

Major Announcements

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MAJOR ANNOUNCEMENTS

Assets

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

If you are using products and price books to track the items you sell on opportunities, you can now also track the purchased or installed products a customer has. Assets can help you better serve your clients; everything you need to know about a customer's purchases can be listed on the account, contact, and case detail page. You can also use assets to track what competitor's products your customers are using.

Asset records are most easily created from the Assets related list on account, contact, or product detail pages. You can search for assets from the sidebar or locate assets from the asset views on the Products tab.

See Also:

[What is an Asset? on page 3](#)

[Viewing Asset Lists on page 4](#)

[Displaying and Editing Assets on page 4](#)

[Creating Assets on page 5](#)

[Cloning Assets on page 5](#)

[Asset Fields on page 6](#)

[Deleting Assets on page 7](#)

[Searching for Assets on page 7](#)

IMPLEMENTATION TIPS

- Add the Assets related list to account, contact, and product page layouts. Users can create new assets from these related lists. See the online help for instructions on changing page layouts.
- Add the Cases related list to appropriate product and asset page layouts.
- Add the **Asset** field to your case page layouts. Consider changing the field-level security for the **Asset** field so that it displays or is required if necessary for your business. See the online help for instructions on changing field-level security.
- By default, your users have "Read," "Create," "Edit," and "Delete" permissions on assets. If necessary, revise these permissions for your user profiles. Without the "Read" permission on assets, users will not see any assets or asset related lists in Salesforce.com. See the online help for information on these profile permissions.
- Optionally, customize asset fields and page layouts by clicking **Setup | Customize | Assets**.
- Optionally, create workflow rules based on assets.

BEST PRACTICES

- If an asset is based on a product and you know the exact name of the product, enter the name in the **Product** field without clicking the *lookup* icon. Salesforce.com automatically creates the asset name for you and associates the asset with that product.
- If you do not know the name of the product, click the product *lookup* icon, locate a product, and select it. Salesforce.com automatically populates the **Product** and **Asset Name** fields with the name of the selected product.
- Optionally, rename the term "Asset" everywhere in your organization to a term that is more meaningful to your business. Click **Setup | Customize | Tab Names | Rename Tabs** and choose **Edit** next to assets.
- If you do not use assets to track competitor products, make the **Product** field required on assets so that users cannot create an asset unless it is based on one of your products.
- Users can associate an asset with an account and a contact on a different account. The asset is listed on both the account and the contact's account.
- If you use contacts to track consumer records, consider linking an asset to a contact and using the **Account** field on the asset to track a product distributor. You can also remove the **Account** field from your asset page layouts if you are only tracking assets for contacts.
- Users can also create new assets while creating new cases. Avoid making custom asset fields required if your users frequently create new assets during case creation as these fields will not be available on the asset creation dialog when creating a case.
- You may want to remove fields like **Serial Number** and **Competitor Asset** if they do not apply to your business. You may also want to change the values of the asset **Status** picklist to be more meaningful to your specific business environment.

ABOUT ASSETS

What is an Asset?

While products represent the items that your company sells, assets represent the specific products your customers have purchased, including a serial number, date of purchase, or any other information related to an individual sale. Depending on how your organization uses assets, they can represent a competitor product that your customer has or versions of your products.

Use assets to store specific information about the products your customers have. Depending on your page layouts, you can view asset related lists on your account, contact, and product page layouts.

Assets are included with Enterprise and Developer Editions and available with Professional Edition when you purchase products, price books, and schedules at an additional cost.

Viewing Asset Lists

Display a list of assets by going to the Products tab and clicking a view from the Asset Views section. From any assets view, you can view detailed asset information and access related information.

User Permissions Needed	
To view assets:	"Read" on assets
To change assets:	"Edit" on assets

- Click an asset name to view detailed information of the asset.
- Choose a predefined view from the drop-down list to select assets to display. Alternatively, you can click **Create New View** to define your own list view.
- Click **Edit** to change asset details.
- Click any column heading to sort the assets in ascending order using that column's information. Click the heading a second time to sort in descending order.
- At the top and bottom of the list, click a letter to display the contents of the sorted column that begin with that character.
- Click the **Next Page** (or **Previous Page**) link to go to the next or previous set of assets.
- At the bottom of the list view, select **fewer** or **more** to view a shorter or longer display list.

Assets are included with Enterprise and Developer Editions and available with Professional Edition when you purchase products, price books, and schedules at an additional cost.

Displaying and Editing Assets

You can display an asset from the Products tab or a related account or contact.

User Permissions Needed	
To view assets:	"Read" on assets
To change assets:	"Edit" on assets

Displaying Assets - Once you have located an asset from a related list or the products home or list pages, click the name to display detailed information.

Editing Assets - To update asset details, click **Edit**, and then change the field you want to update. When you have finished, click **Save**.

Asset Related Lists - Below the asset detail are related lists that include information about associated cases, activities, or notes and attachments. The related lists you see are determined by your personal customization and any customization your administrator has made to page layouts. You can click on individual items to display additional information about them. Click **more** at the bottom of the page or **View More** below a related list to display more items.

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

To return to the last list page you viewed, click **Back to list** at the top of the asset detail page. If your organization has enabled collapsible page sections, use the arrow icons next to the section headings to expand or collapse each section on the detail page.

Assets are included with Enterprise and Developer Editions and available with Professional Edition when you purchase products, price books, and schedules at an additional cost.

NOTE

Users can view an asset if they can view the account or contact listed on the asset. However, sharing settings may prevent users from viewing the account associated with the contact on the asset.

Creating Assets

Administrators and users with the "Create" permission on assets can create new assets.

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

1. Click **New** on the Assets related list of an account, contact, or product. This action automatically inserts the account name, contact name or product name, depending on the record you selected when you clicked **New**.
2. To associate the asset with a product, enter the exact product name. If the product name is unique, Salesforce.com automatically inserts this name in the **Asset Name** field.

If you do not know the name of the product:

- a. Click the **Product** lookup icon if the asset is based on a product.
 - b. Enter a search filter to find a current product, and click **Go!**. See the online help for information on filtering information.
 - c. Select the appropriate product. Salesforce.com automatically inserts the selected product name in the **Asset Name** field.
3. Enter a name for the asset.
 4. Choose the account or contact for the customer who has purchased the asset.
If necessary, you can choose both an account and a contact that are not related. This way, the asset will display on the account of the contact selected on the asset as well as the account selected on the asset.
 5. To create an asset for a competitor's product, check **Competitor Asset**.
 6. Click **Save**.

Assets are included with Enterprise and Developer Editions and available with Professional Edition when you purchase products, price books, and schedules at an additional cost.

Cloning Assets

User Permissions Needed	
To view assets:	"Read" on assets
To create and clone assets:	"Create" on assets

Use the **Clone** button on an asset to quickly create a new asset with the same information as the selected asset. Administrators and users with the "Create" permission on assets can clone assets. To clone an asset for your organization:

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

Assets are included with Enterprise and Developer Editions and available with Professional Edition when you purchase products, price books, and schedules at an additional cost.

Asset Fields

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

Field	Description
Asset Division	<p>Division to which the asset belongs. This value is automatically inherited from the related account if any. Otherwise the value is inherited from the related contact.</p> <p>Available only in organizations that use divisions to segment their data.</p>
Asset Name	<p>Identifying name for the asset. If you select a product from the product lookup, this name is automatically populated with the product name.</p>
Account	<p>Account associated with the asset. Each asset must be associated with an account or contact.</p>
Contact	<p>Contact associated with the asset. Each asset must be associated with an account or contact. If you choose both an account and contact, they do not need to be related to each other.</p> <p>Contacts that are not associated with an account cannot be linked to assets.</p>
Competitor Asset	<p>Checkbox to indicate if the asset represents a competitor's product. Use assets to track what customers have your competitor's products using this checkbox.</p>
Description	<p>Text that distinguishes this asset from others.</p>
Install Date	<p>Date the customer installed the asset.</p>
Price	<p>Amount the customer paid for the asset.</p>
Product	<p>The product on which the asset is based.</p>
Purchase Date	<p>Date the customer bought the asset.</p>
Quantity	<p>The number of assets purchased.</p>
Serial Number	<p>The model number on the asset.</p>
Status	<p>State of the asset.</p>
Usage End Date	<p>The date the asset expires or the last date it is under warranty. Use this field to store whatever date is appropriate for your business.</p>

Deleting Assets

Administrators and users with the "Delete" permission on assets can delete assets. Since assets are related to account and contact records, you can delete them from those records or individually using the Products tab. Before you delete an asset, review the following scenarios:

User Permissions Needed	
To view assets:	"Read" on assets
To delete assets:	"Delete" on assets
To recover deleted assets:	"Delete" on assets

- **Is the asset associated with a case?**
Assets associated with cases cannot be deleted. This includes deleting an account or contact record that is associated with an asset listed on a case.
- **Is the asset associated with a product?**
When an asset is based on a product, deleting the product does not delete the asset.
- **Is the asset associated with an account or contact?**
If you delete an account or contact, all associated assets are also deleted and moved to the Recycle Bin.
Note that if you delete an account with a related contact that is associated with an asset, all three records are deleted. To restore all three records, restore the account record.

NOTE

You can delete an asset individually without deleting any related record. However, if you later delete the related record, you cannot recover the asset from the Recycle Bin.

To delete an asset:

1. Locate the asset on the Assets related list of an account or contact, or on an asset list view from the Products tab.
2. Click **Del** next to the asset you want to delete.
3. Click **OK**.

Assets are included with Enterprise and Developer Editions and available with Professional Edition when you purchase products, price books, and schedules at an additional cost.

Searching for Assets

User Permissions Needed	
To view assets:	"Read" on assets

To locate specific assets, use the sidebar Search or the Advanced Search, accessed by clicking **Advanced Search** in the sidebar. Enter your search terms, and click **Search**. The search returns a list of items that match your search terms. The fields you see are determined by the search layout defined by your administrator and by your field-level security settings (available in Enterprise and Developer Editions only). From the list, select an entry to jump directly to that item. See the online help for tips on searching.

You can also create an asset list view from the Products tab to locate assets that match specific criteria.

Assets are included with Enterprise and Developer Editions and available with Professional Edition when you purchase products, price books, and schedules at an additional cost.

Granular Access Permissions

Available in: **Enterprise** and
Developer Editions

Now you can control the permissions a user has down to their ability to read, create, update, and delete a certain type of record. You can give users access to create records that they cannot edit or delete. These granular permissions are available on all standard tabs such as accounts and opportunities as well as custom objects and other standard objects that do not have their own tabs such as assets and price books.

Granular permissions allow you to hide a type of record from a user everywhere in the application. For example, if you remove the "Read" permission on cases, users will not see the Cases tab and all of its records, case fields on other tabs, case related lists on other types of records, case fields in reports, case merge fields, or case web links.

See Also:

[What are granular access permissions?](#) on page 9

[Standard Object Permissions](#) on page 9

[Custom Object Permissions](#) on page 9

[Accessing Data](#) on page 10

IMPLEMENTATION TIPS

- Your users have the exact same permissions and access levels as they did before the Winter '05 release. However, some of the permissions may have different titles.
- Continue to limit the number of custom profiles so that you have less to maintain.

BEST PRACTICES

- Remember what settings affect a user's ability to see records:
 - Permissions control what users can see and do to a type of record.
 - Sharing determines what records a user can see.
 - Field-level security controls the fields a user can see within a record.
- When you change user permissions, some permissions may automatically enable other permissions. Use the 'i' icons to view what permissions will be automatically enabled. For example, enabling the "View All Data" permission automatically enables the "Read" permission for all standard and custom objects. Likewise, the "Transfer Leads" permission automatically enables the "Read" or "Edit" permissions on leads.

ABOUT GRANULAR ACCESS PERMISSIONS

What are granular access permissions?

Granular access permissions are available for both custom objects and standard objects, such as accounts, opportunities, assets, and price books. You can enable and disable these permissions from the profile edit page by clicking **Setup** | **Manage Users** | **Profiles** and selecting the name of a profile.

Standard Object Permissions

For each type of data, you can specify the following user permissions:

- **Read** - users can only view records of this type.

NOTE

If you remove the "Read" permission from a profile, users with that profile will not see that type of data anywhere including:

- Tab will not be visible
 - Fields of that type will not be visible on other tabs
 - Related lists of that type will not be visible on other tabs
 - Search results will not return records of that type
 - Report data for records of that type will not be available
 - Merge fields of that type will not be available
 - Web links of that type will not be visible
-
- **Create** - users can read and create records
 - **Edit** - users can read and update records
 - **Delete** - users can read, edit, and delete records

Custom Object Permissions

For each custom object, you can specify the following permissions:

- **Read** - users have read-only access to records
- **Create** - users can read and create records
- **Edit** - users can read and update records
- **Delete** - users can read, edit, and delete records

By default, every standard profile except Read Only has create, read, edit, and delete permissions on any custom object. The Read Only standard profile has read permission on every custom object.

NOTE

User permissions do not affect field-level security or sharing. If field-level security specifies that a field is hidden, users with the "Read" permission can view only those fields that are not hidden on the record. In addition, users with "Read" permissions can view only those records that sharing settings allow.

The one exception is the "Edit Read Only Fields" permission which gives users the ability to edit fields marked as read only via field-level security.

Accessing Data

Your administrator can customize many different areas to secure your data. Additionally, users in Professional, Enterprise, and Developer edition organizations can control the access that other users have to their data by sharing records individually with colleagues.

To determine whether you can access data, use the table below:

To view a tab:	<ul style="list-style-type: none">• You must have the "Read" permission on the records within that tab.• Make sure you have customized your personal display to show the tab.
To view a record:	<ul style="list-style-type: none">• Make sure you have the "Read" permission on the type of record you want to view.• Professional, Enterprise, and Developer organizations can set a sharing model that determines the access users have to records they do not own. Depending on your sharing model, the owner may need to share the record with you if you are not the owner of the record or above the owner in the role hierarchy.
To view a field:	<ul style="list-style-type: none">• Make sure you have the "Read" permission on the type of record for the field.• For Enterprise Edition organizations, check the field-level security; your field-level security settings may prevent you from seeing the field.• Check your page layout; depending on your page layout settings, you may see some fields and not others.
To edit a field:	<ul style="list-style-type: none">• Make sure you have the "Edit" permission on the type of record for the field.• For Enterprise Edition organizations, check the field-level security; your field-level security settings may set a field to "Read-Only."• Check your page layout; page layouts can set fields to read only.
To view a related list:	<ul style="list-style-type: none">• Make sure you have the "Read" permission on the type of records displayed in the related list.• Check your page layout; depending on your page layout settings, you may see some fields and not others.

Self-Service User Management

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

If your organization has a Self-Service portal, managing your Self-Service users just became easier. Instead of enabling users one-by-one from the contact records, enable multiple users at once. You can also reset passwords or change Self-Service user information from a central place.

See Also:

[Enabling Multiple Self-Service Users on page 12](#)

[Editing Self-Service User Information on page 12](#)

[Resetting Self-Service User Passwords on page 12](#)

IMPLEMENTATION TIPS

- Regardless of how you enabled a Self-Service user, all of your Self-Service users display when you click **Setup | Customize | Self-Service | Self-Service Portal | Users**.
- Give contacts a password to the Self-Service portal during the final step of the enable process.
- Private contacts, or contacts that do not have accounts, cannot be enabled as Self-Service users.

BEST PRACTICES

- If you need to delete a contact that is a Self-Service user, remember to disable a contact's Self-Service username before deleting the contact record.

ABOUT SELF-SERVICE USER MANAGEMENT

Manage your Self-Service user information from a single place and make changes to more than one user at a time. Before your customers can take advantage of the Self-Service portal, you must enable Self-Service access for each contact. You can enable access for one contact at a time from the Contacts tab or for multiple contacts via the Self-Service setup pages.

- To enable multiple Self-Service users at once, see [Enabling Multiple Self-Service Users on page 12](#).
- To change Self-Service user information, see [Editing Self-Service User Information on page 12](#).
- To reset Self-Service user passwords, see [Resetting Self-Service User Passwords on page 12](#).

Enabling Multiple Self-Service Users

Administrators and users with the "Edit Self-Service Users" can manage Self-Service users. Administrators and users with both the "Edit Self-Service Users" and "Manage Self-Service Portal" permissions can perform mass actions for Self-Service user management such as enabling Self-Service access for many contacts at once. Each contact must have an email address and must be associated with an account to be a Self-Service user.

To enable new users for your Self-Service portal:

1. Click **Setup | Customize | Self-Service | Self-Service Portal | Users**.
2. Click **Enable New User(s)**.
3. Enter search criteria to compile a list of the contacts you want to enable and click **Search**. See the online help for instructions on filtering data.
4. Select the contacts you want to enable and click **Next**.
5. Modify Self-Service user information as necessary.
6. Select the **Super User** checkbox to enable the contact as a Self-Service super user who can view case information, add comments, and upload attachments for all cases submitted by anyone in his or her company.
7. Click **Save**.

Editing Self-Service User Information

Edit Self-Service user information to keep user information updated.

1. Click **Setup | Customize | Self-Service | Self-Service Portal | Users**.
2. Select the users you want to change.
3. Click **Edit User(s)**.
4. Make any necessary changes to these records.
5. Click **Save**.

Resetting Self-Service User Passwords

If a Self-Service user loses his or her password, you can email a new password to him or her. To reset one or more Self-Service users' passwords:

1. Click **Setup | Customize | Self-Service | Self-Service Portal | Users**.
2. Select the users whose passwords you want to reset.
3. Click **Reset Password(s)**.
4. Click **OK**.

Delegated User Administration and Custom Object Development

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

With the Winter '05 release, you can delegate some of your administrative work for user administration and custom object management without compromising your control over your company's data.

You can delegate the ability to create, update, and deactivate users and reset passwords for a portion of the role hierarchy. For example, the ability to manage users at or below the VP of US Sales role might be granted to several people on the US Sales Operations team. Additionally, you can specify which profiles these delegated administrators can assign to their users, so they can't give someone greater permissions than are appropriate or allowed.

You can also delegate administrative and development responsibility for a particular custom tab and custom object to a non-administrator. For example, you could assign responsibility for creating custom fields, changing picklists, and altering page layouts to a department that has implemented a custom object that is only used by that group. This feature is a great way to empower specific departments to make the changes they need without giving the ability to change the standard objects and security information for the rest of your organization.

See Also:

[Defining Delegated Administrators on page 14](#)

[Delegating User Administration on page 14](#)

[Delegating Custom Object Administration on page 15](#)

IMPLEMENTATION TIPS

- Make sure users have the "View Salesforce.com Configuration" permission before you make them delegated administrators.
- Delegated administrators can customize and manage custom objects and custom tabs, but they cannot create new custom objects. Create the custom object first before you delegate administration for it.
- Note that changes to the delegated administration are added to the setup audit trail accessible via **Setup | Security Controls | Setup Audit Trail**. Likewise, changes made by delegated administrators are also logged.
- When selecting which profiles delegated administrators can assign to the users they create or edit, note that profiles with the "Modify All Data" permission cannot be assigned by delegated administrators.

BEST PRACTICES

- Plan which users you want to share similar administrative duties. These users will form a delegated administration group.
- Create as few delegated administration groups as possible to make managing the groups easier.
- If a user is a member of more than one delegated administration group, be aware that he or she can assign any of the assignable profiles to any of the users in roles he or she can manage.

ABOUT DELEGATED ADMINISTRATION

Delegated administrators can perform the following tasks:

- Creating and editing users and resetting passwords for users in specified roles and all subordinate roles, including setting quotas, creating default sales teams, and creating personal groups for those users
- Assigning users to specified profiles
- Managing custom objects created by an administrator

Defining Delegated Administrators

Define delegated administration groups to specify groups of users who you want to have the same administrative privileges. These groups are not related to public groups used for sharing.

1. Click **Setup** | **Security Controls** | **Delegated Administration**.
2. Click **New**.
3. Enter a group name.
4. Click **Save**.
5. Click **Add** in the Delegated Administrators related list to specify the users in this delegated group.
6. Use the magnifying glass *lookup* icon to find and add users to the group. The users must have the "View Salesforce.com Configuration" permission.
7. Click **Save**.
8. See [Delegating User Administration](#) on page 14 and [Delegating Custom Object Administration](#) on page 15 to specify what tasks these users can perform.

Delegating User Administration

Enable delegated administrators to manage users in specified roles and all subordinate roles, and to assign specified profiles to those users.

1. From the detail page of the delegated administration group, click **Add** in the Roles and Subordinates related list.
2. Use the magnifying glass *lookup* icon to find and add roles. Delegated administrators can create and edit users in these roles and all subordinated roles.
3. Click **Save**.
4. Click **Add** in the Assignable Profiles related list.
5. Use the magnifying glass *lookup* icon to find and add profiles. Delegated administrators can assign these profiles to the users they create and edit. Note that profiles with the "Modify All Data" permission cannot be assigned by delegated administrators.
6. Click **Save**.
7. See [Delegating Custom Object Administration](#) on page 15 to specify what custom objects the delegated administrators can manage.

Delegating Custom Object Administration

Enable delegated administrators to manage custom objects that have been created by an administrator.

1. From the detail page of the delegated administration group, click **Add** in the Custom Objects related list.
2. Use the magnifying glass *lookup* icon to find and add custom objects. Delegated administrators can customize nearly every aspect of a custom object, including creating a custom tab for it.
3. Click **Save**.

NOTE

Delegated administrators cannot customize the field-level security for any custom fields on the custom objects they manage. The custom fields they create are automatically set to visible and editable for all users.

Delegated administrators cannot modify or define any relationships for the custom object or set organization-wide sharing defaults.

Customizable Search Results and Lookup Dialogs

Available in: **All** Editions

You now have even more customization options with the added ability to customize which fields display for users in search results, in *lookup* dialogs, and in the key record lists on every tab. You can choose to display any standard or custom field as a column, allowing users to quickly discern similar records from the list of matches returned. These customizations are known as "search layouts," and salesforce.com offers you a separate search layout for each item - search results, *lookup* dialogs, and key record lists.

IMPLEMENTATION TIPS

- You can add up to 10 fields per search layout. After customizing the search layouts, test the layout to make sure you have not added so many fields that the display is hard to use.
- The search layout does not determine which fields are searched for keyword matches. See the online help for a list of which fields are searched.
- Unique identifying fields, such as **Account Name** or **Case Number**, must be listed first in the order of fields in your search layouts. This will make selecting a record easier for users.
- Custom long text area fields (see [Long Text Area Custom Fields](#) on page 18) can be added to search layouts and up to 255 characters will display to users. However, standard long text fields such as **Description** or **Solution Details** cannot.
- The search results layouts for leads, accounts, contacts, and opportunities also apply to the search results displayed when finding duplicate leads.
- When customizing search layouts, you can view all fields and add them to the search layouts even if some fields are normally hidden in other areas of the application.
- Note that changes to your search layouts are logged to the setup audit trail accessible via **Setup | Security Controls | Setup Audit Trail**.

BEST PRACTICES

- For each search layout, plan which fields your users will need to quickly identify the record they want from the matches returned.
- Also, each search layout applies to all users in your organization. So plan carefully which fields are most useful for users across departments.
- In Enterprise and Developer Edition organizations, remember that search layouts also respect field-level security so you can add any field you want to the search layout. Users for whom the field is not visible via field-level security will simply not see it in the search results.
- For Personal, Team, and Professional Edition organizations, search layouts override page layout settings. If a field is included in the search layout but hidden in the page layout, that field will be visible in search results.

ABOUT CUSTOMIZABLE SEARCH LAYOUTS

Administrators, and users with the "Customize Salesforce.com" permission, can customize which fields display for users in search results, in *lookup* dialogs, and in the key lists on tab home pages. You can specify a different set of fields to show in each search layout. The settings apply to all users in your organization.

1. Click **Setup | Customize**, select the appropriate activity or tab link, and choose the **Search Layouts** link.
2. Click **Edit** next to the search layout you want to customize. You can specify a different set of fields to display for search results, *lookup* dialogs, and key lists on tab home pages.
3. Use the arrows to add or remove fields from the search layout, and to define the order in which the fields should display.
4. Click **Save**.

Long Text Area Custom Fields

Available in: **All** Editions

Salesforce.com now includes a custom field that can handle very large amounts of text. The new "long text area" custom field can store up to 32,000 characters of data and will come in handy in a wide variety of situations such as driving directions, selling methodology documentation, and case "steps to reproduce" to name a few. In Enterprise Edition, long text area fields will enable a whole new breed of text-centric custom tabs, such as issue tracking, status reporting, and employee recruiting.

IMPLEMENTATION TIPS

- You can create up to five long text area fields for each type of record in Professional, Enterprise, and Developer Editions, and one for each type of record in Personal and Team Editions.
- Long text area fields can store up to 32,000 characters of text, but you can set the maximum size to a lower limit if desired. Any number from 256 to 32,000 characters is allowed.
- When you create a new custom long text area field and you choose to add it to page layouts via the custom field wizard, it is added to the end of the first one-column section on the page layout. Customize the page layouts if you need to move the field.
- If necessary, convert your existing text or text area fields to long text area fields.
- Long text area fields are not available for activities and opportunity products.
- Keep in mind that long text area fields are not available for use in search criteria filters in list views or reports. However, you can display long text area fields in your list views and reports; up to 255 characters will be visible to users.
- When editing records, every time you press **Enter** within a long text area field, a linebreak and a return character are added to the text. These two characters count toward the 32,000 character limit.
- If you later need to convert a long text area field to another data type, keep in mind that converting to an Email, Phone, Text, Text Area, or URL type field will truncate the data in your records to the first 255 characters of the field.
- The entire 32,000 characters of data in long text area fields are indexed for searching from the Advanced Search page.
- Long text area fields are displayed in their entirety on detail pages and printable views. You can set the number of visible lines displayed on edit pages between 2 and 50 lines (the default is 6 lines). If the text does not fit in the specified number of visible lines, scroll bars will appear.
- When mapping custom lead fields for lead conversion, you can map fields of type Text or Text Area to long text area fields.

BEST PRACTICES

- When editing records, use the "characters remaining" counter next to long text area fields to make sure you are not adding more text than is allowed in the field. This counter appears when you have less than 50 characters remaining until the maximum field length is reached.

- You can paste more than the maximum amount of data into a long text area field. The counter shows the number of characters over the size limit. This gives you an opportunity to edit and delete text as desired to fit within the size limit before saving.
- Use Advanced Search to search for data in long text area fields.
- Put long text area fields in collapsible page sections (see [Customization](#) on page 38) to keep them from making detail pages too long.

CREATING LONG TEXT AREA CUSTOM FIELDS

To create a custom long text area field:

1. Click **Setup | Customize**, select the appropriate activity, tab, or users link, and then click the **Fields** link.
2. Click **New** in the Custom Fields section of the page.
3. Choose Text Area (Long) as the data, and click **Next**.
4. Enter a field label, name, set the number of lines to be displayed in the text area box on edit pages, and click **Next**.
5. In Enterprise and Developer Editions, set the field-level security to determine whether the field should be visible or read only for specific profiles.
6. Choose the page layouts that should display the field as an editable field.
7. Click **Save** to finish or **Save & New** to create more custom fields.

Solution Categories

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

Solution categories enhance your solutions knowledge base by making it easier for you to organize and find the information you need. This new feature significantly improves your ability to manage your solutions by providing your users and customers with a powerful and easy way to browse through your knowledge base for faster access to the desired solution.

IMPLEMENTATION TIPS

- Follow these steps to ensure a successful rollout of solutions:
 1. Plan which categories your support team needs.

Keep in mind that you can also allow customers to find solutions by category in the public knowledge base and your Self-Service portal. You can specify that customers can view only solutions in a particular category and all of its subcategories.
 2. Define your categories; see [Defining Solution Categories](#) on page 21.
 3. Categorize your solutions; see [Categorizing Solutions](#) on page 22. Administrators, and users with the "Manage Categories" permission, can categorize solutions prior to enabling solution categories for the entire organization.
 4. Create a custom report of type Solution Categories to verify that all solutions are categorized appropriately. To find any uncategorized solutions, use the advanced report filters; choose the **Category Name** field and the "equals" operator, and leave the third field blank. Administrators, and users with the "Manage Categories" permission, can create solution category reports prior to enabling solution categories for the entire organization.
 5. Enable solution category browsing for the Solutions tab; see [Customizing Solution Settings](#) on page 23.
 6. Enable solution category browsing for customers in the public knowledge base and your Self-Service portal. See the online help for information on setting up your public knowledge base and Self-Service portal.
 7. Specify the top-level category accessible by customers in the public knowledge base and your Self-Service portal. This is useful if you want to have certain categories available only to internal staff.

Leave this blank if you want customers to view all categories and all solutions that are published or visible in the public knowledge base.
- If you enable solution browsing in your Self-Service portal or public knowledge base and you use your own customized style sheet, download one of the predesigned style sheets to incorporate the category changes into yours.
- When you first define solution categories, all of your solutions are placed in a special category named "Uncategorized Solutions."
- Users continue to search for solutions in the same manner as they do today until you enable solution category browsing via the Solution Settings page.
- Category names cannot include the backslash '\ ' character.

BEST PRACTICES

- Limit the number of categories to which a solution belongs. If you put solutions into only the most relevant categories, they will be easier for users and customers to find.
- Design your category hierarchy carefully so users can easily categorize each solution into as few categories as possible.
- When designing your category hierarchy, you can create as many subcategories as you need at each level.
- To report on the number of solutions in a given category, create a custom report of type Solution Categories.
 - In your solution category report, select the **Category Name** field to display the solution's category and the **Parent Category Name** field to display the category directly above the solution's category.
 - If you restrict your report to solutions in a particular category, the report includes only solutions that are directly associated with that category. It does not include solutions in subcategories of the specified category.
 - To report on uncategorized solutions, use the advanced report filters. Choose the **Category Name** field and the "equals" operator, and leave the third field blank.
- Note that solution category information is not available in list views.
- If you enable solution browsing in your Self-Service portal or public knowledge base, we recommend that you do not place solutions in the top-level category accessible to your customers. It is easier for customers to browse for solutions in subcategories of that top-level category.

ABOUT SOLUTION CATEGORIES

Administrators, and users with the "Manage Categories" permission, can create solution categories so that users can group similar solutions together. Once your solutions are categorized, users can browse for and find solutions by category from the Solutions tab or when solving a case. Customers can also browse solutions by category in the public knowledge base and your Self-Service portal.

See Also:

[Defining Solution Categories on page 21](#)

[Categorizing Solutions on page 22](#)

[Customizing Solution Settings on page 23](#)

Defining Solution Categories

Begin by creating your solution categories. The All Solutions category is automatically created for you as the top of your solution hierarchy. Users cannot add solutions to this category.

1. Click **Setup | Customize | Solutions | Solution Categories**.
2. Click **Add Category** to create a subcategory below a specific category.
3. Enter the category name.

4. Select a different parent category, if desired. The parent category is the category directly above this category in the hierarchy.
5. Select a sort order for any subcategories you create under this category.
 - Choose Alphabetical Order to sort subcategories alphabetically.
 - Choose Custom Order to sort subcategories in the order you specify; see [Adding and Sorting Subcategories](#) on page 22.
6. Click **Save**.
7. After creating categories, categorize your solutions. See [Categorizing Solutions](#) on page 22. Administrators, and users with the "Manage Categories" permission, can categorize solutions prior to enabling solution categories for the entire organization.
8. Then, after categorizing solutions, turn on solution category browsing on the Solutions tab. See [Customizing Solution Settings](#) on page 23.
9. To enable solution category browsing for the public knowledge base or your Self-Service portal, see the online help.

Editing and Deleting Categories

From the list of solution categories, you can:

- Click **Edit** to modify the category name, parent category, or sort order.
- Click **Del** to delete the category. The solutions associated with the category are not deleted.
- Click the category name to view the category details.

Adding and Sorting Subcategories

From a category detail page, you can:

- Click **New** to add a subcategory below the category.
- Enter a custom sort order for the subcategories.
 1. Edit the category to set the **Subcategory Sort Order** to Custom Order.
 2. Enter numbers in the Order column to specify the order of the subcategories.
 3. Click **Reorder**.

Categorizing Solutions

Users with the "Edit" permission on solutions can use solution categories to group similar solutions together. Each solution can belong to more than one category. Once your solutions are categorized, you can browse for and find solutions by category from the Solutions tab or when solving a case. Customers can also browse published solutions by category in the public knowledge base and your Self-Service portal.

Administrators, and users with the "Manage Categories" permission, can categorize solutions prior to enabling solution categories for the entire organization. Once solution category browsing is enabled, all users with the appropriate permissions can categorize solutions.

1. View the solution you want to categorize.
2. Click **Select Categories** in the Solution Categories related list.

This related list is not visible to all users unless your administrator has defined and enabled categories. See [Customizing Solution Settings](#) on page 23 to enable category browsing.

3. In the solution category hierarchy, click **Select** to add a category to the solution. Repeat until you have added all applicable categories.
If necessary, click **Deselect** to remove a category from the solution.
4. Click **Save**.

To later remove a category from a solution, click **Del** in the Solution Categories related list on the solution detail page.

Customizing Solution Settings

Administrators, and users with the "Manage Categories" permission, can customize the Solution Settings to turn on the ability to browse for solutions by category.

1. Click **Setup | Customize | Solutions | Solution Settings**.
2. Select **Enable Solution Browsing** to turn on the ability to browse for and find solutions by category.
This setting enables solution browsing on the Solutions tab and when solving a case.
3. Click **Save**.
4. To enable solution browsing by customers in the public knowledge base or your Self-Service portal, see the online help.

In addition, you can customize the top-level category accessible by public knowledge base and Self-Service users. You do not need to modify this setting if you want customers to view all categories and all solutions that are published or visible in the public knowledge base.

AND, OR, and NOT Report Filters

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

Now, report filters do not have to be connected with an "AND" condition. Use the **Advanced Options** link on the last page of the report wizard to define more complex relationships between your filter conditions. Filter conditions can be connected with one of these operators:

- AND - matches all filter conditions
- OR - matches one filter condition
- NOT - excludes the filter condition

In the example below, the user is creating a report to include all strategic opportunities owned by a VP plus all opportunities over \$5 million, including opportunities over \$1 million closing in the next 90 days. To do this, the user enters the following filter conditions:

1. Owner role starts with VP
2. Amount greater than \$5M
3. Amount greater than \$1M
4. Close date equals next 90 days

To produce this strategic opportunity report, the user would enter the following in the advanced filter conditions to get these results:

"1 OR 2 OR (3 AND 4)"

IMPLEMENTATION TIPS

- Your saved custom reports that were previously using AND filters still use AND filters unless you change them manually.
- If you need to merge existing custom reports, use the new custom report type that lists all your custom reports. Click **Create New Custom Report**, choose **Administrative Reports** and select the **Report** data type.
- To create a filter that includes more than one value for a single field, enter your search terms, separated by commas, in the third field. You can enter up to 80 characters, including the commas. For example, to search for accounts in California, New York, or Washington, use "State contains CA, NY, WA". Place quotation marks around data that includes commas; for example, "10,000", "5,000" searches for 10,000 or 5,000.

BEST PRACTICES

- For each filter line that contains a field, operator, and value, include the line number in the **Advanced Filter Conditions**.
- Make sure each open parenthesis "(" has a matching close parenthesis ")"
- Enclose conditions that have priority in parentheses. For example, "(1 AND 2) OR 3" finds records that meet either both the first two filters or the third. While "1 AND (2 OR 3)" finds records that meet the first filter as well as either the second or third.
- Insert one of these terms between each filter line number: and, or, not. Avoid conditions like "1 and or 2" and "(1 2 3)."

- Begin a condition with the term "not" but do not end one with "not." For example, "not 1 and (2 or 3 or 4)" finds records that meet any of the last three filters and excludes records that meet the first filter.
- If you remove the contents of a filter, remove the number of that filter line from the **Advanced Filter Conditions** field.

ABOUT AND, OR, AND NOT REPORT FILTERS

Advanced filter conditions are available in reports for users of Professional, Enterprise, and Developer Editions. To define advanced filter conditions, begin creating a custom report as usual. On step 5 of the report wizard, select your report criteria, click the **Advanced Options** link and enter your advanced filter conditions.

- Enter your **Advanced Filter Conditions** to specify the relationship between each filter line. Use the line numbers at the beginning of each filter line and separate each line number with AND, OR, or NOT to specify the conditions a record must meet to be included in the report.

Use the AND operator to find records that match both values, use the OR operator to find records that match either value, and use the NOT operator to find records that exclude values.

For example, to report on California accounts that either have over \$10 million in revenue or are public companies, enter three filter lines:

"State equals CA," "Annual Revenue greater than 10,000,000," and "Ownership equals Public." Then enter "1 AND (2 OR 3)" in the

Advanced Filter Conditions.

- Enter up to ten different search criteria using the **Add Row** link. Click **Remove Row** to use fewer filters.

Custom Object Enhancements

Available in: **Enterprise** and
Developer Editions

The Winter '05 release extends the powerful customization and integration tools of Studio by enhancing custom objects with the following:

- You can now create up to 200 custom objects.
- Users can now log their tasks and calendar events for any custom object you create. Activity tracking is an optional feature that you can enable as needed for each custom object.

IMPLEMENTATION TIPS

- You can enable activity tracking on any custom object by selecting the **Track Activities** checkbox on Step 3 of the Custom Object wizard.
- The custom object's **Track Activities** checkbox must be enabled to make the Open Activities and Activity History related lists available in the page layout editor. If you enable activities when you create the custom object, these related lists are added to the default page layout automatically. If you enable activities later, after the custom object already exists, you must add the related lists to the page layout manually.
- Disabling activities for a custom object does not delete existing activity records. It prevents the creation of new activities for the custom object by (1) hiding the Open Activities and Activity History related lists from the custom object's page layouts, and (2) removing the custom object from the **Related To** picklist on the New Task and New Event pages.
- If a custom object has a master-detail relationship with accounts, the custom object's activities are also associated with the account and cause the account's Last Activity date to be updated.
- The activities of custom objects that have relationships with objects other than accounts are not associated with the related object.
- The **Mail Merge** and **Send Email** buttons are not available for custom object activities at this time.
- For tasks and events that are related to custom objects, the **Related To** field on the activity shows as "Not Available" in Offline Edition.
- Note that when you change ownership of a custom object record, any open activities related to that custom object are also transferred to the new record owner.

BEST PRACTICES

- Be aware that when you change the relationship of a custom object that has activities, you may impact the Last Activity date of related objects and the relationship of the activities to those objects.

ABOUT ACTIVITY TRACKING FOR CUSTOM OBJECTS

To enable activity tracking for a custom object:

1. Click **Setup | Extend | Custom Objects**.

2. Click **New Custom Object** to create a custom object, or click **Edit** to modify an existing custom object.
3. Follow the steps in the custom object wizard.
4. On the last page of the wizard, select the **Track Activities** checkbox.
5. Click **Save**.
6. For existing custom objects, modify the page layouts to add the Open Activity and Activity History related lists.
The Open Activities and Activity History related lists are automatically added to the default custom page layout for a new custom object.

Customizable Auto-Numbers on Standard Number Fields

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

You can now customize the standard auto-number field formats for cases, solutions, and contracts (for Professional and Enterprise Editions), which in the past could only be system generated. You can set up the auto-number fields with a starting number and display format of your choice. As examples you can easily add a date stamp to your case or contract number, or you can have ten digits in your solution numbers instead of eight.

IMPLEMENTATION TIPS

- Auto-number format changes do not affect existing records; they are applied only to new records.
- While customizing the auto-number fields, Salesforce.com warns you if the starting number you enter is not higher than existing numbers. You can bypass this warning if you choose, but be aware that it may create duplicate numbers.
- Likewise, Salesforce.com warns you if new records are created while you are in the process of changing the auto-number field, resulting in the next starting number being greater than the value you have entered in setup.
- Use these examples when setting the display format for auto-number fields.

Format	Displayed Values
{0}	3 66 103
{000}	003 066 103
Solution- {00000}	Solution- 00003 Solution- 00666 Solution- 10023
Case- {00} {MM} {DD} {YY}	Case- 03 120204 Case- 76 030304 Case- 123 110904
Contract # {0} {MM}-{DD}- {YY}	Contract #12233 12-20-04 Contract #25 06-07-04 Contract #3 07-07-04

BEST PRACTICES

- Be careful when making changes to auto-number fields. It may be possible to create duplicate numbers if you change the auto-number format such that the resulting numbers look like an existing number or if you set the new starting number to a number that is already in use.
- Include ample leading zeroes in the display format to allow for expected growth. For example, you might not want to use a display format of {00} because the displayed number will overflow after 99 records.
- Avoid choosing a very high starting number that is close to overflowing the selected display format. For example, you would not want to set a starting number of 9000 with a display format of {0000}.

ABOUT STANDARD AUTO-NUMBER FIELDS

The unique identifiers for solutions, cases, and contracts are standard auto-number fields. Each record is assigned a unique number with a specified format upon creation. You can modify the format and numbering for these auto-number fields.

1. Click **Setup | Customize**, select the appropriate tab link, and then click the **Fields** link.
2. Click **Edit** next to the name of the field in the Standard Fields list.
3. Enter a **Display Format** to control such formatting details as the minimum number of leading zeros as well as any prefix or suffix for the number.
4. Enter the number to be assigned to the next record that is created after you save your changes.
5. Click **Save**.

Divisions

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

With the Winter '05 release, Salesforce.com provides very large companies with the means to segment their data into different divisions, improving the speed of record retrieval and making searches, reports, and list views more meaningful to users. Divisions let you segment your organization's data into logical sections. For example, you can create a report to show the opportunities for just the North American division, allowing you to get accurate sales numbers for the North American sales team. Divisions are useful for organizations with extremely large amounts of data.

See Also:

[Getting Started with Divisions on page 32](#)

[Creating and Editing Divisions on page 32](#)

[Transferring Divisions on page 33](#)

[Changing Your Default Division on page 33](#)

[Changing Your Working Division on page 33](#)

IMPLEMENTATION TIPS

- Contact salesforce.com to enable divisions for your organization.
- See [Getting Started with Divisions on page 32](#) for the steps to follow when enabling divisions for your organization.
- Save public list views and reports with the "Current" division scope so that any user running the report or list view will see records in his or her working division.
- For leads, accounts, contacts, cases, opportunities, and assets, add the **Division** field to the page layout so users can see what division a record belongs to.
- Remember that private opportunities and contacts not related to an account are always in the default "global" division and cannot be transferred to another division.

BEST PRACTICES

- Before creating divisions, plan which divisions you need based on how you want to segment your data. For example, you may want one division for all of the records belonging to your North American sales team and one division for your European sales team.
- Plan your criteria for assigning records to divisions before creating the divisions so that the roll out will be quick. Then, use the mass division transfer tool to assign divisions to records.
- Remember that users cannot be assigned to inactive divisions.

ABOUT DIVISIONS

There are three basic aspects to divisions:

- **Division on individual records** - Division is a field on individual records which marks the record as belonging to a particular division. A record can belong to a division that the administrator creates, or it can belong to the standard "global" division which is created automatically when your organization enables divisions.
- **Default division for a user** - Users are assigned to a default division that applies to new accounts and leads they create.
- **Working division** - In the sidebar you set the division in which you want to work. Then, searches will show only the data for your working division. You can change your working division at any time.

The following table shows how using divisions affects different areas:

Area	Description
Search	<p>For sidebar searches, the results include only the records in your working division. You can also specify to search all divisions.</p> <p>In advanced search, you can specify which divisions you want to search, including searching all divisions.</p> <p>For searches in <i>lookup</i> dialogs, the results include records in the division you select from the drop-down list in the <i>lookup</i> dialog window.</p>
List Views	List views include only the records in the division you specify when creating or editing the list view.
Reports	You can set your report options to include records in just one division or all divisions. Reports that are already scoped (such as My Cases or My team's accounts) include records in all divisions, and you cannot further limit them to a specific division.
Viewing records and related lists	When viewing the detail page of a record, the related lists show all associated records to which you have access, regardless of division.
Creating new records	<p>When you create new leads or accounts, the division is automatically set to your default division, unless you override this setting.</p> <p>When you create new records related to an account or other record that already has a division, the new record is assigned to the existing record's division.</p> <p>When you create records that are not related to other records, such as a private opportunity or a contact not related to an account, the division is automatically set to the global division.</p>
Editing records	<p>When editing accounts or leads, you can change the division. All associated records are automatically transferred to the new division as well.</p> <p>When editing other types of records, you cannot change the division setting.</p>

NOTE

Divisions do not restrict users' access to data and are not meant for security purposes.

Getting Started with Divisions

The basic steps to begin using divisions are:

1. Contact salesforce.com to enable divisions for your organization.
When divisions are enabled, one global division is automatically created for your organization and all records are assigned to that division by default.
2. Create divisions for your organization's data.
See [Creating and Editing Divisions](#) on page 32.
3. Transfer leads and accounts into relevant divisions.
When you transfer divisions for accounts, all records related to a particular account, such as contacts and opportunities, inherit the division of that account.
See [Transferring Divisions](#) on page 33.
4. Set the default division for all users.
A user's default division determines the division assigned to all new accounts and leads he or she creates, unless the user explicitly sets a different division. When users create records related to an account or other record that already has a division, the new record is assigned to the existing record's division; the default division is not used.
See [Transferring Divisions](#) on page 33. See also [Changing Your Default Division](#) on page 33 for information on changing divisions for one user at a time.
5. Instruct users how to set their working division for searches and reports.
See [Changing Your Working Division](#) on page 33.

Creating and Editing Divisions

Administrators, and users with the "Modify All Data" permission, can create and edit divisions.

1. Click **Setup | Company Profile | Manage Divisions**.
2. Click **New** to create a division, or **Edit** to change an existing one.
3. Enter the division name.
4. Select the checkbox to make the division active, meaning that records and users can be assigned to this division.
You cannot make a division inactive if users or lead queues are assigned to that division.
5. Click **Save**.

To change the order in which divisions appear in the Division picklist field, click the **Sort** button and use the arrows to order the divisions.

Transferring Divisions

Administrators, and users with the "Modify All Data" permission, can change the division for multiple records at one time.

1. Click **Setup | Data Management | Mass Division Transfer**.
2. Select the type of record for which you want to reassign divisions, and click **Next**.
When you transfer divisions for accounts, all records related to a particular account, such as contacts and opportunities, will inherit the division of that account.
3. Set the search conditions that the records must match, and click **Next**.
4. Select the new division for the matching records.
5. Click **Transfer**. If you are transferring very large numbers of records, you will receive an email when the division transfer is complete.

Changing Your Default Division

Your user information contains a default division. This is the division that is applied, by default, to all new accounts and leads you create, unless you explicitly set a different division during record creation. For records you create that are related to an account or other record that already has a division, the new record is assigned to the existing record's division; the default division is not used.

Your default division setting does not restrict you from viewing or creating records in other divisions.

To change your default division:

1. Click **Setup | My Personal Information | Personal Information**.
2. Click **Change** next to the **Default Division** field.
3. Select a new default division.
4. Select an option to determine if the records you currently own should be transferred to the new division as well.
5. Click **Save**.

Changing Your Working Division

You can change the division in which you are working at any time. The data you see in search results includes records in your working division.

- To set your working division, simply select a division from the Divisions drop-down list in the sidebar. This setting is remembered every time you log in.

- To search within multiple divisions at the same time, use advanced search or select --All-- from the Divisions drop-down list.
- To search within a division in a *lookup* dialog, select a division from the drop-down list in the *lookup* dialog window. Your results include records in the selected division.
- To report on records in a specific division, select a division from the Divisions drop-down list on the report. Select --Current-- to show records in your current working division.
Reports that are already scoped (such as My cases or My team's accounts) include records in all divisions, and you cannot further limit them to a specific division.
- To find records in a specific division in a list view, use the Divisions drop-down list when creating or editing the list view.

NOTE

When you create new records, those records are not automatically assigned to your current working division. See [Changing Your Default Division](#) on page 33 for more information.

Sforce 5.0 Web Services API

Available in: **Enterprise** and
Developer Editions

Salesforce.com is upgrading the sforce Web services API with the Winter '05 release. As always, considerable effort has been made to ensure backward compatibility for applications that have been written against previous versions of the SOAP API, starting with API 2.5. (Note: older XML-RPC APIs should remain unchanged with this release.) The new API provides a number of powerful enhancements that further improve any integration already in place between Salesforce.com and your other systems.

See the sforce website at www.sforce.com for more information.

ADDITIONAL ENHANCEMENTS

Activities

- View the calendar events of your entire team using one of three views: daily, weekly, or monthly. These calendar views now work in conjunction with the single-user and multi-user view icons.

For example, to view the week's events for your team, click the multi-user view icon, choose a list view of users to include, and click the week view icon to see the calendar events of the selected group of people for that week. Hold your mouse over any event listed and you can view event details if you have access to them.

- When creating or editing activity list views, choose one of the following options to refine your results:
 - All Activities - Shows all activities that you can view, as determined by your sharing model.
 - My Activities - Shows activities that you own.
 - My Delegated Activities - Shows activities that you created but are owned by someone else.
 - My Team's Activities - Shows activities owned by users who report to you in the role hierarchy.
- Activities for private contacts only show up in reports for the contact owner.
- Now you can view archived activities in export files.
- You can now create up to 20 custom activity fields.
- The **Last Modified Date** field for activity list views has been renamed to **Last Modified Date/Time** to better reflect the information in that field. Any existing list views continue to show the same information as before but the column heading will now be different.

Salesforce.com has also added a new **Last Modified Date** field which displays only the date and not the time when the activity was last updated. If you prefer to use this field, you will need to update your activity list views.

Analytics

Activity Report Enhancements

- When creating activity reports, use the new standard filters for activities that allow you to limit your report results using the following options. Some of these options will not be visible depending on your edition.
 - My Activities - Shows activities that you own.
 - My Delegated Activities - Shows activities that you created but are owned by someone else.
 - My Team's Activities - Shows activities owned by users who report to you in the role hierarchy.

- All Activities - Shows all activities that you can view, as determined by your sharing model.
- For custom objects that have activity tracking enabled (see [Custom Object Enhancements](#) on page 26), create custom activity reports to analyze activities related to a particular custom object.
- Get more accurate numbers of events in your activity reports by filtering events that are meeting invites sent to users for a group event. Set a search criteria of "Event Invitation equals 0." Your activity report will just include the group event assigned to the meeting host.

Customer Support Report Enhancements

- To report on case comments, use the **Public Case Commented** field to indicate if the comment is private or public. Public comments are indicated with a check mark. To limit report results to public comments, customize the report and enter "Public Case Commented equals 1" on the last page of the Custom Report wizard. Likewise, the filter "Public Case Commented equals 0" yields only private case comments.
- If your organization has enabled solution categories, create custom solution category reports to report on solutions in a particular category or solutions that your team has not yet categorized. See [Solution Categories](#) on page 20 for more information and tips on solution category reports.

Opportunity Reports and Trend Analysis Enhancements

- In Professional, Enterprise, and Developer Edition organizations, the Opportunity Pipeline Trend Report shows a historical snapshot of your opportunities. This report filters on "Historical Stage," listing the opportunity amounts grouped by stage for the previous months specified.
- Create your own custom opportunity trend reports using the Opportunity Trends report type. In Professional, Enterprise, and Developer Edition organizations, select the Opportunity Trends report data type to report on your opportunities during different months in the past. Choose one of the following groupings:
 - Historical Stage - lists a snapshot of your opportunity data grouped by stage as of the beginning of each month in the past for the date range you specify.
 - Historical Probability - lists your opportunity data grouped by probability as of the beginning of each month in the past for the date range you specify.
 - Historical Close Date - lists your opportunity data grouped by close date as of the beginning of each month in the past for the date range you specify.
 - Historical Amount - lists your opportunity data grouped by amount as of the beginning of each month in the past for the date range you specify.
 - As of Date - lists your opportunity data by date as of the beginning of each month in the past for the date range you specify.
- Use the new chart type called "Cumulative Line Chart" when creating opportunity trend reports. It allows you to chart running totals by mapping points on the chart that include all preceding amounts.

Report Customization Enhancements

- When creating report filters, customize your own special value for dates by entering "NEXT <number> DAYS" or "LAST <number> DAYS" and inserting the number of days. For example, use "NEXT 7 DAYS" to include each day in the following week. Insert any number greater than zero without commas.
- When creating report filters, look up the values for a picklist field by clicking on the *lookup* icon. If your organization uses record types, the *lookup* dialog lists picklist values for all record types. Use either the "equals" or "not equal to" operators for these filters.

Report Administration Enhancements

- Use the new custom Reports report type to manage your organization's reports. You can create a custom report that lists your organization's reports and information about each report, including when it was created and by whom, the last time it was modified and by whom, the last time it was viewed, and the folder that contains it. In the custom report wizard, choose Administrative Reports and select Reports as the type of data.
- In contract reports, you can now include the **Activated By** field to list which user activated a particular contract.

Customization

- When replacing a picklist value, you can choose if you want to include all records that have a blank value in that field. If you do, all records with a blank value will be updated with the replacement picklist value.
- Create custom HTML components on your custom home pages using the HTML area component type. Use HTML area components to insert important company messages with colored fonts and graphics to make them more visible or display a picture and bio of your employee of the month. You can easily format the text and graphics in your HTML area using a formatting toolbar so you do not need to know HTML.
- The forecast category previously known as *Forecast* is now called *Commit*.
- For your custom multi-select picklists, up to 255 characters are now visible to users in *lookup* dialogs. Previously only 60 characters were shown.
- Personal Edition users can now customize their display to move tabs around or hide them. Click **Setup | My Personal Information | Change My Display** to change various personal display options.

Collapsible Page Sections

Administrators, and users with the "Customize Salesforce.com" permission, can give users the option to collapse sections on their record detail pages. Users can minimize sections of a detail page to hide fields that do not apply to them and give more room for other sections.

Before your users can collapse or expand page sections, customize your page layouts to display section headings. See the online help for instructions on customizing your page layouts.

If you create custom long text area fields (see [Long Text Area Custom Fields](#) on page 18), we recommend you place these in a separate page section along with other long fields such as **Description**, so users can collapse them when needed.

If your organization has requested that Salesforce.com not automatically enable new features, enable collapsible page sections for your organization by clicking **Setup | Customize | Other Settings | Collapsible Sections** and select **Enable Collapsible Sections**. After enabling collapsible page sections, users can click on a triangular icon to collapse or expand a page section.

Custom Field Limits

- You can now create up to 20 custom activity fields in Professional, Enterprise, and Developer Editions.
- You can now create up to 20 custom fields on users in Professional, Enterprise, and Developer Editions.
- For Enterprise and Developer Edition organizations, you can create up to 300 custom fields for all types of records (except activities and users) including custom objects.

Integration and Data Management

Import Wizard Enhancements

- Email address formats are validated.
- Currency codes on existing records can be updated via import.
- Standard description fields can be populated with the full 32,000 characters.
- URL fields can be populated with the full 255 characters.
- For organization-wide imports of accounts, contacts, or leads, select the **Trigger Workflow Rules** checkbox to fire workflow rules for new and updated records that match workflow rule criteria.
- Multiple values can be imported into a multi-select picklist field. Use a semicolon to separate values in your import file.
- You can import up to 100 values at a time in a multi-select picklist field. If you have more than 100 values in your import file for any one record, the import wizard leaves the field blank in that record.
- For picklist, multi-select picklist, and checkbox fields, if you do not map the field in the import wizard, the default value for the field, if any, is automatically inserted into the new or updated record.
- If you have selected an assignment rule for assigning imported leads, use the **Use assignment rule settings to send notification emails to record owners** checkbox to determine whether notification emails are sent to owners of newly created leads.

- If your import file contains data to be displayed in picklists or multi-select picklists, the wizards warn you when you attempt to import new picklist values that do not match any valid picklist values. If you ignore the warning, the new values are automatically added to the imported record. Your administrator can later edit the field via Setup to add the necessary values. Note that the import wizards do not allow you to import more than 100 new picklist or multi-select picklist values for any field during a single import.
- If your organization uses the translation workbench, the import wizards look for matching translated picklist values before creating new inactive picklist values.
- Also for organizations that use the translation workbench, the import wizards display translated field names in the user's language.

Increased Storage Limits

- Storage limits for Team, Professional, and Enterprise Edition customers has increased to the greater of 20MB per license or 1GB overall.
- Customers that have purchased add-on storage will continue to receive their additional purchased storage over and above the new limits.
- Complimentary document storage of 25MB for Team Edition, 50MB for Professional Edition, and 250MB for Enterprise Edition has not changed.

Recycle Bin Limits

- With the Winter '05 release, each user is limited to 1000 records at a time in the Recycle Bin. If a user reaches this limit, his or her oldest records are automatically and permanently removed from the Recycle Bin until the number of records is below 1000. Items below this 1000 record limit continue to remain in the Recycle Bin for 30 days.

Weekly Data Export Enhancements

The weekly data export service now includes more types of data such as custom objects. In addition, you can optionally select a subset of objects to export, making the export file smaller and easier to manage.

The weekly export service includes these additional enhancements:

- The column order of CSV files on the existing objects has been changed, and the column headings have been made consistent with the field names shown in the field definition and in the sforce API.
 - Companies that have processes that depend on the existing column order will need to adjust their processes.
 - Contact Customer Support for more information on these changes.
 - As a best practice going forward, any automated processes that examine the export file format should rely on the column headings in the CSV file, rather than the position of the column.
- Record identifiers are changed from a 15-character, case-sensitive format to an 18-character, case-insensitive format to be consistent with the sforce API and compatible with Microsoft products such as Microsoft Excel.
- The weekly export data is sent to you in a zipped archive file which contains CSV files for every object exported.
- In the zipped archive file, exported documents and attachments are added to "Documents" and "Attachments" subdirectories, respectively.
- You can now view archived activities in export files.

Mass Email

Higher Mass Email Limits

- You can now send up to 250 emails in a single mass email action. This new higher limit applies to all mass emails to contacts, leads, and users.

Mass Email for Users

Now you can send an email to all your users at once with the Mass Email Users option. Sending a mass email to users works just like sending a mass email to contacts or leads. To mass email users, click **Setup | Manage Users | Mass Email Users**. This link is available to administrators and users with the "Manage Users" permission.

When sending an email to your users, user merge fields represent the user sending the email. Use the new Receiving User Fields listed in the online help to reference the email recipient in a merge field.

Products

- Notes and attachments can now be added to product records. Modify your product page layouts to add the Notes and Attachments related list.

Security

- Your users' password security is now even more stringent to provide greater protection for your data. In Personal and Team Editions, the answer to the password hint question cannot contain the password itself. In Professional, Enterprise, and Developer Editions, you can choose to enable this password security manually via **Setup | Security Controls | Password Policies**.

Support

Case Management Enhancements

- Notify your case owners when a comment is added to a case. Enable this feature by clicking **Setup | Customize | Cases | Support Settings** and enabling the **Enable notification on case comment** checkbox. When another user adds a comment to a case, the case owner receives a notification through email.

- Make cases easier to find by adding the Cases related list to your opportunity page layouts. Then, any case related to the account for an opportunity will be displayed in the Cases related list, depending on your cases sharing model.
- The **Notify Default Case Owner** checkbox on the support settings page indicates if you want the default case owner notified when a case is assigned to him or her. When the new owner is a queue, the notification is sent to the queue email address.
- When entering a case description, users can now spell check what they enter.
- When closing a case, select the **Notify contact on case close** checkbox to send an email based on the Case Close Template to the associated contact.

Solution Enhancements

- Track activities directly from a solution by adding the Open Activities and Activity History related lists to your solution page layouts.
- You can now create workflow rules based on solutions.
- You can now enter up to 32KB of data in the **Solution Details** field. Only the first 255 characters display in reports.

Self-Service Portal Enhancements

- You can now manage your Self-Service users from one central location. See [Self-Service User Management](#) on page 11 for more information.
- If your organization has a Self-Service portal as well as a Public Knowledge Base, you can now designate which solutions to include in both and others that you only want in your Self-Service portal.
To make a solution visible to users of your Public Knowledge Base, check the **Visible in Public Knowledge Base** checkbox on the solution edit page. This option is only available if the solution is also published on your Self-Service portal.
- Users can now delete contacts (if they have the appropriate access and permissions) as long as the contact is not an active Self-Service user. Once inactivated, you can assign a Self-Service username to another Self-Service user.
- When merging contacts, the merged record will adopt the active Self-Service username. Before merging contacts that both have active Self-Service usernames, deactivate one Self-Service username.