

B - Salesforce terminology

Here is a list of commonly used terms in Salesforce and Convergence.

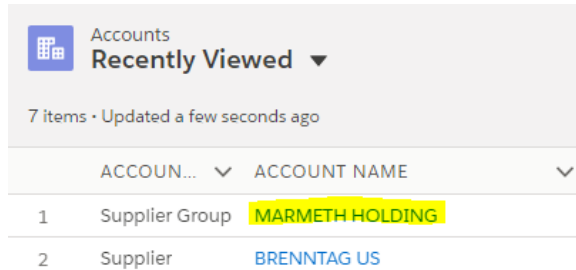
Tabs and objects

Your Convergence application has several tabs. Each tab represents an object.



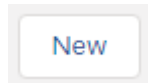
Links

In Convergence, every blue text is a link. In Convergence, links bring to a new page.



Buttons

Buttons exemple : "Save", "Edit", "New Visit Minute".



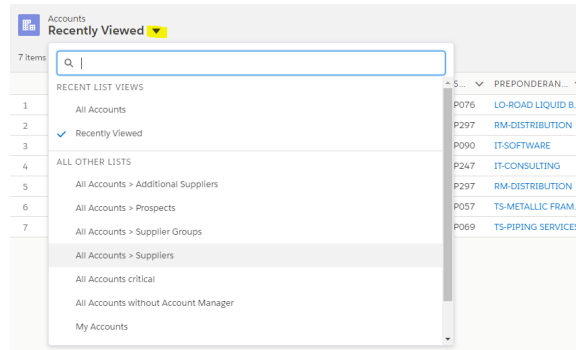
Tool tips

Tooltips are help texts : just hover the sign "i" with your mouse and the help text will show.



View menus

On any object's home page, click on this dropdown menu and choose amongst listviews. Click on the "Go" button if needed.



Listviews

Listviews display a list of records for a given object. In this example, the listview "0. All Accounts" shows all suppliers in Convergence.

ACCOUNT...	ACCOUNT NAME	CITY	COUNTRY	S...	PREPONDER...	NATURE
1	Supplier Group EASTMAN CHEMICAL CO...	KINGSPO	United States	P097	RM-RAW MATE...	CA-Critical Account
2	Supplier Group HYDRITE CHEMICAL	Brookfield	United States	P297	RM-DISTRIBU...	CA-Critical Account
3	Supplier Group AIR LIQUIDE SA ETU EXP...	PARIS	France	P038	RM-INDUSTRIA...	CA-Critical Account
4	Supplier Group AIR PRODUCTS AND CHE...	ALLENTOWN	United States	P038	RM-INDUSTRIA...	CA-Critical Account
5	Supplier Group LINDE AG	MÜNCHEN	Germany	P038	RM-INDUSTRIA...	CA-Critical Account
6	Supplier Group PRAXAIR INC	DANBURY	United States	P038	RM-INDUSTRIA...	CA-Critical Account
7	Supplier Group ANSALDO ENERGIA	NON SPECIFIE...	Non Specified C...	P028	TG-ENGINEERI...	CA-Critical Account
8	Supplier Group FRONTIER KEMPER CON...	NON SPECIFIE...	Non Specified C...	P051	TS-ROTATING E...	CA-Critical Account
9	Supplier Group CLEAN HARBORS ENVIR...	NON SPECIFIE...	Non Specified C...	P111	TS-WASTE TREA...	CA-Critical Account
10	Supplier Group FLOWSERVE CORPORATI...	IRVING	United States	P078	TG-ROTATING E...	CA-Critical Account

Fields

Fields are used to store informations : this is where you read or write things... Fields with an asterisk are mandatory.

Information

Contract Id

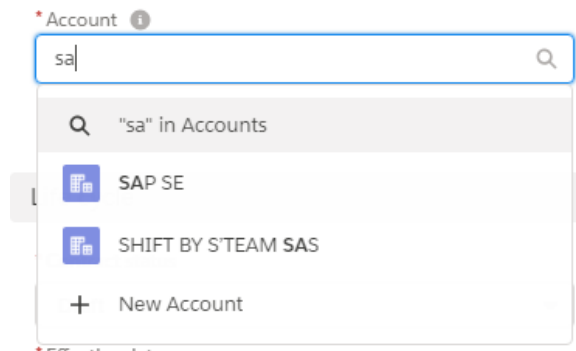
External Key

Hierarchical type

Lookup fields

Click on the magnifier to fill in lookup fields. They are used to search in the Convergence database more easily.

In the lookup field, select always "All fields" This allows for more results in research



Account

sa

Accounts

50+ Results - Sorted by Relevance

ACCOUNT RECORD TYPE	ACCOUNT NAME	CITY	COUNTRY	SEGMENT CODE	PREPONENT
Supplier Group	AIR LIQUIDE SA ETU EXPLOIT PROCEDES GC	PARIS	France	P038	RM-INDUSTRIAL
Supplier	UNIBAL CARBOCLORO S.A.	CUBELIO	Spain	P037	RM-RAW MATES
Supplier	RISESMART SA	BRUXELLES	Belgium	P084	GE-HUMAN RES
Supplier	BRENTAG MEXICO SA DE CV	TUXTILANEDO DE MEXICO	Mexico	P297	RM-DISTRIBUTI
Supplier	DTK TRADING SA	GENEVA	Switzerland	P231	EN-SOLID FUEL
Supplier Group	MSC MEDITERRANEAN SHIPPING COMPANY HOLDING SA	GENEVE	Switzerland	P252	LO-SEA LINE

Quick Search

The Convergence Quick Search is on top of any screen. Use it to search anywhere in Convergence.



Object Details

When you click on any object (Account, RFI, Visit Minute...), a page is displayed. Object details is the first part of this page. The second part are all the related lists : see below.

BRENTAG US

Account Record Type: Supplier
 Address: 5054 BOTTVILLE PIKE
 BEADING, Pennsylvania 19605
 United States

Segment code: P297
 Predecessor Segment: RM-DISTRIBUTION
 Nature: GI-Critical Account

DETAILS | PROPERTIES | ACTIVITY | CHATTER

Account Name: BRENTAG US
 Parent Account: BRENTAG GC
 Language: English
 Printing Block
 Purchasing Block

Account Record Type: Supplier
 External Key: 2156250
 SF Internal Key: A-001106
 OCI Vendor code

360 View | (Link)Mark for Desktop

Account Properties (3)

- AP-000000001
 GPS Axis: RM-DISTRIBUTION
 GEO Axis: NAM
 ORG Axis: Solvay - All GBU's
- AP-0000003127
 GPS Axis: RM-DISTRIBUTION
 GEO Axis: NAM
 ORG Axis: Solvay - All GBU's
- AP-0000003036
 GPS Axis: RM-DISTRIBUTION
 GEO Axis: NAM
 ORG Axis: PURCHASING AND SUPPLY CHAIN EXCE...

Related Lists

On any object's page, related list are small tables showing informations linked to this object. For example, there is a "Visit Minute" related list on any account page : it shows all the Visit minutes from this account.

Account Properties (3)

AP-000000001

GPS Axis: RM-DISTRIBUTION
 GEO Axis: NAM
 ORG Axis: Solvay - All GBU's

AP-0000003127

GPS Axis: RM-DISTRIBUTION
 GEO Axis: NAM
 ORG Axis: Solvay - All GBU's

AP-0000003036

GPS Axis: RM-DISTRIBUTION
 GEO Axis: NAM
 ORG Axis: PURCHASING AND SUPPLY CHAIN EXCE...

[View All](#)

