Learn Salesforce Basics

Salesforce, Winter '16

Find and Organize Information

Search

When you search for your information in Salesforce, the search engine efficiently finds and displays relevant results you have access to through a complex search process. This is whether from the full Salesforce site, a Salesforce1 mobile app, or a custom search implementation built on the Salesforce platform.

Salesforce provides a search engine that effectively finds information such as accounts, contacts, files, articles, and products in your organization. Each time you create a new record, the search engine breaks up the searchable information into pieces it easily recognizes and stores them in an
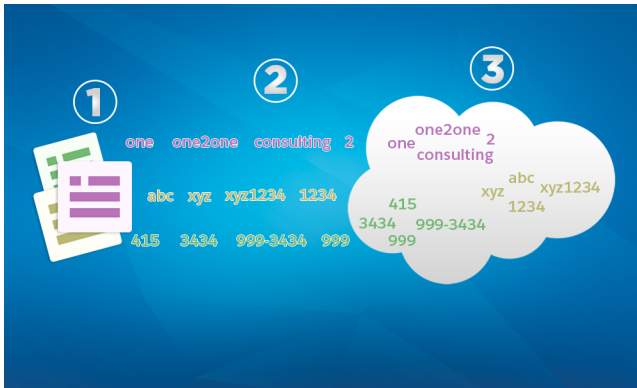
index. When you enter your search, it efficiently finds relevant results for you by breaking apart your search terms and finding matches for them from that index. The search engine returns results you have permission to view.

Here's an overview of the search process.

When you create or update a record (1), the search engine breaks up the record's searchable text into smaller terms (2). Then, it stores those smaller terms in the search index (3).

📝 **Note:** After a searchable object's record is created or updated, it could take about 15 minutes or more for the updated text to become searchable. An object's records are only searchable after they're stored in the search index.

When you enter a search term in the search field (1), the search engine breaks up your search term into smaller terms (2). It matches those smaller terms to the record information stored in the index (3), ranks the associated records by relevancy (4), and returns the results you have access to (5).

For more information on what you can do with Search, check out these videos.

▶ Search in Salesforce Classic

▶ Search in Salesforce Lightning Experience

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How Does Search Break Up Information?

Each time you create a new record, the search engine breaks up the searchable information into pieces it easily recognizes and stores them in an index.

How Is Search Different Between Lightning Experience, Salesforce Classic, and Salesforce1?

Global search in the full Salesforce site (whether Lightning Experience or Salesforce Classic) and Salesforce1 mobile app uses the same search index, so you're always searching the same data. You see the same set of recently accessed records in instant results, and search results are influenced by the same search scope (the list of objects you use the most). But remember that some standard objects aren't available in Salesforce1 and Lightning Experience, so you won't always see the exact same search results. And the global search interface is different between all of these experiences, so there are visual and navigational differences to consider.

How Do I Search in Lookup Fields?

Use lookup dialog search to associate two records together.

Which Fields Are Searchable?

Salesforce searches a unique set of fields for each object.

How Does Search Break Up Information?

Each time you create a new record, the search engine breaks up the searchable information into pieces it easily recognizes and stores them in an index.

The search engine breaks down searchable text into smaller pieces, called *tokens*, and stores them in the search index. When you search, the search engine breaks down your search terms into tokens so it can find matching tokens in the index. It returns the records associated with the matching tokens.

The search engine splits record information that contains letters, numbers, spaces, and punctuation into separate tokens.

Here are some examples of the tokens created from the given record information. You could find the record with a search using any of the indexed tokens listed.

Record Information	Indexed Tokens
Acme, Inc.	acme
	inc
Web2Lead	web2lead
	web
	2
	lead
Exhibit-XYZ1234	exhibit-xyz1234
	exhibitxyz1234
	exhibit
	xyz1234
	xyz

Record Information	Indexed Tokens
	1234
(415) 999-3434	415
	999-3434
	9993434
	999
	3434
john.smith@domain.com	john.smith@domain.com
	@domain.com
	john.smith
	john
	smith
	johnsmith
	domain.com
	domain
	com
	domaincom

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How Search Handles Terms in Chinese, Japanese, Korean, and Thai

Search finds relevant results for searches in East Asian languages such as Chinese, Japanese, Korean, and Thai by breaking up information to store in the search index.

SEE ALSO:

Search

How Search Handles Terms in Chinese, Japanese, Korean, and Thai

Search finds relevant results for searches in East Asian languages such as Chinese, Japanese, Korean, and Thai by breaking up information to store in the search index.

The search engine returns accurate search results from searches in East Asian languages that don't include spaces between words, such as Chinese, Japanese, Korean, and Thai (CJKT), using morphological tokenization.

Consider the problem of indexing the term *Tokyo Prefecture* and a subsequent search for Kyoto in Japanese.

Indexed Term	Search Term
東京都	京都
Tokyo Prefecture	Kyoto

Morphological tokenization segments the term 東京都 (Tokyo Prefecture) into two tokens.

Indexed Term	Search Term
東京	都
Tokyo	Prefecture

Which Fields Are Searchable?

Salesforce searches a unique set of fields for each object.

> 📝 **Note:** When you search for a value in a field that's hidden from you by field-level security, your results include the record that contains the field. However, you can't see the field.

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Searchable Fields by Object in Salesforce Classic

Each search type—sidebar, advanced, global, and lookup—searches a unique set of fields for each object. Your search results for a particular object depend on two factors: the type of search and the searchable fields for that object.

Searchable Fields by Object in Lightning Experience

The records included in search results depend on whether the record's object type and its fields are searchable. If you search for an object with a value that's stored in a field that isn't searchable, you won't see your desired object in your search results.

Searchable Fields by Object in Salesforce Classic

Each search type—sidebar, advanced, global, and lookup—searches a unique set of fields for each object. Your search results for a particular object depend on two factors: the type of search and the searchable fields for that object.

For example, consider an account that contains "Acme" in its `Description` field. The `Description` field isn't queried by standard lookup search, but is queried by global search and enhanced lookup search when **All Fields** is selected. So a search for Acme returns this account record only if you use either global search or enhanced lookup search with **All Fields** selected.

A few things to note about searchable fields:

- Global search finds more fields per object compared to other search types.

- By default, enhanced lookups query a limited set of fields, known as *Name* fields for each object. If your search for a record returns a large number of matches, such as a contact with a widely used name, you can instead query all searchable fields for that record to narrow your results. If available in the enhanced lookup search dialog, select **All Fields** and enter other search terms unique to the record, such as the contact's email address.

- You can't search encrypted, formula, and lookup fields.

- You can't find some objects with sidebar search or advanced search. Use global search or the search on the object's tab to find:

  – Articles

  – Chatter groups, files, topics, and people

  – Salesforce CRM Content

  – Documents

  – Price books

  – Products

  – Solutions

> 📝 **Note:** When you search for a value in a field that's hidden from you by field-level security, your results include the record that contains the field. However, you can't see the field.

This table shows the types of search supported for each object. Follow the links to see the list of searchable fields for each object.

Searchable Fields by Object in Lightning Experience

The records included in search results depend on whether the record's object type and its fields are searchable. If you search for an object with a value that's stored in a field that isn't searchable, you won't see your desired object in your search results.

> **Note:** When you search for a value in a field that's hidden from you by field-level security, your results include the record that contains the field. However, you can't see the field.

Reference the table to determine which objects you can find with a search. If an object has custom fields, you can find records of that object with the custom field values.

Object	Fields
Account	`Account Name`
	`Account Name (Local)`
	`Account Number`
	`Account Site`
	`Billing Address`
	`Description`
	`D-U-N-S Number` (This field is only available to organizations that use Data.com)
	`Fax`
	`Phone`
	`Shipping Address`
	`Ticker Symbol`
	`Website`