](#)

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