

B - Salesforce terminology

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

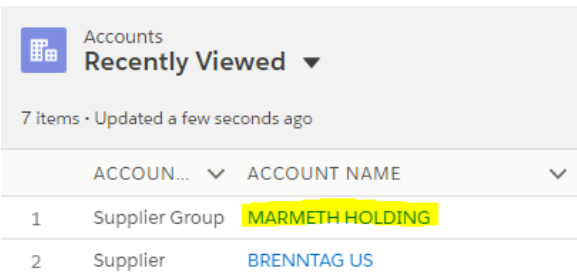
Tabs and objects

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



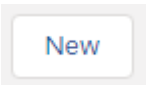
Links

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



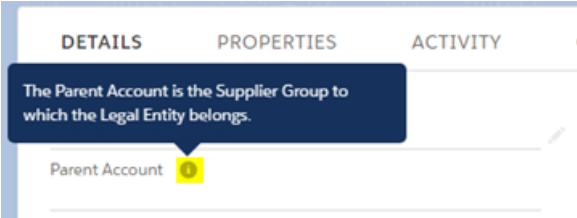
Buttons

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



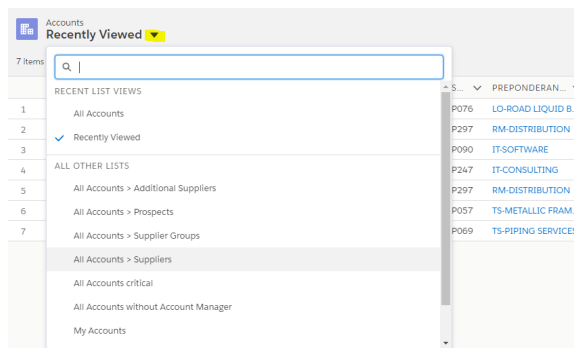
Tool tips

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.

Accounts

All Accounts ▾

50+ Items • Sorted by Nature • Filtered by all accounts • Updated a minute ago

	ACCOUNT...	ACCOUNT NAME	CITY	COUNTRY	S...	PREPONDER...	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	PRAAIR 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 a mandatory field.

Information

Contract Id

External Key

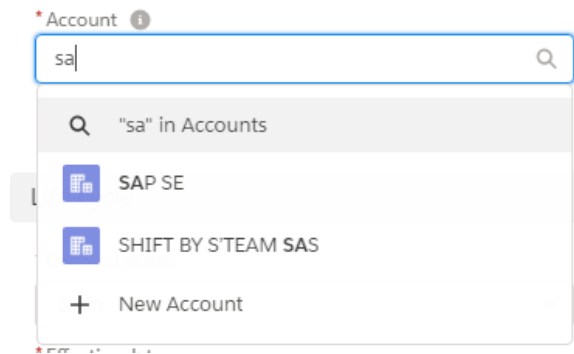
* Hierarchical type

Stand-alone

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	PREPORDERANT
Supplier Group	AIR LIQUIDE SA ETU EXPLOIT PROCEDES GC	PARIS	France	P038	RM-INDUSTRIAL
Supplier	UNIPAR CARBOCLORO S.A.	CUBATERO	Brazil	P097	RM-SOLID MATES
Supplier	RISERBART SA	BRUXELLES	Belgium	P084	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

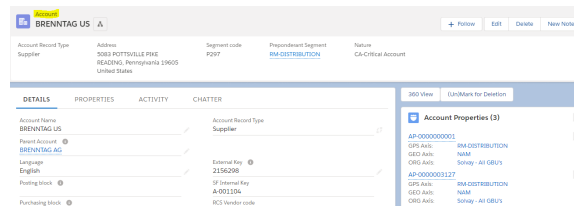
Quick Search

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.

