

Find records MUCH faster with these tricks!

Here are some neat tricks to help you [impress your coworkers and] navigate to records much faster

Chrome users: Create custom search engines that you can access with keywords.

If you follow the below instructions, you'll be able to do either of these from the Chrome search bar:

- Type 'sf', press TAB, type the name of a record or anything you want to use to search for it, and press ENTER. You will be taken directly to search results.
- Type 'id', press TAB, type (or paste, more likely) the ID of any record, and press ENTER. You will be taken directly to the record.

Instructions (and you can modify the keywords if you'd like):

1. Click the three vertical dots in the top right corner
2. Click Settings
3. Scroll down to Search Engines and click 'Manage search engines'
4. Click Add
5. We recommend adding two search engines
 1. Search Engine Title: Salesforce
Keyword: SF
URL:
https://mydomain.my.salesforce.com/_ui/search/ui/UnifiedSearchResults?str=%s&searchAll=true
 2. Search Engine Title: Salesforce ID
Keyword: ID
URL: <http://mydomain.my.salesforce.com/%s>
6. (In both, replace 'mydomain' with your actual my domain. If you don't have My Domain set up, replace 'mydomain.my' with 'login'.)

NOTE: the first search engine listed in Step 5 takes you to search results in Classic. If anyone figures out how to do this in LEX, just ping @solo admin and I'll [be eternally grateful and] update it here.

UPDATE 3/23/2021: Thanks @Sylvoka for finding this article with instructions on how to do this in LEX: <https://sfdad4tec.medium.com/salesforce-lightning-global-search-in-chrome-url-address-bar-8aebd3175ef9>. It works perfectly!

Quickly navigate to a record from anywhere on your (Windows) computer with Autohotkey!

Autohotkey is a scripting language that lets you write scripts that can run in the background, until you press a key combination that you have set up, and then boom! It does something cool.

I wrote a script that runs when you press control-shift-2 (you can change that to anything you want). I first copy any record's ID to the clipboard, and then press control-shift-2, and it opens that record as a new tab in whichever browser window you were in most recently.

Here is the script:

```
^+2: :
clp := clipboard
url := "http: \mydomain.my.salesforce.com/" . clp
Run, %url%
```

Steps to get this working:

1. Install AutoHotKey (<https://www.autohotkey.com/> . Click Download and follow the prompts)
2. Create a new text file using your favorite text editor.
3. Copy and paste the script into the file (change the word 'mydomain' to your actual my domain. If you don't have My Domain set up, replace 'mydomain.my' with 'login'.)
4. Save the file with a .ahk file extension
5. To set this script to always run in the background, press win-r (the Windows key and the letter r at the same time) and type shell:startup. In the folder that opens up, create a shortcut to the ahk file you created in steps 2-4.
6. Here comes the fun. From a report, from excel, from an email, from anywhere... find a record's ID and copy it. Press control-shift-2 and bam!

7. If you want to modify the keyboard shortcut for this script, you would change that in line
 1. See this link for more info: <https://www.autohotkey.com/docs/Hotkeys.htm> . (tl;dr: ^ means control, + means shift, ! means alt, # means windows key)

Search from Salesforce Navigator Chrome Extension

- If you already have the Salesforce Navigator extension installed (and you should!), you can get to search results easily without much setup required
- Assuming you have the extension mapped to the control-shift-space shortcut (if not, click [here](chrome://extensions/shortcuts) to set that up: <chrome://extensions/shortcuts>), when you are in any Salesforce tab, just press control-shift-space, type a question mark (?), and then type whatever you want to search for. Press enter (or control-enter to open the results in a new tab).
- This works even in LEX!
- To install the extension:
Classic version: <https://chrome.google.com/webstore/detail/salesforce-navigator/ecjmdlpgbilopfkkggmgebbmbiklco?hl=en>
LEX version: <https://chrome.google.com/webstore/detail/salesforce-navigator-for-pbjjdhghffpemcglcadejmkcpnplklh?hl=en>
- Salesforce Navigator also helps you get to almost any page in setup with the wave of a magic wand (kind of)

Revision #3

Created 18 December 2019 17:00:57 by Solo Admin

Updated 23 March 2021 16:11:06 by Solo Admin