

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

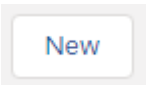
In Convergence, every blue text is a link. In Convergence, links bring to a new page.

A screenshot of a table titled 'Accounts Recently Viewed' with a dropdown arrow. Below the title, it says '7 Items • Updated a few seconds ago'. The table has two columns: 'ACCOUNT NAME' and 'ACCOUNT ID'. The first row shows 'Supplier Group' with the value 'MARMETH HOLDING' highlighted in yellow. The second row shows 'Supplier' with the value 'BRENNTAG US' in blue text.

	ACCOUNT NAME	ACCOUNT ID
1	Supplier Group	MARMETH HOLDING
2	Supplier	BRENNTAG US

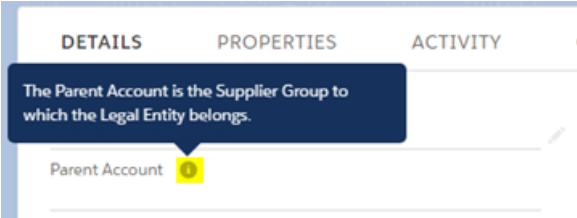
Buttons

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



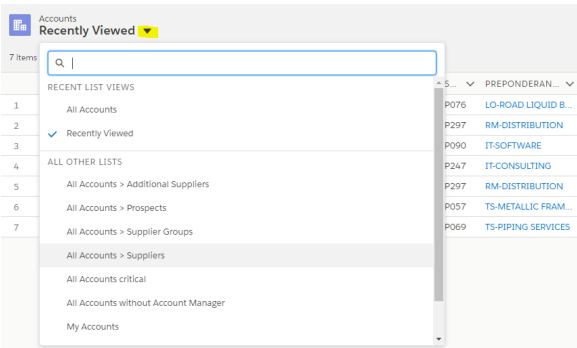
Tool tips

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.

A screenshot of a software interface showing a listview titled 'All Accounts'. The listview displays a table of 10 records. The table has columns for 'ACCOUNT NAME', 'CITY', 'COUNTRY', 'S...', 'PREPONDERAN...', and 'NATURE'. The records are sorted by 'Nature' and filtered by 'all accounts'. The records are as follows:

	ACCOUNT NAME	CITY	COUNTRY	S...	PREPONDERAN...	NATURE
1	SUPPLIER GROUP EASTMAN CHEMICAL CO...	KINGSPORT	United States	P097	RM-RAW MATE...	CA-Critical Account
2	SUPPLIER GROUP HYDRITE CHEMICAL	Brookfield	United States	P297	RM-DISTRIBUTI...	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 PRAAXAIR INC	DANBURY	United States	P038	RM-INDUSTRIA...	CA-Critical Account
7	SUPPLIER GROUP ANSALDO ENERGIA	NON SPECIFIC...	Non Specified C...	P028	TG-ENGINEERI...	CA-Critical Account
8	SUPPLIER GROUP FRONTIER KEMPER CON...	NON SPECIFIC...	Non Specified C...	P051	TS-ROTATING E...	CA-Critical Account
9	SUPPLIER GROUP CLEAN HARBORS ENVIR...	NON SPECIFIC...	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

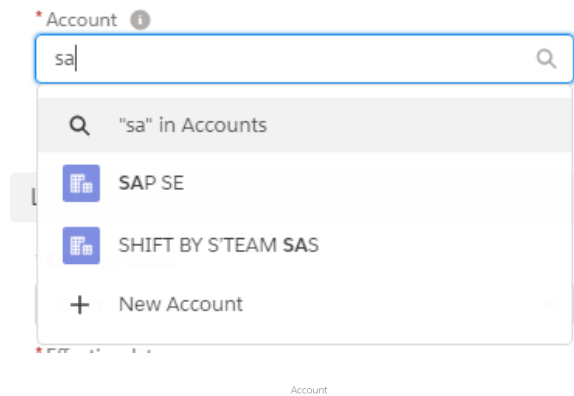
Fields are used to store informations : this is where you read or write things... Fields with an asterisk are mandatory.

A screenshot of a software interface showing a form titled 'Information'. The form contains three fields: 'Contract Id', 'External Key', and 'Hierarchical type'. The 'Contract Id' field is a text input field. The 'External Key' field is a text input field. The 'Hierarchical type' field is a dropdown menu with the option 'Stand-alone' selected. The 'Hierarchical type' field has a yellow asterisk icon next to it, indicating it is mandatory.

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 RECORD TYPE	ACCOUNT NAME	CITY	COUNTRY	SEGMENT CODE	PREPORDERANT
Supplier Group	AIR LIQUIDE SA ETU EXPLOIT PROCEDES GC	PARIS	France	P03B	RM-INDUSTRIAL
Supplier	UNIPAR CARBOCLORO S.A.	CUBATRO	Brazil	P097	RM-SOLID MATES
Supplier	RSESMART SA	BRUXELLES	Belgium	P08A	GE-HUMAN RES
Supplier	BRENTAG MEXICO SA DE CV	TULITLAN EDO DE MEXICO	Mexico	P297	RM-DISTRIBUT
Supplier	OTEX TRADING SA	GENEVA	Switzerland	P231	EN-SOLID FUEL
Supplier Group	MSC MEDITERRANEAN SHIPPING COMPANY HOLDING SA	GENEVE	Switzerland	P252	LO-SEA LINE

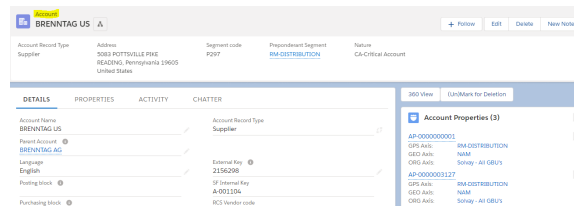
Quick Search

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.



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.

