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Salesforce.com Studio

Available in: **Enterprise** and
Developer Editions

The existing salesforce.com customization and API audit functionality have been rolled into the new Studio, where you can also find new functionality to extend salesforce.com and integrate it with other applications. The existing customization features allowed you to modify salesforce.com in many ways, such as adding fields, changing page layouts, and creating business rules. With the new extension and integration features of Studio, you can now:

- Create custom tabs to contain your own custom data. Set the color, security, and display properties of custom tabs.
- Create custom data objects to extend the data model of salesforce.com beyond the standard objects such as accounts and campaigns.
- Add custom related lists to standard tabs, or to your new custom tabs.
- Use custom data in reports and dashboards.
- Upload content to the sforce control library for use in web integration links.
- Download the salesforce.com Web Services Description Language (WSDL) file to integrate and extend salesforce.com using the sforce API.

See Also:

[What is salesforce.com Studio? on page 3](#)

[What is a Custom Object? on page 3](#)

[Viewing the Custom Objects List on page 3](#)

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IMPLEMENTATION TIPS

- The first step of implementation is to decide how your custom object is related to standard salesforce.com objects like accounts, contracts, etc.
- Before creating custom objects, think about the security and sharing model you want to apply. When creating the objects, you will implement these decisions by setting permissions to control who can access the data or view the custom tabs to interact with the data.
- Do you need to make the custom object part of the salesforce.com interface, or is it an internal entity that will interact only with the sforce API? If the custom object is to be part of the interface, define custom tabs or custom related lists.
- If you want to make the custom object part of the salesforce.com interface, determine whether to provide a new custom tab so users can interact with the custom object. If you only want to display the custom data, set up a related list on a standard tab or include the data in reports.
- Decide whether users will enter data through a custom tab. Another way to put data in the custom object is using the sforce API.
- Provide meaningful names for your custom objects. The plural label of the custom object will also be used as the label of the custom tab based on that object.

BEST PRACTICES

- While developing custom tabs, make sure that you keep the permissions set so that other users can not see the new tab until it is ready for use.

USING STUDIO

What is salesforce.com Studio?

The Studio provides tools to help developers and technical administrators add custom functionality to salesforce.com. Administrators and developers can use the functionality in the Studio to meet custom requirements, beyond simply renaming existing elements of the salesforce.com user interface. The Studio has three sections:

- **Customize** - Modify the standard elements of your salesforce.com organization (formerly known as Customize salesforce.com). For more information, see the online help.
- **Extend** - Add customized functionality to your organization:
 - Custom objects - Create custom data and custom related lists to store and display information unique to your organization (see [Creating Custom Tabs](#) on page 7).
 - Custom tabs - Create tabs to display and edit the data in your custom objects (see [Creating Custom Tabs](#) on page 7). By using custom objects and custom tabs, you can extend salesforce.com without programming.
 - Sforce controls - Upload content such as Java applets or Active-X controls for use in dynamic web integration links (see [Defining sforce Controls](#) on page 8).
- **Integrate** - Make salesforce.com work with your application:
 - Download the salesforce.com Web Services Description Language (WSDL) file and import it into your development environment.
 - If you are using the sforce API, you can use the API Audit tool in the Integrate section to track API transactions. For more information, see the online help.

What is a Custom Object?

Custom objects are custom salesforce.com tables that allow you to store information unique to your organization. For example, your organization may want to create a custom object called "Quotes" to store data for your company's sales quotes.

You can define up to 50 custom objects, create up to 250 custom fields for each custom object, display data from custom objects in custom related lists, build page layouts and custom tabs for custom objects, and delete custom objects.

You must be an administrator, or have the "Customize salesforce.com" permission, to create, edit, and delete custom objects.

Viewing the Custom Objects List

The Custom Objects list page displays a list of all custom objects defined for your organization. From this page, you can view detailed information about custom objects and create, edit, or delete custom objects.

- Click a custom object label to view the detail.
- Click **Edit** to modify the custom object. See [Displaying and Editing Custom Objects](#) on page 4.
- Click **New Custom Object** to create a custom object. See [Creating Custom Tabs](#) on page 7.
- Click **Del** to delete a custom object.

NOTE

All the data stored in the custom object will be deleted and cannot be restored from the Recycle Bin.

Creating Custom Objects

To create a new custom object:

1. Click **Setup | Extend | Custom Objects**.
2. Click **New Custom Object**.
3. Fill in the information for the custom object.
 - **Label** - a name that will be used to refer to the object in any user interface pages. Specify singular and plural versions of the label.
 - **Gender** - if it is appropriate for your organization's default language, you can specify the gender of the label word. The **Gender** field appears if the organization-wide default language specified in Administration Setup expects gender. Your personal language preference setting does not affect whether the **Gender** field appears. For example, if the organization's default language is English and your personal language is French, you are not prompted for gender when creating a custom object label.
 - **Name** - a unique name that will be used to refer to the object when using the sforce API. It can contain only alphanumeric characters and must begin with a letter.
 - **Description** - an optional description of the object. A meaningful description will help you remember the differences between your custom objects when you are viewing them in a list.
 - **Enable Reports** - check this if you want the data in the custom object to be available for inclusion in reports.
4. Click **Save**.

Displaying and Editing Custom Objects

Displaying Custom Objects - Once you have located a custom object on the Custom Objects home or list pages, click the object name to display detailed information.

Editing Custom Objects - To update a custom object, click **Edit**, and then change the object's characteristics. You can work with custom fields, relationships, and page layouts.

Deleting Custom Objects - To delete a custom object, click **Del**.

NOTE

All the data stored in the custom object will be deleted and cannot be restored from the Recycle Bin.

Changing Custom Data Display - Click **Edit List Layout** and select the fields you want to display in a lookup control and on the home page of a custom object. Next, choose how you want them sorted. Finally, click **Save**.

Related Lists in the Custom Object List Page - The lower portion of the display provides information about various characteristics of the custom object: standard fields, custom fields, relationships, and page layouts. You can click on individual items to display additional detail. Click **more** at the bottom of the page or **View More** below a related list to display more items. Click **New** to directly add new items.

Standard Fields in Custom Objects

Below is a list of the fields (in alphabetical order) that are automatically provided when you create a custom object. Some of these fields may not be visible or editable depending on your page layout and field-level security settings. (Field-level security is available in Enterprise and Developer Editions only.)

Field	Description
Created By	User who created the record.
Last Modified By	User who most recently changed the record.
Name	Unique identifier for records in the custom object. By default, this field is added to the custom object's page layout as a required field.
Owner	Assigned owner of the custom object.

Creating Custom Fields for Custom Objects

You can create up to 250 custom fields for each custom object you define. To create a custom field for a custom object:

1. Click **Setup | Extend | Custom Objects**.
2. Select a custom object from the list.
3. Click **New** in the Custom Fields related list to create a custom field for the custom object. Follow the procedure in the online help.

From the Custom Fields related list, you can also edit and delete existing custom fields. See the online help for more information about creating, editing, and deleting custom fields.

Defining Relationships for Custom Objects

If you want data from your custom object to appear in custom related lists, or if you want to create lookup fields where the lookup values come from another object, you must define relationships. You can create relationships with accounts, campaigns, cases, contacts, contracts, leads, opportunities, and users.

There are two types of relationships. Their differences include how they handle data deletion, security, and required fields in page layouts:

- **Master-detail** - When a record in the master object is deleted, the related records in the detail object are also deleted. The security settings for the master record also control the detail record. The lookup field (which is the field linking the two objects) must be present in the page layout of the detail object.
When you define a master-detail relationship, the custom object on which you are working is the "detail" side. Its data can appear as a custom related list on page layouts for the other object.
You can not create a master-detail relationship to users or leads.
- **Lookup** - This type of relationship has no effect on deletion or security, and the lookup field is not required in the page layout.
When you define a lookup relationship for a custom object, data from the custom object can appear as a custom related list on page layouts for the other object.

The following restrictions apply:

- Each custom object can have only one master-detail relationship, but can have many lookup relationships, up to a total of five relationships.
- If a custom object is the "detail" side of a master-detail relationship, it can not also be the "master" side of a different master-detail relationship.
- After you have created a relationship, you cannot change which object is related to your custom object. To achieve the same goal, delete the relationship and create a new relationship to a different object.
- You can convert the type of the relationship from master-detail to lookup. You can also convert a lookup relationship to a master-detail relationship, but only if the lookup field in all records contains a valid value -- that is, a value that matches a value in the key field of the object on the other side of the relationship.
- You can not create a master-detail relationship if your custom object already contains data. You can, however, create the relationship as a lookup and then convert it to master-detail if it meets the criteria described above.

To create a new relationship for a custom object

1. Click **Setup | Extend | Custom Objects**.
2. Select one of the custom objects in the list. This is the object that will be on the "detail" or "from" side of the relationship, supplying data for a custom related list on the other object's page layout.
3. In the Relationships related list, click **New**.
4. Select the object with which you want to create a relationship, then click **Next**.
5. Specify whether you want to create a master-detail relationship or a lookup relationship, then click **Next**.
6. Enter a label and a name for the lookup field, then click **Next**.
7. For a lookup relationship, you can specify whether each profile can view and edit the lookup field. Then click **Next**.
8. For a lookup relationship, you can specify whether the lookup field appears on a page layout. Then click **Next**.
9. Specify to which page layouts you want to add a custom related list.
10. If you want to add the new related list to those available for customization, check **Append related list to users' existing personal customizations**.
11. Click **Save**.
12. If desired, specify which fields from the custom object will appear in the custom related list by clicking **Related List** in the Relationships area. Select the fields you want, specify a sort order, and click **Save**.

To modify an existing relationship on a custom object

1. Click **Setup | Extend | Custom Objects**.
2. Click the name of the object you want to modify.
3. In the Relationships related list, click one of the following:
 - To change the type, label, or other attributes, click **Edit** next to the name of a relationship.
 - To select which of the custom object's fields to display in related lists, click **Related List** next to the name of a relationship.

Building Page Layouts for Custom Objects

You can use the default page layout that is created automatically when you create a custom object. You can also build your own page layout with related lists and web integration links for any custom object. If you do not use any page layout with your custom object, you can still interact with it by using the sforce API to manage custom data or build a custom user interface.

To edit an existing page layout for a custom object

1. Click **Setup | Extend | Custom Objects**.
2. Select one of the custom objects in the list.
3. In the Page Layouts related list, click **Edit** next to one of the page layouts.
4. Edit the page layout just as you would any other page layout. For more information, see the online help.
5. When finished, click **Save**.

To create a new page layout for a custom object

1. Click **Setup | Extend | Custom Objects**.
2. Select one of the custom objects in the list.
3. In the Page Layouts related list, click **New** to create a new page layout for the custom object.
4. If desired, select an existing page layout to clone.
5. Enter a name.
6. Click **Save**.
7. Click **Edit** and make any desired changes to the appearance and contents of the page layout.
8. When finished, click **Save**.

Creating Custom Tabs

You can define a new tab that will display the data stored in your custom object, using the custom page layout.

1. Click **Setup | Extend | Custom Tabs**.
2. Click **New Custom Tab**.
3. Select the custom object that will contain the data you want to display in the new custom tab. If you did not already create the custom object, click **create a new custom object now** and follow the instructions in [Creating Custom Tabs](#) on page 7.
4. In **Tab Style**, select the color scheme for the appearance of the custom tab.
5. Enter a description of the tab, if desired, and click **Next**.
6. Choose which profiles you want to permit to view your tab.
7. In **Tab Visibility**, choose **Default On**, **Default Off**, or **Hidden** to determine whether the custom tab is visible. The administrator can change this setting later.
8. Check **Append tab to users' existing personal customizations** if you want to be able to show/hide the tab under Personal Setup.
9. Click **Save**.

The label of the new tab is the same as the plural version of the label of the custom object on which it is based. If you want to change the tab label, you must change the custom object's plural label, as described in [Creating Custom Tabs](#) on page 7.

Defining sforce Controls

The sforce control library is a place where you can store and upload content for use in web integration links. Sforce controls provide a flexible, open means of extending the salesforce.com user interface, including the ability to create and display your own custom data forms within the application. For example, you could define an sforce control containing a Java applet that provides access to data unique to your users and business processes. Sforce controls leverage browser-based technologies, like Java and ActiveX, rather than server modifications, to provide this capability.

An sforce control can contain any type of content that you can display or run in a browser, for example, a Java applet, an Active-X control, an Excel file, or a custom HTML web form. In addition to any file you upload, an sforce control contains HTML code that controls how the content is displayed and referenced in a web integration link.

To define an sforce control:

1. Click **Setup | Extend | sforce Controls**.
2. Click **New sforce Control**, or click **Edit** to change an existing sforce control.
3. If you want to reference salesforce.com data in the sforce control, use **Available Merge Fields** to select the fields that contain the data.
4. Enter a **Name** and, if desired, a **Description** for the sforce control.
5. In the **HTML Body**, enter HTML code to control how the sforce control is referenced and displayed to users in a web integration link. You can enter up to 1 million characters in this field.
The HTML code defines exactly how your users should view the sforce control web integration link.
6. Copy merge field values into the **HTML Body** if you want to reference any salesforce.com data within the sforce control.
7. If you are uploading a file as part of the sforce control, insert the `{!Scontrol_URL}` merge field to reference the file. For a Java Applet, you can also use the `{!Scontrol_JavaCodebase}` merge field and the `{!Scontrol_JavaArchive}` merge field.
8. In the **Filename** field, upload an object to display when you add this sforce control to a web integration link.
The object can be a Java applet, Active-X control, file, or any other type of content you want.
9. Click **Save**.
10. Create a web integration link to display the sforce control to your users. See the online help.

Using WSDL to Integrate Applications

Administrators, and users with the "Modify All Data" permission, can download the Web Services Description Language (WSDL) file to integrate and extend salesforce.com using the sforce API.

You can use Web Services Description Language (WSDL) to easily integrate salesforce.com with your applications or build new applications that work with salesforce.com. To get started, download a WSDL file to a place accessible to your development environment.

1. Click **Setup | Integrate | WSDL Generator**.
2. Click the appropriate link to download enterprise WSDL (if you are a salesforce.com customer) or partner WSDL.
3. Import the WSDL into your development environment.

New Products Tab

Available in: **Professional**,
Enterprise, and **Developer**
Editions

We have enhanced product and price book capabilities. Now you can manage your products and price books using the new Products tab. Salesforce.com's new product and price book capabilities include:

- Custom fields to better describe and categorize products
- Keyword and filter-based search tools to easily browse and find product and price information
- Enhanced price book management functionality such as:
 - Cloning of price books
 - Adding products to more than one price book at a time
 - Maintaining multiple currencies per price book

The Opportunities tab has also been enhanced to make it easier for you to find and add products to opportunities. For example, you can search for products based on keywords or filter criteria. Then, select one or more products to add to an opportunity and use or overwrite their associated list prices.

Key Product Terms

Custom Price Book - Any price book you create for your organization. A custom price book can contain products and their list prices.

List Price - The price of a product in a custom price book.

Sales Price - The price of a product on an opportunity. This can be different than the product's standard or list price.

Standard Price - Price associated with a product that is included in the Standard Price Book.

Standard Price Book - Salesforce.com generated price book containing all your products and their standard prices.

Products and price books are included with Enterprise and Developer Editions and available for an additional cost with Professional Edition.

See Also:

[What are Products, Price Books, and Schedules? on page 10](#)

[Managing Price Books on page 11](#)

[Creating Price Books on page 11](#)

[Cloning Price Books on page 11](#)

[Creating Products on page 11](#)

[Setting Product Prices on page 12](#)

[Product Fields on page 13](#)

[Choosing a Price Book for an Opportunity on page 14](#)

[Adding Products to Opportunities on page 14](#)

[Selecting Price Books and Products on page 15](#)

[Searching for Price Books and Products on page 16](#)

IMPLEMENTATION TIPS

- The new Products tab is automatically on for all users.
- Your existing price books are still available and still contain the same product and price entries.
- If you created the same product in several different price books, you can identify duplicates and deactivate them.
- The new standard price book is inactive initially. Administrators and users with the "Manage Price Books" permission can activate it by clicking **Manage Price Books** from the Products home page and editing the properties of that price book.
- If you need to create new products, set up one standard price per currency for each product.
- Two permissions have replaced the "Edit Price Books and Products" permission. "Manage Price Books" and "Manage Products" are automatically added to any user profile that had "Edit Price Books and Products," including the Administrator.

BEST PRACTICES

- Activate your standard price book after you have resolved all duplicate product entries in your price books.
- Hide the Products tab from your users until you have resolved duplicate product entries in price books.
- Create a custom checkbox field that indicates a product is a duplicate. Then create a custom view that does not include products with the duplicate checkbox checked. Use this view to display a list of active products.

USING PRODUCTS

What are Products, Price Books, and Schedules?

Products

Products are the individual items that you are selling in your opportunities. The Products related list of an Opportunity detail page lists the products for that opportunity. In the Products related list, you can associate a price book with the opportunity, add or edit products, and establish or edit product schedules.

Price Books

A price book contains products and their associated prices. You can use the standard price book or create custom price books. The standard price book is automatically generated to contain a master list of all products and standard prices regardless of the custom price books that also contain them.

Schedules

You can also establish schedules for products on opportunities. Your administrator determines which types of schedules your organization can use - quantity schedules, revenue schedules, or both. Your administrator also specifies which types of schedules can be established for each separate product.

- **Quantity Schedule** - Outlines the dates, number of units, and number of installments for payments, shipping, or other use as determined by your organization.
- **Revenue Schedule** - Outlines the dates, revenue amounts, and number of installments for payments, recognizing revenue, or other use.

Managing Price Books

Administrators and users with the "Manage Price Books" permission can edit and create new price books. Click **Manage Price Books** from the Products home page to create new price books and activate or deactivate existing ones.

- Click any price book name listed to view details, including a list of products within that price book. From this page you can click **Edit** to change the properties of the price book, **Clone** to create a new price book with the same product entries, or change the product entries using these product links:
 - **Add** allows you to add a new product entry to the price book.
 - **Edit All** allows you to make changes to all product entries in the price book.
 - **Edit** allows you to make changes to a single product entry.
- Click **View** to display a list of price book entries for the selected price book.
- Click **New** to create a new custom price book. See [Creating Price Books](#) on page 11.
- Click **View More** to view a longer list of price books.

Creating Price Books

Administrators and users with the "Manage Price Books" permission can create price books. To create a custom price book for your organization:

1. Click **Manage Price Books** from the Products home page.
2. Click **New**.
3. Enter a name for your price book.
4. Optionally, enter a description.
5. Check **Active** to make the price book available from opportunities.
6. Optionally, select an existing price book to add its products and prices to the new price book.
7. Click **Save**.

Cloning Price Books

Use the **Clone** button on a price book to quickly create a new price book with the same information as the selected price book. Administrators and users with the "Manage Price Books" permission can clone price books. To clone a price book for your organization:

- Click **Clone** on an existing price book. Enter or change any information for the new price book, and click **Save**.

Creating Products

Administrators and users with the "Manage Products" permission can create products. To create a new product:

1. Click **New Product** from the task bar.
2. Enter a name for the product.
3. Enter any additional information for the product. See [Product Fields](#) on page 13 for a description of each field.

4. Click **Save** when you are finished or click **Save & New** to save the current product and create another.
 - Optionally, click **Add** in the Standard Price related list to add an associated price and currency to the new product.
 - Optionally, click **Add to Price Book** from the Price Books related list to include the new product in a price book. Products must have a standard price before you can add them to a price book. See [Setting Product Prices](#) on page 12.

Setting Product Prices

Your organization can customize salesforce.com to fit the way your organization prices products. For example, you may have up to three different types of prices for products:

- **Standard Prices** are the default list prices you associate with products and are automatically included in your Standard Price Book.
- **List Prices** are the prices associated with products in your custom price books.
- **Sales Prices** are the prices applied to products that you add to your opportunities. Sale prices can be different than both list prices and standard prices.

NOTE

You can expand the format of your price fields to up to 8 decimal places to the right of the decimal point. Contact salesforce.com to expand your decimal place settings.

Setting Standard Prices

Before you can add the new product to an opportunity or custom price book, create a standard price for it.

Users with the "Manage Price Books" or "Manage Products" permission can set standard prices. To create a standard price for a product:

1. Select the product.
2. From the product detail page, click **Add** from the Standard Price related list. If you have already added a standard price, click **Edit** to change it or **Edit All** to edit all standard prices in other currencies.
3. Enter the **Standard Price**.
4. Select the **Active** box to make this price available to products on opportunities or other custom price books.
5. Click **Save**. The standard price is automatically associated with the product in your standard price book.

Setting List Prices

If you have created custom price books, you can assign a list price for a product. The list price is available to use when you add that product to an opportunity from any customized price books your organization has created.

Administrators and users with the "Manage Price Books" permission can set list prices. Before you begin, the product must have a standard price. To add a list price:

1. Select the product.
2. From the product detail page, click **Edit** from the Price Books related list next to the custom price book that should contain the list price. Click **Add to Price Book** from the Price Books related list if you have not already added the product to a custom price book.
3. Enter the **List Price**. Alternatively, check **Use Standard Price** if both prices are the same.

4. Select the **Active** box to make this price available to products on opportunities.
5. Click **Save**.

Setting Sales Prices

Regardless of the price book used, you can specify a sale price to any product that you add to an opportunity. Initially, the sale price for a product added to an opportunity is the product's list price from the price book. See [Adding Products to Opportunities](#) on page 14 for instructions on associating a sale price with a product.

Product Fields

Below is a description of the fields (in alphabetical order) that make up a product. Some of these fields may not be visible or editable depending on your page layout and field-level security settings. (Field-level security is available in Enterprise and Developer Editions only.)

Product Fields

Field	Description
Active	Indicates whether the product is ready for use in a price book or opportunity and whether you can find the product in searches and see the product in views.
Created By	Name of the user who created the product.
Product Description	Text to distinguish this product from other products.
Last Modified By	Name of the user who last saved the product record.
Product Name	Title for the product.
Product Code	Internal code or product number used to identify the product.
Product Family	Category of the product.
Quantity Scheduling Enabled	Indicates whether the product can have a quantity schedule.
Revenue Scheduling Enabled	Indicates whether the product can have a revenue schedule.

Price Book Fields

Field	Description
Active	Indicates whether you can add the price book to an opportunity.
Created By	Name of the user who created the price book.
Description	Text to distinguish this price book from others.
Modified By	Date of the most recent save to the record.
Price Book Name	Title for the price book.

Price Book Entry Fields

Field	Description
Active	Indicates whether the price book entry (product and list price) is active and can be added to an opportunity.
List Price	Price of the product within the price book including currency.
Product Name	Title for the product.
Product Code	Internal code or product number used to identify the product.

Scheduling Fields

Field	Description
Schedule Type	Defines whether the product revenue or quantity will be divided into multiple installments or repeated for multiple installments.
Installment Period	Sets the interval for installments; for example, Weekly, Monthly.
Number of Installments	Number of installments in the schedule.

Choosing a Price Book for an Opportunity

To include products on an opportunity, you must first choose a price book that contains the products you want to add. You can add products only from a single price book. Click **Choose Price Book** in the Products related list to select a price book.

NOTE

If you change the price book for an opportunity, all existing products are deleted from the opportunity.

Adding Products to Opportunities

To add products to an opportunity:

1. Select a price book; see [Choosing a Price Book for an Opportunity](#) on page 14.
2. Click **Add Product** in the Products related list.
3. Select one or more products. See [Selecting Price Books and Products](#) on page 15 for instructions on selecting products.
4. Enter the attributes for each product. Your administrator may have customized this page to include fields specific to your business.
5. Enter the **Sales Price** for the product.
The **Sales Price** is automatically filled in with the **List Price** specified in the price book. You can override this value.
6. Enter the number of products at this price in the **Quantity** field.
7. Click **Save**.

NOTE

If the product has default schedules, the schedules are automatically created when you add the product to the opportunity.

NOTE

The opportunity **Amount** is the sum of the related products. You cannot directly edit the **Amount** unless you first delete all of the products from the opportunity.

For multi-currency organizations, the opportunity **Currency** is tied to the currency of the associated price book entry. You cannot directly edit the **Currency** unless you first delete all of the products from the opportunity.

Editing Products on Opportunities

To edit the attributes of a product on an opportunity:

1. Click **Edit** next to the product name in the Products related list of an opportunity, or click the **Edit All** button to edit all of the products at once.
2. Enter the attributes for each product. Your administrator may have customized this page to include fields specific to your business.
3. Enter the **Sales Price** for the product.
4. Enter the number of products at this price in the **Quantity** field.
5. Click **Save**.

Sorting Products on Opportunities

On the Products related list of an opportunity, the associated products appear in alphabetical order, by default. However, you may wish to sort the products so that related or "bundled" products display together.

To specify the order of products in the Products related list of an opportunity:

1. Click **Sort** in the Products related list.
2. Select a product name, and use the arrows to sort the product.
3. Click **Save** to finish.

Selecting Price Books and Products

You can find and select products and price books to associate with each other or opportunities. For example:

- On an opportunity detail page, click **Add Product** to select a product to be listed on the opportunity.
- On a product detail page, click **Add to Price Book** to select a price book to contain the product.
- On a price book detail page, click **Add** to select a product to be included in that price book.

To find and select a price book or product:

1. Enter any number of keywords to find records that contain all your keywords.

Keywords you enter return matches in the **Product Name**, **Product Description**, or **Product Code** fields of any record. We recommend using one or more filters instead of a keyword search for keywords that return more than 2000 matches.

2. Select your filter criteria to refine your search further. Click **More filters** to use additional conditions to refine your search.

TIP

Search by keyword or filter criteria either alone or together. When used together, salesforce.com finds records that match both your keyword and filter criteria.

3. Click **Find**.
4. Check the boxes next to the records you want to select. Optionally, check the box in the column header to select all or none.
5. Click **Select**.

TIP

Try to keep search results as small as possible. If you click **Next Page**, you will lose the records you selected with check marks. Use at least two characters in keyword searches. If you search without any keyword or filter criteria, the search results include all products or price books.

Searching for Price Books and Products

You can find a specific product or price book from any of the search or selection pages. Enter your product and price book search criteria in the same format you would a sidebar search. See the online help for details on how sidebar searches work.

- To find a product from the Products home page, enter your keywords in the Find Products area and click **Find**. Select a record from the search results to go directly to that record.

TIP

Use at least two characters in keyword searches. If you search without any keyword, the search results include all products. Keywords you enter return matches in the **Product Name**, **Product Description**, or **Product Code** fields of any record. We recommend using one or more filters instead of a keyword search for keywords that return more than 2000 matches.

- To find a price book, select the price book from the drop down list available in the Price Books area of the Products home page. Click **Go!** to view details of the selected price book.
- Click **Create New View** in the Price Books area of the Products home page to create a price book list view to display price book entries that match specific criteria. You can choose to include all price books or select a single price book to include.
- Click **Create New View** in the Product Views area of the Products home page to create a product list view to display products that match specific criteria.

NOTE

The sidebar search feature is not designed to find products or price books. Instead, use the search and selection pages from the Products tab.

Contract Management

Available in: **Professional**,
Enterprise, and **Developer**
Editions

The contract management system was designed to be flexible enough to accommodate complex processes for managing contracts. You can start using contracts by customizing salesforce.com to manage your agreements with your customers in a way that enhances your internal process.

Use contracts to manage your:

- Sales agreements
- Service and support contracts
- Legal agreements

See Also:

[What is a Contract? on page 18](#)
[Displaying and Editing Contracts on page 18](#)
[Creating Contracts on page 19](#)
[Cloning Contracts on page 19](#)
[Contract Fields on page 19](#)
[Approving Contracts on page 20](#)
[Activating Contracts on page 21](#)
[Deleting Contracts on page 21](#)
[Searching for Contracts on page 22](#)

IMPLEMENTATION TIPS

- The new Contracts tab is automatically enabled for all users of Professional, Enterprise, and Developer editions.
- Give your users the appropriate permissions:
 - Edit Contracts** Create, edit, and delete contracts that are not yet activated
 - Approve Contracts** Apply an approved status to a contract
 - Activate Contracts** Activate contracts, create, edit, and delete contracts
 - Delete Activated Contracts** Delete contracts regardless of status, activate, create, and edit contracts
- Customize your contracts page layouts to include the appropriate fields. Enterprise Edition organizations can create many different contract page layouts and assign different page layouts to different users based on profile.
- Add the Contracts related list to your appropriate accounts page layouts so that users can create contracts from the account detail page.
- See the *Getting Started with Contracts* tip sheet for instructions on creating a link from the opportunities page layouts so that users can create contracts from an opportunity.

BEST PRACTICES

- Customize the contract **Status** field to include the steps within your contract business process.
- Create custom contract fields to store data specific to your contract management process.
- Set up workflow rules that assign tasks or send email alerts when your contracts meet certain conditions. For example, you may want to set up a workflow rule that sends an email notification to your legal department when a contract status reaches "ready for legal review" if that is a part of your internal contract workflow. You may also want to create a workflow rule to assign a task to your sales operations team when a contract status reaches "ready for activation." These scenarios assume you have customized the contract **Status** field.
- Enterprise Edition organizations can set up record types so different contracts use different page layouts.

USING CONTRACTS

What is a Contract?

A contract is a written agreement between two or more parties. Many companies use contracts to define the terms for doing business with other companies.

Use salesforce.com to establish and document the contracts you have with your accounts. Then, track the contract through your organization's approval process and use workflow alerts to notify yourself when to initiate contract renewals.

Displaying and Editing Contracts

Displaying Contracts - Once you have located a contract on the Contracts home or list pages, click the contract number to display detailed information. From an account, click the contract number in the Contracts related list to display the contract. All contracts associated with the account are listed in the Contracts related list.

Editing Contracts - To update a contract, click **Edit**, and then change the fields that you want to update. When you have finished, click **Save**. You can also select **Save & New** to save the current contract and create another. Users with the "Edit Contracts" permission can edit contracts until they are activated.

Contract Related Lists - The lower portion of the display provides a snapshot of key information relating to the contract. The related lists you see are determined by your personal customization and by any customization your administrator has made to page layouts. You can click on individual items to display additional detail. Click **more** at the bottom of the page or **View More** below a related list to display more items. Click **New** to directly add new items.

Printing Contracts - To view a printable display of all information for the contract, click **Printable View** from the Contracts detail page. Use your browser's Print function to print the display.

To return to the last list page you viewed, click **Back to list** at the top of the Contracts detail page.

Approval Requests

The Approval Requests related list on a contract detail page tracks the status of each approval request. This list displays information about each approval request and includes the status and any approve or reject comments. When the status is "Pending," no comment is included.

Contract History

The Contract History related list of a contract tracks changes to a contract's custom fields. Salesforce.com creates a new entry in this related list whenever a change is made to the custom fields on a contract. Each entry includes the name of the person making the change and a date stamp.

Creating Contracts

Administrators and users with the "Edit Contracts" permission can create contracts. You must have at least read access to an account in order to associate a contract with it.

To create a new contract:

1. Click **New Contract** from the task bar.
2. Select an **Account Name** to associate the new contract with that account.
3. Choose a contract status.
4. Enter the start date of the contract.
5. Enter the number of months that the new contract will be in effect.
6. Enter the rest of the information for the new contract.
7. Click **Save**.

The contract is listed under the Contracts related list of the account.

Enterprise and Developer Edition organizations can activate record types that prompt you to choose a **Record Type** when creating a record. This determines the picklist values and status values available when creating and editing a record.

Cloning Contracts

The **Clone** button on a contract quickly creates a new contract with the same information as the existing contract. For example, you can add multiple contracts for the same account.

- Click **Clone** on an existing contract. Enter or change any information for the new contract and click **Save**.

Contract Fields

Available in: **Professional**,
Enterprise, and **Developer**
Editions

Below is a list of the fields (in alphabetical order) that make up a contract. Some of these fields may not be visible or editable depending on your page layout and field-level security settings. (Field-level security is available in Enterprise and Developer Editions only.)

Field	Description
Account Name	Name of account associated with the contract.
Activated By	The name of the person that activated the contract.
Activated Date	The activation date of the contract.
Billing Address	The mailing address used for billing the account on the contract.
Company Signed By	The contact at the account who authorized the contract.
Company Signed Date	The date that the contract was authorized.
Contract End Date	The last day the contract is in effect.
Contract Number	A unique number automatically assigned to the contract.
Contract Owner	The user that owns the contract record.

Field	Description
Contract Start Date	The first day that the contract is in effect.
Contract Term (months)	The number of months that the contract is in effect.
Created By	User who created the contract record.
Customer Signed By	The contact on the account that authorized the contract.
Customer Signed Date	The date the contact signed the contract.
Customer Signed Title	The title of the contact who signed the contract.
Description	A label or statement describing the contract.
Last Modified By	The user who most recently changed the contract record.
Owner Expiration Notice	If the contract owner and account owner would like to be notified of an upcoming contract expiration, select how many days before the contract end date you want to send the notification.
Special Terms	Any terms that you have specifically agreed to and want to track in the contract.
Status	Indicates what stage the contract has reached in the contract business process. This is a unique picklist in that your organization can add values to it within three system-defined contract status categories: "Draft," "In Approval Process," and "Activated." Then, use these status categories to track contracts within your business process using reports and views.

Approving Contracts

Available in: **Professional, Enterprise, and Developer Editions**

Your organization may already have a process for approving contracts. For example, you may have one person designated for each team to approve contracts. You may also have one administrator designated to activate contracts. If so, your salesforce.com administrator can customize salesforce.com to give the appropriate people the permissions they need to perform their part of the contract life-cycle.

Before you begin customizing salesforce.com, define the life-cycle of a contract in your organization. Use the following basic contract approval process to get started:

1. A user creates a contract. This user needs to have the "Edit Contracts" permission. All newly created contracts have a **Draft** status.
2. The contract owner sends an approval request to have the contract approved by a team lead. The first approval request on a contract changes its status to **In Approval Process**.
3. The team lead accepts or rejects the contract approval request. If rejected, the contract owner can make changes to the contract and submit another approval request. The status remains **In Approval Process** whether the approval request was accepted or rejected.

4. If accepted, a contract administrator activates the contract. Users with the "Activate Contracts" permission can activate a contract. Activating a contract changes the contract status to **Activated** and makes the contract read only. Activated contracts cannot be changed and only users with the "Delete Activated Contracts" permission can delete a contract with **Activated** status.

Sending Approval Requests

To send an approval request for a contract:

1. Select the contract.
2. Click **New** in the Approval Requests related list.
3. Select the person you want to receive the approval request.
4. Enter any request comments.
5. Click **Save**. Salesforce.com sends an email approval request to the recipient you selected. The recipient can click a link in the email to view the contract and click **Approve** to accept the contract or **Reject** to return the approval request. All approval requests are tracked in the Approval Request related list.

Receiving Approval Requests

Use the Approval Pending list on the Contracts home page to view all the contracts that require your approval. When you receive an email approval request, click the included link to view the contract.

- Click **Approve** to accept the contract as is and notify the contract owner that the request is approved. You will be prompted to select an approval request status and enter any approval request comments. Click **Save** to send and save the approval request.
- Click **Reject** to return the approval request. Select an approval request status and enter any comments you want attached to the approval request. Click **Save** to send your response and save the approval request.

Activating Contracts

Available in: **Professional**,
Enterprise, and **Developer**
Editions

Administrators and users with the "Activate Contracts" permission can activate contracts. To edit an activated contract, a user must have the "Activate Contracts" permission.

To activate a contract:

1. Select the contract you want to activate.
2. Click **Activate**. The status of an activated contract is "Activated."

Deleting Contracts

To delete a contract, click **Del** next to the contract on the Contracts list page. You can also delete a contract by clicking **Delete** on the Contract detail page.

When you delete a contract, all related notes, attachments, events and tasks, history, and approval requests are deleted. Associated accounts are not deleted with the contract. The deleted contract is moved to the Recycle Bin. If you undelete the contract, any related items are also restored.

NOTE

Administrators and users with the "Edit Contracts" permission can delete contracts that are not activated. But only users with the "Delete Activated Contracts" permission can delete contracts after they have been activated.

Searching for Contracts

To locate a specific contract, use the sidebar Search or the Advanced Search, accessed by clicking **Advanced Search** in the sidebar. Enter your search terms, and click **Search**. The search returns a list of items that match your search terms. From the list, select an entry to jump directly to that item.

You can also create a contract list view to locate contracts that match specific criteria.

Public Knowledge Base

Available in: **Professional**,
Enterprise, and **Developer**
Editions

To allow your users to easily search online for solutions, you can now set up a public knowledge base by simply adding a button to your own website.

See Also:

[Enabling the Public Knowledge Base on page 23](#)

IMPLEMENTATION TIPS

- Make sure that any solutions you want to appear in the public knowledge base have the **Published** field checked.
- Specify who can modify the public knowledge base by setting the following permissions in user profiles:
 - "Edit Un-Published Solutions" -- users whose profiles include this permission can create, edit, and delete only solutions that have not been made accessible in your public knowledge base.
 - "Edit Published Solutions" -- users whose profiles include this permission can create, edit, and delete solutions that are accessible in your public knowledge base.
 - "Create Solutions" -- users whose profiles include this permission can create solutions. As part of the creation process, these users can mark solutions as published to make them available in the public knowledge base.

BEST PRACTICES

- Since any solution that has the **Published** field checked will be visible through the public knowledge base, make sure that sensitive information is not made available in a published solution.

USING THE PUBLIC KNOWLEDGE BASE

Enabling the Public Knowledge Base

Using the Cases and Solutions tabs, your customer support representatives might create many solutions that would be of interest outside your organization. Using HTML code supplied by salesforce.com, in cooperation with your website administrator, you can add a special search box and button to your website to allow your customers to search for solutions. In salesforce.com, this is referred to as creating a public knowledge base.

Using this public knowledge base, your customers can find answers to frequently asked questions on their own without having to call your customer support center. Any solutions that have been marked "Published" will be available in the public knowledge base.

A public knowledge base is different from a Self-Service portal because users are not required to log in, and they can only search for solutions, not submit cases. For more information about Self-Service portals, see the online help.

NOTE

The search box and button are displayed in a frame; your website must support frames in order for the solution search feature to work.

To enable web access to solutions:

1. Click **Setup | Customize | Solutions | Public Knowledge Base**.
2. Click **Edit**.
3. Check **Public Knowledge Base Enabled**.
4. If desired, you can change the appearance of the frame on your site by specifying the **Maximum Page Width** and **Minimum Page Height**.
5. Provide the URL of your CSS page in **Style Sheet URL**. The CSS file does not have to exist yet; you can download a sample file as a starting point later, or use your own file.
6. You can change the word or phrase that is used to describe solutions in the frame in **Alternative Term**. Provide singular and plural versions of the term.
7. Click **Save**.
8. If desired, click **Download Sample CSS File** to get the salesforce.com style sheet.
9. Click **Generate HTML**.
10. Copy the resulting HTML code and click **Finished**.
11. Send the HTML (and the CSS file, if you downloaded it) to your website administrator to be added to your site as follows:
 - Add the HTML to your web page.
 - Customize the downloaded style sheet.
 - Host the style sheet in a publicly accessible location on your web server.

Advanced Solution Management

Page layouts, WILs, printable view, and custom fields are available in **All** Editions. Business processes and record types are available in **Enterprise** and **Developer** Editions.

The Solutions tab is now displayed by default in Professional and Enterprise Editions, and the functionality of solutions has been upgraded so that you can now:

- Customize the page layouts for solution record detail and edit pages.
- Add web integration links (WILs) to solutions to integrate solution data with external URLs, your company's intranet, or other back-end office systems.
- Use the new printer-friendly page to more easily print solutions.
- Add custom fields to solutions. The maximum number of custom fields you can add depends on your salesforce.com edition.
- Enterprise and Developer Edition organizations can create different business processes for solutions that include some or all of the picklist values available for the **Status** field.
- Enterprise and Developer Edition organizations can use record types with solutions to offer different business processes and subsets of picklist values to different users based on their profiles.

See Also:

[Customizing Solutions on page 26](#)

IMPLEMENTATION TIPS

- Before setting page layouts and field-level security for solutions, plan which fields you want users to be able to view or edit, which fields you want to be required for each profile, and how you want the pages to be displayed for users.
- Set field-level security to restrict users' access to solution fields. Use page layouts primarily to organize detail and edit pages. This helps reduce the number of page layouts for you to maintain.
- Create different page layouts for different solution record types. Each record type can have a different set of displayed fields, different fields identified as required or read only, different arrangements of fields, or different related lists and Web integration links.
- Use the same page layout for all profiles for a specific record type.
- Customize different solution review processes for different solution record types. Each solution record type can have different review stages and milestones.

BEST PRACTICES

- Set up business processes to review the different types of solutions submitted by your users. Ensure that every solution goes through the review process before it is published.
- Allow as many users as possible within your company to create solutions. This will require some additional solution management for the administrator, but will also ensure that the breadth of knowledge available in your company becomes available to everyone else.
- Assign one or more solution reviewers for each department. Use the solutions permissions to distinguish between users who can submit solutions and those who can review them. For example, you can allow service representatives to edit solutions until they are published, then restrict access to solution managers only.
- Consider creating custom fields such as Intended Audience to enable your users to look for the most relevant solutions for their task.
- Create an Expiration Date custom field and use it to keep track of older solutions, revising them as your business requirements change.
- Create custom workflow rules to automatically assign tasks or send alerts when a solution is updated or expires.

USING SOLUTION MANAGEMENT

Customizing Solutions

To tailor salesforce.com for your organization, you can customize the display of the Solutions tab.

1. Click **Setup | Customize | Solutions**.
2. Select the link for the customization option you want. You can customize the standard solution picklists, create custom fields and web integration links, control the layout of fields, related lists, and integration links, and create record types for Enterprise and Developer Edition organizations.

Group Calendaring

Viewing other users' calendars and multi-user view are available in **Team**, **Professional**, **Enterprise**, and **Developer** Editions. Personal calendar sharing, public calendars, and resource calendars are available in **Professional**, **Enterprise**, and **Developer** Editions.

To enable your users to more easily coordinate their activities, you can now use the following group calendaring features:

- View other users' calendars; allow other users to view your calendar.
- Use multi-user view to see several calendars at the same time.
- Specify who is allowed to view or edit your calendar by setting up personal calendar sharing permissions.
- Create public calendars so that a group of people can track events of interest to all of them. For example, create a marketing department calendar to show upcoming marketing events.
- Schedule resources, such as conference rooms and projectors.

See Also:

[Personal Calendar Sharing Model on page 27](#)

[Viewing and Editing Activities on page 28](#)

[Creating Activities on page 29](#)

[Sharing Your Calendar on page 29](#)

[Managing Public and Resource Calendars on page 30](#)

IMPLEMENTATION TIPS

- Set the organization-wide default calendar access level. This setting determines the minimum level of sharing for personal user calendars. Users can modify their calendar sharing to make their calendars more accessible to other users, if desired.
- When you create a public calendar or resource, it is available to other users only after you share it with specific users, groups, roles, and roles and subordinates.
- To allow all users to access a public calendar or resource, share the public calendar or resource with the public group: Entire Organization.

BEST PRACTICES

- Use resources to manage the scheduling of conference rooms, overhead projectors, and other company resources.
- Use public calendars for maintaining important shared calendars such as a marketing events calendar, project calendars, and production schedules.
- To make access to a public calendar easier, create a bookmark to the public calendar in your browser, add a web integration link to the Home tab, or add a hyperlink on your company's intranet.

USING GROUP CALENDARING

Personal Calendar Sharing Model

1. To set the sharing model for users' personal calendars, select **Setup | Security Controls | Sharing Rules**.

2. Click **Edit** in the Organization Wide Defaults related list of the Sharing Rules page to set the default sharing access for calendars to one of the following:

Field	Description
Hide Details	Others can see whether the user is available at given times, but can not see any other information about the nature of events in the user's calendar.
Hide Details and Add Events	In addition to the sharing levels set by Hide Details, users can insert events in other users' calendars.
Show Details	Users can see detailed information about events in other users' calendars.
Show Details and Add Events	In addition to the sharing levels set by Show Details, users can insert events in other users' calendars.
Full Access	Users can see detailed information about events in other users' calendars, insert events in other users' calendars, and edit existing events in other users' calendars.

Viewing and Editing Activities

To view a calendar other than your own (not available in Personal Edition):

1. In day, week, or month view, click **Change** next to the name at the top of the calendar, then select the type (User Calendars or Public Calendars & Resources) and name of the calendar you would like to see.

NOTE

When viewing a resource calendar, you can not add a new event as you can when viewing a personal or group calendar. You can add events to resource calendars only by inviting the resource to an event.

The Tasks portion of the window continues to display your tasks even if you change to view a different calendar.

2. To view your own calendar again, click **Back to My Calendar**.

Viewing Multiple Calendars Simultaneously

Users of Team, Professional, Enterprise, and Developer Editions can view more than one calendar at a time.

1. From the home page or one of the calendar views, click the Multi-User View icon.
2. In **View**, choose the name of a set of users whose calendars you would like to view.

The availability of each user is indicated in color: free time is grey, busy time is blue, and out-of-office time is purple. If your organization-wide calendar sharing rules and the user's personal calendar sharing levels permit it, you can click the colored area to see more details about any scheduled event. If the organization-wide calendar sharing includes Show Details, popup text appears when you move the mouse over an event.

You can also create an event from the multi-user calendar view: check the boxes next to those you want to invite, then click **New Event**.

Creating Activities

- To create a group event:
 1. If you are not in the multi-user calendar view, begin creating an event as usual. (If you are in the multi-user view, use the technique described in [Viewing Multiple Calendars Simultaneously](#) on page 28.)
 2. Click **Add Invitees** in the Invite Others section, and search for users or contacts. Users in Professional, Enterprise, or Developer Edition organizations can also invite leads or resources (such as a conference room) to group events.
The availability of invitees is indicated in color on their calendars: free time is grey, busy time is blue, and out-of-office time is purple.
 3. Check the boxes next to one or more of the invitees in the search result list, then click **Insert Selected** to add them to the Selected List.
 4. To add more invitees, specify a new search and then repeat step 3. Continue until the Selected List is complete.
 5. Click **Done**.
 6. Adjust the date and time of the event, if necessary.
 7. Click **Send Invitation**.
The system sends email to the invitees. If an invited resource is available at the given time, it will automatically accept the invitation. You can not double-book resources. Invited leads and contacts receive email containing a link to a web page where they can accept or decline the invitation.

Sharing Your Calendar

You can grant access to other users, personal and public groups, roles, or roles and subordinates to view your calendar.

1. Click **Setup | My Personal Information | Calendar Sharing**.
2. Click **Add** to share your calendar with others.
3. Select items from the left and click **Add** to add them to the New Sharing list.
4. In **Calendar Access**, select what you want to allow people viewing your calendar to do. The available options vary depending on the organization-wide calendar sharing level set by your administrator. Only choices that make your calendar access less restrictive are displayed in the **Calendar Access** picklist. You can not make your calendar sharing more restrictive than the organization-wide default.
 - Hide Details and Add Events - Others can see whether you are available at given times, but can not see details of events in your calendar. Other users can insert events in your calendar.
 - Show Details - Others can see detailed information about events in your calendar.
 - Show Details and Add Events - Others can see detailed information about events in your calendar and can insert events in your calendar.
 - Full Access - Others can see detailed information about events in your calendar, insert events in your calendar, and edit existing events in your calendar.
5. Click **Save**.

Managing Public and Resource Calendars

In contrast to users' individual calendars, public and resource calendars are for managing group activities or shared resources.

Using public calendars, a group of people can track events of interest to all of them (such as marketing events, product releases, or training classes) or schedule a common activity (such as a team vacation calendar). For example, your marketing team can set up an events calendar to show upcoming marketing events to the entire sales and marketing organization.

With resource calendars, multiple people can coordinate their usage of a shared resource such as a conference room or overhead projector.

Administrators and users who have the `Customize salesforce.com` permission can create, edit, and delete public calendars and resources.

- To display a list of the currently-defined public and resource calendars, click **Setup | Customize | Activities | Public Calendars & Resources**.

From the list page, you can perform the following tasks:

- To view the properties of a calendar, click its name in the list.
- To edit calendar properties, click **Edit**.
- To create a new public calendar or resource:
 1. Click **New**.
 2. Give the calendar or resource a name, and check **Active**.
 3. Then click **Save**.
 4. To make the new calendar or resource available to others, click **Sharing**. Select which public groups, roles, or users you want to share the calendar with, and add them to **New Sharing**.
 5. In **Calendar Access**, specify how to share the calendar by selecting one of the following:
 - **Hide Details** - Others can see whether given times are available, but can not see any other information about the nature of events in the calendar.
 - **Hide Details and Add Events** - Others can see whether given times are available, but can not see details of events. Other users can insert events in the calendar.
 - **Show Details** - Others can see detailed information about events in the calendar.
 - **Show Details and Add Events** - Others can see detailed information about events in the calendar and can insert events in the calendar.
 - **Full Access** - Others can see detailed information about events in the calendar, insert events in the calendar, and edit existing events in the calendar.

Deleting a Public Calendar

1. Click **Setup | Customize | Activities | Public Calendars & Resources**.
2. Click **Del** next to the name of the calendar you want to delete.

Lead Search and Merge Utility

Available in: **Professional**,
Enterprise, and **Developer**
Editions

Duplicate leads can be a frustrating and time-consuming challenge. If more than one person on your sales force is pursuing the same lead, it not only is a waste of resources but could also mean a negative experience for your prospects. Before calling and targeting a lead, your reps need to have advance knowledge of all previous communications, whether it is an interaction from the past or a currently active deal.

The new lead search and merge utility helps you quickly locate and join your duplicate lead records. It also allows you to choose which fields to include in the merged lead record.

See Also:

[Merging Duplicate Leads on page 31](#)

IMPLEMENTATION TIPS

- The **Search** link next to the **Company** field on the lead detail page has been replaced with the new **Find Duplicates** button.
- Establish a process for your telesales or telemarketing representatives to follow the practices below.

BEST PRACTICES

- Check for duplicate leads before calling a prospect for the first time. This quickly highlights whether your organization has had any previous communication with the specific individual or anyone else at the company.
- Once you get the results, expand your search by adding email domain, last name, or both to the search criteria. This enables you to cast a wider net to find matching records.
- If you find a matching account, in addition to matching leads, convert the lead into the existing account.

USING THE LEAD SEARCH AND MERGE UTILITY

Merging Duplicate Leads

To merge duplicate leads:

1. Select a lead record.
2. Click **Find Duplicates**.
3. Select up to three leads in the matching leads list that you want to merge.

Optionally, enter a new lead name or company and click **Search** to find another lead to merge. Salesforce.com performs a phrase search for matches in the **Name** and **Company** fields. It also considers an implied wildcard after any entry. Search results include matches for any fields you enter, so if you enter *Bob Jones* who works at *Acme*, search results include anyone named *Bob Jones* at any company and any lead with *Acme* as a company.

4. Click **Merge Leads**.

TIP

Click **Convert Lead** to quickly convert the selected lead into an existing account, opportunity, and contact. See the online help for information on converting leads.

5. Select one lead as the "Master Record." Any data in hidden or read-only fields will be taken from the Master Record. However, administrators, and users with the "Edit Read Only Fields" permission, can manually select which read-only fields to retain. Note that hidden fields are not displayed during the merge.
6. Select the fields that you want to retain from each record. When there is conflicting data, the fields in the left column are preselected and the row is marked.
7. Click the **Merge** button to complete the merge.
8. Click **OK** to confirm.
 - Any related items from the duplicate leads, such as campaign or activity information, will be associated with the newly merged lead.
 - In Professional, Enterprise, and Developer Edition organizations, any sharing rules are applied to the newly merged lead.
 - All discarded duplicate records are moved to the Recycle Bin.
 - The newly merged lead displays the **Created By** date from the oldest lead you are merging, and shows the merge date as the **Modified By** date.

NOTE

To merge leads, you must have access to delete the leads you want to merge.

Opportunity Update Reminder

Available in: **Professional**,
Enterprise, and **Developer**
Editions

Updated and accurate opportunities drive precise forecasts. Ensure that your opportunities are up to date by enabling managers to schedule opportunity update reminders: automated opportunity reports that managers can customize for their teams. For example, a manager can schedule a weekly report of all the opportunities for the current fiscal quarter owned by anyone on the team and have the report distributed to everyone on the team.

See Also:

[Enabling Opportunity Update Reminders on page 33](#)

[Scheduling Opportunity Update Reminders on page 34](#)

IMPLEMENTATION TIPS

- With this release, salesforce.com automatically enables opportunity update reminders for every user that has direct reports if those direct reports own opportunities with a close date within the current fiscal year.
- Once a day, salesforce.com checks for new users added to your organization and automatically enables their opportunity update reminders if they have direct reports that own opportunities with close dates within the current fiscal year.

BEST PRACTICES

- Your first opportunity update reminders run on 4/25/04. If you wish to disable them before that time, see [Enabling Opportunity Update Reminders](#) on page 33.
- Schedule reminders to be sent a few days ahead of your regular forecast reviews for maximum effectiveness.
- Include any other custom information, such as links, in the custom message body.

USING OPPORTUNITY UPDATE REMINDERS

Enabling Opportunity Update Reminders

To enable opportunity update reminders for your organization:

1. Click **Setup | Customize | Opportunities | Update Reminders**.
2. Click **Edit**.
3. Select **Enable Update Reminders for My Organization**. Remove the check to disable this feature.
4. Optionally, select **Automatically Activate Reminders for Users with Direct Reports** if you want to schedule opportunity update reminders for all your current users and users you add in the future that have direct reports.
5. Click **Save**.
6. Select all the users that you want to activate. Activated users can schedule an opportunity update reminder. See [Scheduling Opportunity Update Reminders](#) on page 34.
7. Click **Activate**. Click **Deactivate** to prevent the selected users from creating an opportunity update reminder.

This enables each user selected to schedule opportunity update reminders for his or her team. You can activate any user that has direct reports.

Scheduling Opportunity Update Reminders

Once opportunity update reminders are enabled for your organization, any user who has direct reports can schedule them.

To schedule an opportunity update reminder:

1. Click **Setup | Email | My Update Reminder**.
2. Check **Active** if you want reminders to start after you save the settings.
3. Enter a name and address for the sender of the reminders.
4. Choose a recipients option.
5. Enter any other recipients in the **CC** field.
6. Enter a subject and message to be included in the email reminders.
7. Select a schedule frequency.
8. Select **Include Stale Opportunities** if you want to include all opportunities that are open but have a close date within the previous 90 days.
9. Choose a **Close Date** to include opportunities with dates within that range.
10. Select the fields to include in the email reminders. Use the following field descriptions:

Field	Description
Last Login Date	Most recent login date of the opportunity owner
# of Open Opportunities	Total number of opportunities in the report
# Not Updated in Last 30 Days	Total number of opportunities that have not been updated in 30 days
Open Opportunity Amount	Total of all opportunity amounts in report
Total Closed Amount	Total closed amount for all opportunities in report
Last Update Date	Most recent date the opportunity owner submitted a forecast
Forecast Amount	See forecast fields from the online help.
Best Case Amount	See forecast fields from the online help.

11. Click **Save**.

When there are no records in an opportunity update reminder, salesforce.com does not send an email. If no email is sent for three consecutive opportunity update reminders, the scheduled reminder is deactivated.

Multi-Tier Case Escalations

Available in: **Professional**,
Enterprise, and **Developer**
Editions

When creating a case escalation rule, you can now specify up to five escalation actions to escalate the case repeatedly over time. You can also select a checkbox to notify the case owner of each escalation.

See Also:

[Setting Escalation Rules on page 35](#)

IMPLEMENTATION TIPS

- Document your organization's escalation policies in detail before you begin to customize your escalation rule settings.

BEST PRACTICES

- To make sure action is taken in response to repeated escalations, be sure to notify a different user or queue in at least one escalation action.
- Each escalation action should result in notification to a user with a progressively higher level of responsibility within the company to ensure that the appropriate action is taken.
- Create a special queue containing your best support representatives and have the last escalation action notify this special queue to ensure that your best representatives are working on your most critical cases.

USING MULTI-TIER CASE ESCALATIONS

Setting Escalation Rules

Administrators, and users with the "Customize salesforce.com" permission, can create case escalation rules to escalate cases automatically if they are not resolved within a certain period of time. Escalation rules run only during your specified business hours.

Typically, your organization will have one escalation rule that consists of multiple rule entries which specify exactly how the cases are escalated. For example, your standard case escalation rule may have two entries: cases with "Type equals Gold" are escalated within two hours, and cases with "Type equals Silver" are escalated within eight hours.

Creating Escalation Rules

To create an escalation rule:

1. Choose **Setup | Customize | Cases | Escalation Rules**.
2. Choose **New**, and give the rule a name. Specify whether you want this to be the active escalation rule. Click **Save**.
3. To create the rule entries, click **New**. Each rule can have up to 500 entries. Each entry defines a condition that determines how cases are processed. For each entry, you can specify the following:

Field	Description
Order	Sets the order in which the entry will be processed in the rule, for example, '1,' '2.' Salesforce.com evaluates each entry in order and tries to match the criteria of the entry. As soon as a match is found, salesforce.com processes the item and stops evaluating the rule entries for that item. If no match is found, the case is simply not escalated.
Criteria	Specifies conditions that the case must match for it to be escalated. See Entering Filter Criteria on page 353 for more information on search criteria. Note that if your condition uses a custom field, the rule entry will automatically be deleted if the custom field is deleted.
Ignore Business Hours	Indicates that the rule entry is in effect at all times.

4. After creating the entry, click **Save**, or **Save & New** to save the entry and create more entries.
5. After you create the last entry, click **Save**. The escalation rule and a list of one or more rule entries are displayed.

NOTE

To create an error-proof rule, always create the last rule entry with no criteria. This rule entry will catch any cases that the previous rule entries did not assign.

6. Specify what action you want to be taken when one of the escalation rule entries is true. Click **Edit** next to the name of one of the rule entries.
7. Click **New** to add an escalation action. You can specify up to five actions for each rule entry, to escalate the case over increasing periods of time. For each escalation action, you can specify the following:

Field	Description
Age Over	Specifies the number of hours after which a case should be escalated if it has not been closed. The time is calculated from case creation to the present using your support hours. No two escalation actions can have the same number in this field.
Ignore Business Hours	Indicates that the rule entry is in effect at all times.
Assign To	Specifies the user or queue to which the case will be assigned if it matches the condition. Users specified here cannot be marked "inactive." Re-assigning an escalated case is optional.
Notification Template	Specifies the template to use for the email that is automatically sent to the new owner specified in the Assign To field. If no template is specified, no email will be sent.
Notify	Specifies the user to notify when the case is escalated. Notifying another user is optional.

Field	Description
Notify Case Owner	Indicates that the owner of the case is notified when the case is escalated.
Notification Template	Specifies the template to use for the notification email that is automatically sent to the Notify user(s). If you choose a user in the Notify field, you must select a template.
Additional Emails	Specifies additional individuals that you want to notify upon escalation.

Checkbox Custom Fields

Available in: **All** Editions

You have probably already made use of salesforce.com's custom fields. You can create custom fields to contain many different types of values such as dates, percentages, and URLs. Now, a new custom field type allows you to assign a true or false attribute to any record.

See Also:

[Creating Custom Fields on page 38](#)

IMPLEMENTATION TIPS

- Create checkbox custom fields just like any other custom field. Click **Setup | Customize salesforce.com** and select the appropriate tab or link.
- Convert your existing custom picklists to custom checkboxes by clicking on the **Change Type of this Field** button from the custom field edit page. When you select Checkbox as the new data type, salesforce.com prompts you to select which picklist values to map to checked boxes and unchecked boxes.

BEST PRACTICES

- Convert your picklists into checkboxes if they only contain two values.
- Use your custom checkbox fields when running reports.

USING CUSTOM CHECKBOXES

Creating Custom Fields

Available in: **All** Editions

To tailor salesforce.com for your organization, you can add custom fields for each of the tabs that your organization uses.

salesforce.com Edition	Maximum custom fields
Personal	5 per tab, plus 5 for users
Team	5 per tab, plus 5 for users
Professional	100 per tab, plus 10 for activities and users
Enterprise	250 per tab, plus 10 for activities and users
Developer	250 per tab, plus 10 for activities and users

Click **Setup | Customize**, select the appropriate activity, tab, or users link, and then click the **Fields** link.

Adding Fields - To add a custom field:

1. Click **New** in the Custom Fields section of the page.
2. Choose the type of field to create, and click **Next**.

3. Enter a field label, name, any other attributes, and click **Next**.
 - For checkboxes, choose **Checked** or **Unchecked** in **Default Value** to indicate the default when creating new records.
 - Use the field name for merge fields in web integration links and sforce controls, and when referencing the field from the API. The field name can only contain characters, letters, and the underscore (_) character, must start with a letter, and cannot end with an underscore or contain two consecutive underscore characters.
 - For custom picklists, select the appropriate checkbox to alphabetize the picklist entries. You can also set the first value as the default selection. If you mark both boxes, salesforce.com first alphabetizes the entries and then sets the first alphabetized value as the default.
4. In Enterprise and Developer Editions, set the field-level security to determine whether the field should be visible or read-only for specific profiles.
5. Choose the page layouts that should display the field as an editable field. The field is added to the first two-column section on the page layout. For user custom fields, the field is automatically added to the bottom of the User detail page.
6. Click **Save** to finish or **Save & New** to create more custom fields.

Changing Page Layouts - To change the location of a new custom field, edit the page layout for the appropriate tab.

Editing Fields - To edit a custom field, click **Edit** next to the field's name. You can modify the field attributes, change the field's data type, and in Enterprise and Developer Editions, set the field-level security for the field.

Viewing Fields - In Enterprise and Developer Editions, to view the details for a custom or standard field, click the name of the field. From the field detail page, you can:

- Click **Set Field-Level Security** to set users' access to the field.
- Click **View Field Accessibility** to view who can access the field based on profile and record type.
- For picklist fields, you can add new values and edit, replace, or delete existing values.

Using Record Types - If your organization uses record types, edit the record type to modify which picklist values are visible for the record type.

Using Translation Workbench - If your organization uses the translation workbench, notify your translators that new fields need translations.

Converting Picklists into Checkboxes

Changing your custom picklists to custom checkboxes is simple using the **Change Type of this Field** button from the custom field edit page. If you select **Checkbox** as the new data type, you can choose which picklist values to map to checked boxes and unchecked boxes.

NOTE

If you change the data type of any custom field that is used for lead conversion, that lead field mapping will be deleted.

Changing the data type of an existing custom field can cause data loss in the following situations. If data is lost, any list view based on the custom field will be deleted, and assignment and escalation rules may be affected.

- * Changing to or from type Date or Date/Time
- * Changing to or from type Picklist
- * Changing to Number from any other type
- * Changing to Percent from any other type
- * Changing to Currency from any other type
- * Changing from Checkbox to any other type

Sharing Cases and Leads

Available in: **Enterprise**, and
Developer Editions

If your organization has a special method for sharing records, you have probably made use of salesforce.com's flexible sharing model. Now you can customize salesforce.com to meet your case sharing needs. With this release, you can set an organization-wide default for sharing cases, create case sharing rules, and share cases individually.

See Also:

[Setting the Sharing Model on page 40](#)

[Setting Sharing Rules on page 44](#)

[Sharing Cases on page 46](#)

[Sharing Leads on page 48](#)

IMPLEMENTATION TIPS

- All organizations with a Public Read/Write or Public Read Only sharing model for accounts will get a Public Read/Write/Transfer model for cases and leads.
- Accounts that are manually shared to users or shared through account teams will need to be manually shared to associated cases of the account.

USING CASE SHARING

Setting the Sharing Model

Your organization's sharing model sets the default access that users have to each other's data. The default sharing access levels are listed below. Administrators, and users with the "Manage Users" permission, can change the default access for accounts, calendars, cases, contacts, contracts, leads, opportunities, and custom objects.

Type	Default Access Level	Controlled By
Accounts	Public Read/Write	Organization-wide defaults
Activities	Private	Access to other users' activities is based on your role in the hierarchy
Calendar Access	Hide Details and Add Events	Organization-wide defaults
Campaigns	Public Read Only OR Public Read/Write for users with the Marketing User checkbox selected on their personal information	Cannot be changed
Cases	Public Read/Write/Transfer	Organization-wide defaults
Contacts	Public Read/Write	Organization-wide defaults
Contracts	Public Read/Write	Organization-wide defaults
Custom Objects	Public Read/Write	Organization-wide defaults

Type	Default Access Level	Controlled By
Documents	Private	Access to view or edit documents is determined by your access to document folders
Forecasts	Private	Access to other users' forecasts is based on your role in the hierarchy
Leads	Public Read/Write	Organization-wide defaults
Opportunities	Public Read Only	Organization-wide defaults
Solutions	Public Read/Write	Cannot be changed

Managing the Sharing Model

To maintain your organization's sharing model, create public groups, and specify sharing rules, select **Setup** | **Security Controls** | **Sharing Rules**. The page contains these related lists:

- [Organization Wide Defaults](#) on page 41
- [Public Groups](#) on page 41
- [Account Sharing Rules](#) on page 41
- [Opportunity Sharing Rules](#) on page 42

Organization Wide Defaults

Click **Edit** in this related list of the Sharing Rules page to set the default sharing access for accounts, calendars, cases, contacts, contracts, leads, opportunities, and custom objects. See [Sharing Model Fields](#) on page 43 for a description of the possible access levels.

Public Groups

This related list of the Sharing Rules page is where you can create, edit, and delete public groups.

- Click **New** to create a public group. Specify a name, add members to the group, and click **Save**.
- To edit or delete a group, click **Edit** or **Del** next to the group name.

NOTE

A public group consists of one or more users, public groups, or roles. Any user can share their data with a public group.

Users can also use public groups to synchronize contacts owned by other users.

Account Sharing Rules

The Account Sharing Rules related list of the Sharing Rules page allows you to set default sharing access for accounts and their associated opportunities and cases. If you have organization-wide sharing defaults of Public Read Only or Private, you can set sharing rules to allow users to share data automatically. See [Setting Sharing Rules](#) on page 44 for more information.

Case Sharing Rules

The Case Sharing Rules related list of the Sharing Rules page allows you to set default sharing access for cases and their associated accounts. If you have organization-wide sharing defaults of Public Read Only or Private, you can set sharing rules to allow users to share data automatically. Available in Enterprise and Developer Editions only. See [Setting Sharing Rules](#) on page 44 for more information.

Lead Sharing Rules

The Lead Sharing Rules related list of the Sharing Rules page allows you to set default sharing access for leads until they are converted. If you have organization-wide sharing defaults of Public Read Only or Private, you can set sharing rules to allow users to share data automatically. Available in Enterprise and Developer Editions only. See [Setting Sharing Rules](#) on page 44 for more information.

Opportunity Sharing Rules

The Opportunity Sharing Rules related list of the Sharing Rules page allows you to set default sharing access for individual opportunities and their associated accounts. Available in Enterprise and Developer Editions only.

Notes on the Sharing Model

- Regardless of the organization-wide defaults, users can always view and edit all data owned by or shared with users below them in the role hierarchy.
- Administrators, and users with the "View All Data" or "Modify All Data" permissions, have access to view or edit all data, except campaigns.
- Only users that have the **Marketing User** checkbox selected on their personal information page can create, edit, and delete campaigns.
- Contacts that are not linked to an account are always private. Only the owner of the contact and administrators can view it.
- Private opportunities can be accessed only by their owners, users above the owners in the role hierarchy, and administrators.
- Individual users can further extend, but not restrict, the sharing access for their own records.
- Regardless of the sharing model, only record owners, users above the owners in the role hierarchy, and administrators can delete or extend the sharing access for individual records.
- To restrict users' access to opportunities they do not own that are associated with accounts they do own, set the **Opportunity Access** field on the role.
- You must have at least read access to a record to be able to add activities or other associated records to it.
- You must have read/write access to a record to be able to add notes or attachments to it.

Sharing Model Fields

Here is a description of the organization-wide sharing model fields:

Field	Description
Default Account, Contact and Contract Access	Specifies default sharing of accounts and their associated contacts and contracts. To use cases effectively, set this sharing access to Read/Write.
Default Calendar Access	Specifies sharing of individual users' calendars.
Default Case Access	Specifies default sharing of cases and associated accounts.
Default Custom Object Access	Specifies default sharing of any custom objects that your organization has created.
Default Lead Access	Specifies default sharing of leads.
Default Opportunity Access	Specifies default sharing of opportunities.

Here is a description of the access levels you can assign for sharing accounts, cases, contacts, contracts, leads, opportunities, and custom objects:

Field	Description
Private	Only the record owner, and users above that role in the hierarchy, can view, edit, and report on those records. For example, if Tom is the owner of an account, and he is assigned to the role of Western Sales, reporting to Carol (who is in the role of VP of Western Region Sales), then Carol can also view, edit, and report on Tom's accounts.
Public Read Only	All users can view and report on records but not edit them. Only the owner, and users above that role in the hierarchy, can edit those records. For example, Sara is the owner of ABC Corp. Sara is also in the role Western Sales, reporting to Carol, who is in the role of VP of Western Region Sales. Sara and Carol have full read/write access to ABC Corp. Tom (another Western Sales Rep) can also view and report on ABC Corp, but cannot edit it.
Public Read/Write	All users can view, edit, and report on all records. For example, if Tom is the owner of Trident Inc., all other users can view, edit, and report on the Trident account. However, only Tom can alter the sharing settings or delete the Trident account.
Public Read/Write/Transfer	All users can view, edit, transfer, and report on all records. Only available for cases or leads. For example, if Alice is the owner of ACME case number 100, all other users can view, edit, transfer ownership, and report on that case. But only Alice can delete or change the sharing on case 100.

Here is a description of the access levels you can assign for sharing personal calendars:

Field	Description
Hide Details	Others can see whether the user is available at given times, but can not see any other information about the nature of events in the user's calendar.
Hide Details and Add Events	In addition to the sharing levels set by Hide Details, users can insert events in other users' calendars.
Show Details	Users can see detailed information about events in other users' calendars.
Show Details and Add Events	In addition to the sharing levels set by Show Details, users can insert events in other users' calendars.
Full Access	Users can see detailed information about events in other users' calendars, insert events in other users' calendars, and edit existing events in other users' calendars.

No matter what calendar sharing levels are set in the organization-wide defaults or by individual users, all users can invite all other users to group events.

Setting Sharing Rules

Account sharing rules are available in: **Professional**, **Enterprise**, and **Developer** Editions.
Case, lead, and opportunity sharing rules are available in: **Enterprise** and **Developer** Editions.

Administrators, and users with the "Manage Users" permission, can set rules. Sharing rules give users of a selected public group or role access to data owned by users in another public group or role.

You can create the following types of sharing rules:

- **Account Sharing Rules** - Set default sharing access for accounts and their associated contacts, cases, contracts, and opportunities.
- **Case Sharing Rules** - Set default sharing access for individual cases and associated accounts.
- **Lead Sharing Rules** - Set default sharing access for individual leads.
- **Opportunity Sharing Rules** - Set default sharing access for individual opportunities and their associated accounts.

Creating Sharing Rules

To create a sharing rule:

1. Click **Setup** | **Security Controls** | **Sharing Rules**.
2. Create public groups, if you have not already done so. See [Public Groups](#) on page 41.
3. Click **New** in the related list for the for the appropriate type of record.

4. Select the group, queue, or role whose data should be shared. Then select the group, queue, or role who should have access to that data. You can share data between the following:

Type	Description
Case Queues	All cases owned by the queue, excluding records owned by individual members of the queue. Not available in the Share with list.
Lead Queues	All leads owned by the queue, excluding records owned by individual members of the queue. Not available in the Share with list.
Public Groups	All public groups defined by your administrator.
Roles	All roles defined for your organization. This includes all of the users in that role.
Roles and subordinates	This includes all of the users in the role plus all of the users in roles below that role.

5. Set the sharing access that the users should have.
 - For account sharing rules, the **Account, Contact and Contract Access** level applies to accounts and associated contacts or contracts owned by the role or group members. The **Opportunity Access** level applies only to the opportunities associated with the shared accounts.
 - For opportunity sharing rules, the **Opportunity Access** level applies to opportunities owned by the role or group members, regardless of the associated account.
6. Click **Save**.

Editing and Deleting Sharing Rules

To edit or delete a sharing rule, click **Edit** or **Del** in the Sharing Rules related lists of the Sharing Rules page.

You can edit the access levels for any sharing rule. You cannot change the specified groups or roles for the rule.

Recalculating Sharing Rules

When you make modifications to groups and roles, sharing rules are automatically re-evaluated to add or remove access as necessary. Modifications might include adding or removing individual users from a group or role, changing which role a particular role reports to, or adding or removing a group from within another group. However, if these modifications affect too many users at once, you are warned that the sharing rules will not be automatically reevaluated. You must manually recalculate them.

To recalculate the sharing rules, click **Recalculate** in the Sharing Rules related lists of the Sharing Rules page.

Notes on Sharing Rules

- You can use sharing rules to grant wider access to data. You cannot restrict access below your organization-wide default levels.
- Sharing rules apply to all new and existing records owned by the specified role or group members.
- Sharing rules do not apply to inactive users.
- When you change the access levels for a sharing rule, all existing records are automatically updated to reflect the new access levels.
- When you delete a sharing rule, the sharing access created by that rule is automatically removed.

- When you transfer records from one user to another, the sharing rules are reevaluated to add or remove access to the transferred records as necessary.
- When you modify which users are in a group or role, the sharing rules are reevaluated to add or remove access as necessary.
- For opportunity sharing rules, if the role or group members do not have access to the account associated with the shared opportunity, the rule automatically gives them access to view the account as well.
- For case sharing rules, if the role or group members do not have access to the account associated with the shared case, the rule automatically gives them access to view the account as well.
- Managers in the role hierarchy are automatically granted the same access that users below them in the hierarchy have from a sharing rule.

Sample Uses for Sharing Rules

- Organizations with organization-wide defaults of Public Read Only or Private can create sharing rules to give specific users access to data owned by other users.
- To use cases effectively, customer support users must have read access to accounts and contacts. You can create account sharing rules to give your customer support team access to accounts and contacts when working on cases.
- The Western and Eastern Regional Directors need to see all of the accounts created by each others' sales reps. You can create two public groups - one that includes the Western and Eastern Regional Director roles and one that includes the Western and Eastern Sales Rep roles. Then create an account sharing rule so that records owned by the Western and Eastern Sales Rep group are shared with the group containing the Western and Eastern Regional Director roles.

Sharing Cases

Available in: **Enterprise** and **Developer** Editions

Your administrator defines the default sharing model for your entire organization. You can change this model to extend sharing to more users than the default set by your administrator. However, you cannot change the sharing model to make it more restrictive than the default.

NOTE

To share a case with another user, that user must have access to the account associated with the case.

To extend sharing of a case, click **Sharing** on the case you want to share. To grant access to others, see [Granting Access to Records](#) on page 46. To view all users that have access to the record, see [Viewing Which Users Have Access](#) on page 47.

Granting Access to Records

Users can manually grant access to certain types of records. In some cases, granting access includes access to all associated records. For example, if you grant another user access to your account, the user will automatically have access to all the opportunities and cases associated with that account.

To grant access to a record:

1. Click **Sharing** on the record you want to share.
2. Click **Add**.

3. From the drop-down list, select the type of group, user, or role to add. Your choices are:

Type	Description
Public Groups	All public groups defined by your administrator.
Personal Groups	All personal groups defined by the record owner. Only the record owner can share with his or her personal groups.
Users	All users in your organization.
Roles	All roles defined for your organization. This includes all of the users in that role.
Roles and subordinates	This includes all of the users in the role plus all of the users in roles below that role.

4. Choose the specific groups, users, or roles who should have access by adding their names to the New Sharing list.
5. Choose the access level for the record you are sharing and any associated records.
When sharing an opportunity or case, users must also have at least read access to the associated account. If you also have privileges to share the account, users are automatically given read access to the account. If you do not have privileges to share the account, you must ask the account owner to give the users read access to it.
6. Click **Save**.

To edit the access levels for a record:

- Click **Sharing** on the record, and then click **Edit** next to the group, user, or role whose access you want to modify.

To delete the sharing access for a group, user, or role:

- Click **Sharing** on the record, and then click **Del** next to the group, user, or role whose access you want to remove.

NOTE

To grant sharing privileges for a record, you must be the record owner, a user in a role above the owner, or an administrator.

Viewing Which Users Have Access

After you have granted access to a record you own, you can view a list of users who have access to the record and its related information. You can also view the reason why each user has access.

1. Click **Sharing** on the desired record.
2. Click **Expand List** to view a detailed list of every user who has access that is greater than the organization-wide default settings.

The list also shows each user's access level for the record and any associated records. The possible access levels are:

Access Level	Description
All	User can view, edit, delete, and transfer the record. User can also extend sharing access to other users.
Read/Write	User can view and edit the record, and add associated records, notes, and attachments to it.
Read Only	User can view the record, and add associated records to it. They cannot edit the record or add notes or attachments.
Private	User cannot access the record in any way.

3. Click **Why?** next to a user's name to view the reason he or she has access.
The list shows all of the reasons why the user has access. The user is granted the greatest access level. The possible reasons are:

Reason	Description
Account Sharing Rule	The user has access via an account sharing rule created by the administrator.
Account Sharing	The user was granted access via the Sharing button on the associated account.
Account Team	The user is a member of the account team.
Administrator	The user is an administrator, or has the "Modify All Data" permission.
Associated record owner or sharing	The user owns or has been given sharing access to a record associated with the account. Click the link to view which associated records the user owns or has been given sharing access to.
Case Sharing Rule	The user has access via a case sharing rule created by the administrator.
Lead Sharing Rule	The user has access via a lead sharing rule created by the administrator.
Manual Sharing	The user has access that was granted via the Sharing button on the account.
Opportunity Sharing Rule	The user has access via an opportunity sharing rule created by the administrator.
Owner	The user owns the record.
Sales Team	The user is a member of the opportunity sales team.

Sharing Leads

Your administrator defines the organization sharing model; however, you can extend sharing privileges for your own data on a lead-by-lead basis. You can use lead sharing to increase access to your leads; you cannot restrict access beyond your organization's default access levels.

To extend sharing of a lead, click **Sharing** on the lead you want to share. To grant access to others, see [Granting Access to Records](#) on page 46. To view all users that have access to the record, see [Viewing Which Users Have Access](#) on page 47.

Offline PDA Edition

Available in: **Professional** and **Enterprise** Editions

Salesforce.com offers many different mobile editions so that you can access your data anywhere. Offline Edition gives you access from your disconnected laptop; Wireless Edition allows you to connect to your data from your wireless or handheld devices. Now, Offline PDA Edition gives you access to your salesforce.com data from any Pocket PC or Palm OS 5.0 or later device.

See Also:

What is Offline PDA Edition? on page 49

Installing Offline PDA Edition on page 49

Working with Offline PDA Edition on page 50

IMPLEMENTATION TIPS

- Offline PDA Edition is available to Professional and Enterprise Edition customers at an additional charge.
- Verify device compatibility by taking the free 30-day trial is available.

BEST PRACTICES

- Use the same **Include Offline** button available on an account to include that account's information in your Offline PDA Edition.

USING OFFLINE PDA EDITION

What is Offline PDA Edition?

Offline PDA Edition is similar to salesforce.com Offline Edition in that it frees you to work on your deals from anywhere. Use your Pocket PC or Palm OS 5.0 or later mobile device to view, edit, create, and delete your salesforce.com accounts, contacts, opportunities, and activities. Then when you're back in the office, you can easily update the online system with the changes.

Offline PDA Edition is available for an additional cost with Professional and Enterprise Editions. Offline PDA Edition is delivered by AvantGo, a service of iAnywhere Solutions.

Installing Offline PDA Edition

Offline PDA Edition is available for an additional cost with Professional and Enterprise Editions.

To download and install the Offline PDA Edition client:

1. Click **Setup | Mobile Users | Offline PDA Edition**.
The **Offline PDA Edition** link is available only if your administrator has granted you access to Offline PDA Edition via the **Offline PDA User** checkbox on your personal information. Professional and Enterprise Edition users can also access the link for a 30 day trial of the service.
2. Click **Setup & Install**.
3. Complete the setup wizard. If you do not have an active AvantGo account, the wizard prompts you to create one.
Completing the setup wizard includes:
 - Creating an AvantGo account if you don't already have one
 - Downloading and running the installer
 - Configuring your mobile device
 - Synchronizing your salesforce.com data

NOTE

This feature requires salesforce.com to install components that edit the registry on your computer. If your organization imposes security that prevents you from editing the registry, log in as the administrator of your machine before installing these components or contact your IT department for assistance.

To run Offline PDA Edition:

1. Start your mobile device.
 - On your Pocket PC, select **Start | Programs | salesforce.com**.
 - On your Palm, select **Applications | salesforce.com**.

Working with Offline PDA Edition

Offline PDA Edition uses a simple user interface with a main drop down list containing options that correlate with standard salesforce.com tab names. The following options are available.

Accounts

- View and select your key accounts
- View, create, modify, or delete accounts
- Link contacts, opportunities, and activities to offline accounts

Contacts

- View and select your key contacts
- View, create, modify, clone, or delete contacts
- Link activities to offline contacts

Opportunities

- View and select your key opportunities
- View, create, modify, clone or delete opportunities
- Associate contact roles to offline opportunities

Tasks

- Find your tasks
- View, create, modify, clone, or delete tasks

Calendar

- View by day or month
- View, create, modify, or delete calendar events

History

- View history of any data conflicts identified during synchronization. See the online help for information on resolving data conflicts and using the History option.

System Requirements

The system requirements for Offline PDA Edition are:

- Windows 98, 2000, XP, or NT
- Pocket PC or Palm OS 5 handheld
- Microsoft Windows CE or Pocket PC
- 1.5MB free disk space minimum
- A desktop cradle for synchronizing data

NOTE

If you are the organizer of a group event and you change the group event offline, the changes are not automatically emailed to all attendees, although the changes will appear in their calendars the next time you do an update.

If you have been invited to a group event, but are not the organizer, you cannot modify or delete that group event offline.

Real-Time Data Replication

Available in: **Enterprise** Editions

The sforce Web Services API supports *data replication*, which allows you to store and maintain a local, separate copy of your organization's pertinent salesforce.com data for specialized uses, such as data warehousing, data mining, custom reporting, analytics, integration with other applications, and so on. Data replication provides you with local control and the ability to run large or ad hoc analytical queries across the entire data set without transmitting all that data across the network.

This feature provides a mechanism that targets data replication (one-way copying of data). It does *not* provide data synchronization (two-way copying of data) or data mirroring capabilities.

The sforce API supports data replication with the following new API calls:

API Call	Description
getUpdated	Retrieves the list of objects that have been updated (added or changed) during the specified timespan for the specified object.
getDeleted	Retrieves the list of objects that have been deleted during the specified timespan for the specified object.

See Also:

[Data Replication](#) on page 53

IMPLEMENTATION TIPS

- The sforce Web service truncates the seconds portion of dateTime values. For example, if a client application submits a timespan between 12:30:15 (GMT) and 12:35:15 (GMT), then the sforce Web service retrieves information about items that have changed between 12:30:00 (GMT) and 12:35:00 (GMT), inclusive.

BEST PRACTICES

- We recommend polling no more frequently than every five minutes. The sforce Web service has built-in controls to prevent errant applications from invoking the data replication API calls too frequently.
- The polling frequency depends on business requirements for how quickly changes in your organization's salesforce.com data need to be reflected in the local copy. Some client applications might poll just once a day to retrieve changes, while other client applications might poll every five minutes to achieve near real-time redundant mirroring of the salesforce.com data.
- Client applications should save the timespan used in previous data replication API calls so that the application knows the last time period for which data replication was successfully completed.
- To ensure data integrity on the local copy of the data, a client application needs to capture all of the relevant changes during polling—even if it requires processing data redundantly to ensure that there are no gaps. Your client application can contain business logic to skip processing objects that have already been integrated into your local data.
- Gaps can also occur if the client application somehow fails to poll the data as expected (for example, due to a hardware crash or network connection failure). Your client application can contain business logic that determines the last successful replication and polls for the next consecutive timespan.

- If for any reason the local data is compromised, your client application might also provide business logic for rebuilding the local data from scratch.
- In the sforce API, data replication focuses on changes made to *rows* of objects. It does not determine whether changes have been made to the *structure* of objects (for example, fields added to—or removed from—a custom object). It is the responsibility of the client application to check whether the structure of a given object has changed since the last update. Before replicating data, client applications can call `describeSObject` on the object, and then compare the data returned in the `describeSObjectResult` with the data returned and saved from previous `describeSObject` invocations.

USING DATA REPLICATION

Data Replication

A client application typically proceeds along the following basic steps for *each* object that it replicates:

1. Optionally, the client application determines whether the structure of the object has changed since the last replication request.
2. Call `getUpdated`, passing in the object and timespan for which to retrieve data.
Note that `describeSObject` retrieves the IDs for data to which the logged-in user has access. Data that is outside of the user's sharing model is *not* returned. The sforce Web service returns the ID of every changed object that is visible to you, regardless of what change occurred in the object.
3. Iterate through the returned array of IDs. For each ID element in the array, call `retrieve` to obtain the latest information you want from the associated object. The client application must then take the appropriate action on the local data, such as inserting new rows or updating existing ones with the latest information.
4. Call `getDeleted`, passing in the object and timespan for which to retrieve data.
Unlike `getUpdated`, `getDeleted` retrieves the IDs of *all* deleted objects for the given object throughout the organization, including data that is outside of the user's sharing model.
5. Iterate through the returned array of IDs. Your client application must then take the appropriate action on the local data to remove (or flag as deleted) the deleted objects. If your client application cannot match rows in the local data using the retrieved object ID, then it must call `retrieve`, passing in the ID, to obtain the information it needs to match the rows in the local data to delete.
6. Optionally, the client application saves the request timespans for future reference.

Programmatic Text Searching

Available in: **Enterprise** Edition

The sforce Web Services API supports the ability to perform *programmatic text searches* in SOAP client applications. The sforce Object Search Language (SOSL) is used to construct simple but powerful text searches for the new search API call.

SOSL allows you to programmatically search your organization's salesforce.com data for specific information. You can search all objects—including custom objects—to which you have access. The sforce Web service executes the search within the specified scope and returns to you only the information that is available to you based on the user permissions under which your application has logged in. SOSL allows you to specify the text expression, the scope of fields to search, the list of objects and fields to retrieve, and the maximum number of objects to return.

The search call supports searching custom objects. Certain objects cannot be searched via the sforce API, such as Attachment objects. To search an object via the search call, its object must be configured as searchable (`searchable=True`). To determine whether an object can be searched, your client application can invoke the describeSObject call on the object and inspect its `searchable` property.

The search call searches most objects (including custom objects) and text fields to which you have access. It does *not* search the following objects and fields:

- Any objects (such as picklists) that are defined as not searchable (`searchable=false`). To determine whether a given object is searchable, your application can invoke the describeSObject call on the object and inspect the `searchable` property in the describeSObjectResult.
- Number, date, checkbox, or textarea fields. To search for such information, use the query call instead.
- Attachment objects associated with certain objects, such as account, contact, or opportunity objects.

See Also:

[Text Searches in Client Applications on page 55](#)

IMPLEMENTATION TIPS

- Before coding your text search programmatically, you can test your text search syntax using the sidebar Search or Advanced Search features in the salesforce.com interface. Programmatic searches are most similar (but not identical) to the Advanced Search feature—programmatic searches are more exacting, requiring you to structure your searches carefully, while the Advanced Search feature is prestructured and is more forgiving to the end user.

BEST PRACTICES

- When designing text searches, make sure that your text searches are designed with efficiency and performance in mind. A text search should be sufficiently comprehensive to gather all the information you need but also properly focused to search only where you want to look. SOSL syntax allows you to define the search scope, both in the types of columns to search (`IN` clause) and the objects to search (`RETURNING` clause).
- When using wildcards, consider the following issues:
 - The more focused your wildcard search, the faster the search results are returned, and the more likely the results will reflect your intention. For example, to search for all occurrences of the word `prospect` (or `prospects`, the plural form), it is more efficient to specify `prospect*` in the search string than to specify a less restrictive wildcard search (such as `prosp*`) that could return extraneous matches (such as `prosperity`).
 - Tailor your searches to find all variations of a word. For example, to find `property` and `properties`, you would specify `propert*`.
 - Punctuation is indexed. To find `*` or `?` inside a phrase, you *must* enclose your search string in quotation marks and you *must* escape the special character. For example, `"where are you\"?"` finds the phrase `where are you?`. The escape character (`\`) is required in order for this search to work correctly.

USING TEXT SEARCHES IN CLIENT APPLICATIONS

Text Searches in Client Applications

This section provides sample SOSL text search strings.

Look for `joe` anywhere in the system. Return the IDs of the records where `joe` is found.

```
Find {joe}
```

Look for the name `Joe Smith` anywhere in the system, in a case insensitive way. Return the IDs of the records where `Joe Smith` is found.

```
Find {Joe Smith}
```

Look for the name `Joe Smith` in the name field of a lead, and return the ID field of the records.

```
Find {Joe Smith}
```

```
In All Fields
```

```
Returning lead
```

Look for the name `Joe Smith` in the name field of a lead and return the name and phone number.

```
Find {Joe Smith}
```

```
In All Fields
```

```
Returning lead(name, phone)
```

Look for the name `Joe Smith` or `Joe Smythe` in the name field of a lead or contact and return the name and phone number. If an opportunity is called `Joe Smith`, the opportunity should not be returned.

```
Find {"Joe Smith" OR "Joe Smythe"}
```

```
In All Fields
```

```
Returning lead(name, phone), contact(name, phone)
```

Wildcards:

```
Find {Joe Sm*}
```

```
Find {Joe Sm?th*}
```

Delimiting "and" and "or" as literals when used alone:

```
Find {"and" or "or"}
```

```
Find {"joe and mary"}
```

```
Find {in}
```

```
Find {returning}
```

```
Find {find}
```

Escaping special characters `& | ! () { } [] ^ " ~ * ? : \ '`

```
Find {right brace \}}
```

```
Find {asterisk \*}
```

```
Find {question \?}
```

```
Find {single quote \'}
```

```
Find {double quote \"}
```

ADDITIONAL ENHANCEMENTS

Cases

- Select an option to notify your default case owner when a case is assigned to the default case owner because no assignment rules applied.
- If you want your case escalation rules to trigger early, click **Setup | Customize | Cases | Support Settings**. Check **Early Triggers Enabled** if you want escalation rules to trigger before the **Age Over** time specified on the escalation rule entry.
- You can now customize the page layout that is used for closing cases.
- When a case is escalated or a user adds an attachment to a case, the case owner is notified by email.
- Case history reporting is now available to track changes in ownership of a case over time.

Customize My Display

Now this functionality has been extended to Team Edition users. To change your display, click **Setup | My Personal Information | Change My Display**.

Dashboards

Clone dashboards to copy the contents of a dashboard into a new one. To clone a dashboard, click **Clone** from the dashboard's display page.

Documents

Document title and filename are now two separate fields so that you can give a document a title that is more descriptive than its filename.

Email Attachments

Because email attachments are sometimes more than 3 MB, this release allows you to attach a file to an email that is up to 10 MB. Any email you send with an attachment over 3 MB will contain links to the attached files on the salesforce.com public server.

Email Templates

- Now the creator of any HTML email template is listed on the template detail page as **Author**. The author of any existing HTML email template is the person who created it. Users with the "Manage Public Templates" permission can change the author by clicking on a link from the detail page of the HTML email template.
- Text and HTML email templates now track the most recent date the template was attached to an email that was sent from salesforce.com. In addition, the detail page for any email template displays the total number of times an email was sent using the selected template.

Events

- You can now invite leads and contacts to events. This enables you to invite people who are not part of your organization.
- You can mark an event as private, preventing other users from seeing the details about the event.

Help, Training, and Support

The new redesigned help includes all user education information in one central place. When you click **Help and Training** at the top of any salesforce.com page, choose one of the key tabs: Help, Support, or Training.

Leads

- Opt to notify the default lead owner when a lead is assigned to the default owner because no assignment rules applied.

Record Types

- Creating new record types is more convenient with the addition of separate prompts so that you don't have to apply to page layouts and profiles separately.
- Control which record type is assigned to a lead or case when assignment rules are used: the record type of the person creating the lead or case, or the record type of the person to whom the lead or case is assigned by the rule.
- Delete unused record types and business processes.

Security

To increase security, you can restrict login access to a single IP address, rather than a range of addresses.

Tabs

- Enterprise Edition Administrators can now customize the tab settings on standard profiles.
- Team Edition Administrators can change which tabs are displayed and the order of the tabs displayed.
- All editions receive an additional tab where you can view all tabs available. Click the tab with the right arrow to view all tabs available to you. Using this page, you can:
 - Click any of the tab names to quickly jump to that tab.
 - Click **Customize My Tabs** to change which tabs display when you log in.

NOTE

Your administrator can hide tabs within your organization for features you do not use.

Users

- Your users may be members of many different teams. So, when you deactivate a user, you will have an option to keep him or her on account teams or sales teams.

Workflow

Now you can activate and deactivate workflow rules. Click **Setup | Customize | Workflow | Workflow Rules** and choose **Activate** or **Deactivate** for any rule.

