

# 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

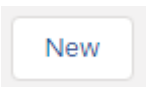
In Convergence, every blue text is a link. In Convergence, links bring to a new page.

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     |

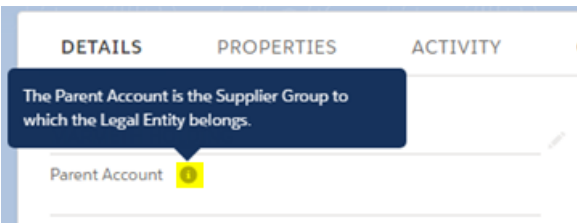
## Buttons

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



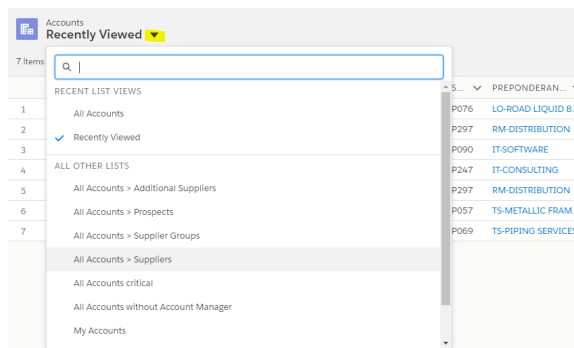
## Tool tips

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: ACCOUNT NAME, CITY, COUNTRY, S., PREPONDERAN..., and NATURE. The records are as follows:

| ACCOUNT NAME            | CITY            | COUNTRY            | S.   | PREPONDERAN...   | NATURE              |
|-------------------------|-----------------|--------------------|------|------------------|---------------------|
| EASTMAN CHEMICAL CO...  | KINGSPORT       | United States      | P097 | RM-RAW MATE...   | CA-Critical Account |
| HYDRITE CHEMICAL        | Brookfield      | United States      | P297 | RM-DISTRIBUTI... | CA-Critical Account |
| AIR LIQUIDE SA ETU EXP. | PARIS           | France             | P038 | RM-INDUSTRIA...  | CA-Critical Account |
| AIR PRODUCTS AND CHE... | ALLENTOWN       | United States      | P038 | RM-INDUSTRIA...  | CA-Critical Account |
| LINDE AG                | MÜNCHEN         | Germany            | P038 | RM-INDUSTRIA...  | CA-Critical Account |
| PRAAXAIR INC            | DANBURY         | United States      | P038 | RM-INDUSTRIA...  | CA-Critical Account |
| ANSALDO ENERGIA         | NON SPECIFIC... | Non Specified C... | P028 | TG-ENGINEERI...  | CA-Critical Account |
| FRONTIER KEMPER CON...  | NON SPECIFIC... | Non Specified C... | P051 | TS-ROTATING E... | CA-Critical Account |
| CLEAN HARBORS ENVIR...  | NON SPECIFIC... | Non Specified C... | P111 | TS-WASTE TREA... | CA-Critical Account |
| FLOWSERVE CORPORATI...  | IRVING          | United States      | P078 | TG-ROTATING E... | CA-Critical Account |

## Fields

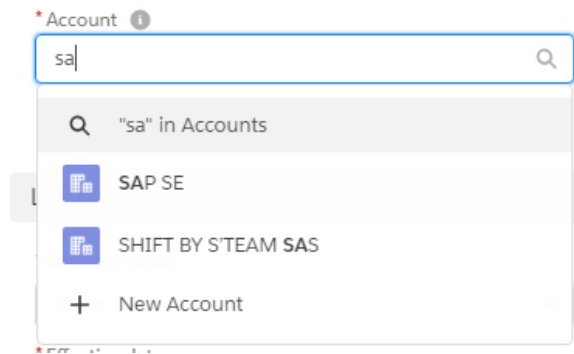
Fields are used to store informations : this is where you read or write things... Fields with an asterisk are mandatory.

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. There is a yellow asterisk icon next to the 'Hierarchical type' field label.

## 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            | UNIPAC CARBOCLORO S.A.                        | CUBATERO               | Spain       | P097         | RM-SOLID MATES |
| Supplier            | RISESMART 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.

**BRENTAG US**

Account Record Type: Supplier Address: 5051 POTTSVILLE PIKE, BEADING, Pennsylvania 19005, United States Segment code: P097 Preparedness Tagment: RM-DISTRIBUTION Nature: CA-Critical Account

**DETAILS** PROPERTIES ACTIVITY CHATITER

Account Name: BRENTAG US Account Record Type: Supplier

Parent Account: BRENTAG AG External Key: 2156299

Language: English SF Internal Key: A-001104

Purchasing block: RCI tender code

**Account Properties (3)**

AP-0000000001  
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-0000000001](#)  
GPS Axis: RM-DISTRIBUTION  
GEO Axis: NAM  
ORG Axis: Solvay - All GBU's

[AP-0000003127](#)  
GPS Axis: RM-DISTRIBUTION  
GEO Axis: NAM  
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[AP-0000003036](#)  
GPS Axis: RM-DISTRIBUTION  
GEO Axis: NAM  
ORG Axis: PURCHASING AND SUPPLY CHAIN EXCE...

[View All](#)

