Release Notes

Salesforce Summer '06

Table of Contents

Summer '06 Release Notes

Salesforce PRM

Available in: Enterprise, Unlimited, and Developer Editions

With Summer '06, salesforce.com customers can leverage the power of the Salesforce PRM to extend the benefits of a CRM system to their indirect sales channels through a simple and easy-to-use portal. Salesforce PRM allows companies to track a consolidated sales forecast and manage pipeline dashboards across internal sales groups and external partner sales groups. With Salesforce PRM, it is easy to collaborate with strategic partners through co-marketing and joint selling programs.

Implementation Tips

To begin implementing a Salesforce PRM, click the PRM Portal Setup tab. From there,

- To create a new PRM portal, click **New**. See Defining a PRM Portal on page 4.
- To assign partner users to a portal, click **Portal Assignment**. See Assigning Partner Users to a PRM Portal on page 5.
- To reset the default portal, click **Reset Default Portal**. Resetting the default portal removes any customizations you have made to your default portal.
- To view and customize the settings for an existing portal, select the portal name. See Configuring a PRM Portal on page 6.
- To edit the details of an existing portal, click **Edit** next to a portal name. In addition to being able to set the portal name, you can also configure what objects to include in search, the partner account owner title, change the logout URL, and manage the look and feel of the portal.
- To preview an existing partner portal, click **Preview**.

  A new window opens with a preview of your portal.

- To delete a portal, click **Del**. A warning dialog prompts you to confirm the deletion. Any users assigned to a deleted portal are reassigned to the default portal. None of the associated documents are deleted. You cannot delete the default portal.

Best Practices

A collection of best practices is available in the Salesforce PRM Implementation Guide.

About the Salesforce PRM Portal

About Partner Relationship Management

Note

Partner relationship management is not enabled by default in Salesforce. To request partner relationship management, contact salesforce.com.

Partner relationship management allows companies that sell through indirect sales channels to maximize the return on their channel investments and increase channel revenues. With partner relationship management, organizations can manage, track, and forecast their channel business alongside direct sales business. It also helps partners sell more effectively, close more business, and achieve greater profits.

Empowering your partners and resellers with your Salesforce data can help you sell more without spending more. However, you want to control the information your partners can access, and you want your partners to work within an application that uses your company's branding. You can accomplish this by granting your partners access to a Salesforce PRM portal.

A PRM portal allows partner users to log in to Salesforce through a separate website than your non-partner users. PRM portal users can only see the data that you have made available to them. Furthermore, partner portal users can only manipulate data if you give them the appropriate user permissions.

The main features in Salesforce to assist with partner relationship management are the following:

Partner accounts

Partner accounts are accounts that a channel manager uses to manage partner organizations, partner users, and activities.

Partner users

Partner users are Salesforce users with limited capabilities. They are associated with a particular partner account, have limited access to your organization's data, and log in via a PRM portal.

PRM portals

PRM portals allow partner users to log in to Salesforce through a web portal rather than through salesforce.com. You can customize the web portal to show your branding, and you can configure it to meet your functional and security needs. You can also have multiple portals to meet your different requirements for working with partners.

Salesforce.com will set up an initial default PRM portal for you. Before partner users begin to use the PRM portal, though, the administrator will need to customize one or more PRM portals.

Warning

Do not change the name of the PRM custom app. If you change the name of the custom app, PRM will no longer function properly.

Once the portals are customized to meet your needs, channel managers and partner users can begin to work together within Salesforce.

Creating Partner Accounts and Partner Users

User Permissions Needed	
To view accounts:	"Read" on accounts
To create accounts:	"Create" on accounts

Partner accounts are accounts that a channel manager uses to manage partner organizations, partner users, and activities. Each company with which you partner should be added to Salesforce as an account. Channel managers are associated with partner accounts by account ownership. A channel manager who owns a partner account can access all the information and manage all the activities of the partner account. This allows the channel manager to easily keep up to date on partner activities.

Once you have a partner account created, you can add partner users to the account as contact records. Partner users are Salesforce users with limited capabilities focused on managing leads. Partner users log in to Salesforce through the PRM portal.

To create a partner account, simply create and save a new account. See "Creating Accounts" in the Salesforce online help.

To create a partner user:

1. View the partner account for which you want to create a partner user.
2. Create a new contact for the partner user. Choose **New** from the Contacts related list on the partner account.
3. Create a role for the partner user that reports to the channel manager's role.

   ### Tip
   Include the partner account name in the role name, for example, "Acme Partner Role."

4. Create a new user.
   a. Enter the information on the partner user.
   b. Set the **Role** to the role you just created.
   c. Set the **Profile**. You can either select the default partner profile, or a profile you have created for partners. For more information on partner profiles, see the Salesforce PRM Implementation Guide. The partner profile must include at least create, read, and edit on leads, as well as read on accounts and contacts.
   d. Deselect `Receive the Salesforce newsletter`, `Receive the Salesforce administrator newsletter`, and `Generate new password and notify user immediately`.
   e. Click **Save**.

5. Edit the contact record for this partner, and set the `Partner User` field to the user you created for this contact.

   ### Warning
   Do not associate the more than one contact to a partner user. If you do, the user will not be able to log into the portal.

6. View the partner's user record again, and click **Reset Password** to have a new password emailed to the user.

   Note

   For more information on managing partner user passwords, see the Salesforce PRM Implementation Guide.

Managing PRM Portals

User Permissions Needed	
To create, edit, and delete PRM portals:	"Customize Application"

When partner relationship management is enabled, salesforce.com will create a default portal for you. You can customize this portal to fit your needs, or you can create new portals as needed. Having multiple portals allows you to have a custom portal for each type of partner you have. For example, you may have partners in different geographies, or you may have different partner levels based on the amount of sales they have generated. Each type of partner can be associated with a unique PRM portal that you have customized for them.

To begin customizing PRM portals, click the PRM Portal Setup tab.

- To create a new PRM portal, click **New**. See Defining a PRM Portal on page 4.
- To assign partner users to a portal, click **Portal Assignment**. See Assigning Partner Users to a PRM Portal on page 5.
- To reset the default portal, click **Reset Default Portal**. Resetting the default portal removes any customizations you have made to your default portal.
- To view and customize the settings for an existing portal, select the portal name. See Configuring a PRM Portal on page 6.
- To edit the details of an existing portal, click **Edit** next to a portal name. In addition to being able to set the portal name, you can also configure what objects to include in search, the partner account owner title, change the logout URL, and manage the look and feel of the portal.
- To preview an existing partner portal, click **Preview**.

  A new window opens with a preview of your portal.

- To delete a portal, click **Del**. A warning dialog prompts you to confirm the deletion. Any users assigned to a deleted portal are reassigned to the default portal. None of the associated documents are deleted. You cannot delete the default portal.

Defining a PRM Portal

User Permissions Needed	
To create, edit, and delete PRM portals:	"Customize Application"

When partner relationship management is enabled, salesforce.com will create a default portal for you. You can customize this portal to fit your needs, or you can create new portals as needed. Having multiple portals allows you to have a custom portal for each type of partner you have. For example, you may have partners in different geographies, or you may have different partner

levels based on the amount of sales they have generated. Each type of partner can be associated with a unique PRM portal that you have customized for them.

To create a new PRM portal:

1. Click the PRM Portal Setup tab.
2. Click **New**.
3. Select an existing portal to copy.

   This allows you to easily create several portals that are based on the same design. For example, you may have three different portals for three different geographical zones and the only difference between them is branding. To easily create all three portals, create one, make sure it is exactly how you want it, and then create the other two from that base portal.

4. Set the portal name.
5. If you want this portal to become your default PRM portal, select the `Default Portal` checkbox. The default portal is the portal that all partner users will be using unless you assign them to another portal.
6. Click **Save**.
7. Next, customize the PRM portal as needed. See Configuring a PRM Portal on page 6.

Assigning Partner Users to a PRM Portal

User Permissions Needed	
To create, edit, and delete PRM portals:	"Customize Application"

You may choose to have multiple PRM portals that are customized for each type of partner you work with. You can control which portal a partner user accesses by assigning partner profiles to the appropriate portal. For example, if you have three levels of partners, gold, silver, and bronze, you could create three partner profiles, one called "Gold Partner," another called "Silver Partner," and a third called "Bronze Partner." You can then assign all the partner users with the "Gold Partner" profile to the gold PRM portal, all the users with the "Silver Partner" profile to the silver partner profile, and all the users with the "Bronze Partner" profile to the bronze portal.

To assign partner users to a portal:

1. Click the PRM Portal Setup tab.
2. Click **Portal Assignment**. A list of the partner profiles and their portal assignments displays.

   Note

   All profiles with the "API Only User" permission will be shown in this list. Only profiles that have been **Portal Enabled** will be able to log in to the portal.

3. Optionally, click on **View Users** to review which users are in the available profiles.
4. Click **Edit Assignment**.

   Note

   If you only have one portal, all partner users will be assigned to it, and this button will not be enabled.

5. Select **Portal Enabled** and choose the appropriate `Portal Name` for each partner profile.

> **Note**
>
> Selecting **Portal Enabled** will add a login IP range to the profile. This IP range ensures that user with this profile can log in to the portal. If you manually remove the login IP range, or deselect **Partner Enabled**, partner users with this profile will not be able to log in to the portal. See "Restricting Login IP Ranges" in the Salesforce online help for more information on login IP ranges.

6. Click **Save**.

Configuring a PRM Portal

User Permissions Needed	
To create, edit, and delete PRM portals:	"Customize Application"

When partner relationship management is enabled, salesforce.com will create a default portal for you. You can customize this portal to fit your needs, or you can create new portals as needed. Having multiple portals allows you to have a custom portal for each type of partner you have. For example, you may have partners in different geographies, or you may have different partner levels based on the amount of sales they have generated. Each type of partner can be associated with a unique PRM portal that you have customized for them.

To configure an existing partner portal, click the PRM Portal Setup tab. Click a portal name to view and change the portal settings.

PRM Portal Details

To create a new portal that is a copy of this portal, click **Clone**.

Click **Edit** to change the values of any of the following fields:

Field	Description
Application Name	The application name as displayed in the browser title bar when a user logs into the portal.
Default Portal	Determines whether the portal is the default portal.
Description	A description of the portal.
Footer	The footer displays at the bottom of the partner portal. Typically this includes copyright information and contact information for the portal.
Header	The header displays above the tabs in your partner portal. Typically this includes a logo and any other branding needed for the portal.
Help Options	Choose whether to use the default help or your own custom help. See "PRM Portal Help Options" in the Salesforce online help for more information.

Field	Description
Include in Search	Set which objects your partners can search by selecting them.
Login URL	The URL to the login page for the partner portal. This field is for information only.
Logo	Your company logo or the logo you want to use for this partner portal. The logo is not automatically included in the portal, but is usually included in the header. If the logo is available, it is displayed.
Logout URL	If you want to redirect the partner users to a particular URL when they log out, set this value to that URL. By default, they will be redirected to the login URL.
Partner Account Owner Title	This is the title of the people that will own partner accounts, for example, "Channel Manager". This title will be displayed in the sidebar of the Home tab of the partner portal.
PRM Portal Name	The portal name as displayed on the partner portal.
Style Sheet	A cascading style sheet that controls the appearance of the partner portal. Review the default style sheet to see the classes that are used by the portal. You may want to add additional classes for use by the header or footer. For more information on cascading style sheets, see the Cascading Style Sheets Home Page at the World Wide Web Consortium.
Your Company Name	The name of your company as displayed on the partner portal.

Available Tabs

You can configure the appearance and functionality of each of the available tabs in the PRM portal. You control which tabs partner users can see by configuring the tab settings and standard object permissions on the partner user profiles. A tab will be displayed in this list if the tab is included in the PRM custom app. For more information, see "Creating and Editing Profiles" in the Salesforce online help and "Managing Custom Apps" in the Salesforce online help. To configure a tab, click **Edit**.

For specific help on configuring the available tabs, see:

Translations

To add additional languages for the PRM portal:

1. Click **New Language** in the Translations section.
2. Select the language you want to use for PRM portal, and click **Save**.
3. Set the values for the portal in the selected language, and click **Save**.

See Managing Translations in PRM Portals on page 11 for more information.

Configuring the PRM Portal Home Tab

User Permissions Needed	
To customize the PRM portal:	"Customize Application"

The Home tab is the first page a partner user sees when logging into the portal. The Home tab includes the following:

Sidebar
The Home tab sidebar includes a link to the partner user's account, information about the channel manager, and quick links for creating records such as leads.

Home Page Message
The home page message, like the messages on the other tabs of the portal, is an area for you to share information with all of your partner users.

Lead Inbox
The Lead Inbox lists leads that have been assigned to the partner user and leads that have been added to the lead pool.
The lead pool is a collection of unclaimed leads that are assigned to the partner lead queues that you have defined as part of the portal Home tab setup. A partner user who belongs to one of these queues can claim ownership of a lead in the lead pool via their Lead Inbox. Once the lead has been claimed, the lead will no longer be in the lead pool, and no other partner user can claim the lead. This allows you to make leads available to multiple partners, while still ensuring that multiple partners are not working the same lead.

To customize the Home tab of a PRM portal:

1. Click the PRM Portal Setup tab.
2. Select the name of the portal you want to configure.
3. In the Available Tabs section, click **Edit** next to the Home tab.
4. Customize the Home tab message. Select an appropriate document using the lookup icon (). Since this document will be used in a web page, make sure you pick a document that will display properly on the page, such as an HTML or a graphic file.

   Customizing this message allows you to inform your partner users of upcoming events or give them some other message.

5. To include a list view of leads that any partner can claim:

   a. Select `Include Lead Inbox`.
   b. Select the columns to display in the Lead Inbox.

c. Add the partner lead queues that should contribute leads to the lead pool. Any leads assigned to these queues will be part of the lead pool for partner users to claim. Select a queue in the Available queues and click **Add** to add it to the lead pool. Select a queue in the Selected queues and click **Remove** to remove it from the lead pool

d. Set the `Lead Pool Limit` to the maximum number of open leads a partner user can have claimed from the lead pool. For example, if the limit is set to 25, and a partner user has claimed 25 leads from the lead pool, the partner user will not be able to claim any more leads until they either close the lead or the lead is assigned to another user.

6. When you have finished customizing the Home tab for the partner portal, click **Save** to return to the partner portal detail page, or **Save and Edit the Leads Tab** to continue configuring the PRM portal tabs.

Configuring the PRM Portal Leads Tab

User Permissions Needed	
To customize the PRM portal:	"Customize Application"

Configuring the Leads tab for partner users allows you to control how the Leads tab is displayed for your partner users as well as how actions by the partner users are handled. To customize the Leads tab for a PRM portal:

1. Click the PRM Portal Setup tab.
2. Select the name of the portal you want to configure.
3. In the Available Tabs section, click **Edit** next to the Leads tab.
4. Customize the Leads tab message. Select an appropriate document using the lookup icon ().

   When your partner users are working with their leads, you may want to inform them of upcoming events or give them some other message. To do that, you want to customize the Leads tab message.

5. Check `Automatic Lead Conversion` to allow your partner users to convert leads to opportunities. If this is not checked, the channel manager will have to convert the leads.

6. If you enable automatic lead conversions, and you want to map standard lead fields to custom opportunity fields, check `Standard Field Mapping`. You can then choose to map a standard lead field to a custom opportunity field by selecting a custom field from the dropdown next to each lead field. If you have no custom opportunity fields, you will be able to select anything in the dropdown. This overrides the standard lead mapping. For more information on lead conversion mapping, see "Lead Conversion Mapping" in the Salesforce online help.

7. When you have finished customizing the Leads tab for the partner portal, click **Save** to return to the partner portal detail page, or **Save and Edit the Documents Tab** to continue configuring the PRM portal tabs.

Configuring the PRM Portal Opportunities Tab

User Permissions Needed	
To customize the PRM portal:	"Customize Application"

When your partner users are working with their opportunities, you may want to inform them of upcoming events or give them some other message.

To customize the Opportunities tab for a PRM portal:

1. Click the PRM Portal Setup tab.
2. Select the name of the portal you want to configure.
3. In the Available Tabs section, click **Edit** next to the Opportunities tab.
4. Customize the Opportunities tab message. Select an appropriate document using the lookup icon (🔍).
5. When you have finished customizing the Opportunities tab for the PRM portal, click **Save** to return to the PRM portal detail page.

Configuring the PRM Portal Documents Tab

User Permissions Needed	
To customize the PRM portal:	"Customize Application"

When your partner users are working with their documents, you may want to inform them of upcoming events or give them some other message.

Note
Documents stored as links cannot be accessed from the PRM portal.

To customize the Documents tab for a PRM portal:

1. Click the PRM Portal Setup tab.
2. Select the name of the portal you want to configure.
3. In the Available Tabs section click **Edit** next to the Documents tab.
4. Customize the Documents tab message.Select an appropriate document using the lookup icon (🔍).

5. When you have finished customizing the Documents tab for the partner portal, click **Save** to return to the partner portal detail page, or **Save and Edit the Opportunities Tab** to continue configuring the PRM portal tabs.

Managing Translations in PRM Portals

User Permissions Needed	
To customize the PRM portal:	"Customize Application"

A PRM portal can be delivered in multiple languages. You can create a portal that includes support for multiple languages. We suggest that PRM portals are created based on business need, and then configured for multiple languages as needed.

To configure an existing portal for another language:

1. Click the PRM Portal Setup tab.
2. Select the name of the portal you want to configure.
3. In the Translations section:
   - To add a new language, click **New Language**, select the language you want to add to the portal, and click **Save**.
   - To modify translations for an existing language, click **Edit** next to the language.
4. Set the element or message as appropriate to the language you are defining. The base elements are the following:

Message or User Interface Element	Description
Title of the Partner Account Owner	The title of the partner account owner displays on the home page, along with the name of the channel manager for the partner user.
Name of Portal Application	The name of the portal displays in the browser title bar.
Custom Help Document	Custom help allows you to give your users custom help in their language. You must set the custom help for the entire portal before setting custom help for a specific language.
Your Organization Name	The name of your organization displays in the browser title bar. You must set the organization name for the entire portal before setting it for a specific language.
Documents Page Message	Allows you to inform partner users of upcoming events or give them some other message while they are viewing the Documents tab.
Home Page Message	Allows you to inform partner users of upcoming events or give them some other message while they are viewing the Home tab.
Leads Page Message	Allows you to inform partner users of upcoming events or give them some other message while they are viewing the Leads tab.

Message or User Interface Element	Description
Opportunity Page Message	Allows you to inform partner users of upcoming events or give them some other message while they are viewing the Opportunities tab.

More elements may be available if you have made custom tabs available to your partner users.

The value of the non-translated version of the portal is displayed in the **Master Value** column. If the value is not set in the non-translated portal, you must set it before you can change it in the translated portal.

If the element is marked out of date, the master portal has been updated more recently than the translations.

5. Click **Save**.

Using Documents with a PRM Portal

User Permissions Needed	
To customize a PRM portal:	"Customize Application"
To view documents:	"Read" on documents
To change document properties:	"Edit" on documents
To replace documents:	"Edit" on documents
To delete documents:	"Delete" on documents

You can use documents from your organization's Documents tab to add images and text to a PRM portal.

When partner relationship management is enabled, Salesforce creates two new document folders. One is called Default Messages and contains sample text messages for a PRM portal. The other, Default Theme, contains files that control the look and feel of a portal. The documents in these folders are used in the default PRM portal.

Each time you create a new portal, Salesforce creates two document folders for that portal. They follow the same naming convention of the folders for the default portal. For example, if you create a portal called "Gold PRM Portal," the two folders would be named Gold PRM Portal Theme and Gold PRM Portal Messages.

When you are customizing a PRM portal (see Managing PRM Portals), you may use documents to set messages, logos, custom help, or other portal elements. Be aware that the document folder permissions must be set to allow your partner users to see these documents and the documents should be set to be externally available.

Tip

The default folders have public read only access. We suggest any document folders you use in your PRM portal have public read only access, too. This allows all users to view the documents.

Warning

Be careful not to delete a document that is being used in a partner portal. If you do, the element that refers to the deleted document will show "Document not found" instead of the document

folder and name when you edit the portal. If you attempt to clone a portal that is referring to a document that no longer exists, an error message will list the the missing documents.

Managing Partner Accounts

Partner accounts are accounts that a channel manager uses to manage partner organizations, partner users, and activities. Channel managers are associated with partner accounts by account ownership. A channel manager who owns a partner account can access all the information and manage all the activities of the partner account. This allows the channel manager to easily keep up to date on partner activities through forecasting and reporting.

Managing Partner Users

Channel managers are associated with the partner users they manage by partner account ownership. A channel manager who owns a partner account can access all the information and manage all the activities of the partner users associated with that account.

Some common tasks when managing your partner users include:

- Creating a partner account
- Creating partner users
- Creating tasks for partner users
- Assigning leads to partner users
- Deactivating partner users
- Editing partner user information

Tip

Create a public group for all your partner users called "All Partners". This public group allows you to include or exclude the entire group of partner users in lead queues, workflow alerts, lead assignment rules, or when changing lead owners.

Assigning Leads to Partner Users

User Permissions Needed	
To assign leads to partners:	"Edit" on leads

A vital piece of partner relationship management is lead assignment. Your partners can only work with leads that are assigned to them. There are two ways to handle lead assignment for partner users:

- Assign each lead to an individual partner user
- Assign leads to a lead queue and allow partner users to claim leads from the queue

In addition, you can create lead assignment rules that automatically assign leads to partner users or queues based on certain properties of those leads. For more information, see "Setting Up Assignment Rules" in the Salesforce online help.

Assigning a lead to a partner user or partner lead queue is just like assigning a lead to any other user or queue. For more information, see "Assigning Leads" in the Salesforce online help.

Service Entitlements

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

Complying with service level agreements is critical to many customer service and support organizations. With Summer '06, customers can easily determine what level of service their customers are entitled to receive, understand how well they meet their service commitments, and better manage their service quality. Service entitlements is available as an AppExchange app you can download and install into your Salesforce organization.

Implementation Tips

- For implementation tips, see "Implementing Service Entitlements" below, or the *Service Entitlements Implementation Guide* available in the Service Entitlements Documentation folder on the Documents tab after you install the service entitlements app.

Best Practices

- Click the **Clone** button on service entitlements to quickly create a new service entitlement using information from the existing service entitlement, for example, when you need to create multiple service entitlements that have similar information.

- When creating or updating service entitlements, enter descriptive text in the `Service Entitlement Name` field to easily identity specific service entitlements on the Service Entitlements tab and on cases associated with service entitlements. For example, if you associate a specific entitlement with an account rating, you may want to include the account rating in the name of the service entitlement.

- Provide each contact who is a named caller with their PIN (Personal Identification Number) so that when they contact support they can give a support rep their PIN which can be used to quickly identify the contact record and service level agreement that entitles them to support.

- If a contact provides you with a valid PIN (Personal Identification Number), click the PIN from the Named Callers related list on the contact's record to verify that he or she is a named caller on a contract. When viewing the details of the named caller, select the contract to view the details of the contact's service entitlement.

- Define service entitlements to specify what type of issue or support a customer is entitled to receive by selecting an asset and picklist values from the `Case Type` and `Account Rating` fields.

- Select the `Include Business Hours` checkbox on service entitlements to automatically calculate entitled response and resolve times for cases using your organization's business hours. If the checkbox is not selected, entitled response and resolve times on cases associated with the service entitlement are automatically calculated as if your support team is always available and offers "24x7" support.

- Enter a number in either the `Entitled Response (Hours)` and `Entitled Resolve (Hours)` fields on service entitlements. You do not have to enter a number in both fields to create a service entitlement.
- Manually update any cases associated with service entitlements that are changed. Cases associated with service entitlements that are changed do not automatically update.
- Click the **Invalid Entitlement - Change** button on a case to select a valid service entitlement for the case. The **Invalid Entitlement - Change** button displays on cases where the asset associated with the case no longer matches the asset associated with the case's service entitlement. If there are no valid entitlements to choose from, then click **Create New Case without Entitlement** to replace the case with a new case without a service entitlement. Remember to delete the original case with the invalid service entitlement.

Note

Service entitlements is currently available in English only.

About Service Entitlements

The Basics

Service Entitlements is an AppExchange app that is completely integrated with Salesforce. Use service level agreements and entitlements to:

- Manage your customer service based on clearly defined terms
- Easily determine the level of service to which a customer is entitled
- Automatically calculate first response times, entitled resolution times, and actual resolution times
- Automatically escalate cases that violate service level agreements

Service Entitlements Terminology

Review the following terminology:

Service level agreement
A contract between a company and a customer that determines the level of support a customer is entitled to receive.

Service Entitlement
An individual service term included on a service level agreement. For example, a service level agreement may state that a customer is entitled to a response time to an inquiry within one hour and a resolution time to an inquiry within four hours. Both the response time and the resolution time are service entitlements in the service level agreement.

Named caller
A contact authorized to receive service on a particular service level agreement contract.

Review the following process:

1. Set up service level agreements.
2. Verify that customers with inquiries are entitled to support.

3. Create or update cases with service entitlements as defined in customers' service level agreements.

Implementing Service Entitlements

Service Entitlements System Requirements

The service entitlements app includes two custom objects and one custom tab. Before you install it, make sure these items will not exceed your organization's limits for custom tabs and objects.

In addition, review the system requirements for the service entitlements app:

- Any browser that Salesforce supports:
  - Microsoft® Internet Explorer version 6.0 or later (recommended)
  - Mozilla Firefox version 1.0 or later
  - Netscape version 8.0 or later
  - Your browser must have JavaScript enabled.
  - Your browser must have cookies enabled.
- Your Salesforce organization must be enabled to use the AppExchange API.
- The service entitlements app is available in English only.

Entity Relationship Diagram

Service entitlements includes two custom objects that relate to several standard objects. Review the following entity relationship diagram to determine how these objects are associated with other objects.

Service Entitlements Documentation

The service entitlements app contains two documents that are available to you after installation. Both of these documents are located in the Service Entitlements Documentation folder in the Documents tab:

Service Entitlements Implementation Guide
This document is in PDF format and is designed for administrators. It covers system requirements and post installation implementation tips.

Service Entitlements User Guide
This document is in HTML format and is designed for users of the service entitlements app. We recommend updating it to fit your organization's business process for service entitlements. However, store the original version of this document before changing it so that you can refer to the original in the future if necessary.

Users can view this HTML guide by clicking the **Help for Entitlements** custom link on any record detail page to which it has been added. For more details, see .

> **Note**
>
> If you change the name of this file or convert it into another file type, you can still store it in the Service Entitlements Documentation folder but you may need to modify the **Help for Entitlements** custom links that refer to the original filename.

Configuring Service Entitlements

The service entitlements app is available for installation from the AppExchange. After you have installed the service entitlements app successfully, configure it for your organization using these tips:

Add custom fields to standard objects in the order specified

> **Note**
>
> When adding these fields, remember to make them visible to all appropriate profiles and add them to page layouts, unless otherwise specified. The custom field wizard guides you through this process.
>
> For the formula fields, you can copy the supplied code and paste it into the text box available when defining the formula.

On contacts:

Add the `Service Entitlement` formula field. This field displays a custom s-control which lists verified service entitlements that can be associated with a contact. Set the return type of the formula to text and insert the following code:

```
HYPERLINK("/appex/app.jsp?"
& "appParam=SLA_entitlementContact&setAPISessionId=1"
& "&setAPIServerURL=1 &apiURL=API_Partner_Server_URL_70"
& "&accid=" & {!AccountId} & "&contactid=" & {!Id}
& "&contactname=" & {!FirstName} & " " & {!LastName},
IMAGE("/appex/sla/img/Verify_Service_Entitlement.gif",
"Verify this contact is entitled to service"))
```

On cases:

- Add the `Actual First Response` date/time field. This field automatically calculates the date and time of a first response to specific a case. Set this field to read-only on case page layouts so that automatically calculated values cannot be modified by users.

- Add the `entitleAssetId` text field with a length of 15. This field determines when there is an entitlement mismatch on a case.This field does not need to be added to page layouts as users do not need to see this field.

- Add the `Entitled Close Date` date/time field. This field automatically calculates the date and time a contact is entitled to have a specific case resolved. Set this field to read-only on case page layouts so that automatically calculated values cannot be modified by users.

- Add the `Entitled First Response` date/time field. This field automatically calculates the date and time a contact is entitled to a first response to a specific case. Set this field to read-only on case page layouts so that automatically calculated values cannot be modified by users.

- Add the `Service Entitlement` custom lookup field and relate it to the Service Entitlement custom object, and change the `Field Name` from "SFDC_Entitlement" to "Entitlement". The `Service Entitlement` custom lookup field displays the service entitlement associated with a specific case.

  Accept all of the default settings in the custom field wizard so that the Cases related list is added to the entitlements page layout. This related lists allows you to see which cases are associated with entitlements.

- Add the `entitlementCaseLink` formula field.This field determines when there is an entitlement mismatch on a case. Set the return type of the formula to text and insert the following code:

```
"/appex/app.jsp?"
& "appParam=SLA_entitlementCase&setAPISessionId=1"
& "&setAPIServerURL=1&apiURL=API_Partner_Server_URL_70&accid="
& {!AccountId} & "&contactid=" & {!ContactId} & "&caseid="
& {!Id}& "&assetid="& {!AssetId}
```

  This field does not need to be added to page layouts as users do not need to see this field.

- Add the `Options` formula field. This field displays the **Change Service Entitlement**, **Respond with Email**, and **Respond with Call** buttons on a case. Set the return type of the formula to text and insert the following code:

```
IF({!Entitlement__c}<>null,IF({!entitleAssetId__c}={!AssetId},
HYPERLINK({!entitlementCaseLink__c},
IMAGE("/appex/sla/img/Change_Service_Entitlement.gif",
"Change Service Entitlement" )),
HYPERLINK({!entitlementCaseLink__c},
IMAGE("/appex/sla/img/Invalid_Entitlement.gif",
"Invaild Entitlement" ) )),
HYPERLINK({!entitlementCaseLink__c},
IMAGE("/appex/sla/img/Verify_Service_Entitlement.gif",
"Verify Service Entitlement" ) ))
&HYPERLINK("/appex/app.jsp?appParam=SLA_emailResponse&"
& "setAPISessionId=1&setAPIServerURL=1&"
& "apiURL=API_Partner_Server_URL_70&caseid="
& {!Id} & "&contactid=" & {!ContactId},
IMAGE("/appex/sla/img/Response_by_Email.gif",
"Respond with an Email" )) & HYPERLINK("/appex/app.jsp?"
& "appParam=SLA_callResponse&setAPISessionId=1"
& "&setAPIServerURL=1&apiURL=API_Partner_Server_URL_70"
& "&caseid=" & {!Id} & "&contactid=" & {!ContactId},
IMAGE("/appex/sla/img/Response_by_Phone.gif",
"Response by Phone"))
```

Set field-level security

- Set field-level security on the `Contract Name` field on contracts to editable or required for the necessary profiles so that users can verify and change service entitlements. By default, the `Contract Name` field is set to hidden.

- Set field-level security on the `Asset` field on cases and service entitlements to editable or required for the necessary profiles so that users can verify and change service entitlements.

Update picklist values

- Add the picklist values from the `Type` field on cases to the `Case Type` field on the Service Entitlement custom object. This allows users to specify the support a customer is entitled to receive for a particular type of issue.
- Add the picklist values from the `Rating` field on accounts to the `Account Rating` field on the Service Entitlement custom object. This allows users to specify the support a customer is entitled to receive for a particular account rating.

Customize page layouts

- Add the Named Callers and Service Entitlements related lists to contract page layouts so that users can add named callers and service entitlements to contracts.
- Create a new section on case page layouts named Service Entitlements and move the custom fields related to entitlements to this section. This allows users to easily find fields related to entitlements on cases.

  > ### Note
  > Remember that you do not need to add the `entitleAssetId` or `entitlement-CaseLink` fields to this section because it is not necessary for users to see these fields.

Configure user profiles

- Set the Service Entitlements tab to "Default On" for the profiles of users who need to use the Service Entitlements tab as well as the Service Entitlements related list.
- Set the appropriate user permissions for each new custom object:
  - Users who create service entitlements need the "Read," "Create," "Edit," and "Delete" permissions on all service entitlements custom objects: Service Entitlement and Named Caller.
  - Users who verify service entitlements, but never create them, need the "Read" permission on all service entitlements custom objects.

Customize documentation

- Update the *Service Entitlements User Guide* as necessary for your organization. See Service Entitlements Documentation on page 16.
- Add the **Help for Entitlements** custom link to the appropriate page layouts in your organization. Users can click this link to view the *Service Entitlements User Guide* which contains instructions on creating and using service entitlements. You can add this custom link to all your contract, case, and contact page layouts. It is included by default on service entitlement page layouts.

Deploying Service Entitlements

Before rolling out the service entitlements app, we recommend preparing your users. Review the following suggestions for deployment:

- Make sure you have made all the necessary customizations for your organization. See Configuring Service Entitlements on page 17.
- Meet with the appropriate users, and provide training on how to use the app and information on how to access the documentation if they need additional help.

- Notify users of the permissions they must have to use the service entitlements app.

Using Service Entitlements

Creating Contracts with Service Level Agreements

User Permissions Needed	
To create contracts with service level agreements:	"Create" on contracts and "Read" on accounts
	AND
	"Create" on service entitlements

To create a contract with a service level agreement:

1. View the account for which you want to create a contract, and click **New** on the Contracts related list. You must have at least read access to an account in order to associate a contract with it.
2. Enter information for the contract, and click **Save**.
3. Click **New** on the Service Entitlements related list of the contract.
4. Enter information for the service entitlement, and click **Save**.

Adding Named Callers to Contracts

User Permissions Needed	
To add named callers to contracts:	"Edit" on contracts and "Read" on accounts
	AND
	"Create" on named callers

Optionally, if set up by your administrator, you can add named callers to a service level agreement contract. Named callers are contacts authorized to receive customer support.

1. Select a contract, and click **New** on the Named Callers related list.
2. Select a contact. The contract is automatically selected for you.
3. Click **Save** to save the named caller, or click **Save & New** to save the named caller and create another.

   ### Note
   Each named caller is automatically assigned a personal identification number (PIN) displayed in the PIN field. The PIN field is an auto-number custom field whose values are automatically generated and cannot be modified.

   You can provide each named caller with their PIN so that when they contact support they can give a support rep their PIN which can be used to quickly identify the contact record and service level agreement that entitles them to support.

When you update the contact for a named caller, the new contact receives the original named caller's PIN.

Adding Service Entitlements to Contracts

User Permissions Needed	
To add service entitlements to contracts:	"Edit" on contracts and "Read" on accounts AND "Create" on service entitlements

To add a service entitlement to a contract:

1. Select a contract and click **New** on the Service Entitlements related list.
2. Enter information for the service entitlement.
   - Optionally, select an asset and picklist values from the `Case Type` and `Account Rating` fields to define the service entitlement. This helps you specify what type of issue or support a customer is entitled to receive.
   - Optionally, select the `Include Business Hours` checkbox to automatically calculate entitled response and resolve times for cases using your organization's business hours. If the checkbox is not selected, entitled response and resolve times on cases associated with the service entitlement are automatically calculated as if your support team is always available and offers "24x7" support.
   - Enter a number in the `Entitled Response (Hours)` field to define the number of hours by which customers are entitled to receive a first response to a case.
   - Enter a number in the `Entitled Resolve (Hours)` field to define the number of hours by which customers are entitled to a resolution to a case.

     Note

     You can enter a number in either the `Entitled Response (Hours)` field or the `Entitled Resolve (Hours)` field. You do not have to enter a number in both fields to create a service entitlement.

3. Click **Save**, or click **Save & New** to save the service entitlement and create another.

Note

Cases associated with service entitlements that are changed do not automatically update. You must manually update any cases associated with service entitlements that are changed.

Creating Service Entitlements without Contracts

User Permissions Needed	
To create service entitlements:	"Create" on service entitlements

You can create service entitlements that are not associated to a contract. If a service entitlement is not associated with a contract, then it can be applied to multiple accounts and contacts. For example, if your organization offers standard support to all customers, then instead of creating a service level agreement contract for every customer, you could create one service entitlement that covers all customers.

To create a service entitlement that is not associated with a contract:

1. Select the Service Entitlements tab, and click **New**.

2. Enter information for the service entitlement.

   - Optionally, select an asset and picklist values from the `Case Type` and `Account Rating` fields to define the service entitlement. This helps you specify what type of issue or support a customer is entitled to receive.

   - Optionally, select the `Include Business Hours` checkbox to automatically calculate entitled response and resolve times for cases using your organization's business hours. If the checkbox is not selected, entitled response and resolve times on cases associated with the service entitlement are automatically calculated as if your support team is always available and offers "24x7" support.

   - Enter a number in the `Entitled Response (Hours)` field to define the number of hours by which customers are entitled to receive a first response to a case.

   - Enter a number in the `Entitled Resolve (Hours)` field to define the number of hours by which customers are entitled to a resolution to a case.

     #### Note
     You can enter a number in either the `Entitled Response (Hours)` field or the `Entitled Resolve (Hours)` field. You do not have to enter a number in both fields to create a service entitlement.

3. Click **Save**, or click **Save & New** to save the service entitlement and create another.

Note
Cases associated with service entitlements that are changed do not automatically update. You must manually update any cases associated with service entitlements that are changed.

Deleting Service Entitlements

User Permissions Needed	
To delete service entitlements:	"Delete" on service entitlements

To delete a service entitlement, click **Del** next to the service entitlement on a contract, or click **Delete** on the service entitlement detail page.

When you delete a service entitlement that has cases associated with it, the **Verify Service Entitlement** button displays on the cases to notify support reps that they need to verify if the case is entitled to support. For more information, see Verifying Service Entitlements on Cases

. The deleted service entitlement is moved to the Recycle Bin. If you undelete the service entitlement, any associated contracts and cases are not restored.

Verifying Service Entitlements on Contacts

User Permissions Needed	
To verify service entitlements on contacts:	"Read" on contacts AND "Read" on service entitlements
To create cases:	"Create" on cases

To verify that a contact is entitled to support:

1. View the contact.
2. Click **Verify Service Entitlement**.

   If no service entitlements are found for the contact, then a `No Active Entitlements Found for this Contact` field displays. If the contact is entitled to support, then a list of service entitlements displays from which you can choose to create a case.

3. Next, either select a service entitlement or create a case without a service entitlement:

   - Click **Select** next to a service entitlement to automatically create a new case for the contact using that service entitlement. The fields that are automatically calculated on the case include the `Service Entitlement`, `Entitled First Response`, and `Entitled Close Date` fields.

     If set up by your administrator, `Not Named Caller` displays next to service entitlements where the contact is not a named caller.

     Service entitlements associated with contracts set to expire within 30 days are noted.

   - Click **Create New Case without Entitlement** to create a new case without a service entitlement for the contact.

Note

If a contact provides you with a valid PIN (Personal Identification Number), you can click the PIN from the Named Callers related list on the contact's record to verify that he or she is a named caller on a contract. When viewing the details of the named caller, you can select the contract to view the details of the contact's service entitlement.

Verifying Service Entitlements on Cases

User Permissions Needed	
To verify service entitlements on cases:	"Edit" on cases AND "Read" on service entitlements
To create cases:	"Create" on cases

To verify that a case is entitled to support:

1. View the case, and click **Verify Service Entitlement**.

   If no service entitlements are found for the contact associated with the case, then a `No Active Entitlements Found for this Contact` field is displayed. If the contact is entitled to support, then a list of service entitlements displays from which you can choose to associate with the case.

2. Click **Select** next to a service entitlement to automatically update the case using that entitlement. The fields that are automatically calculated on the case include the `Service Entitlement`, `Entitled First Response`, and `Entitled Close Date` fields.

   If set up by your administrator, `Not Named Caller` displays next to service entitlements where the contact is not a named caller.

   Service entitlements associated with contracts set to expire within 30 days are noted.

Be aware of the following when verifying service entitlements on cases:

- The **Invalid Entitlement - Change** button displays on cases where the asset associated with the case no longer matches the asset associated with the case's service entitlement. Click the **Invalid Entitlement - Change** button to select a valid service entitlement for the case. If there are no valid entitlements to choose from, then click **Create New Case without Entitlement** to replace the case with a new case without a service entitlement. Remember to delete the original case with the invalid service entitlement.
- All cases submitted via the Self-Service portal and Email-to-Case require verification because customers cannot select a service entitlement for themselves before submitting a case.
- The **Change Service Entitlement** button displays on cases whose service entitlements have already been verified. However, you can click **Change Service Entitlement** to change the service entitlement on the case.

Creating Cases with Service Entitlements

User Permissions Needed	
To create cases with service entitlements:	"Create" on cases
	AND
	"Read" on service entitlements

To create a case with a service entitlement:

1. View the contact for whom you want to create a case.
2. Click **Verify Service Entitlement**.

   If no service entitlements are found for the contact, then a `No Active Entitlements Found for this Contact` field displays. If the contact is entitled to support, then a list of service entitlements displays from which you can choose to create a case.

3. Next, either select a service entitlement or create a case without a service entitlement:
   - Click **Select** next to a service entitlement to automatically create a new case for the contact using that service entitlement. The fields that are automatically calculated on

the case include the `Service Entitlement`, `Entitled First Response`, and `Entitled Close Date` fields.

If set up by your administrator, `Not Named Caller` displays next to service entitlements where the contact is not a named caller.

Service entitlements associated with contracts set to expire within 30 days are noted.

- Click **Create New Case without Entitlement** to create a new case without a service entitlement for the contact.

Responding to Cases with Service Entitlements

User Permissions Needed	
To respond to cases with service entitlements:	"Edit" on cases

You can respond to cases with service entitlements so that your first response dates and times are automatically calculated on each case. To respond to a case with a service entitlement:

1. View the case.
2. Click **Respond with Email** to send an email to a contact, another user, or any other email address; or click **Respond with Call** to log the results of a phone call. Responses are recorded on the Activity History related list of the case.

Changing Service Entitlements on Cases

User Permissions Needed	
To change a service entitlements on a case:	"Edit" on cases

To change a service entitlement associated with a case:

1. Select **Change Service Entitlement** on the case.
2. Click **Select** next to the entitlement you want to associate with the case.

   The case's `Entitled First Response` and `Entitled Close Date` fields automatically update with the new service entitlement's response times. However, if you already responded to the case's previous service entitlement, then the date and time in the case's `Actual First Response` field will not change.

Note

If you update the `Asset` field on a case and it conflicts with the `Asset` field on the service entitlement associated with the case, the **Invalid Entitlement - Change** button displays on the

case detail page. Click the button to select a valid service entitlement for the case. For more in-formation, see .

Reporting on Service Entitlements

User Permissions Needed	
To run reports on service entitlements:	"Run Reports"
	AND
	"Read" on the records included in report

If set up by your administrator, you can report on service entitlement information that includes:

- The number of service entitlement violations for your organization and by support rep.
- The number of cases that have been closed on or before service entitlement resolution dates.
- The average first response and resolution time of cases in hours for your organization and by case owner.

Contact your administrator for more information on reporting on service entitlements.

Lead History Tracking

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

Tracking information is key to managing your business processes effectively, such as who changed information, when it was changed, and what was changed. With Salesforce Summer '06, admin-istrators can now select the information on leads that need a detailed audit trail. Standard and custom fields can easily be audited by enabling history tracking for those fields. The historical information is tracked as part of the Lead History related list. The new extended history data is available for reporting, which allows easy construction of audit trail reports.

With Summer '06, you can now add notes and attachments to leads just as you can with accounts, contacts, and other objects in Salesforce.

Implementation Tips

- Track the standard lead fields that are important to your lead processes to verify that they are being followed correctly.
- Track custom lead fields to gain insight into how your sales reps are handling lead data that is unique to your organization.
- Be sure to customize lead page layouts to include the Lead History related list. For more information, see "Customizing Page Layouts" in the Salesforce online help.
- Add the Notes & Attachments related list to lead page layouts so that users can include notes and attachments on leads. For more information, see "Customizing Page Layouts" in the Salesforce online help.

Best Practices

- Run the standard Lead History Report to see both the old and new values of the fields that are set to be tracked, or create a custom audit trail report using the Lead History custom report type.

- Do not delete a custom field with history tracking unless you are absolutely certain you will no longer need the history data associated with the field. History for deleted custom fields is removed from Salesforce and cannot be retrieved from the Recycle Bin.

About Lead History Tracking

Setting Up Lead History Tracking

User Permissions Needed	
To set up which fields are tracked:	"Customize Application"

You can select which standard and custom fields to track on the Lead History related list of leads. Any time a user modifies any of the standard or custom fields whose history is set to be tracked, a new entry is added to the Lead History related list. All entries include the date, time, nature of the change, and who made the change. History data does not count against your organization's storage limit.

1. Click **Setup | Customize | Leads**.
2. Select **Fields**.
3. Click **Set History Tracking**.

   - The `Enable Lead History` checkbox is automatically selected. Deselect the checkbox if you do not want to track any lead changes. This checkbox is not available for cases, solutions, or contracts because you cannot disable history tracking for these objects. Certain changes, such as case escalation, are always tracked.

   - When you choose the fields you want to track, Salesforce begins tracking history from that date and time forward. Changes made before that date and time are not included in the history.

4. Choose the fields you want tracked in the History related list of the record detail page.
5. Click **Save**.

Notes on History Tracking

- You can select a combination of up to 20 standard and custom fields per object.
- You cannot track the history of formula or auto-number fields.
- Tracked field values are not automatically translated; they display in the language in which they were made. For example, if a field value is changed from Green to Verde, Verde is displayed no matter what a user's language is, unless the field value has been translated

into other languages via the translation workbench. This applies to record types and picklist values as well.

- Changes to date fields, number fields, and standard field labels are shown in the locale of the user viewing the History related list. For example, a date change to August 8, 2005 shows as 8/5/2005 for a user with the English (United States) locale and as 5/8/2005 for user with the English (United Kingdom) locale.

- Changes to custom field labels that have been translated via the translation workbench are shown in the locale of the user viewing the History related list. For example, if a custom field label is Red and translated into Spanish as Rojo, then a user with a Spanish locale will see the custom field label as Rojo. Otherwise, the user would see the custom field label as Red.

- Changes to fields with more than 250 characters are tracked as edited and their old and new values are not recorded. For example, changes to long text area fields are tracked as edited.

- Users who can view the History related list are able to see the history data on all tracked fields, including fields that are hidden from them in their page layouts or via field-level security. See "Setting Field-Level Security" in the Salesforce online help.

- For automated lead changes that result from Web-to-Lead, the user listed in the history is the `Default Lead Creator` chosen in the Web-to-Lead Settings. For more information, see "Setting Up Web-to-Lead" in the Salesforce online help.

Advanced Call Scripting

Available in: Enterprise, Unlimited, and Developer Editions

Give the power of advanced call scripting to your telesales, service, and support teams with Summer '06. With the advanced call scripting capabilities of Summer '06, you can empower your team with branching scripts, question and answer coaching, and answer scoring to help qualify leads, upsell and cross-sell products and services, resolve cases, or escalate issues when necessary. Advanced call scripting is available as an AppExchange app that you can download and install into your Salesforce organization.

Implementation Tips

- For implementation tips, see "Implementing Advanced Call Scripting" below, or the *Advanced Call Scripting Implementation Guide* available from the AppExchange directory listing or in the Call Scripting Documentation folder on the Documents tab after you install the call scripting app.

Best Practices

- To ensure consistent positioning of your products and services, provide coaching tips in your call scripts for your telesales reps to use during the lead qualification process.

- Use the script wizard to easily author scripts.

- When authoring scripts using the script wizard, you can create new questions or reuse existing questions. Reuse existing questions and their associated answers within a script to repeat the same set of questions and answers throughout a branching script.

- Save answers to editable text fields to easily view and report on answers.
- Use scoring for lead scripts to improve the quality of qualified leads and let agents know when a lead can be converted.
- Define upsell scripts to help agents sell related products and broadcast promotions.
- You can store script responses to a question in a field. To do this, first determine the text field you want to use. If you want to use a custom field, create the field, making sure it is a text field such as picklist, multi-select picklist, or text. Next, make sure that the script is only available to a single object - the object that contains the field that will store the response. Then, select the field when adding an answer to your question in the script. Note that if the field you select already contains data, that data will be overwritten by the script response.
- You can create workflow rules based on script responses. For example, define a workflow rule to notify the regional manager when a telesales representative qualifies a lead with a budget of over $1,000,000. To set this up, create a custom text field to store the budget on a lead. Set up the script to automatically store the lead's budget to this field. Create a workflow rule that is triggered when this field is greater than or equal to $1,000,000.

Note

Advanced call scripting is currently available in English only.

About Advanced Call Scripting

The Basics

Advanced call scripting is an AppExchange app that is completely integrated with Salesforce. It allows organizations to quickly design and run question and answer scripts from within Salesforce. Designed using Salesforce custom objects, links, and fields, the call scripting app allows you to create and run call scripts from your accounts, cases, contacts, leads, and opportunities. It can automate your lead qualification, telesales, or call resolution processes. Use call scripting to:

- Store responses to questions
- Assign scores to responses
- Provide coaching tips for questions and answers
- Make a question contingent upon a response to another question
- Analyze script results

Advanced Call Scripting Terminology

Review the following call scripting terminology:

Answer Coach
Tips for entering responses to questions. An answer coach can help guide the user in choosing the right answer based on the customer's response.

Answers
Any response to a question. In the call scripting app, answers are stored in a custom object and are available from the Answers related list on a question detail page.

Answer Format

> The way the answers are presented for a question. The answer format allows script users to choose a single answer using radio buttons, multiple answers for a single question, or enter a response in a text field.

Passing Score

> The script's required passing score. For leads, users can only convert leads that attain a score greater than or equal to the passing score for that script.

Question Coach

> Tips that guide the script user when asking a specific question. A question coach can provide product positioning or company messaging.

Questions

> An inquiry to pose during a script. In the call scripting app, questions are stored in a custom object and can be available from the Questions related list on a script detail page.

Root Question

> The starting question or question at the root of a series of branched questions.

Running Score

> The total number of scores given for each previous answer in a script.

Scripts

> A script is a series of questions and their associated answers. A user running the script is prompted with a question, records the answer, and is presented with the next question depending on the response to the previous question. Each script always begins with a root question, a question that is independent of another question and answer. Thereafter, questions can either be root questions or dependent on the answer of a previous question in the script.

Score

> A number associated with a given answer in a script to help analyze the results. For example, your lead qualification script may contain five questions and you can assign a score of one to each answer before the lead can be converted.

Implementing Advanced Call Scripting

Advanced Call Scripting System Requirements

The call scripting app includes seven custom objects and three custom tabs. Before you install it, make sure these items will not exceed your organization's limits for custom tabs and objects. For a list of these limits, see App Setup Limits.

In addition, review the system requirements for the call scripting app:

- Any browser that Salesforce supports:

    - Microsoft® Internet Explorer version 6.0 or later
    - Mozilla Firefox version 1.0 or later
    - Netscape version 8.0 or later
    - Your browser must have JavaScript enabled.
    - Your browser must have cookies enabled.

- Your Salesforce organization must be enabled to use the AppExchange API.

- The call scripting app is available in English only.

Entity Relationship Diagram

Call scripting includes seven custom objects that relate to each other and to several standard objects. Review the following entity relationship diagram to determine how these objects are associated with other objects.

Note

- Each question can have one or more answers that links to a follow-on question.
- The Script Header custom object relates to the standard object on which the script is being used. This is based on how you configure call scripting for your organization. See Configuring Advanced Call Scripting on page 31.
- The Script-Campaign Association object allows you to associate scripts with campaigns so scripts that are run from leads can be filtered based on the campaigns for which the lead is a member. See Configuring Advanced Call Scripting on page 31 for more information.

Configuring Advanced Call Scripting

The call scripting app is available for installation from the AppExchange. After you have installed the call scripting app successfully, configure it for your organization using these tips:

Add custom links

- Add the **Find Scripts** custom link to the appropriate page layouts in your organization. Users can click this link to select the appropriate script and begin asking questions. This custom link is available on all your account, case, contact, lead, and opportunity page layouts.
- To use campaign call scripts, add the **Find Campaign Scripts** custom link to the appropriate lead page layouts in your organization. Users can use the **Find Campaign Scripts** custom link on a lead to select a call script that is associated with a campaign of which the lead is a member. You can associate a campaign with a call script using the Targeted Scripts related list on campaigns or the Included In Campaigns related list on a script detail page.
- Add the **Help for Scripts** custom link to the appropriate page layouts in your organization. Users can click this link to view the *Advanced Call Scripting User Guide* which contains instructions on creating and using scripts. You can add this custom link to all your account, case, contact, lead, and opportunity page layouts.

  ## Note
  By default, the page layouts for all call scripting custom objects include a **Help for Scripts** formula field that contains a link for users to access the *Advanced Call Scripting User Guide*.

Add related lists

- Add the Scripts related list to the appropriate page layouts in your organization. This related list is available on all your account, case, contact, lead, and opportunity page

layouts. Users can reference this list from a record detail page to know what scripts have been saved for that record. We recommend editing the Scripts related list properties to display any additional fields that may be helpful to your users, such as the `Date Taken` or `Score` fields.

- To use campaign call scripts, add the Targeted Scripts related list to the appropriate campaign page layouts in your organization. Users can use the Targeted Scripts related list to associate a campaign with a call script. They can also associate campaigns with scripts using the Included In Campaigns related list on a script detail page. We recommend editing the Targeted Scripts related list properties to display any additional fields that may be helpful to your users, such as the `Script` or `Created Date` fields.

Configure user profiles

- Set the Scripts tab to "Default On" for the profiles of users who need to use the Scripts tab as well as the Scripts related list.
- Set the appropriate user permissions for each new custom object:
  - Users who create scripts, such as sales and customer support managers, need the "Read," "Create," "Edit," and "Delete" permissions on all call scripting custom objects: Answers, FollowOnQuestions, Script - Campaign Associations, Script Results, Questions, Script, and Script Header.
  - Users who use scripts but never create them, such as salespeople and customer support representatives, need the "Read" permission on all call scripting custom objects. In addition, they need the "Read," "Create," "Edit," and "Delete" permissions on two custom objects: Script Header and Script Results.

  Note

  We recommend assigning custom profiles to the users who will be running scripts so that you can change their custom object permissions.

Customize documentation

- Update the *Advanced Call Scripting User Guide* as necessary for your organization. See .

Advanced Call Scripting Documentation

The call scripting app contains two documents that are available to you after installation. Both of these documents are located in the Call Scripting Documentation folder:

Advanced Call Scripting Implementation Guide
This document is in PDF format and is designed for administrators. It covers system requirements and post installation implementation tips.

Advanced Call Scripting User Guide
This document is in HTML format and is designed for users of the call scripting app. We recommend cloning it and updating your copy to fit your organization's business process for call scripting. Make sure to store the original version of this document so that you can refer to itin the future if necessary.

Users can view this HTML guide by clicking the **Help for Scripts** link on any record detail page to which it has been added. For more details, see Configuring Advanced Call Scripting on page 31.

> **Note**
>
> If you change the name of this file or convert it into another file type, you can still store it in the Call Scripting Documentation folder but check the **Help for Scripts** custom links and formula fields that refer to the old filename.

Deploying Advanced Call Scripting

Before rolling out the call scripting app to your users, we recommend preparing your users. Review the following suggestions for deployment:

- Make sure you have made all the necessary customizations for your organization. See Configuring Advanced Call Scripting on page 31.
- Meet with the appropriate users and provide training and information on how to access the documentation.
- Notify users of the permissions they have to use the call scripting app.

Advanced Call Scripting Upgrades

Currently, Salesforce does not provide a method for automatic upgrades. However, if you have installed the call scripting app from the AppExchange and a new version becomes available, install the new version by doing the following:

1. Back up all existing data associated with the app.
2. Delete all the data associated with the app.
3. Uninstall the old version of the app.
4. Install the new version of the app and configure it as necessary.
5. Import the app-related data back into the new app custom objects.

Using Advanced Call Scripting

What Are Scripts?

Scripts are records within Salesforce that contain a series of questions with their answers. Each script begins with a root question, a question that does not rely on the response to a previous answer. Each question that follows the root question can be an additional root question or another question that only displays to the user when a response to a previous question matches a particular answer. Scripts can have any number of root questions and branches from the root that lead to another question and answer series.

You can assign a score to each answer in a script. Each score contributes to the running score of a script, providing the user with a sum of each score earned for each answer. You can use this score to determine if a lead is qualified or if a customer service agent has gathered enough information to recommend a resolution. Alternatively, you can disable scoring for any script.

Elements of a Script

Each script contains basic properties such as:

- Script Name
- Passing Score
- Indicator to determine if the script uses scores
- Description
- Objects for which the script is available
- Questions

  A script can contain any number of questions that are listed in the Questions related list of a script. Each question can contain any number of answers that are listed in the Answers related list of a question. For each question, you can enter any number of answers.

- Answers

  Answers are associated with questions. You can set up an answer so that users are able to choose a single answer, multiple answers, or enter a free form text response. Additionally, you can make any of these answer options stored to a standard or custom text field if the script is only available on a single object. For example, if you make a script available on leads only, you can store responses in a custom lead text field such as `Product of Interest` to store which products the lead is interested in.

Running Call Scripts

User Permissions Needed	
To run scripts:	"Read," "Create," "Edit," and "Delete" on Script Results and Script Header AND "Read" on Answers, Questions, FollowOnQuestions, and Script

Scripts can be available from the detail page of any account, case, contact, lead, or opportunity record. If your administrator has made call scripts available on a standard object, you will see a **Find Scripts** link in the Custom Links section of a detail page. On leads, you may also see a **Find Campaign Scripts** custom link to select and run a call script associated with the campaign on which the lead is a member.

To run a call script:

1. Click the **Find Scripts** or **Find Campaign Scripts** link from the Custom Links section of the detail page for a record.
2. Select a script from the list of available scripts. The selected script displays in three sections: brief script information on the top, questions on the left, and answers on the right.
3. Ask the highlighted question on the left. Refer to the running score, passing score, and question coach for any question.

4. For each question, choose or enter the answer in the answer section on the right. Answered questions are noted with a check mark.

   - Click **Next** if you have provided an answer and would like to proceed to the next question.
   - Click **Cancel** to stop the script and return to the detail page.

5. Click **Save** when finished to store the selected answers. Optionally, click **Save & Convert** if the script results have qualified the lead and you want to convert the lead into an account, contact, and opportunity, attaching the script results to the contact record.

After you have saved script results, the results are stored with a script ID and attached to the record. If your organization has added the Scripts related list to your page layout, you can view script results by selecting the record and clicking the **View Results** link next to the script ID listed in the Scripts related list.

Creating Call Scripts

User Permissions Needed	
To create scripts:	"Read," "Create," "Edit," and "Delete" on all call scripting objects: Answers, FollowOnQuestions, Questions, Script, Script Results, and Script Header

Call scripts consist of basic script properties, questions, and answers. Before you begin creating your script, consider what type of information you want to gather.

To store a question's response to a field, first determine the field you want to use. You can select any standard or custom text, picklist, or text area field when adding an answer. If you want to store results in a custom field, create the custom field before you begin creating the call script. Also, make the call script available to a single object - the object that contains the field you want updated. For example, to update the `Comments` field on a lead record, make the script available with leads only.

Note

If you choose to store script responses to a field, any data in that field will be overwritten by the script response.

To create a call script:

1. Click **New** from the Scripts tab.
2. Enter the attributes of the call script:

Field	Description
Script Name	Identifies the script. The script name shows up in lists and is the text the user clicks when selecting a script to run.
Passing Score	The score required for the subject to qualify. For leads, users can only convert leads that attain a score greater than or equal to the passing score for that script.

Field	Description
Use Scoring	Select if you want to display the running score to users when running the script.
Description	Additional text that describes the script.
Available With	Select the standard objects on which users can run this script.

3. Click **Save**.
4. Click **Script Wizard** from the Custom Links section of the script's detail page.
5. Use the script wizard to build your script.

Using the Script Wizard

User Permissions Needed	
To create scripts:	"Read," "Create," "Edit," and "Delete" on all call scripting objects: Answers, FollowOnQuestions, Questions, Script, Script Results, and Script Header

Use the script wizard to quickly build the questions and answers in your script. The script wizard is available from the Custom Links section of a script detail page. Select a script and click **Script Wizard** to launch the script wizard popup. Within the popup, you can do the following tasks:

Adding questions
Click **Add Question** to create a new question or insert an existing question. For instructions on creating questions, see "Creating Questions" below.

Adding answers
Click **Add Answer** to create a new answer to a selected question. For instructions on creating answers, see "Creating Answers."

Adding questions that are dependent on a previous question's answer
To make a question dependent on the response of a previous question, click the down-arrow icon next to the answer, choose **Add Question**, select the answer that precedes this question in the Add To Answer drop-down list, and enter the question as usual. This question becomes a branch of the selected answer.

Changing questions and answers
Click the down-arrow icon to the right of a question or answer to view more options. Use this menu to add, change, or remove items. Click the up-arrow icon to close this menu.

Viewing scripts
You can view your questions and answers using two display modes: tree view and folder view. Click **Folder View** to display the questions and answers as Windows-like folders that you can expand and collapse. Click **Tree View** to display a graphical representation of the questions and answers as branches in a tree.

Returning to Salesforce
Click **Done** to close the popup.

Creating Questions

User Permissions Needed	
To create scripts:	"Read," "Create," "Edit," and "Delete" on all call scripting objects: Answers, FollowOnQuestions, Questions, Script, Script Results, and Script Header

To create a question from the script wizard:

1. Click **Add Question** to create a new question or insert an existing question.
2. At the top of the popup window, click **Add Existing Question** to select an existing question or **Create New Question** to create a new question and add it to the script.
3. In the `Add to Answer` drop-down list, select the type of question. Select **Add As Root Question** if this is the first question in a script or you want this question to be a first-level question. Otherwise, select the answer to a previous question so that your new question displays based on the responses of an earlier question.
4. Enter the question.
5. Optionally, enter question coach notes, tips that guide the script user when asking a specific question.
6. Optionally, enter answers by clicking **More Options**.

    a. Enter the answers you want to offer.
    b. Enter a score to contribute to the running score for that answer.
    c. Choose an answer format.
    d. If you want to store the response to a standard or custom field, select that field in the `Save Answer to...` option.

        • Click **Add More** to insert another answer option.
        • Click **Clear All** to remove all responses and start over.

7. Click **Save**.

Creating Answers

User Permissions Needed	
To create scripts:	"Read," "Create," "Edit," and "Delete" on all call scripting objects: Answers, FollowOnQuestions, Questions, Script, Script Results, and Script Header

Answers are associated with questions. When the question is deleted, its associated answer is deleted along with it.

To create an answer from the script wizard:

1. Click **Add Answer** to associate a new answer with a question.
2. If the question is not already selected, select the question that you want the new answer associated with.
3. Enter the answer.
4. Optionally, enter answer coach notes, which are similar to question coach notes and provide guidance for the script user.
5. Enter a score to apply if the user receives the correct answer.
6. Click **Save**.
7. Optionally, to allow users to enter any text as the answer, click **Edit** and select `Allow Free-form Answer`.

Special Considerations for Campaign Scripts

Call scripts can be associated with campaigns. This allows scripts that are run from leads to be filtered based on the campaigns for which the lead is a member. Review the following considerations before creating campaign call scripts for your organization:

- Make your campaign call scripts available with the leads standard object.
- Use the Targeted Scripts related list on campaigns to associate a campaign with a lead call script, or use the Included In Campaigns related list on the script detail page.
- If the campaign is associated with a lead call script, clicking the **Find Campaign Scripts** custom link on a lead record displays all the campaigns of which that lead is a member.
- Review the *Advanced Call Scripting Implementation Guide* for some additional post-installation instructions required to run campaign call scripts. (This document is available from the AppExchange directory listing or in the Call Scripting Documentation folder on the Documents tab after you install the call scripting app.)

Special Considerations for Lead Scripts

Lead scripts are different than scripts on other standard objects in several ways. Review the following considerations before creating lead call scripts for your organization:

- Lead call scripts include an additional button: **Save & Convert**.
- The **Save & Convert** button is only available when the running score is greater than or equal to the passing score.
- Clicking **Save & Convert** from a lead script converts a lead in the same manner it does in Salesforce: it uses the lead data to create an account, contact, and opportunity record. You may be prompted to select an existing account or contact.

- After a lead is converted using the **Save & Convert** option from a lead script, the script results are stored on the contact record.

Analyzing Script Results

The call scripting app includes a report folder called Call Scripting that contains several reports that detail the usage and result statistics of your organization's call scripts. Click the Reports tab and select one of the reports in the Call Scripting folder to view results.

Note

To view the script results for a single record, select the record and click the **View Results** link next to the script ID listed in the Scripts related list.

The installed app also includes several dashboards in a dashboard folder called Call Scripting. Click the Dashboards tab and select the Call Scripting dashboard to analyze call scripting information.

Troubleshooting Advanced Call Scripting

Use the following common situations and solutions to troubleshoot call scripting issues:

Unable to run Script Wizard custom link.
The call scripting app is available to Enterprise, Unlimited, and Developer Edition organizations. Although Professional Edition organizations can install the app, they cannot run it unless the API is enabled for that organization. Contact salesforce.com to upgrade your Salesforce Edition.

How do I uninstall the call scripting app?
All your installed apps are listed in the Get Apps page when you click **Setup | Exchange**. You can remove any app by clicking the **Uninstall** link next to the app name.

My install failed.
An install can fail for several reasons:

- The app you are installing includes custom objects that will cause your organization to exceed its limit of custom objects. See the Salesforce online help for a list of these limits.
- The app you are installing includes custom tabs that will cause your organization to exceed its limit of custom tabs. See the Salesforce online help for a list of these limits.
- The app you are installing contains a custom object with the same name as an existing custom object in your organization.
- The app contains features that are not available in your Edition.

Salesforce Connector for SAP R/3

Available in: Unlimited Edition

Available for an additional cost in: Enterprise Edition

Note

The Salesforce Connector for SAP R/3 is not enabled by default in Salesforce. To request Salesforce Connector for SAP R/3, contact salesforce.com. The Salesforce Connector for SAP R/3 is available in English only.

With Summer '06, salesforce.com is introducing the Salesforce Connector for SAP R/3. This simple and easy-to-implement tool enables customers to seamlessly integrate Salesforce with their back-office SAP® R/3® software. It provides out-of-the-box support for the synchronization of account information between Salesforce and SAP R/3 and will significantly reduce the time and effort needed to integrate the two systems. The connector allows you to:

Jump-start Integrations
The connector facilitates end-to-end integration between Salesforce and SAP R/3.

Synchronize Customer Data
Bidirectional synchronizations ensure consistent data quality in both Salesforce and SAP R/3.

Automate Business Flows
Leverage business process that span both applications by seamlessly integrating key Salesforce and SAP R/3 functionalities.

To learn more about using the Salesforce Connector for SAP R/3, contact your salesforce.com Account Executive.

AppExchange Mobile

Available in: Unlimited and Developer Editions

Available for an additional cost in: Professional and Enterprise Editions

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AppExchange Mobile empowers mobile teams with up-to-date data anytime, anywhere. With Summer '06, AppExchange Mobile includes numerous new features and performance enhancements to help your mobile teams succeed. Key improvements include:

- Mobile access to product prices
- Mobile creation of opportunity products
- Automated lead assignments while mobile, for faster lead response times
- More efficient mobile case management
- Richer mobile case data, for faster case closure times
- Direct and immediate access to each company's support representative for fast resolution of questions or problems
- Remote assistance through remote login to any user device

Note

AppExchange Mobile is currently available only for English-language apps.

About AppExchange Mobile

AppExchange Mobile Enhancements for Salesforce SFA

Products and Price Books

With Summer '06, AppExchange Mobile offers full mobile support for products and price books, giving you the ability to view, add, edit, and delete the individual items you are selling with your opportunities. From a mobile device, you can view product lists and price book entries, manage price books, choose a price book for an opportunity, and add products to opportunities.

If the filtered data on your device does not include all product and price book records you need, you can run a remote search to retrieve more products, price books, and price book entries.

When creating new profiles in the mobile administration console, the product and price book objects are selected by default for mobilization. Default queries are also provided, but can be overridden in the Advanced filter screen.

To mobilize products and price books:

1. Click **AppExchange Mobile** | **Add Profile** to create a new mobile profile.
2. Enter your Salesforce username and password and click **Next**.
3. Retain or modify the default selected objects (Product2 and Pricebook2), and click **Done**.
4. Retain the default filters for each object, or click **Edit** next to Entity Filters to customize them.
5. Click **Done**.
6. Click **Save**.

Lead Assignment Rules

With Summer '06, AppExchange Mobile offers read-only mobile support for lead assignment rules. You can apply your organization's lead assignment rules created within Salesforce via your mobile device, and you can set your preference within the Leads tab to always on, always off, or prompt every time.

Assignment rules are automatically available as long as leads are selected and mobilized in the mobile profile.

AppExchange Mobile Enhancements for Salesforce Service and Support

Cases and Solutions

With Summer '06, AppExchange Mobile increases support for cases and solutions by giving you the ability to associate a solution with a case, view and access case comments, and view and access case histories while mobile.

To mobilize case comments and case histories, the CaseComments and CaseHistory objects must be selected and filters must be defined. This gives flexibility to those organizations that may or

may not want potentially large quantities of comments and historical data stored on their users' devices.

Summer '06 has extended the case information returned from a mobile search, displaying not only the case number but the case identification number, date, and contact information.

When creating new profiles in the mobile administration console, cases and solutions are selected by default for mobilization. CaseComments and CaseHistory are maintained as separate supporting objects and can be mobilized by the administrator at his or her discretion. Default queries are provided, but can be overridden in the Advanced filter screen.

Case Assignment Rules

With Summer '06, AppExchange Mobile adds read-only mobile support for case assignment rules. You can apply your organization's case assignment rules created within Salesforce via your mobile device, and you can set your preference within the Cases tab to always on, always off, or prompt every time.

Assignment rules are automatically available as long as cases are selected and mobilized in the mobile profile.

AppExchange Mobile Administration and Support Enhancements

Direct Support for Users

A new **Support** menu item gives you instant access to support contact information while mobile. This support contact information comes directly from the administrator, giving administrators the capability to communicate where to go for help. You can directly place calls or send emails to the appropriate support channel right from your device. This support contact information is also available to you in the Self-Management Console.

Customized Support Information

Administrators can now input support contact information for each application within their domain. This information is sent down to the mobile device and is exposed to users as a support channel if application assistance is needed.

Grant Login Access

Domain administrators can now grant login access to salesforce.com customer support representatives by entering in their credentials on the profile login screen and clicking **Grant**. This allows salesforce.com customer support representatives to assist administrators with profile configurations, data filters, and any other issues they may have. Once granted, access is allowed until the expiration date is met. Access can be revoked at any time.

You can also grant access to salesforce.com customer support representatives or your AppExchange Mobile administrator from your device or from the **Grant Access to Test User Data** tool in the Self-Management Console. This allows salesforce.com customer support representatives or domain administrators to test user data against your account and debug any reported issues.

Password Verification

A new **Verify Password** option on the login screen helps synchronize Salesforce passwords with the locally stored passwords on your device. If AppExchange Mobile detects that your local and Salesforce passwords are not the same, it prompts you to verify your Salesforce password on your device before you can access the application. This new feature protects your data and allows you to verify a new password without requiring all data to be reloaded.

Auto-Generated Passwords

When adding new users in the administration console, administrators can now either manually create passwords for each new account or have the system automatically generate passwords. In either case, a welcome email is sent to the user with login and account information for the Self-Management Console.

Other Administration Enhancements

The Mobile Administration Console also includes the following enhancements:

- A new debug trace output link on the view user page helps administrators and customer support diagnose problems.
- Renamed object names default to the plural name rather than the singular name.
- Custom views now allow relationship-based filtering, such as "Show me all contacts related to the account 'Acme Corporation'."
- The `Username` field is now present in the **Invite Mobile Users** process, allowing administrators to specify usernames for their mobile users, as opposed to automatically defaulting usernames to the email address.
- Default templates and queries have been updated to better suit customer needs.
- A new **Status** link has been added to the user list page. This gives quick visibility to the connection status of any given user or device account.

AppExchange Mobile Installation and Deployment Enhancements

Informative Messages

Summer '06 facilitates the installation and deployment of AppExchange Mobile by providing more direct, informative messages throughout the process. If an error occurs for one of many possible reasons (for example, wireless connectivity is turned off, the device is outside of the coverage area, or a firewall is blocking the installation), error notifications will inform you of the exact problem and provide instructions on how to address it.

Progress Indicator

Summer '06 makes deploying AppExchange Mobile easier by displaying a progress indicator while data downloads from Salesforce. If an error occurs during the data transfer, the progress indicator stops and an error message informs you of the problem that has occurred.

General Enhancements for the RIM Blackberry Platform

New Device Certifications

- United States - Verizon Wireless 7130e
- United States - Alltel 7130e
- United States - Sprint 7100i
- United States - Nextel 7100i
- United States - T-Mobile 8700g

Local Search

The Local Search/Find feature now behaves in the same manner as native RIM applications. Additional enhancements were made to the 7100 series devices to overcome difficulties with the native SureType keyboard.

Custom Views

All date fields in custom views are now relative rather than absolute. For example, when you search for "All opportunities scheduled to close this month," the latest records display, without needing to manually change the view configuration. This matches the behavior of the Palm Treo.

Custom views have also been extended to all objects, not only those with tabs.

Dimmed Icons

Temporary records now have a dimmed icon to visually differentiate them from other records.

Performance

List screens on the mobile device now load significantly faster, improving the performance of operations like logging a call and adding a product.

Dependent Picklists

With dependent picklists, if no controlling picklist value is set, the dependent value cannot be selected. Thus, the **Show List** menu item is hidden until a value is selected for the controlling picklist field.

Activities

When tasks and events are not mobilized, the **Open Activities** and **Activity History** menu items are hidden. This is to improve usability, as users cannot create, view, edit, or delete related activities if those objects are not mobilized.

Show/Hide Passwords

Many customers have difficulty entering passwords on mobile devices, especially when using complex combinations of uppercase, lowercase, numeric, and other characters. Due to this difficulty, some customers often lock themselves out of Salesforce after numerous login attempts. To address this concern, AppExchange Mobile now displays a `Show Password` checkbox on the Activate, Login, Locked Out, and Change Password screens. By default the checkbox is deselected and the password is masked. To view your password in plain, readable text as you enter it, simply select the `Show Password` checkbox before logging in. Once you have confirmed your password was entered correctly, deselect the checkbox to hide your password and continue using the application.

Activation and Login Messaging

With Summer '06, better messages during activation and when logging in make AppExchange Mobile easier to use.

Default Values for Multi-Select Picklists

Summer '06 extends support for default values to multi-select picklists. If a default value is set in Salesforce, AppExchange Mobile automatically inherits that default value on your mobile device.

Preference Screens

Preference screens for each object are now accessible from the list screen of each object instead of only on the home screen. This makes it easier for you to find the data you want and to change your preferences for a given object.

Checkboxes

Picklists with values of True/False or Yes/No have been replaced with checkboxes to improve the user interface and minimize the number of clicks required to set them.

RIM Tasks

A new task option allows you to set your default application for tasks to either AppExchange Mobile or RIM. If the application is set to AppExchange Mobile (default), Salesforce tasks are shown as usual. If the application is set to RIM, the RIM tasks application appears when you click the Tasks tab.

Other Enhancements

- Sorted custom views no longer display lowercase letters at the bottom of the list.
- Multi-value default picklist values now inherit properly.

General Enhancements for the Palm Treo Platform

New Device Certifications

- United Kingdom - T-Mobile Treo 650
- United States - T-Mobile Treo 650
- United States - Verizon Treo 700p
- United States - Sprint Treo 700p

Remote Search

The Remote Search feature on the Palm Treo 6x0 now allows you to search for records in Salesforce across all objects and by any field in your page layout.

User Interface

For collapsible sections, section headers now only appear when fields and values exist beneath the header, reducing the number of clicks required to find information.

Checkboxes have been removed from the Manage Views screen to optimize screen space.

Adding Events

A **New Event** menu item on the account, contact, and opportunity detail screens now allows you to create events directly from that record, reducing the number of clicks for this common action.

Return Key

The **Return** key on the login screen now tabs from the `Username` to the `Password` field, reducing the need to use the stylus.

Show/Hide Passwords

Many customers have difficulty entering passwords on mobile devices, especially when using complex combinations of uppercase, lowercase, numeric, and other characters. Due to this difficulty, some customers often lock themselves out of Salesforce after numerous login attempts. To address this concern, AppExchange Mobile now displays a `Show Password` checkbox on the Activate, Login, Locked Out, and Change Password screens. By default the checkbox is deselected

and the password is masked. To view your password in plain, readable text as you enter it, simply select the `Show Password` checkbox before logging in. Once you have confirmed your password was entered correctly, deselect the checkbox to hide your password and continue using the application.

Activation and Login Messaging

With Summer '06, better messages during activation and when logging in make AppExchange Mobile easier to use.

Cross-Platform Parity with the Blackberry Platform

- In order to maintain consistency across platforms, field labels, buttons, and other user interface elements have been renamed to match the RIM Blackberry platform.
- Custom views are now aligned with the Blackberry platform to include collapsible sections and identical field placement.
- The **Manage Views** menu item for managing custom views is now available from the home screen. Not only is this consistent with the Blackberry, but it also provides an easy shortcut for you to manage their views across all objects.
- Page titles for custom views now display the view actually in use so that you can refer back at any time.
- The detail screen of all records has been modified to display in two columns, identically to that on the Blackberry platform. This two-column view allows for a much better use of limited space.

Other Enhancements

- Record type picklist values no longer override dependent picklist values.
- The custom view name is now shown properly when moving between views.
- Address fields now populate correctly when copying the address of an associated account to a new contact.
- Custom views can no longer be saved without an assigned name.