

Release Notes

Salesforce Winter '06



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AppExchange

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

The AppExchange is an on-demand application-sharing service and platform from salesforce.com that allows you to browse, install, and share apps and components built for the AppExchange platform. Each app is registered with salesforce.com and listed in an appropriate category that makes it easy for users to find the apps they need. Users can share registered apps privately with a particular user or publicly with all users on the AppExchange.

Like most Internet marketplaces, the AppExchange contains detailed information about each app, specifications, reviews from the Salesforce user community, and links to test drive or install the apps. The publisher of the app is listed and users can contact the publisher with any questions. Users can click the Reviews tab to view what other users have to say about it or study ratings it received. Users can also post reviews.

Users can click **Test Drive** to run a fully-functioning demo of the app in a familiar Salesforce environment. Finally, users can click **Get It Now** to begin the installation process.

After users install an app, they can customize it to fit the needs of their business. So, an installed app may have different custom fields, tabs, or custom s-controls in other Salesforce organizations.

Implementation Tips

- Before installing an app from the AppExchange, make sure the installation will not cause you to exceed your organization's limits. See [Verifying Requirements for an App on page 8](#) for a list of these limits.
- Before installing an app from the AppExchange, make sure it does not contain features that are not available for your Salesforce Edition.
- After you install an app, customize the folders, page layouts, profiles and any other components included. See [Configuring Installed Apps on page 8](#) for a list of components you may want to configure.
- If you are an Enterprise, Unlimited, or Developer Edition organization, you can choose which user profiles have access to the app as part of the installation process. Apps installed in Team and Professional organizations are installed with "Full Access" to all user profiles. However, regardless of Edition, all custom objects are installed in "In Development" mode which hides them from all standard users. Users must have the "Customize Application" permission to view custom objects in "In Development" mode. When you are ready to roll out the app to other users, change the custom object status to "Deployed."
- Once you install an app, Salesforce does not offer a means to upgrade. Instead, uninstall the app and reinstall it from the AppExchange. See [Uninstalling an App on page 10](#).
- Apps that you upload from your Salesforce Sandbox and install into your production organization are listed under **Setup | Exchange | Share Apps** rather than **Setup | Exchange | Get Apps**. These apps also do not have an uninstall option. Instead, you can remove each component individually.

Best Practices

- Be advised that components like custom links, formula fields, and web tabs can send session IDs to external services, which, in turn, could gain access to your data. While Salesforce makes every effort to ensure that published apps meet the highest standards for security, we cannot guarantee that privately shared apps will be 100% safe. The user installing the app should examine the components within it carefully to make sure the links are going to trusted sites. See [Taking a Test Drive on the AppExchange on page 7](#) for instructions on verifying app components.
- Your users must have the "Upload AppExchange Packages" permission in order to upload, register, or publish apps on the AppExchange. Give this permission to the appropriate users in your organization.
- The AppExchange lists feedback and ratings similar to those found on most consumer Internet sites. This gives the power to the Salesforce user community to determine how useful an app is. Review all the information for an app on the AppExchange before installing it.
- Apps on the AppExchange cannot contain standard objects, custom fields on standard objects, or references to these fields. Make sure that the reports and dashboards you plan to add to your package do not include any of these fields.
- If you published an app from your Salesforce Sandbox, avoid creating a new copy. Once you create a new copy, you will no longer be able to manage those apps.
- After uploading an app from your Salesforce Sandbox, log in to your Salesforce Sandbox as you usually do to register it. The link included in the upload confirmation email links to your production organization.
- To include attachments on email templates in a package, add the attachment to the email template using "My Computer" instead of a document folder. Packages cannot include attachments from the Documents tab in an email template.
- Only one person in your organization can install or upload an app at a time. Salesforce displays an error if multiple users in your organization try to install or upload apps at the same time.
- Custom s-controls may not be included in a list of dependencies if they are referenced in a custom formula field or custom link.

About the AppExchange

What is the AppExchange?

User Permissions Needed	
To use the AppExchange:	Various user permissions required depending on the action

The AppExchange is an on-demand application-sharing service and platform from salesforce.com that allows you to browse, install, and share apps and components built for the AppExchange platform. Custom apps can contain custom objects, custom tabs, reports, or many other items that are packaged together and published on the AppExchange.

Apps are available to other Salesforce users on the AppExchange. Users on the AppExchange can browse for apps, take a test drive, and install the apps in their own Salesforce organizations. Review the following AppExchange basics to familiarize yourself with them:

- See [AppExchange Concepts on page 3](#) for a description of AppExchange terminology.
- See "About the AppExchange" in the online help to find out what it is and how it works.
- See [About AppExchange Apps on page 4](#) to see a list of the types of items an app can contain.

AppExchange Concepts

Review the following terminology used on the AppExchange:

AppExchange

The AppExchange is an on-demand application-sharing service and platform from salesforce.com that allows you to browse, install, and share apps and components built for the AppExchange platform.

The AppExchange platform combines a powerful user interface, operating system, and customization and integration capabilities for CRM — plus a framework for development and deployment of new applications for your entire enterprise. AppExchange allows you to customize standard objects and build custom objects, custom tabs, and custom s-controls.

Apps

A collection of Salesforce components such as tabs, reports, dashboards, and custom s-controls that addresses a specific business need. You store an app in a package to upload it to the AppExchange.

Certify

Apps marked "AppExchange Certified" have been inspected by salesforce.com to ensure that they meet salesforce.com's standards for AppExchange apps. For more information about app certification, go to www.appexchange.com.

Deploy

Deploying an installed app makes any custom objects in the app available to users in your organization. Before a custom object is deployed, it is only available to administrators and any users with the "Customize Application" permission.

Install

Incorporating the contents of a package into your Salesforce organization. A package on the AppExchange can include an app, a component, or a combination of the two.

Package

The container for an app and its components. You use packages to bundle an app along with any related components so that you can upload them to the AppExchange together.

Personal Sharing

The process of privately sharing a registered package on the AppExchange using an unlisted URL without making it public.

Publish

Publishing your app makes it publicly available on the AppExchange. Apps can be found under specific categories and by doing a search.

Publisher

The publisher of an app is the person or organization that published the app on the AppExchange. Publishers are required to register using their contact information after registering their app on the AppExchange.

Register

Registering your app creates a link to it and any collateral on the AppExchange. When you register your app, you will receive a URL that you can share with others privately. All apps on the AppExchange must be registered. After registering your app, you may want to publish it if you want to make it publicly available.

Share

Allowing other Salesforce users to install your app or components into their Salesforce organizations.

Test Drive

A test drive, also known as a demo, is a fully functional Salesforce organization that contains an app and any demo records added by the app publisher. It allows users on the AppExchange to experience an app as a read-only user using a familiar Salesforce interface.

Upload

Uploading a package sends it to the AppExchange. Uploading your app is just the first step; all apps on the AppExchange must be registered, making them privately available. The final and optional step is to publish it, making it publicly available on the AppExchange.

About AppExchange Apps

An app is a collection of Salesforce components such as tabs, reports, dashboards, and custom s-controls that addresses a specific business need. You store an app in a package to upload it to the AppExchange. Your app can contain one or more of the following app components:

- Attachments (to email templates)
- Custom links
- Custom objects

Including all custom fields, relationships (master-detail and lookup), picklist values, page layouts, related list layouts, search layouts, public list views, and custom links

- Custom reports
- Custom s-controls
- Custom tabs
- Dashboards
- Documents
- Email templates

Including any letterheads that they use

- Folders
- Profiles
- Custom apps

When adding components to a package, some related items are automatically included. For example, when you add a custom object to a package, its custom fields, page layouts, and relationships with standard objects are automatically included.

Installing Apps from the AppExchange

User Permissions Needed	
To install apps:	"Download AppExchange Packages"

The AppExchange is an on-demand application-sharing service and platform from salesforce.com that allows you to browse, install, and share apps and components built for the AppExchange platform. Users can go to the AppExchange to review apps submitted by other Salesforce customers, take a test drive, and install them. Installed apps function just like other custom apps within your Salesforce organization.

Before installing an app, use the AppExchange to:

- [Take a test drive](#)
- [Verify requirements](#)

To install an app:

1. Go to the AppExchange by clicking **Setup | Exchange | Get Apps**.

If the listing does not have a **Get It Now** option, it may be a partner app that you can download and use outside of Salesforce. Contact the publisher for more information on this.

2. Click **Visit the AppExchange** to go to the AppExchange website.
3. Browse the AppExchange to find the app you want to install.
4. Click **Get It Now** from the app information page.

If the listing does not have a **Get It Now** option, it may be a partner app that you can download and use outside of Salesforce. Contact the publisher for more information on this.

5. Enter your username and password, read the user terms and select the **I agree...** checkbox, and click **Continue**.

Select your sandbox location to install the app in your organization's Salesforce Sandbox, if available.

Note

This app will be removed from your sandbox organization whenever you create a new Salesforce Sandbox copy.

6. Review the components to ensure this is the app you want to install and click **Next**.
7. In Enterprise, Unlimited, and Developer Editions, choose a security option and click **Next**:

Select security settings

Allows you to choose the usage access for all existing custom and standard profiles in your organization. You can set each profile to have full access or no access for the new app and all its components.

Grant access to all users

Enables the "Read," "Create," "Edit," and "Delete" permissions on all user profiles for each custom object included in the new app. Additionally, sets field-level security to visible and editable for all fields included in the new app.

Admin access only

Gives no user permissions to any user profile except the administrator's and any profile with the "Customize Application" permission. This option also sets field-level security to visible and editable for all fields included in the new app. After installation, if you have Enterprise, Unlimited, or Developer Edition, you can give the appropriate user permissions to your user profiles as needed.

Note

In Team and Professional Editions or if the app does not contain a custom object, all users get full access and you will not see this step or the following step.

8. In Enterprise, Unlimited, and Developer Editions, if you chose **Select security settings**, select the level of access to give users in each profile and click **Next**. Standard options are:
 - Full Access-
Enables the "Read," "Create," "Edit," and "Delete" permissions on all user profiles for each custom object included in the new app. Additionally, sets field-level security to visible and editable for all fields included in the new app.
 - No Access - Gives no user permissions to any user profile except the administrator's and any profile with the "Customize Application" permission. This option also sets field-level security to visible and editable for all fields included in the new app.

You may see other options if the publisher has included settings for custom profiles. You can incorporate the settings of the publisher's custom profiles into your profiles without affecting the existing settings in your profiles. Choose the name of the profile settings in the drop-down list next to the profile you want them applied to. The current settings in that profile remain intact.

Alternatively, click **Set All** next to an access level to give this setting to all user profiles.

9. Click **Install** to install all the components in the app you have selected. See [Configuring Installed Apps on page 8](#) to view the standard settings each type of component will have after you install.

Note

During installation, Salesforce automatically resolves any references to components from the source organization. For example, if a custom link in the package refers to a document, the ID for the document will be different once you install it so Salesforce automatically alters the installed custom link to refer to the new ID in your organization.

10. Click **OK**.

If the app has custom objects, click **Deploy** to change the status of any custom objects in the app to "Deployed."

11. Next, [configure installed apps](#) and [deploy](#).

Note

Only one person in your organization can install or upload an app at a time. Salesforce displays an error if multiple users in your organization try to install or upload apps at the same time.

Taking a Test Drive on the AppExchange

Most apps on the AppExchange offer a **Test Drive** option. You can take a test drive of an app before installing it to review it as a read-only user. Taking a test drive allows you to judge whether the app is appropriate for your organization before installing it.

During your test drive, review the app and its components to ensure that it is appropriate for your organization and poses no obvious security risks. Apps marked "AppExchange Certified" have been inspected by salesforce.com to ensure that they meet salesforce.com's standards for AppExchange apps. For more information about app certification, go to www.appexchange.com. After an app is certified, the app can no longer be changed on the AppExchange. However, the custom links and web tabs installed are not guaranteed to remain static over time because your administrator can customize them after installation and the target URL could change over time.

Components like custom links, formula fields, and web tabs can send session IDs to external services, which, in turn, could gain access to your data. A session ID is a token you receive when your login information has been authenticated and is valid for the duration of your session. It allows you to use different pages in the application without entering your login name and password again. We recommend you check all links for the inclusion of a `SessionId` because they are potentially dangerous. An example of a safe link is on your account detail page, which includes a map custom link that displays a Yahoo! map to the account's address without including any merge field for a session ID.

Verify the app components before installation:

1. Click **Test Drive** on the app information page on the AppExchange.
2. Click the About... tab to view information about the app.
3. Click **Setup | Build | Custom Objects**.
4. Check the names of the custom objects you are installing. Make sure you do not already have custom objects with the same names.
5. For each custom object included, review the contents of any custom links. Look for `SessionId` and check the domain name for the target to make sure it is a trusted site. If you have any doubts about the target domain name of the URL, contact the publisher before installing.
6. For each custom formula field on the custom object, review the contents of the formula. Look for `SessionId` in the formula or a hyperlink that goes to an unknown domain name. If you have any doubts about the target domain name of the hyperlink, contact the publisher before installing.
7. Click **Setup | Build | Custom Tabs**.
8. Review the URL of any web tabs. Look for `SessionId` and check the domain name for the target to make sure it is a trusted site. If you have any doubts about the target domain name of the URL, contact the publisher before installing.

Note

Be advised that you are ultimately responsible for determining whether to trust the source of the app and whether the app is appropriate for your environment.

9. If you have an Enterprise, Unlimited, or Developer Edition organization, examine the custom profiles by clicking **Setup | Manage Users | Profiles**. Determine which profile settings are appropriate for your users.

Note

When you install an app in a Team or Professional Edition organization, all user profiles get full access to the app. You do not have the option to customize profiles.

Verifying Requirements for an App

Before installing an app from the AppExchange, review the specifications. On the app information page on the AppExchange, click the Specifications tab to view the specific requirements for the app you are interested in installing. Use this information to verify:

Edition Compatibility

Verify that the custom app only includes components that are compatible with your Salesforce Edition. For example, a custom link to an asset page is not useful in a Team Edition organization where assets are not available.

Click the Specifications tab and view the product edition and languages supported. Make sure that these are appropriate for your organization.

Maximum Requirements

AppExchange apps can include custom objects and custom tabs that add to your organization's total number of custom objects and custom tabs. Be sure that the new objects and tabs will not cause your organization to exceed the maximum allowed:

- See "Defining Custom Objects" in the online help for the maximum number of custom objects allowed per Edition.
- See "Defining Custom Tabs" in the online help for the maximum number of custom tabs allowed per Edition.
- See "Defining Custom Apps" in the online help for the maximum number of custom apps allowed per Edition.

External Services

If the custom app references an external service, make sure you have access to that service. For example, an app can include links to Google Maps for account management.

Configuring Installed Apps

User Permissions Needed	
To install apps:	"Download AppExchange Packages"
To configure installed apps:	"Customize Application"

Before deploying the app to your users, make any necessary changes for your implementation. All apps are installed with the following standard settings:

Custom tabs

If the `Tab Style` of a custom tab matches one used within your organization, we recommend that you change the `Tab Style` after you install the app.

Dashboard running user

The `Running User` for any dashboards included in the app are set to the user installing the app. If necessary, edit the properties of the dashboard and change the `Running User` to a user that has the security settings you want applied to the dashboard.

Folders

When apps contain documents, email templates, reports, or dashboards, Salesforce creates new folders in the installer's organization using the publisher's folder names. Make sure these folder names are unique in your organization.

These new folders are visible to all users. Configure folder settings before you deploy if you want them to have limited visibility.

List views

List views included in apps are visible to all users. Change the visibility of these list views if necessary.

Page layouts

All users are assigned the default page layout for any custom objects included in the app. Administrators of Enterprise, Unlimited, and Developer Edition organizations can configure the page layout as necessary for the appropriate users.

If a custom object in the app includes any relationships to standard objects, add them as related lists on the appropriate page layouts.

If the app includes any custom links, add them to the appropriate page layouts.

Tip

If the publisher added a splash page to the About tab with information for the installing administrator, dismiss the splash page before deploying your app so your users do not have to dismiss it.

Also, add any necessary custom fields or links to the new custom objects. Make any more customizations that are necessary for your implementation.

Note

Anything you add to a custom app after installation will be removed with the custom app if you ever uninstall it.

All custom objects or tabs in the app are hidden from your users until you deploy them. See [Deploying Installed Apps on page 9](#) for instructions on deploying an app installed from the AppExchange.

Deploying Installed Apps

User Permissions Needed	
To deploy apps:	"Customize Application"

After installing an app from the AppExchange, components that are stored in folders, like reports or dashboards, are instantly available to users because of their folder settings. However, custom objects are hidden until you deploy them. Deploy an AppExchange installed custom object after making the necessary customizations for your organization. See [Configuring Installed Apps on page 8](#) for tips on making customizations to installed apps and app components before deploying. Deployed apps are available to users in your organization with the appropriate profile and page layout settings.

To deploy an AppExchange installed App:

1. Click **Setup | Exchange | Get Apps**.

2. Select the app you want to deploy.
3. Click **Deploy**.

Uninstalling an App

User Permissions Needed	
To uninstall apps:	"Download AppExchange Packages"

You can remove any installed app including all of its components and all data in the app. Additionally, any custom fields, links, or anything else you added to the custom app after installation will also be removed.

Warning

We strongly recommend you export your data before uninstalling an app because all data associated with that app will be permanently deleted. See "Exporting Backup Data" in the online help for more information.

To remove an app:

1. Click **Setup | Exchange | Get Apps**.
2. Click **Uninstall** next to the app that you want to remove.
3. Check *Yes, I want to uninstall...* and click **Uninstall**.

Managing AppExchange Downloads

User Permissions Needed	
To uninstall apps:	"Download AppExchange Packages"

View a list of the apps you installed from the AppExchange by clicking **Setup | Exchange | Get Apps**. Using this list, you can:

- Click **Uninstall** to remove the app and all its components from your Salesforce environment. See [Uninstalling an App on page 10](#).
- Click the app name to view details about this app.
- Use this list to track the version number of the app.

Preparing Your App for the AppExchange

User Permissions Needed	
To create packages:	"Create AppExchange Packages"
To upload packages to the AppExchange:	"Upload AppExchange Packages"

You can create, upload, and register your apps on your own timeline. To get started sharing apps, upload the package and register it. Next you can create a demo, publish it if you want it

public, and get it certified by salesforce.com. Before you begin, review these steps to preparing your apps for the AppExchange:

- Plan and prepare your app for the AppExchange. See [Designing Your App on page 11](#). Preparing your app also entails:
 - [Developing App Documentation](#)
 - [Assigning App Publishers](#)
 - [Determining App Visibility](#)
- Bundle the necessary components for your app in a package to export it. See [Uploading Apps on page 14](#) for information on uploading your app to the AppExchange.
- Give users a way to test drive your app on the AppExchange. See [Creating a Test Drive for the AppExchange on page 16](#) for information on building a demo that you can register with your app.
- List your app on the AppExchange to share it privately. See [Registering Apps on page 17](#) for information on registering apps.
- Optionally, share your app with the Salesforce community by sharing it publicly. See [Publishing Apps on page 17](#) for instructions on how to publish your app.

Note

Only one person in your organization can install or upload an app at a time. Salesforce displays an error if multiple users in your organization try to install or upload apps at the same time.

Designing Your App

User Permissions Needed	
To create AppExchange packages:	"Create AppExchange Packages"

Prepare your app or components carefully before you publish. Use the guidelines below to help you determine what and how to publish:

Naming custom objects and tabs

Custom object and tab names must be unique within an organization. To ensure that your custom object or tab name does not conflict with the name of one in an installer's environment, prefix the name with a unique four-character ID. To request your unique four-character ID, send an email message to appexchangeinfo@salesforce.com.

Note

Field names on custom objects do not need this prefix because merge fields are prefixed by the custom object name.

Choosing custom tab style

The `Tab Style` for a custom tab must be unique within your app. However, it does not need to be unique within the organization where it is installed. A custom tab's style will not conflict with an existing custom tab in the installer's environment.

Intellectual property restrictions

Only publish components that are your intellectual property and that you have the rights to share. Once components are available on the AppExchange, you cannot recall them from anyone who has installed them.

Folders

Items that Salesforce stores in folders, such as documents, cannot be added to packages when stored in personal and unfiled folders. Put documents, reports, and other items that Salesforce stores in folders in one of your publicly accessible folders.

Components such as documents, email templates, reports, or dashboards are stored in new folders in the installer's organization using the publisher's folder names. Give these folders names that indicate they are part of the package.

Reports and dashboards

Reports and dashboards can refer to custom fields on standard objects, which cannot be included in a package. Review any reports and dashboards to ensure that they are not using any custom fields on standard objects.

Page layouts

The page layout of the person uploading a package is the only one installed for Team and Professional Edition organizations and becomes the default page layout for Enterprise, Unlimited, and Developer Edition organizations. Enterprise, Unlimited, and Developer Edition organizations receive any additional page layouts for the custom objects included in the package. Give these page layouts meaningful names for the app.

Tip

Use the AppExchange API guide available at www.salesforce.com/developer to learn how to gain programmatic access to your organization's Salesforce data.

Note

All the information in the components you package and publish will be visible to anyone on the AppExchange. You will not be able to hide the content of a custom s-control, formula, or other component that contains your code.

Developing App Documentation

User Permissions Needed	
To edit custom tabs:	"Customize Application"

You may have many different types of collateral for your app. We recommend publishing your app on the AppExchange with the following types of documentation:

About tab

Most apps are installed by an administrator. Therefore, most users will not be aware of the app until it is deployed. After deployment, an About tab is very useful to users and should give them an introduction to the entire app.

An About tab is a custom tab included with an app on the AppExchange. It provides users with:

- Description of the app
- Training and support information

Providing users with training options is the best way to ensure customer adoption of your app. Similar to the way that salesforce.com provides free training, you should provide user training for commercial applications either through webinars or recorded presentations. Include a section in your About tab that covers how to get training on the app.

If users of your app call salesforce.com for assistance, we will try to determine if the issue resides with our application or yours. We can only support our application, our standard user interface, and the installation of apps from the AppExchange. If the customer is asking about functionality that is unique to your app, we will ask them to examine the About tab for infor-

mation on how to get support for your app. We expect commercial apps to provide support that is similar to the support salesforce.com offers and that the About tab contain contact information for this support.

About tab splash page

Most administrators that install your app will want to customize it before deploying it to their users. If you want to include customization instructions for administrators who install your app, we recommend putting this information in a splash page for the About tab that only administrators will see. Administrators that install your app can dismiss the splash page before deploying the app to their users.

Include installation and configuration details like:

- Adding custom fields and custom links to standard objects
- Requesting or executing an end user license agreement
- Provisioning the external service of a composite app

Multimedia presentation

If you are publishing a commercial app, we recommend compiling a presentation, such as a Breeze presentation, to demonstrate its attributes.

Data sheet

Give installers the fundamental information they need to know about your app before they install.

Customization and enhancement guide

Let installers know what they should customize after installation as part of their implementation.

Custom tab splash page

You can add a splash page to any custom tabs in your app. Custom splash pages can include information about using the custom tab and custom object with links to additional information. They include a **Continue** button and a **Don't show me this again** button.

Create the splash page for your app in the form of a custom link for home pages via **Setup | Customize | Home | Custom Links**. Custom links can be a URL to an HTML page or a custom s-control. Create your custom splash page as a Home tab custom link and then add it as the splash page option to any custom tabs you plan to upload to the AppExchange.

Online help

You can also provide online help from the detail pages of each record. To do so, create custom links or custom formula fields to point to your help files. Then, put a custom link in the Web Links section of your page layout or embed custom formula fields in another section of your page layout. Note that you cannot override the Salesforce online help links that appear on each page.

Assigning App Publishers

User Permissions Needed	
To assign permissions:	"Customize Application"

Users that publish apps on the AppExchange must have the following user permissions:

Create AppExchange Packages

Allows a user to create packages and add components to it

Upload AppExchange Packages

Allows a user to upload and register or publish apps to the AppExchange

The System Administrator profile automatically has both these permissions as well as any custom profile with the "Customize Application" and "Modify All Data" permissions. Determine which of your users should have these permissions and add them to the appropriate user profiles.

Determining App Visibility

When you create an app for the AppExchange, you can decide how widely you want to share it. You can choose to share it publicly or privately and, optionally, password protect it.

Registering an app shares it privately. Registered apps are like unlisted phone numbers. They do not appear in any categories or in search results on the AppExchange. If you give friends the URL for one of your registered apps, they can go directly to the listing for this private package on the AppExchange. This is called personal sharing. Also, like unlisted phone numbers, if someone has the URL, they can get access to the package.

A second layer of protection is provided in the form of a password. You can protect a package with a password when it is uploaded so that only those with the password have access to the package contents. Salesforce prompts you for a password when installing a registered or published app.

To share your app privately, follow these steps:

- [Upload your app](#)
- [Create a demo](#)
- [Register your app](#)

To share your app publicly, follow these steps:

- [Upload your app](#)
- [Create a demo](#)
- [Register your app](#)
- [Publish your app](#)

Uploading Apps

User Permissions Needed	
To create packages:	"Create AppExchange Packages"
To upload packages:	"Upload AppExchange Packages"

An app can contain many different components. To group components in a container to upload to the AppExchange, create a package and add components to the package. A package is the container for the app that you must use to upload all its components together.

To create a package:

1. Click **Setup | Exchange | Share Apps**.
2. Click **New**.
3. Enter a name for your package. This does not have to be the same name that appears on the AppExchange.
4. Optionally, enter a description that defines the package. You will have a chance to change this description before you upload it to the AppExchange.
5. Click **Save**.

6. Add the necessary components for your app.
 - a. Click **Add**.
 - b. From the drop-down list, choose the type of item you want to add to your package.
 - At the top of the list, click a letter to display the contents of the sorted column that begin with that character.
 - If available, click the **Next Page** (or **Previous Page**) link to go to the next or previous set of items.
 - If available, click **fewer** or **more** at the bottom of the list to view a shorter or longer display list.
 - c. Select the items you want to add.
 - d. Click **Add To Package**.

Repeat these steps until you have added all the components you want in your package.

7. Optionally, click **Find Dependencies** to display a list of components that are related to the items contained in the package.

Some related items are automatically included. For example, when you add a custom object to a package, its custom fields, page layouts, and relationships with standard objects are automatically included. Clicking **Find Dependencies** helps you ensure that your package contains all necessary components before you upload it to the AppExchange.

8. Click **Upload to AppExchange** when you are finished adding all the necessary components for your app.
9. Enter a `Version Number` for the upload such as version 1.0a. This is how you will identify this upload of the package.
10. Change the `Description` if necessary.
11. Choose a security option:
 - No password...**
Makes the app available to anyone on the AppExchange. Choose this option to share your app publicly.
 - Password required...**
Allows you to share the app privately with anyone who has the password. Choose this option and enter a password if you want to distribute the password to a select group of people and share your app privately with them.
12. Click **Upload to AppExchange**.
13. Click **Done**.

Check the status of your uploaded package by clicking the version number on the package detail page. You will receive an email when your package has been uploaded successfully. The email includes a URL to the package on the AppExchange. However, your app is not listed on the

AppExchange until you [register](#) and [publish](#) it. You can also create a [test drive](#) to post with your app on the AppExchange.

Note

If you published an app from your Salesforce Sandbox, you will only be able to manage it until you create a new copy. Once you create a new copy of your Salesforce Sandbox, you will no longer be able to manage apps that you uploaded from it.

Creating a Test Drive for the AppExchange

User Permissions Needed	
To create a test drive:	"Upload AppExchange Packages"

Give other Salesforce users a chance to test drive your app within a new Salesforce environment by creating a test drive. Test drives are as safe and secure as any other Salesforce environment. In your test drive, you can add appropriate sample data and allow users to try the app using the standard AppExchange on-demand platform.

A test drive is a new fully functional Salesforce environment that contains your app. It will be read-only to AppExchange viewers. Your app does not require a test drive to be published on the AppExchange. However, a test drive is registered along with your app and is one of the collateral pieces that the AppExchange hosts for you.

To create a test drive:

1. Click **Setup | Exchange | Share Apps**.
2. Select the package you want to associate with the new test drive.
3. Select the version number that you want to associate with the new test drive.
4. Click **Create Test Drive**.
5. Enter the upload name. This is used as part of your username for the Salesforce environment that is created for your app's test drive.

Salesforce creates two usernames for your test drive.

admin@upload_name.com

The username you can use to add sample data for the test drive.

eval@upload_name.com

The username you can use to see how other users will experience your app's test drive; it is a restricted read-only user that is not allowed to save any data. When this user logs in, he or she always sees the default custom app for the "Restricted Read Only" profile.

6. Click **Create Test Drive**.
7. Click **Done**.

You will receive an email with login information for your test drive organization when it has been created. Test drives take just a few minutes to create. You can check the progress of your request for a test drive organization by viewing the detail page for the upload.

8. Next, use the login information in the confirmation email to log in to your test drive organization and enter sample data that shows off the usefulness of your app.
9. When you are ready for others to use your test drive, click the AppExchange URL from the upload detail page, click the **Edit** link, and enter the Test Drive User Name and Test Drive Password for your test drive. For example:

Test Drive User Name: eval@upload1.com

Test Drive Password: password.

Remember that your app is not listed on the AppExchange until you [register](#) and [publish](#) it.

Tip

We recommend you create your test drive before you register your app so that you can register your test drive along with the app.

Registering Apps

User Permissions Needed	
To register apps:	"Upload AppExchange Packages"

Whether you are sharing your app privately or publicly, you must first register it to make it available on the AppExchange. After registering your app, salesforce.com sends you a confirmation email including a URL that you can share with others. Send this URL to others if you would like to share the app privately.

Registered apps have the same functionality as published apps but do not expose the listing to the public. Publish your app after registration if you want to make it publicly available on the AppExchange.

To register a package:

1. Click **Setup | Exchange | Share Apps**.
2. Select the package that contains the app you want to register.
3. Choose the version number you want to register.
4. Click **Register**. Salesforce displays the URL to your app on the AppExchange. Send this URL to others if you want to share the app with them privately.
5. Optionally, click **Continue** and enter the information about your app that you want displayed when users click the URL for your app. For privately shared apps, this information is just as private as your app. If you choose to later publish your app on the AppExchange, this information becomes part of your app's information page.
6. Click **Save** to save the information you entered.
7. Optionally, publish your app to make it publicly available to the entire Salesforce community on the AppExchange. See [Publishing Apps on page 17](#).

Publishing Apps

User Permissions Needed	
To create packages:	"Create AppExchange Packages"
To upload packages:	"Upload AppExchange Packages"

Publishing your app means that it is publicly available on the AppExchange and available for Salesforce users to install. You can publish your app after you have [registered](#) it.

A published app is different from a registered app in that a published app is listed in one or more categories and is included in search results on the AppExchange. This listing includes more details about the app such as title, abstract, and owner. Optionally, it can also include other materials such as a screenshot, Breeze or Flash presentation, and data sheet. Before you begin the publishing process, visit www.appexchange.com to review the required and recommended information that you can include in your listing, and prepare it if necessary.

To get started, review the basic steps to publishing your app:

- Publish your app from Salesforce
- Create your listing on the AppExchange
- Assign your app to a publishing profile
- Get your app inspected
- Post your listing

To publish your app:

1. Click **Setup | Exchange | Share Apps**.
2. Select the package that contains the app you want to publish.
3. Select the version number you want to publish.
4. Click **Publish/Update**. The "App Preview" in the online help page displays.
5. Click **Edit** to make changes to the information on your app listing. For a description of each item, see "AppExchange Listing" in the online help.
6. Click **Save**.
7. Click **Manage** to display "My AppExchange" in the online help with a list of your registered apps.
8. Create an AppExchange publishing profile if you do not already have one. See "Creating Your Publishing Profile" in the online help.
9. Assign your publishing profile to the app. See "Assigning an App to a Publishing Profile" in the online help.
10. Submit your app for inspection. All apps must pass inspection before they can be publicly available on the AppExchange. See "Submitting Your App for Review" in the online help.
11. Post your listing on the AppExchange. Your listing will not be displayed to the public until you post it. You can post it at any time after it has passed inspection. See "Posting Your Listing" in the online help.

Note

To post a listing for partner app that users can download and use outside of Salesforce, contact salesforce.com.

AppExchange Review and Certification

You can request that salesforce.com review or certify your app. Reviewed apps are evaluated by salesforce.com and certified apps are evaluated, checked against a list of best practices, and highlighted on the AppExchange by an AppExchange Certified icon.

- See [Requesting Review on page 19](#) for information on getting your apps reviewed.

- See [Requesting Certification on page 19](#) for information on getting your app certified by salesforce.com.

Requesting Review

Because of possible security and content issues, users on the AppExchange may not wish to install apps from the AppExchange unless they have been reviewed. To show users that your app does not have any security or content issues, you can request that salesforce.com review your app. The review process includes:

- **Risks:** checks the app for dangerous or inappropriate content
- **Security:** ensures links to external services such as custom links or custom s-controls are going to trusted sites

Alternatively, you can highlight your app on the AppExchange with an AppExchange Certified icon. See [Requesting Certification on page 19](#).

For more information about app reviews, go to www.appexchange.com.

Requesting Certification

Certify your app and it will be highlighted on the AppExchange with an AppExchange Certified icon. Certification means that your app meets salesforce.com's standards for AppExchange apps. The certification process covers:

- **Risks:** checks the app for dangerous or inappropriate content
- **Security:** ensures links to external services such as custom links or custom s-controls are going to trusted sites
- **Best Practices:** includes a best practices review. We look for apps that have included an About tab, a splash page that includes user help, and relationships that are optimal for their intended purposes.

For more information about app certification, go to www.appexchange.com.

Managing Uploads

User Permissions Needed	
To upload apps:	"Upload AppExchange Packages"

After you upload an app to the AppExchange, you can still manage it from Salesforce. To manage your uploads:

1. Click **Setup | Exchange | Share Apps**.
2. Select the package that contains the app or components you uploaded.
3. Select the version number listed in the Uploads on AppExchange related list.
 - Click **Publish/Update** to publish the selected version number to the AppExchange.
 - Click **Register** to make your app privately available on the AppExchange.
 - Click **Create Test Drive** to create a demo of your app and components.

- Click **Edit Security** to change the password option.

Tip

If you have forgotten the password for an upload, contact salesforce.com and provide the ID listed on the Edit Security page.

- Click **View Contents** to show a list of the apps and components in the package.
- Click **Delete** to remove the app from your organization. Remember to remove it from the AppExchange as well. See [Removing Apps from the AppExchange on page 20](#)

Managing Packages

User Permissions Needed	
To upload apps:	"Upload AppExchange Packages"

Packages are like suitcases that can contain your apps and components. Bundle your app in a package along with additional related components so that you can upload them to the AppExchange together. To manage your packages:

1. Click **Setup | Exchange | Share Apps** to view a list of packages. From this list:
 - Click **New** to create a new package, enter a package name and description, and click **Save** to store it in your list of packages. See [Uploading Apps on page 14](#) for more information on creating packages.
 - Click **Edit** to update the package properties.
 - Click **Del** to delete the package. The components contained in your package are not deleted.
2. Select a package you want to edit.
 - Click **Edit** to change the package name or description.
 - Click **Delete** to delete the package. This does not delete the items contained in the package but the items will no longer be bundled together within this package.
 - Click **Upload to AppExchange** to transfer the package to the AppExchange. You will receive an email when the upload is complete.
 - Click **Add** to add items to the package.
 - Click **Find Dependencies** to display a list of the other items that rely on the items in your package.
 - Click the version number of any upload listed to manage that upload. See [Managing Uploads on page 19](#) for information on managing these uploads.

Removing Apps from the AppExchange

User Permissions Needed	
To remove apps from the AppExchange:	"Upload AppExchange Packages"

Your app is available on the AppExchange until you remove it or until it has not been installed by any users in 180 days. Remove an app from the AppExchange by deleting the upload and the app listed in the Manage My Applications section of My AppExchange:

1. Click **Setup | Exchange | Share Apps**.
2. Select the package.
3. Select the upload you want removed from the AppExchange.
4. Click **Delete**.
5. Remove the app and its listing from the AppExchange by logging into My AppExchange. See "Deleting an App Listing" in the online help.

Next Generation User Interface

Available in: All Editions

Winter '06 includes a new - but familiar - user interface to help you work more efficiently. The new user interface controls the look and feel of the application, including colors, icons, and fonts. Also added to this user interface is an easy-to-use drop-down list in the sidebar that lets you create records. This Create New drop-down list replaces the **New...** links in the task bar below the tabs. The rest of the functionality of the application is not affected by the new user interface, so no additional training is necessary.

Winter '06 also includes a Salesforce Classic user interface theme for organizations that prefer to roll out new features gradually.

Implementation Tips

- With the Winter '06 release, all organizations automatically use the new Salesforce user interface theme. No set up is necessary.
- If your organization prefers to roll out the new look and feel at a later date, you can customize the user interface to use the Salesforce Classic theme. Go to **Setup | Customize | User Interface Settings**.
- The user interface theme is an organization-wide setting. All users in your organization will use the same user interface theme.
- The new user interface contains several changes that Salesforce partners and developers should be aware of. Consult <http://www.sforce.com/resources/tn-17.jsp> for detailed information.

Best Practices

- The new Salesforce user interface offers the same functionality as the Salesforce Classic user interface theme. You may, however, wish to notify your users of the upcoming change.

About the Next Generation User Interface

Customizing User Interface Settings

User Permissions Needed	
To modify user interface settings:	"Customize Application"

To change your organization's user interface settings:

1. Click **Setup | Customize | User Interface**.
2. Select or deselect the [Show Group Calendar Details on page 22](#) checkbox to enable or disable the display of event details on daily, weekly, and monthly group calendar views.
3. Select or deselect the [Enable Collapsible Sections on page 22](#) checkbox to enable or disable collapsible sections on record detail pages.
4. Select or deselect the [Show Quick Create on page 23](#) checkbox to display or hide the Quick Create area on tab home pages and in lookup dialogs.
5. Select a theme from the [User Interface Theme on page 23](#) drop-down list.
6. Click **Save**.
7. If you changed your user interface theme, select the checkbox to confirm that the new theme applies to all users in your organization. Then click **Save**.

The user interface settings are:

Show Group Calendar Details

If your organization-wide calendar sharing includes Show Details or if you are the manager of another user in the role hierarchy, group calendar views typically display the details of users' events when you mouse-over the "busy" areas of the calendar. When you enable the [Show Group Calendar Details](#) checkbox, event details display on-screen rather than in mouse-over text. This setting applies to daily, weekly, and monthly group calendar views for all users. Group calendar views include multi-user calendar views and public resource calendars.

Note

Enabling this setting does not override calendar sharing. If a user's calendar details are not visible to other users via calendar sharing or the user's position in the role hierarchy, this setting does not change that.

Enable Collapsible Sections

Collapsible sections give users the option to collapse or expand sections on their record detail pages using the arrow icon next to the section heading. When enabling collapsible sections, make sure your section headings are displayed for each page layout. See "Customizing Page Layouts" in the online help for instructions on creating and displaying section headings.

Note

Sections remain expanded or collapsed until the user changes his or her settings for that tab. If your organization has enabled record types, Salesforce remembers a different setting for each record type.

Show Quick Create

The Quick Create area on a tab home page allows users to create a new record quickly with minimal information. It displays, by default, on the tab home pages for leads, accounts, contacts, forecasts, and opportunities. You can control whether the Quick Create area is displayed on all relevant tab home pages.

Note

The `Show Quick Create` setting also affects whether or not users can create new records within the lookup dialog. For example, with the setting enabled, users can create a new account within the account lookup dialog while creating or editing a contact. Create new records in the lookup dialog is available only if Quick Create is available for the type of record you are creating. In addition, users always need the appropriate "Create" permission to use Quick Create even though it will be displayed for all users. See "Lookup icon link" in the online help for a description of a lookup dialog.

User Interface Theme

The user interface theme controls the look and feel of the application, including colors, icons, and fonts. The functionality of the application is not affected.

Note

When you select the Salesforce theme, users with the appropriate "Create" permission can create new records using the Create New drop-down list in the sidebar. With the Salesforce Classic theme, the Create New drop-down list is replaced by **New** links in the task bar below the tabs.

Creating Records using the Create New Drop-Down List

The Create New drop-down list, available in the sidebar, provides options to create new records. To create a new record using the drop-down list:

1. Select the type of record you want to create. The new record page immediately displays in the appropriate tab.
2. Fill in the fields.
3. Click **Save**.

Note

If your organization uses the Salesforce Classic user interface theme, the Create New drop-down list is not available in the sidebar. Instead, the task bar below the tabs displays links that let you create new records.

Dependent Picklists

Available in: All Editions

Your picklists may get unwieldy with hundreds of values, making it difficult for users to find the right one quickly. With Winter '06, administrators can define dependency rules that filter the values that are displayed in one picklist based on the user's selection in another picklist, such as opportunity `Stage` or case `Status`. When a user selects a value in one picklist, known as a controlling field, the available values in its correlating dependent field change dynamically based on the values you specify.

Implementation Tips

- Use multiple levels of dependent fields to represent categories.
- Set field-level security for your controlling fields independent of the field-level security for your dependent fields. Remember to hide controlling fields whenever its correlating dependent field is hidden.
- If you create a dependency for lead fields that map to account, contact, and opportunity fields for lead conversion, create the same dependency on the account, contact, or opportunity as well.
- Any default values for your dependent fields are ignored.
- Make sure that required fields have values available. If a dependent field is required and no values are available for it based on the controlling field value, users can save the record without entering a value. The record is saved with no value for that field.
- The maximum number of values allowed in a controlling field is 200. In addition, if a field represents both a controlling field and dependent field, it cannot contain more than 200 values.
- Before defining a dependency, make sure your picklist has at least one value; standard fields like `Product Family` do not contain any values until you add them.

Best Practices

- For improved efficiency and usability, convert existing picklists into controlling or dependent fields. You can convert any standard picklist or checkbox fields and custom picklist fields into controlling fields. Also, convert any custom picklist or multi-select picklist fields into dependent fields.
- Make sure controlling fields exist on any page layout that contains their correlating dependent field. When the controlling field is not on the same page layout, the dependent field shows no available values.
- For visually-impaired users, make sure the dependent field is lower on the page layout than its controlling field.

Setting Up Dependent Fields

About Dependent Fields

Dependent fields can help make your data more accurate and consistent by applying filters to your fields. A dependent field works in conjunction with a controlling field to filter its values. The value chosen in the controlling field affects the values available in the dependent field.

For example, you can use dependent fields to help categorize your closed won and lost opportunities. In this example, the opportunity `Stage` field is a controlling field that makes appropriate values available in the correlating dependent field, **Reason**. Here, `Reason` is a custom field on opportunities.

Stage	Reason
Closed Won	Lower price/TCO Superior features ROI/value justification
Closed Lost	Higher price/TCO Inferior features No decision Won't change current system ROI/value justification Company viability

Users who choose "Closed Won" from the `Stage` field can choose from the applicable values instead of all values in the `Reason` field. When users choose any open stage value, no values are available in the `Reason` field.

To get started using field dependencies, review these basic concepts:

Dependent field

Any custom picklist or multi-select picklist field that displays available values based on the value selected in its corresponding controlling field.

Controlling field

Any standard or custom picklist (with at least one and less than 200 values) or checkbox field whose values control the available values in one or more corresponding dependent fields.

See [Defining Field Dependencies on page 25](#) for instructions on how to begin creating field dependencies.

Defining Field Dependencies

User Permissions Needed	
To define field dependencies:	"Customize Application"

Field dependencies allow you to control the available values in a custom picklist or multi-select picklist field. Before you begin defining your field dependencies, create the fields you want to include in your field dependencies and review the basic concepts in [About Dependent Fields on page 24](#) and dependent field limitations in [Dependent Field Considerations on page 27](#).

To define field dependencies:

1. Click **Setup | Customize**, select the appropriate tab and click the **Fields** link. For activity custom fields, click **Setup | Customize | Activities | Activity Custom Fields**.
2. Click **Field Dependencies**.
3. Click **New**.

4. Choose a controlling field and dependent field. See [About Dependent Fields on page 24](#) for definitions of these fields.

Note

Some picklist and checkbox fields may not be available as controlling fields. See [Dependent Field Considerations on page 27](#) for a complete list of these fields.

5. Click **Continue**.
6. Each value in the controlling field is listed in the top row and each value in the dependent field displays in the column below it. See [Using the Field Dependency Matrix on page 26](#) for instructions on including or excluding values from the dependent field based on values in the controlling field.
7. Optionally, click **Preview** to test your selections. If your organization uses record types, choose a record type to test how it affects your controlling and dependent field values. The record type controls what values are available in the controlling field. The record type and the controlling field together determine what values are available in the dependent field. For example, a dependent value is only available if it is available in the selected record type as well as the selected controlling value.

Note

The `Filter by Record Type` option does not appear in the Preview window for activity custom fields.

8. Click **Save**.
9. If your organization uses record types, make sure that your controlling and dependent field values are available in the appropriate record types. See "Managing Record Types" in the online help for instructions on using record types.

Using the Field Dependency Matrix

User Permissions Needed	
To define field dependencies:	"Customize Application"

The field dependency matrix displays all the values in a controlling field and dependent field. Use this matrix to include or exclude values. Included values are available in the dependent field when a value in the controlling field is selected. Excluded fields are not available in the dependent field for the selected controlling field value.

To include or exclude values:

- Double-click values to include them. Included values are indicated with highlighting. Double-click any highlighted values to exclude them.
- Click a value and use Shift+click on another value to select a range of adjacent values. Then click **Include Values** to make the values available, or **Exclude Values** to remove them from the list of available values.
- Click a value and use Ctrl+click to select multiple values. Then click **Include Values** to make the values available, or **Exclude Values** to remove them from the list of available values.
- Click a column header to select all the values in that column. Then click **Include Values** to make the values available, or **Exclude Values** to remove them from the list of available values.

To change the values in your view:

- Click **View All** to view all available values at once.
- Click **Go To** and choose a controlling value to view all the dependent values in that column.
- Click **Previous** or **Next** to view the values in columns that are on the previous or next page.
- Click **View sets of 5** to view 5 columns at a time.

Dependent Field Considerations

User Permissions Needed	
To define and edit field dependencies:	"Customize Application"

Consider the following when defining and editing dependent fields:

Checkboxes

Checkbox fields can be controlling fields but not dependent fields.

Converting fields

Convert your existing fields to dependent or controlling fields without affecting the existing values in your records. Going forward, dependency rules apply to any changes to existing records or new records.

Default values

You can set default values for controlling fields but not for dependent fields.

Field-level security

Field-level security settings for a controlling field and dependent field are completely independent. Remember to hide controlling fields whenever its correlating dependent field is hidden.

Import

The import wizards do not consider field dependencies. Any value can be imported into a dependent field regardless of the value imported for a controlling field.

Lead conversion

If you create a dependency for lead fields that map to account, contact, and opportunity fields for lead conversion, create the same dependency on the account, contact, or opportunity as well.

Dependent and controlling lead fields can be mapped to account, contact, or opportunity fields with different dependency rules.

Multi-select picklists

Multi-select picklists can be dependent fields but not controlling fields.

Offline Edition

While controlling and dependent fields are available in Offline Edition, the logic between them is not.

Page layouts

Make sure controlling fields exist on any page layout that contains their associated dependent field. When the controlling field is not on the same page layout, the dependent field shows no available values.

For visually-impaired users, make sure the dependent field is lower on the page layout than its controlling field.

If a dependent field is required and no values are available for it based on the controlling field value, users can save the record without entering a value. The record is saved with no value for that field.

Picklist limitations

Custom picklist fields can be either controlling or dependent fields.

Standard picklist fields can be controlling fields but not dependent fields.

The maximum number of values allowed in a controlling field is 200. In addition, if a field represents both a controlling field and dependent field, it cannot contain more than 200 values. Before defining a dependency, make sure your picklist has at least one value; standard fields like `Product Family` do not contain any values until you add them.

If a standard controlling field relies on functionality that your organization decides to disable, the dependency rules for the field will go away. For example, if your organization disables the Self-Service portal and the `Closed by Self-Service User` is a controlling field, its dependent field will display all available values.

The following fields are not available as controlling fields:

Activity Fields

Task

Create recurring series of events

Contact Fields

Salutation

Contact Currency

Custom Object Fields

Currency

Lead Fields

Converted

Unread By Owner

Record types

The values in your controlling fields are determined by the record type selected. The values in your dependent fields are determined by the record type and controlling field value selected. In short, the values available in dependent fields are an intersection of the record type and controlling field selections. See "Managing Record Types" in the online help for more information on record types.

Salesforce Sandbox

Available in: Enterprise and Unlimited Edition

Salesforce Sandbox enables you to take a snapshot of your company's Salesforce environment to do a variety of actions, without interrupting users' everyday activities. With a single click, you can use Salesforce Sandbox to test new customizations or features before rolling them out to users, create a development environment for building and testing integrations, and create a safe training environment for employees.

Note

Salesforce Sandbox is available for an additional cost with Enterprise Edition.

Implementation Tips

- Contact salesforce.com to activate the ability to create a Salesforce Sandbox for your organization.

- Create custom links as relative URLs within Salesforce so that they will also work in your Salesforce Sandbox. For example, use /00Oz0000000EVpU&pv0={!Account_ID} instead of https://na1.salesforce.com/00Oz0000000EVpU&pv0={!Account_ID}.

Best Practices

- Use the **Quick Copy** option when creating your Salesforce Sandbox to significantly reduce the amount of time it takes to copy your organization. **Quick Copy** includes all of your organization's reports, dashboards, price books, products, and customizations under **Setup**, but excludes all of your organization's standard and custom object records.
- When creating your Salesforce Sandbox, we recommend you use the option to alter usernames and passwords to prevent unauthorized access. Your username and password will remain unchanged so you can log in.
- If you plan to do employee training using your Salesforce Sandbox, create a copy that does not have usernames and passwords altered. If you already have a Salesforce Sandbox with altered usernames, you can manually update the employees' usernames and email them new passwords for the Salesforce Sandbox.

About Salesforce Sandbox

Creating a Salesforce Sandbox

User Permissions Needed	
To create a Salesforce Sandbox:	"Modify All Data" AND "Customize Application"

You can create a complete single copy of your organization once every 30 days in a separate environment to do a variety of actions, such as quality assurance testing, integration and app testing, or user training, without compromising your organization's data. The copy of your organization is referred to as a "Salesforce Sandbox." From a Salesforce Sandbox, you can perform any function that you can perform in your Salesforce organization.

Note

Contact [salesforce.com](https://www.salesforce.com) to activate the ability to create a Salesforce Sandbox for your organization.

To create a Salesforce Sandbox:

1. Click **Setup | Data Management | Salesforce Sandbox**.
2. Depending on how [salesforce.com](https://www.salesforce.com) has set up your organization, select:
 - **Quick Copy** to create a Salesforce Sandbox that includes all of your organization's reports, dashboards, price books, products, apps, and customizations under **Setup**, but excludes all of your organization's standard and custom object records. Choosing **Quick Copy** can potentially improve the time it takes to create a Salesforce Sandbox

from several hours to just a few minutes. This allows you to access your Salesforce Sandbox much sooner than if you select the **Complete Copy** option.

- **Complete Copy** to create a Salesforce Sandbox that is a complete single copy of your organization, including all apps, documents, and attachments.
3. Choose whether to alter usernames and passwords for your Salesforce Sandbox. This option is selected by default.

If you select this option, you will be able to log in to your Salesforce Sandbox with your Salesforce username and password, but all other users in your organization will have their usernames changed. This prevents unauthorized access to the Salesforce Sandbox.
 4. Enter the warning text into the text box. By entering this text, you acknowledge that creating a new Salesforce Sandbox will delete any existing Salesforce Sandbox data. Your organization's real data will not be affected in any way.
 5. Click **Create Salesforce Sandbox**. You will receive an email notification when your Salesforce Sandbox is available.
 6. Click the link in the email notification.
 7. Enter a valid Salesforce username and password to access your organization's Salesforce Sandbox.

Tips on Using Salesforce Sandbox

- You cannot delete your organization's Salesforce Sandbox. However, you can create a new Salesforce Sandbox copy of your organization, which will replace any existing copy.
- You can access your organization's Salesforce Sandbox until you instruct salesforce.com Customer Support to disable the feature.
- When you create a new Salesforce Sandbox, you cannot access any existing Salesforce Sandbox copy until the new one is complete.
- Only custom links created as relative URLs, such as /00Oz0000000EVpU&pv0={!Account_ID} will work in your Salesforce Sandbox. All custom links created as absolute URLs, such as https://na1.salesforce.com/00Oz0000000EVpU&pv0={!Account_ID}, will not work in your organization's SalesforceSandbox.
- Your Salesforce Sandbox is not synchronized with your Salesforce organization. Therefore, you cannot make changes in your Salesforce Sandbox and then automatically populate those changes back to your Salesforce organization; changes must be manually replicated in Salesforce.
- Customizations to your organization on Salesforce do not automatically update to your Salesforce Sandbox. You must create a new Salesforce Sandbox to see any customizations made to your organization since the last time you created a Salesforce Sandbox.
- You can install and deploy apps from the AppExchange in your Salesforce Sandbox. You can also publish apps from your Salesforce Sandbox and manage them on the AppExchange until you create a new Salesforce Sandbox.

- You can only run one copy of your organization in the Salesforce Sandbox at a time.

Accessibility for the Disabled

Available in: All Editions

Salesforce.com is committed to achieving general compliance with the Section 508 accessibility standards and is dedicated to providing high-quality on-demand enterprise applications that are accessible to people with disabilities. Salesforce.com's suite of on-demand enterprise applications provides support for leading assistive technologies and incorporates enhancements to ensure accessibility for people with disabilities. A variety of accessibility features are available that ensure all users have access to and can use salesforce.com's products.

In addition to making Salesforce more accessible in general, Salesforce provides an "accessibility mode" that provides a better user experience for visually-impaired users.

Section 508 of the Rehabilitation Act of 1973, as amended, is a US law requiring electronic technology used by the government to be accessible. Specific requirements are maintained by the Access Board in the Electronic and Information Technology Accessibility Standards (36 CFR Part 1194). This standard is structured as a set of provisions, each identified by a paragraph. There are 16 paragraphs applicable to web technology, most of which correspond to WCAG checkpoints.

About Accessibility for the Disabled

Supported Assistive Technologies

Salesforce supports the following assistive technologies:

- JAWS™ 6.1 and later
- Window-Eyes™ 4.5 and later

Using Assistive Technologies

Users who employ a screen reader while using Salesforce should be aware of the following application functionality:

- After a specified period of inactivity, a session timeout popup window automatically appears, prompting you to log out or continue working. The time interval for this popup window is configurable by your administrator, or your administrator can disable the session timeout popup altogether. Contact your Salesforce administrator for information about your organization's settings.
- Required fields on edit pages are marked with an asterisk (*).
- On edit pages, the keyboard focus defaults to the first editable field on the page. When creating or editing a task or event, the keyboard focus defaults to the `Subject` field, regardless of its location on the page.

- Some user interface controls make use of the JavaScript "onClick" function. However, this functionality is also accessible using screen readers and is not limited to activation by a mouse.
- Buttons, links, and fields that are not currently active are labeled with a "DISABLED" attribute. For example, when using a wizard with multiple steps, some buttons may be disabled until you select a specific option.
- Dashboards contain charts and graphs that are visual in nature. To access the report data used to generate the chart or graph, simply select the dashboard component.

Note

The underlying report may contain additional data than what is represented in the dashboard component. In addition, the underlying report may contain some data that you do not have access to view due to sharing settings.

- Each record name in a report is a link to the record's detail page. Depending on your report criteria, your report could contain a large number of links, which may cause performance issues for your screen reader.
- The ability to create an HTML email template (via **Setup | Email | My Templates**) is not fully accessible. We recommend that you create text email templates.
- The multi-user calendar month view is extremely complex and can be difficult to use with a screen reader. We suggest you use the multi-user week view or day view instead.
- On edit pages, the standard Salesforce convention is to use section headings rather than the HTML `fieldset` tag to group editable fields within the page. Section headings are marked with HTML header tags (`h1`, `h2`, and so on). We recommend using the header tags to orient yourself on the page.
- The ability to select categories for a solution is not currently accessible.

Contacting Salesforce.com with 508 Accessibility Issues

Salesforce.com is committed to providing accessible documentation and support for all users. Documentation, customer support, and knowledge base access are available by selecting the **Help & Training** link at the top of any page.

To report any 508 accessibility issues or to request an alternate format of any document free of charge, contact accessibility@salesforce.com.

Note

Customer support is not available to Personal and Developer Edition users. In addition, knowledge base access is not available to Developer Edition users. All users are welcome to contact accessibility@salesforce.com with any accessibility-related queries.

Enabling Accessibility Mode

Salesforce provides an alternate user interface mode that enables users with screen readers (such as JAWS or Window-Eyes) to use the application more effectively. This "accessibility mode" includes the full functionality of Salesforce with slight modifications designed to create a better user experience for visually-impaired users.

To enable accessibility mode:

1. Click **Setup | My Personal Information | Personal Information**.

2. Click **Edit** to modify your personal information.
3. Use the skip link at the top of the page to navigate directly to the `Accessibility Mode` checkbox located in the second column of the page.
4. Select the `Accessibility Mode` checkbox.
5. Click **Save**.

Areas Affected by Accessibility Mode

When you enable accessibility mode, the following drop-down lists include a **Go** button that you must select to navigate to the option chosen in the drop-down list. With accessibility mode disabled, these drop-down lists automatically navigate to the chosen option when you select it.

- AppExchange drop-down list at the top of every page
- Create New drop-down list in the sidebar of every page
- Divisions drop-down list in the sidebar of every page (Available only if your organization uses divisions to segment data)
- Drop-down list to change your My Tasks view on the Home tab
- List view selector on every tab, including the activity list views available from the Home tab
- Drop-down list to change your view of recent records on the home page of every tab
- View drop-down list to show available tabs on the All Tabs page
- Custom App drop-down list to view and customize the tabs in your apps (available via the **Customize My Tabs** button on the All Tabs page)
- Folder selector for documents, dashboards, reports, and email templates
- Drop-down list to change your view in the recycle bin
- Forecast Summary drop-down list on the Forecast tab
- Drop-down list to change your display of roles (available via **Setup | Manage Users | Roles**)
- Drop-down list to change your display of territories (available via **Setup | Manage Territories | Hierarchy**)
- Custom report wizard drop-down list to select the type of data for the report
- Custom report wizard navigation drop-down list to move between steps of the wizard

Also, all error messages are preceded by the word "Error" whether you are using accessibility mode or not.

Enhanced Import Wizard

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

The ability to easily import data into Salesforce is one of the application's key benefits. With Winter '06, the import wizard is extended to custom objects and solutions. Additional new capabilities include new matching options and enhanced field- and relationship-mapping options. With the custom object and solution import wizards, you can:

- Prevent duplicate records by matching on Salesforce ID, custom object name, solution title, or a new external ID field.
- Choose whether to update existing records, import new ones, or do both at once.

- Import up to 50,000 records at a time. This applies to organization-wide imports for accounts, contacts, leads, custom objects, and solutions.
- Establish master-detail and lookup relationships to existing records for the custom objects you are importing.
- Select a record type to apply to imported records.

Winter '06 also includes the ability to set an external ID flag on a custom text, number, or email field. Setting the external ID flag will place a custom index on the field, exposes it to the import wizards and the API for matching, and allows you to use the sidebar Search or Advanced Search to find values in this field.

Implementation Tips

- Administrators and users with the "Modify All Data" permission can import custom objects and solutions. Make sure the appropriate users have the right permissions.
- If you integrate Salesforce with an external system that uses a unique record identifier, consider creating an external ID field for this data. For each type of record that can have custom fields, you can set one custom field as an external ID.
- If you want to prevent duplicate records by matching on an external ID field, create the external ID before importing your data.

Best Practices

- If you are importing custom objects with master-detail or lookup relationships, make sure the related records already exist in Salesforce. In your import file, specify the name or ID of the existing related records. During import, you can create these relationships, but you cannot create new related records.
- When matching records by Salesforce ID or by a custom object name that is an auto-number field, note that you can only update existing records. You cannot create new ones.
- To obtain the Salesforce ID for your records, run a report that includes the ID field and export it to Excel.
- Set the field-level security to read-only for any external ID fields you create. To maintain data integrity, external IDs should only be updated using the import wizards or the API.
- When importing records with external IDs, ensure that the IDs are unique in your import file. Neither the import wizard nor the API enforces uniqueness for external IDs.
- Consider whether the type of record matching you have chosen is case-sensitive or not:
 - For external IDs, matching is not case-sensitive. An ID of "AQ123" will match "aq123."
 - For custom object names and solutions titles, matching is not case-sensitive. "IBM" will match "ibm."
 - For Salesforce IDs, matching is case-sensitive. The IDs must match exactly.
- If you plan to choose a type of record matching that is not case-sensitive, scan and standardize your data before importing to prevent unintended matches.
- To import records that belong to multiple record types, group your records into separate files for each record type and import each one individually.

- To map more than one of your import file columns to the same Salesforce field, duplicate that column in your import file. Field mapping in the custom object and solution import wizards is "source to target," that is, for each column in your import file, you can select one Salesforce field for that data.

About the Enhanced Import Wizard

What is Imported for Custom Objects and Solutions?

The import wizard for custom objects and the import wizard for solutions both allow you to prevent the creation of duplicate records by matching records according to one of the following fields: custom object name or solution title, Salesforce ID, or external ID. In your import file, include a column for the field that you are using for record matching.

Matching by Name or Solution Title

When you select this option, the import wizard will detect existing records in Salesforce that have the same custom object name or solution title. Note that this type of matching is not case-sensitive - for example, names or titles that begin with a capital letter will be matched with the same name or title that begins with a lowercase letter. If necessary, scan and standardize your custom object names or solution titles before performing the import to prevent unintended matches.

Matching by Salesforce ID

A Salesforce ID is a system-generated, case-sensitive string of 15 or 18 letters and numbers that uniquely identifies each Salesforce record. When you select this option, the import wizard will detect existing records in Salesforce that have the same Salesforce ID. Note that Salesforce IDs are case-sensitive and must match exactly. Salesforce IDs can be obtained by running reports that include the ID field of the record.

Matching by External ID

An external ID is a custom field that has been set as an `External ID`, meaning that it contains unique record identifiers from a system outside of Salesforce. For more information, see "Custom Field Attributes" in the online help. When you select this option, the import wizard will detect existing records in Salesforce that have the same external ID. Note that this operation is not case-sensitive - for example, "ABC" will be matched with "abc". If necessary, scan and standardize your external ID values before performing the import to prevent unintended matches.

When matching by external ID, if the import wizard finds duplicate records, only the first three duplicate records are reported to you in the confirmation email.

Ignoring or Updating Matching Records

When the import wizard detects existing records in Salesforce that match according to the field you have chosen, you can choose one of the following actions:

- Only insert new records - If there are records in your file that are new and do not match any existing records, then insert them into Salesforce. Also, ignore any records in your file that match an existing record, and do nothing to the existing record.
- Only update existing records - If there are records in your file that match an existing record, then update the existing record. Also, ignore any records in your file that do not match an existing record, and do not insert them as new records.
- Insert and update records - If there are records in your file that are new and do not match any existing records, then insert them into Salesforce. Also, if there are records in your file that match an existing record, then update the existing record.

Import My Organization's Custom Objects or Solutions

User Permissions Needed	
To import custom objects or solutions:	"Modify All Data"

With the Import My Organization's Custom Objects wizard and the Import My Organization's Solutions wizard, you can import custom objects or solutions.

Follow these basic steps to import custom objects or solutions. Click each link for more details.

1. [Launch the wizards on page 36](#)
2. [Choose the custom object \(custom objects only\) on page 37](#)
3. [Prevent duplicate records on page 37](#)
4. [Specify owner, master-detail, author, and lookup relationships on page 37](#)
5. [Set lookup record matching on page 38](#)
6. [Select record type on page 38](#)
7. [Upload your import file on page 38](#)
8. [Map fields on page 39](#)
9. [Confirm and submit your import on page 39](#)
10. [Complete your import on page 39](#)

Note

The custom object and solution import wizards are dynamic; they display different screens depending on what you are importing and the setup of your organization.

Launch the wizards

1. To import custom objects, choose **Setup | Data Management | Import Custom Objects**.
To import solutions, choose **Setup | Data Management | Import Solutions**.
2. For best results, perform all of the steps provided on the introductory page.

3. Click **Start the Import Wizard!** to begin your import.

Choose the custom object (custom objects only)

1. The first step of the wizard lists the custom objects that have been defined for your organization.
2. Identify the custom object you are importing by selecting the corresponding radio button.
3. Click **Next**.

Prevent duplicate records

1. The import wizard can compare the records in your import file with existing records in Salesforce in order to prevent duplicate records from being created as a result of your import. Indicate whether you would like to prevent duplicate records from being created. You must select **Yes** in order to update existing records.

For details, see [What is Imported for Custom Objects and Solutions? on page 35](#).

2. If you choose **Yes**, then additional choices will appear:
 - Choose the field that you are using to match existing records in Salesforce with records in your import file. The `External ID` option is disabled if no external ID fields have been created for your records.
 - Choose what you want to happen if matches are found - only import new records, only update existing records, or update existing records and import new ones.

Note

If you have chosen to match by `Salesforce ID`, you can only update existing records; you cannot import new ones.

3. Click **Next**.

Specify owner, master-detail, author, and lookup relationships

1. (Custom objects only) Custom objects can be owned by users, or they can have a master-detail relationship with other records. For example, a custom object can have a custom field that creates a master-detail relationship with accounts. In that case, your custom object import file must include the names or IDs of all associated accounts.
 - If your custom objects are owned by users, then choose the field in your import file to use for matching record owners.

You can use the following values for matching users:

- First name followed by last name
- Last name followed by first name
- Alias

- Username

See "User Fields" in the online help for more information.

- If your custom objects have a master-detail relationship with another kind of record, then choose the field in your import file to use for matching master records.
2. (Solutions only) Solutions are associated with authors, who are the users that initially created the solutions. If you have included a column in your import file to identify authors, specify the user field it contains.

You can use the following values for matching users:

- First name followed by last name
- Last name followed by first name
- Alias
- Username

See "User Fields" in the online help for more information.

Choose `None` to specify yourself as the author of the imported solutions.

3. Both custom object and solution records can have custom fields that create lookup relationships with other records. If you have included lookup fields in your import file, then check the corresponding boxes.

Note

Any related records must already exist in Salesforce before proceeding. Related records will not be updated during your import even if your import file contains different values for fields on those related records.

4. Click **Next**.

Set lookup record matching

1. If you checked one or more lookup fields in the previous step, select the field (name or ID) you are using to uniquely identify those related records.
2. Click **Next**.

Select record type

1. If the records you are importing have record types, then choose the record type that you want to assign to the records in your import file.
2. If you are inserting new records and updating existing records at the same time, then choose whether to override the record types of existing records.
3. Click **Next**.

Upload your import file

1. Click **Browse...** to provide the location of your import file.

2. Choose the character encoding of your import file. In most cases, you can accept the default value.
3. Make additional settings depending on the setup of your organization, such as whether workflow rules will be triggered and the language of the records in the import file.
4. Click **Next**.

Map fields

1. Map the fields in your import file with the appropriate Salesforce fields by matching the fields on the left, which includes all the columns in your import file, with the appropriate Salesforce field on the right.
2. If the column labels in your import file exactly match field labels in Salesforce, the wizard automatically maps those fields for you. However, if two or more of your file's column labels are identical matches with a field in Salesforce, then you must map the fields manually.

Note

Some Salesforce fields cannot be updated using import, for example, the `Created Date` and `Last Modified Date`. So even though you may be using an exported report as your import file, some of the Salesforce fields in your file cannot be mapped.

3. Click **Next**. The import wizards warns you if you have not mapped all of the fields in your import file. Unmapped field values are not imported.

Confirm and submit your import

1. Read any warning messages that the import wizard displays. Optionally, click **Previous** to return to earlier steps and resolve potential problems.
2. Click **Import Now!** to submit your import request to Salesforce.

Complete your import

1. A message indicates approximately how long the import will take. When the import operation is finished, a message from Customer Support will be sent to the email address shown.
2. Click **Finish** to exit the wizard.
3. To monitor the status of your pending import, visit the import queue. See "Import Queue" in the online help.

Creating an External ID Field

To create an external ID field:

1. Click **Setup | Customize**, select the appropriate activity, tab, or users link, and then click the **Fields** link.
2. Click **New** to create a new custom text, number, or email field. To set an existing custom text, number, or email field as an external ID, click **Edit** next to that field.
3. In the custom field wizard, select the `External ID` checkbox.

4. Set any other attributes as necessary.
5. Click **Save** to finish.

AppExchange API 7.0

With the Winter '06 release, salesforce.com is upgrading the AppExchange API (previously known as the Sforce Web Services API). 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 AppExchange API 7.0 provides a number of powerful enhancements that further improve any integration already in place between Salesforce and your other systems.

Upsert Call

The 7.0 API has a new call: upsert. This powerful new call allows integrations to match on a custom field and either create or update based on the presence of an existing record. Use this feature when integrating with a back-end accounting or ERP system or to prevent duplicate records.

System Fields

When migrating data from an external system, the 7.0 API lets customers set the `CreatedBy`, `CreatedDate`, `LastUpdateBy`, and `LastUpdateDate` fields, as well as a number of other fields that were previously read-only. To enable this feature, contact salesforce.com.

Office Toolkit

The Office toolkit enables Microsoft Office developers to utilize the power of the AppExchange API (all API versions). With Winter '06, [documentation](#) is being provided for the Office toolkit, as well as a distributable MSI file.

Improved Performance

The API SOAP stack has been re-architected from the ground up to have improved performance.

Create and update operations will not update the Recent Items list by default in the 7.0 API. A new header will allow developers to update the Recent Items list for those that need to maintain backwards compatibility (note that the behavior for API 6.0 and below will not change). Skipping Recent Items updates can improve performance of bulk loads as much as 25 percent.

Visit <http://www.sforce.com/resources/tn-17.jsp> for more details on new features. Complete documentation will be available with Winter '06.

Additional AppExchange Enhancements

Contracts

- Enter up to 4000 characters in a contract approval request.
- Deleting the account associated with a contract now works similarly to deleting the account associated with a case. When you delete an account, all related contracts (as long as they are not activated) are also deleted. Note that you cannot delete an account if it has associated activated contracts.

Custom Lookup Relationships

Create custom lookup fields if you want to create a relationship between two different types of records. For example, you can create a custom lookup field on products that displays the related expense record from your expenses custom object. You can also add these lookup fields to page layouts and search layouts. Custom lookup fields are available on both standard and custom objects but you cannot create a relationship between one standard object and another standard object other than users. This is only available to Team, Professional, Enterprise, Unlimited and Developer Edition organizations.

Custom Objects

- Custom tabs, custom objects, custom s-controls, and custom apps are now available to Team Edition organizations at no additional charge.
- With Winter '06, administrators can differentiate page layouts and available picklist values by record type on custom objects--just like standard objects. This is available for Enterprise, Unlimited, and Developer Edition organizations only.
- Workflow rules on custom objects can trigger task and email actions--just like standard objects. This is available for Enterprise, Unlimited, and Developer Edition organizations only.
- Now, you can add a splash page to any custom tabs. Custom splash pages can include information about using the custom tab and custom object with links to additional information. They include a **Continue** button and a **Don't show me this again** button.

Create the splash page for your custom tabs in the form of a custom link for home pages via **Setup | Customize | Home | Custom Links**. Custom links can be a URL to an HTML page or a custom s-control. Create your custom splash page as a Home tab custom link and then add it as the splash page option to your custom object or custom web tab.

Expanded Limits

- You can create up to 150 custom links for each type of data including users, home, and custom objects.
- Each custom object can have only one master-detail relationship, but can have many lookup relationships, up to a total of 25 relationships. Each relationship is included in the maximum number of custom fields allowed.
- Team Edition organizations now have the same number of custom fields as Professional Edition organizations:

Salesforce Edition	Maximum Custom Fields	Maximum Custom Tabs	Maximum Custom Apps
Personal	5 per tab, plus 5 for users	Not available	Not available
Team	100 per tab, plus 20 for users	5	1
Professional	100 per tab, plus 20 for activities and users	10	5

Salesforce Edition	Maximum Custom Fields	Maximum Custom Tabs	Maximum Custom Apps
Enterprise	500 per tab, plus 20 for activities and users	25	10
Unlimited	500 per tab, plus 20 for activities and users	50	An unlimited number of custom apps
Developer	500 per tab, plus 20 for activities and users	25	10

- If your organization uses divisions to segment data, you can now create up to 100 divisions.

Formulas

- Your CASE functions can now include ISPICKVAL functions. This means you no longer have to include IF functions to test if a field contains a particular picklist value. For example the formula `CASE({!Term__c}, "12", 12*{!Monthly_Commit__c}, "24", 24*{!Monthly_Commit__c}, 0)` multiplies the Monthly Commit amount by 12 whenever the Term picklist value is 12 or multiplies the Monthly Commit amount by 24 whenever the Term picklist value is 24. Otherwise, the result is zero.
- Create more complex formulas with an increased compiled size limit. The compiled size of your formula displays below the formula editor.
- To reference the unique identifier for your Salesforce organization in a formula, insert the `{!Organization.ID}` merge field. This merge field can display anywhere formula fields can except in reports.
- The new IMAGE function allows you to embed images on detail pages, list views, and reports:

Description:	Inserts an image with alternate text and height/width specifications.
Use:	<code>IMAGE(image_url, alternate_text, height, width)</code> and replace <code>image_url</code> with the full path to the image; replace <code>alternate_text</code> with the string of text you want displayed when you mouse-over the image; replace <code>height</code> with the vertical size of the image in pixels; replace <code>width</code> with the horizontal size of the image in pixels.
Example:	<code>HYPERLINK("ymsgr:sendIM?" & {!Yahoo_Name__c}, IMAGE("http://opi.yahoo.com/online?u=" & {!Yahoo_Name__c} & "&m;=g&t;=0", "Yahoo"))</code> displays a clickable Yahoo! Messenger icon indicating if the person is logged on or off. Users can click the icon to launch a Yahoo! Messenger conversation with the person. This example uses a custom text field called <code>Yahoo Name</code> on contacts where you can store the contact's Yahoo! Messenger ID.

Tips for using IMAGE functions:

- The height and width parameters are optional.
- Use a text string to replace the `image_url` and `alternate_text` parameters. Surround each text string in quotes.
- Use numbers to replace the `height` and `width` parameters.
- Add images to your Documents tab if you want to display them elsewhere. For example, store the image of a product in a document folder, copy the URL to the document, and paste that URL in the `image_url` parameter of a formula field on the Products tab.
- If you use Internet Explorer, you may need to change your security settings so that it does not display a warning prompt when images use HTTP protocol. See the online help for Internet Explorer for instructions on changing your security settings.
- The IMAGE function cannot include the GETSESSIONID function as one of its arguments.

List Views

- When filtering list views, reports, or other items by checkbox fields, the "True" and "False" values in the lookup dialog are now represented by radio buttons, not checkboxes, so that you can only select one value.
- When you display a long text area field in your list view, now the first 1000 characters of the field are shown.

Login History

From the Login History page, you can now see the platform from which users are logging into Salesforce. For example, if a user is logging into Salesforce from a computer that operates on Windows XP, "WinXP" displays in the Platform column of the Login History page. Platform is also included in the downloadable login history CSV file.

Mass Transfer

When transferring records via **Setup | Data Management | Mass Transfer Records**, you no longer need to specify the `Transfer From` user. This means that you can transfer records owned by multiple users to one other user all in one step.

Offline PDA Edition

Offline PDA Edition is now called Sales Anywhere. Use your Pocket PC or Palm OS 5.0 or later mobile device to view, edit, create, and delete your Salesforce accounts, contacts, opportunities, and activities.

Profiles

Now, add a description to your custom user profiles using the `Description` field.

Replacing Salesforce Online Help for Renamed Tabs

If your organization uses renamed tabs and you have chosen to replace the Salesforce online help with your own help file, you can now make your help context-sensitive by taking advantage of the context-specific parameters that are passed with each help link. For example, the help link from the Opportunities tab home page is constructed as:

```
http://your_help_file.com?loc=help&body=%2Fhelp%2Fdoc%2Fen%2Fhelp2.jsp&target=opp_overview.htm&section=Opportunities
```

The values of the `target` and `section` parameters are unique for every page within the application. You can parse these parameters to display context-sensitive help content for your users.

Search

In lookup dialogs, you can now search for first and last names that include spaces by entering quotes around the terms. For example, a search for "Van Gundy", would return results with "Van Gundy" as the first or last name.

Setup Audit Trail

- The audit trail now tracks the following additional types of changes:
 - Company information, default settings such as language or locale, and company message changes
 - Apps from the AppExchange that you installed or uninstalled
 - Changes to account team and opportunity team selling settings
 - Changes to user interface settings, such as collapsible sections, Quick Create, or the user interface theme
 - Session settings changes, such as changing the session timeout setting

- Changes to custom apps, custom objects, and custom tabs
- Record type changes, including creating or renaming record types and assigning record types to profiles
- Custom field and field-level security changes, including changes to formulas
- Picklist value changes for custom and standard fields
- Use of the campaign member import wizard
- Use of the custom object or solution import wizards
- How many records a user emptied from their Recycle Bin and from the organization's Recycle Bin
- Mass delete use when a single mass delete exceeds the user's Recycle Bin limit of 5000 deleted records. The oldest, excess records will be permanently removed from the Recycle Bin within two hours of the mass delete transaction time.
- Changes to territories

Single Sign-On Monitoring

If your organization is enabled for Single Sign-On and has built a Single Sign-On solution, you can view the most recent Single Sign-On login errors for your organization. Click **Setup | Manage Users | Single Sign-On Error History**. Contact salesforce.com to learn more about enabling Single Sign-On for your organization.

Storage Limits

General storage and complimentary document storage are calculated asynchronously, so if you import or add a large number of records, your organization's storage usage will not be reflected immediately.

Supported Browsers

With Winter '06, Salesforce supports the following browsers:

- Microsoft® Internet Explorer version 6.0 or later (recommended)
- Mozilla Firefox version 1.0 or later
- Netscape version 8.0 or later

Regardless of which browser you use, JavaScript must be enabled.

Due to Netscape 8.0 security controls, some areas of Salesforce may open in new browser tabs and not function properly. To prevent specific Salesforce pages from opening in new browser tabs, right-click on the new browser tab, and select **Show Site Controls | I Trust This Site**.

User Interface Changes

Both the new Salesforce user interface theme and the Salesforce Classic theme include the following additional enhancements:

- On each page in Salesforce, the link to open the online help window now displays as **Help for this Page** to better reflect that the online help will open directly to information about that Salesforce page. Also, on related lists, the help link includes the name of the related list, such as **Activity History Help**, so you know exactly which online help topic will display when you click the link.
- The Key lists on all tab home pages have been renamed to better reflect the type of data they display. For example, on the Accounts tab home page, the "Key Accounts" list is now called "Recent Accounts."
- Splash pages on standard tabs no longer display by default when you click the tab. To view the informational splash page for a tab, click the All Tabs tab (the last tab with an arrow) and then click **Tell me more** next to the tab name.
- The salesforce.com section of the Messages and Alerts area of the Home tab has been removed. This area now displays only the messages added by your administrator.

User Permissions

Now buttons and links only display for users who have the appropriate user permissions to use them. For example, the **Delete** button will not display on a detail page for users that do not have the "Delete" permission on that object.

Workflow

- Create workflow rules on your custom objects. Now you can trigger workflow task and email alerts on custom objects--just like standard objects.

Note

If a custom object has a master-detail relationship with a standard object, the owner of the custom object record is automatically set to the owner of the master standard object record. For example, if a custom object called "Expenses" has a master-detail relationship with accounts, the owner of each expense record is the owner of the account for the expense.

- When creating workflow tasks for custom objects, only custom objects that track activities are available.
- When creating workflow rules, use the lookup icon to choose a picklist value when filtering on a picklist field.
- Assign workflow tasks to record creators.
- Workflow rules are now triggered on cases submitted via Web-to-Case that do not contain email addresses.
- When you create a workflow rule, you can set it to trigger on one of three different options:
Evaluate this rule only when a new record is created
Choose this option to ignore updates to existing records.

Evaluate this rule when a new record is created, or when an existing record is edited and did not previously meet the trigger criteria specified below

Choose this option to include new records and updates to existing records. If a record meets the rule criteria, it does not re-trigger that rule every time it is saved even though it still meets the criteria.

Evaluate this rule when a new record is created or when an existing record is edited, regardless of whether it previously met the criteria specified below

Choose this option to include new records and updates to existing records and repeatedly trigger the rule if the record still meets the criteria.

Quantity Forecasts

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

Winter '06 adds new enterprise forecasting capabilities to Salesforce, offering customers the ability to forecast product quantities by individual product families. With this new capability, organizations can effectively use their sales forecast to provide relevant input to enterprise demand and resource planning processes in their supply-chain management. With quantity forecasting, users receive all the functionality of Salesforce's previous forecasting capabilities, plus these new features:

Forecast Product Quantities

Winter '06 enables sales managers to forecast expected product quantities at the opportunity product or schedule level. Managers can break out product quantity forecasts by different time periods and product families.

Quantity Overrides

Managers can override their subordinates' forecasted product quantity data at the individual deal or at the aggregate level. Managers' product quantity forecast overrides are hidden from subordinates and do not change actual opportunity values.

Product Quantity Quotas

Forecast quotas in Winter '06 can be set for product quantity by product family and time period for each sales representative.

Implementation Tips

- To get started with quantity forecasting, click **Setup | Customize | Forecast | Settings** and then select **Forecast Quantity**.
- Clicking the Forecasts tab displays the quantity forecast for the selected forecast period.
 - Click **Edit** to make changes to the selected forecast. See "Overriding Customizable Forecasts" in the online help for instructions on overriding forecast amounts.
 - Click **Submit** to submit your forecast, making a snapshot of your forecast data available in your forecast history and forecast reports. .
 - Click **Forecast History** to display the forecast data you submitted in the past. Then, click **Forecast Summary** to return to the current forecast data.
 - Click **Printable View** to display the selected forecast in a simple, print-ready layout.
 - Review your forecast and the forecasts of any direct reports. See "Viewing Customizable Forecasts" in the online help for instructions on different viewing options.

Best Practices

- To see both revenue and quantity forecast amounts, select both options on the Forecast Settings page.

- Opportunity forecasts include new fields relating to forecast quantity and revenue, as well as overrides. See [Reporting & Analytics on page 92](#) for more details on these new fields.

Custom Fiscal Years

Available in: All Editions

For companies that breakdown their fiscal years, quarters, and weeks into custom fiscal periods based on their financial planning requirements, custom fiscal years provides the flexibility to define these periods in any way that they require. For example, a 13 week quarter may be represented by three periods of 4, 4, and 5 weeks, rather than calendar months. With custom fiscal years, administrators define individual fiscal years once and then use the fiscal periods throughout Salesforce, including for reporting and forecasting

Implementation Tips

- Before defining any custom fiscal years, back up your current data.
 1. Run and export these reports to Excel:
 - Opportunity Pipeline
 - Quarterly Forecast Summary
 - Quota vs. Actual
 2. Optionally, generate weekly export data. See "Backing Up Data" in the online help.

We suggest you do this because changing the fiscal year will cause fiscal periods to shift. This change will affect opportunities and forecasts organization-wide.

- Define your fiscal period name label picklists before defining your custom fiscal years.

Best Practices

- As a best practice, define your custom fiscal years after your current forecast. Also, update product schedules and forecasts whenever a custom fiscal year is created or changed.
- Create fiscal years several years in advance to ensure that your forecasts for future periods are accurate.
- If you have not enabled customizable forecasting, enable custom fiscal years, and define your fiscal years, before enabling customizable forecasting.
- Create printouts or a PDF of the custom fiscal year preview for your users.
- When defining fiscal years, be very careful to ensure your fiscal year is correct. Changing a fiscal year has impact on forecasts, reporting, and quotas.

About Custom Fiscal Years

About Fiscal Years

User Permissions Needed	
To define or edit fiscal years:	"Customize Application"
To view fiscal years:	"View Setup and Configuration"

Not all businesses use the "Gregorian year" in the online help for their "fiscal year" in the online help. Salesforce makes it easy for you to define a fiscal year that fits your business needs.

If your fiscal year follows the Gregorian calendar, but does not start in January, you can simply and easily set your fiscal year by defining a standard fiscal year. If your fiscal year follows a different structure, you can define a custom fiscal year that meets your needs.

Whether you use a standard fiscal year or a custom fiscal year, you can define individual fiscal years once for your entire organization. These fiscal year definitions allow you to use these fiscal periods throughout Salesforce including in reporting, opportunities, and forecasting.

Tip

As a best practice, define your custom fiscal years after your current forecast. Also, update product schedules and forecasts whenever a custom fiscal year is created or changed.

Standard Fiscal Years

Standard fiscal years are periods that follow the Gregorian calendar, but can start on the first day of any month of the year. Unlike custom fiscal year, standard fiscal years can be used by organizations that do not have customizable forecasting enabled.

Custom Fiscal Years

For companies that break down their fiscal years, quarters, and weeks into custom fiscal periods based on their financial planning requirements, Salesforce allows you to flexibly define these periods using custom fiscal years. For example, as part of a custom fiscal year, you can create a 13-week quarter represented by three periods of 4, 4, and 5 weeks, rather than calendar months.

If you use a common fiscal year structure, such as 4-4-5 or a 13-period structure, you can rapidly define a fiscal year by simply specifying a start date and an included template. If your fiscal year structure is not included in the templates, you can easily modify a template. For example, if you use three fiscal quarters per year (a trimester) rather than four, delete or modify quarters and periods to meet your needs.

Custom fiscal periods can be named based on your standards. For example, a fiscal period could be called "P2" or "February."

Fiscal years can be modified any time that you need to change their definition. For example, an extra week could be added to synchronize a custom fiscal year with a standard calendar in a leap year. Changes to fiscal year structure take effect immediately upon being saved.

Considerations When Enabling Custom Fiscal Years

Before enabling custom fiscal year, consider these issues:

- Once you enable custom fiscal years, you cannot disable it. However, you can define custom fiscal years that follow the same Gregorian calendar structure as Salesforce's standard fiscal years.
- Fiscal years will not be automatically created. The only fiscal years available are those that your organization defines.
- Forecasting cannot be used with custom fiscal years unless you have customizable forecasting enabled. To determine if you have customizable forecasting, see "Do I Have Customizable Forecasting?" in the online help.
- Enabling or defining custom fiscal years impacts your forecasts, reports, and quotas.
 - When you define a new custom fiscal year, or when you change the length of any fiscal period, all quotas for that year will be lost.
 - When you define a new custom fiscal year, or when you change the length of any fiscal period, forecasts, forecast history, and forecast overrides are lost. Changing the length of a period may also affect the previous or next fiscal year and reports associated with it. Forecasts for periods before the first custom fiscal year will be saved and can be accessed as usual.
 - Forecast reports for a period after the last defined fiscal year cannot be grouped by period, only by date.
 - To ensure your forecast reports have the most updated amounts, view the forecast for the period included in the report before running a forecast report.
- Your organization will not be able to use fiscal period columns in opportunity, opportunity with product, or opportunity with schedule reports.
- Opportunity list views will not include a fiscal period columns.

Setting the Fiscal Year

User Permissions Needed	
To view fiscal year:	"View Setup and Configuration"
To change fiscal year:	"Customize Application"

You can set one of two types of fiscal years: standard fiscal years or custom fiscal years. For specific information on both types of fiscal years, see [About Fiscal Years on page 50](#).

Setting a Standard Fiscal Year

If your organization follows the "Gregorian calendar" in the online help year, but you need to change the fiscal year start month, use standard fiscal years. Standard fiscal years can start on the first day of any month, and you can specify whether the fiscal year is named for the starting or ending year. For example, if your fiscal year starts in April 2001 and ends in March 2002, your fiscal year setting can be either 2001 or 2002. If your fiscal year is more complicated than this, see [Enabling Custom Fiscal Years on page 52](#)

Warning

All quotas, forecast history, and overrides are lost if the fiscal start month is changed.

To set a standard fiscal year:

1. Back up your current data.
 - a. Run and export these reports to Excel:
 - Opportunity Pipeline
 - Quarterly Forecast Summary
 - Quota vs. Actual
 - b. Optionally, generate weekly export data. See "Backing Up Data" in the online help.
- We suggest you do this because changing the fiscal year will cause fiscal periods to shift. This change will affect opportunities and forecasts organization-wide.
2. Click **Setup | Company Profile | Fiscal Year**.
 3. Select `Standard Fiscal Year`.
 4. Choose the start month.
 5. Specify whether the fiscal year is defined by the year it begins or ends.
 6. Optionally, select `Apply to All Forecasts and Quotas` if you want to apply the new fiscal year settings to your existing forecasts and quotas. This option may not be available depending on your forecast settings.
 7. Click **Save** to finish.

Enabling Custom Fiscal Years

If your fiscal year definition is not met by a standard fiscal year, you can enable custom fiscal years which will allow you to flexibly define a more complex fiscal year structure.

To enable custom fiscal years:

Note

Before enabling custom fiscal years, make sure that you have exported any data related to fiscal periods. See [About Fiscal Years on page 50](#) for specific details about the effects of enabling custom fiscal years.

1. Back up your current data.
 - a. Run and export these reports to Excel:
 - Opportunity Pipeline
 - Quarterly Forecast Summary
 - Quota vs. Actual
 - b. Optionally, generate weekly export data. See "Backing Up Data" in the online help.
- We suggest you do this because changing the fiscal year will cause fiscal periods to shift. This change will affect opportunities and forecasts organization-wide.
2. Click **Setup | Company Profile | Fiscal Year**.
 3. Select `Custom Fiscal Year`.

4. Click **Enable Custom Fiscal Years**.
5. If you understand the effects of enabling custom fiscal years and you have all your data exported, click **OK**.

Warning

Custom fiscal years cannot be disabled once enabled. Enabling custom fiscal years has impacts on your reports, forecasts, quotas, and other date sensitive material. Do not enable custom fiscal years unless you understand and are prepared for all the implications.

If you are not certain you want to enable custom fiscal years, click **Cancel**.

6. Once you have enabled custom fiscal years, define your fiscal year. See [Defining a Custom Fiscal Year on page 53](#).

Defining a Custom Fiscal Year

User Permissions Needed	
To view fiscal year:	"View Setup and Configuration"
To change your fiscal year:	"Customize Application"

Before defining a custom fiscal year, enable custom fiscal years for your organization. See [Enabling Custom Fiscal Years on page 52](#) for more information.

Enabling custom fiscal years does not automatically define them. You must define all of your company's custom fiscal years so that they fit your company's calendar.

If you have defined a custom fiscal year and you need to change it, you can edit the existing fiscal year definition. Custom fiscal years cannot be deleted. Instead of deleting an existing fiscal year, edit it until it meets your needs.

Before defining or editing any custom fiscal years, be aware of its impact on forecasting, reports, and other objects by reviewing [About Fiscal Years on page 50](#).

Defining a New Custom Fiscal Year

To define a new custom fiscal year:

1. Click **Setup | Company Profile | Fiscal Year**.
2. Click **New**. The Custom Fiscal Year template dialog opens.
3. Choose a template and click **Continue** to close the Custom Fiscal Year template dialog. For more information on the templates, see "Choosing a Custom Fiscal Year Template" in the online help.
4. Set the fiscal year start date, the fiscal year name, and choose the week start day. You can also add a description for the fiscal year.

Note

If this is the first custom fiscal year you have defined, the `Fiscal Year Start Date` and the `Week Start Date` are set to today's date and day of week. If you have already defined a custom fiscal year, they will be set to the day after the last end date of your custom fiscal years.

If you need to make changes other than the start date, year name, or week start day, see [Customizing the Fiscal Year Structure on page 54](#).

5. Optionally, review the fiscal year definition by clicking on **Preview**.

If it is correct, close the preview and click **Save** to save your fiscal year, or **Save & New** to save your fiscal year and define another fiscal year.

Editing a Custom Fiscal Year

To edit an existing custom fiscal year definition:

1. Click **Setup | Company Profile | Fiscal Year**.
2. Click a defined fiscal year name to review the details. Close the fiscal year preview to continue.
3. Click **Edit** for the fiscal year you want to edit.
4. Change the Fiscal Year Start Date, the Fiscal Year Name, Description, or Week Start Day.

If changing the Fiscal Year Start Date causes this fiscal year to overlap with the previous fiscal year, or if it creates a gap between the fiscal years, the end date of the previous fiscal year will be changed to the day before the start of this fiscal year.

If changing the end date will cause this fiscal year to overlap the next fiscal year, or if it creates a gap between the fiscal years, the start date of the next fiscal year will be changed to the day after the end of this fiscal year.

Note

You cannot change the start or end date of a fiscal year that causes it to overlap with a fiscal year that is defined using a "Gregorian year" in the online help template.

Warning

If you change the start or end date of any quarter, period, or week, all forecast data (including quotas, forecast history, and forecast overrides) that are within that date range, and all forecasts for date ranges automatically adjusted as a result of that change, will be lost. This includes end or start date changes resulting from inserting or deleting periods.

5. Click **Preview**.
6. Review the fiscal year definition. If it is correct, close the preview and click **Save** to save your fiscal year. If you need to make more detailed edits, see [Customizing the Fiscal Year Structure on page 54](#)

Note

Unless you specify them, the fiscal year period labels for forecasting and reporting will be set by the default label values for the fiscal year periods. If you would like to change them, see [Customizing the Fiscal Year Labels on page 56](#).

Customizing the Fiscal Year Structure

User Permissions Needed	
To define or edit fiscal years:	"Customize Application"
To view fiscal years:	"View Setup and Configuration"

If your custom fiscal year needs a different structure than one available from the "templates" in the online help, you can use advanced customization to modify the details of your custom fiscal year definition. Custom fiscal years allow you to:

- [Customize the period labels](#)
- [Reset the fiscal year to a template](#)
- [Add or remove fiscal periods](#)
- [Change the length of a fiscal week](#)

Warning

Changing the length of a fiscal year has an impact on forecasting and reporting. See [About Fiscal Years on page 51](#) for detailed information on the impact.

Customizing the Period Labels

The fiscal year period labels for forecasting and reporting are set by the default label values for the fiscal year periods. To change them, see [Customizing the Fiscal Year Labels on page 56](#).

Resetting the Fiscal Year to a Template

During customization, if you want to return to a fiscal year template, select a template from the `Reset Fiscal Year Structure` drop-down list.

Note

Resetting the fiscal year structure to a template removes all the customizations you made to the fiscal year.

Adding or Removing Fiscal Periods

You can easily add or remove fiscal periods (such as quarters, periods, or weeks) from the fiscal year structure.

To add fiscal periods:

1. Click **Setup | Company Profile | Fiscal Year**.
2. Click **Edit** for the fiscal year you want to edit.
3. If it is not already expanded, expand the **Advanced Customization** section.
4. Select the checkbox for the period before the new period. For example, if you want to add a new quarter, and you want it to be the second quarter, select the checkbox for the first quarter.
5. Click **Insert**.

Note

The maximum number of fiscal periods is 250.

To remove a fiscal period:

1. Click **Setup | Company Profile | Fiscal Year**.
2. Click **Edit** for the fiscal year you want to edit.
3. If it is not already expanded, expand the **Advanced Customization** section.

4. Select the checkbox for the period you want to delete.
5. Click **Delete**.

Note

You must have at least one quarter, one period, and one week.

Changing the Length of a Fiscal Week

To change the length of fiscal periods:

1. Click **Setup | Company Profile | Fiscal Year**.
2. Click **Edit** for the fiscal year you want to edit.
3. If it is not already expanded, expand the **Advanced Customization** section.
4. Choose the length from the **Duration** drop-down list for the fiscal week.

Note

To change the duration of a fiscal period or quarter, insert or delete weeks, or change the length of weeks that compose the period or quarter.

Once you have customized your fiscal year, preview the fiscal year definition. If it is correct, close the preview and click **Save** to save your fiscal year.

Customizing the Fiscal Year Labels

User Permissions Needed	
To define or edit fiscal years:	"Customize Application"
To view fiscal years:	"View Setup and Configuration"

There are two ways to customize the labeling of your fiscal year:

1. Naming schemes and prefix choices
2. Fiscal year picklist customization

Fiscal Year Naming Schemes and Prefix Choices

When defining a custom fiscal year, you can choose the labeling scheme to use for your custom fiscal year. Each fiscal period type (quarter, period, and week) has a list of labeling schemes that you can select.

Quarter Name Scheme

Numbered by Year

This option allows you to add the quarter number to the quarter label. The quarter label is a combination of the label for the quarter prefix and the quarter number. For example, if the quarter prefix is "Q", the label for the third quarter Q3. To customize the quarter prefix, see [Quarter Prefix on page 57](#). By default the number for each quarter is set by their order (the first quarter is labeled "1"), but you can customize it by selecting a different value from the quarter detail drop-down list.

Custom Quarter Names

This option allows you to set the quarter label to any name. The quarter label is set to the name you select from [Quarter Name on page 57](#). By default the order of the quarter names is the same as the picklist order, but you can customize it by selecting a different value from the quarter detail drop-down list.

Period Name Scheme

Numbered By Year

This option allows you to set the period label based on its position in the year. The period label is a combination of the period prefix and the period number. Period numbers do not reset in each quarter. For example, if the period prefix is "P," the label for the sixth period is P6. To customize the `Period Prefix`, see [Period Prefix on page 57](#). By default the number for each period is set by their order (the first period is labeled "1"), but you can customize it by selecting a different value from the period detail drop-down list.

Numbered By Quarter

This option allows you to set the period label based on its position in the quarter. The period label is a combination of the period prefix and the period number. Period numbers reset in each quarter. For example, if the period prefix is "P," and the sixth period is the second period in the second quarter, its label is P2. To customize the period prefix, see [Period Prefix on page 57](#). By default the number for each period is set by their order within the quarter (the first period in a quarter is labeled "1"), but you can customize it by selecting a different value from the period detail drop-down list.

Standard Month Names

This option allows you to set the period label to the month name of the start of the period. For example, if a period started on October 12 and ends on November 10, the period label would be October.

Custom Period Names

This option allows you to set the period label to any string. The period label is set to the string you select from [Period Name on page 58](#). By default the order of the period names is the same as the picklist order, which you can customize by selecting a different value from the period detail drop-down list.

Fiscal Year Picklists

Review these custom picklists to customize the labels for your custom fiscal year.

Quarter Prefix

The quarter prefix picklist is a list of options for the text that prefixes the quarter number or name if your fiscal year uses the **Numbered By Year** quarter naming scheme. For example, if the fiscal quarter is called "Q4," the "Q" is the quarter prefix.

Period Prefix

The period prefix picklist is a list of options for the text that prefixes the period number or name if your fiscal year uses the **Numbered By Year** period naming scheme. For example, if the fiscal quarter is called "P4," the "P" is the period prefix.

Quarter Name

The quarter name picklist is a list of options for the quarter name if your fiscal year uses the **Custom Quarter Names** quarter naming scheme. For example, if you want to name your quarters for the seasons (Spring, Summer, Fall, and Winter), you could set the quarter name list to those values.

Period Name

The period name picklist is a list of options for the quarter name if your fiscal year uses the **Custom Period Names** quarter naming scheme. Similar to the quarter name picklist, you can choose meaningful names for the period name picklist.

Customizing Fiscal Year Names

To customize one of these picklists:

1. Click **Setup | Company Profile | Fiscal Year**.
2. Click **Edit** next to the appropriate picklist.

For details on customizing the values of these picklists, see "Additional Options for Updating Picklists" in the online help.

Territory Management (Limited Release)

Available in: Enterprise, Unlimited, and Developer Editions

With Winter '06, managing your territories has never been easier. Now, customers can create, manage, and report on complex sales organizations and territory structures. Using this new capability, executives can manage matrixed organizational structures that are typically used for regional, industry, channel, or product overlay groups. Accounts can be assigned to territories either manually or by account assignment rules. Users can be assigned to territories by selecting them from customizable list views. All users in a territory have access to the accounts in that territory, regardless of account ownership.

Implementation Tips

- Territory management is available as a limited release. Contact salesforce.com to learn how your organization can begin using territory management.
- Make sure your organization is using customizable forecasting. Territory management is not available unless you have customizable forecasting enabled and turned on. See the online help for information on customizable forecasting.
- Review your organization's role hierarchy. Your initial territory hierarchy may be based on a copy of your role hierarchy. You can build a territory hierarchy from scratch; however, it may be easier to start with a copy of the role hierarchy.
- Define account assignment rules with specific criteria at the lowest territory level possible. For better performance, we recommend you create very specific rules rather than defining generic rules at higher-level territories.
- Territory management is designed for integration. You can use the AppExchange API to define territories, create account assignment rules, manually assign accounts and users to territories, and query territory assignments.

Best Practices

- If you plan to create accounts via import or the API, define your account assignment rules first to have them run on import rather than evaluating the rules retroactively (via the **Save and Run Rules** button) after the accounts have been created.
- When you modify account assignment rules defined in a territory, click **Save and Run Rules** on that territory to evaluate the assignment rules for that territory and its children territories. There is no need to reevaluate assignment rules for all territories, only the ones that are modified.
- Run territory reports to view which users, accounts, or opportunities have been assigned to any territories, multiple territories, or no territories. For example, run the User Missing Territory Report to see which users have not been assigned to any territories.

About Territory Management

What is Territory Management?

Territory management enables your company to structure your Salesforce data and users the same way you structure your sales territories. Particularly if your organization has a private sharing model, you may need to grant users access to accounts based on criteria such as zip code, industry, revenue, or a custom field that is important to your business. You may also need to generate forecasts for these diverse categories of accounts. Territory management solves these business needs and provides a powerful solution for structuring your users, accounts, and their associated opportunities and cases.

What is a Territory?

A territory is a flexible collection of accounts and users where the users have at least read access to the accounts, regardless of who owns the account. By configuring territory settings, users in a territory can be granted read, read/write, or owner-like access (that is, the ability to view, edit, transfer, and delete records) to the accounts in that territory. Both accounts and users can exist in multiple territories. You can manually add accounts to territories, or you can define account assignment rules that assign accounts to territories for you.

Not only can you control access to accounts for users in each territory, you can also control users' access to the opportunities and cases associated with the accounts in the territory, regardless of who owns the records. For more information, see [Standard Territory Fields on page 65](#).

What is a Territory Hierarchy?

Territories exist in a hierarchy which you can set up with as many nested levels as you wish. For example, you could create a top-level territory named "Worldwide Sales" that has the child territories "North America," "Europe/Middle East," "Latin America," "Africa," and "Asia/Australia." "North America" might have the child territories "Canada" and "United States." "United States" might have the child territories "Western," "Central," "Southern," and "Eastern." Finally, "Western" might have the child territories "California," "Oregon," "Washington," "Nevada," "Arizona," and "Utah." Note that territory hierarchies do not have to be focused on geography; they can be defined however you like. For more information, see [Building Your Territory Hierarchy on page 62](#).

How Do Territories Affect Forecasting?

When you enable territory management for your organization, your forecast data is derived from the opportunities that are associated with the accounts in your territories. You will have a different forecast for each territory to which you are assigned. For example, if you are assigned to both "California" and "Arizona," you will have one forecast for the opportunities you have in "California," and another forecast for the opportunities you have in "Arizona." See "Viewing Customizable Forecasts" in the online help.

Enabling Territory Management

User Permissions Needed	
To enable territory management:	"Manage Territories"

Territory management is not enabled by default in Salesforce. To request territory management for your organization, contact salesforce.com.

You must meet the following prerequisites before enabling territory management:

- Your organization must be using customizable forecasting in order to enable territory management. If you do not know whether you have customizable forecasting, see "Do I Have Customizable Forecasting?" in the online help.

After you have completed the prerequisites, you will be ready to turn on territory management for your organization:

1. In Salesforce, go to **Setup | Manage Territories | Settings**.
2. Optionally, change the organization-wide territory management settings that are configurable from the Territory Settings page. See. [Configuring Territory Management Settings on page 61](#).
3. Click either **Enable Territory Management** or **Enable Territory Management from Scratch**.
 - When you click **Enable Territory Management**, your organization's current forecast hierarchy and forecast data will be copied to the territory hierarchy:
 - For each role in the forecast hierarchy, a respective territory will automatically be created in the new territory hierarchy.
 - The name of your organization will automatically be set as the top of the territory hierarchy.
 - Opportunities will be assigned to the opportunity owner's territory.
 - Accounts will not be assigned anywhere in the territory hierarchy.
 - Until you add or edit territories, your forecasts will work the same as they did before you enabled territory management.
 - Clicking **Enable Territory Management from Scratch** is recommended only when you are setting up a brand new organization in Salesforce that does not have an existing

forecast hierarchy. Clicking this button results in an empty territory hierarchy and no initial forecasting data.

Warning

Irreversible data loss can result from clicking **Enable Territory Management from Scratch**.

4. To begin working with your new territory hierarchy, click **Setup | Manage Territories | Hierarchy**. See [Building Your Territory Hierarchy on page 62](#).

Managing Territories

User Permissions Needed	
To manage territories:	"Manage Territories" OR You are a forecast user, Forecast users can manage territories is selected, and you are working below your position in the territory hierarchy.

Managing your organization's territories involves the following tasks:

- Organize territories into hierarchies that represent your organization's forecasting requirements and how users work in your organization. See [Building Your Territory Hierarchy on page 62](#).
- Configure organization-wide settings for territory management. See [Configuring Territory Management Settings on page 61](#).
- Create new territories and edit existing territories. See [Creating Territories on page 64](#) and [Displaying and Editing Territories on page 63](#).
- Assign users to territories. See [Managing Users in Territories on page 67](#).
- Define account assignment rules that evaluate accounts and assign them to territories. See [Managing Account Assignment Rules on page 70](#).
- Select accounts from lists and manually assign them to territories. See [Manually Assigning Accounts to Territories on page 72](#).

Configuring Territory Management Settings

User Permissions Needed	
To configure territory settings:	"Manage Territories"

You can set default account, opportunity, and case access levels for new territories, as well as whether forecast users can administer the territories located below them in the territory hierarchy.

1. Go to **Setup | Manage Territories | Settings**.

- Choose default access levels for accounts, opportunities, and cases. These are the access levels that will be selected by default when a new territory is created. See [Standard Territory Fields on page 65](#) for descriptions of these fields.

Note

When creating or editing an individual territory, you can override these default access levels. See [Creating Territories on page 64](#).

- Check the `Forecast users can manage territories` box to extend the ability to create and edit territories to forecast users. When checked, forecast users can administer territories located below them in the territory hierarchy. To learn more about forecast users, see "Assigning Users in Your Forecast Hierarchy" in the online help.

Building Your Territory Hierarchy

User Permissions Needed	
To view territories:	"View Setup and Configuration"
To edit territories:	"Manage Territories" OR You are a forecast user, <code>Forecast users can manage territories</code> is selected, and you are working below your position in the territory hierarchy.

To work with your organization's territory hierarchy, click **Setup | Manage Territories | Hierarchy**. The following terms are used when referring to territories in the hierarchy:

Parent Territory

A territory that is located immediately above another territory in the hierarchy. A territory has exactly one parent territory in the hierarchy, except for the top-level territory which does not have a parent.

Child Territory

A territory that is immediately below another territory in the hierarchy. A parent territory can have an unlimited number of child territories.

Sibling Territory

Child territories that share the same parent territory.

Choose an option from the drop-down list to change how the territory hierarchy is displayed:

- Show in tree view - See a visual representation of the parent-child relationships between your territories. Click **Expand All** to see all territories, or click **Collapse All** to see only top-level territories. To expand an individual node, click the plus (+) icon. To collapse an individual node, click the minus (-) icon.
- Show in sorted list view - See a territory list that you can sort alphabetically by territory name, parent territory (**Reports to**), or description.
- Show in list view - See a list of territories and their children, grouped alphabetically by the name of the top-level territory. The columns are not sortable.

Each view provides links so you can create, edit, or delete territories. For more information, see:

- [Creating Territories on page 64](#)
- [Displaying and Editing Territories on page 63](#)
- [Deleting Territories on page 66](#)

Displaying and Editing Territories

User Permissions Needed	
To view territories:	"View Setup and Configuration"
To edit territories:	"Manage Territories" OR You are a forecast user, Forecast users can manage territories is selected, and you are working below your position in the territory hierarchy.

From the territory detail page, you can view and modify different aspects of the territory, including related territories, assigned users, and included accounts.

Displaying Territories

1. Click **Setup | Manage Territories | Hierarchy**.
2. Select the name of the territory you want to view.

Viewing Related Territories

The **Hierarchy** list at the top of the territory detail page shows how this territory is related to the top-level territory in the territory hierarchy. To see the names of other territories who share the same parent territory as this one, refer to the **Siblings** list immediately below. In either list, you can click a territory name to view that territory. The territory detail page also includes a **Child Territories** related list; see [Working with Territory Related Lists on page 64](#).

Editing Territories

To update an existing territory, click **Edit**, and then change the fields you want to modify. For more information, see [Standard Territory Fields on page 65](#) and [Creating Custom Territory Fields on page 66](#).

Cloning Territories

Click **Clone** to create a new territory with the same standard and custom field values as the current territory. The cloned territory will have the same parent territory as the original territory. However, assigned users, account assignment rules, and manually assigned accounts are not cloned.

Viewing Accounts Assigned to a Territory

Click **View Accounts** to see a list of the accounts that have been assigned to this territory and territories below it in the territory hierarchy. The list includes both manually assigned accounts and accounts that were assigned via rules.

Working with Territory Related Lists

Each territory detail page has the following related lists:

- Assigned Users - Lists the users in the territory. See [Managing Users in Territories on page 67](#).
- Inherited Account Assignment Rules - Lists the account assignment rules for this territory that are defined in a parent territory. See [Managing Account Assignment Rules on page 70](#).
- Account Assignment Rules Defined in This Territory - Lists the account assignment rules for this territory. See [Managing Account Assignment Rules on page 70](#).
- Manually Assigned Accounts - Lists the accounts that have been manually added to this territory. See [Manually Assigning Accounts to Territories on page 72](#).
- Child Territories - Lists the territories located immediately below this territory in the territory hierarchy. Click **Add Territory** to create a new child territory for this territory. Click a child territory name to view that territory's detail page.

Creating Territories

User Permissions Needed	
To create territories:	"Manage Territories" OR You are a forecast user, Forecast users can manage territories is selected, and you are working below your position in the territory hierarchy.

You can create up to 500 territories for your organization. To create a new territory:

1. Click **Setup | Manage Territories | Hierarchy | Add Territory**. You can also click **Add Territory** from the Child Territories related list of a territory detail page.
2. Define the new territory by entering or changing fields. See [Standard Territory Fields on page 65](#) for a description of each field.

There are two required standard fields for territories: `Territory Name` and `Parent Territory`. Territories can also have custom fields. For more information, see [Creating Custom Territory Fields on page 66](#).

3. Click **Save** to finish or **Save & New** to create more territories.

Standard Territory Fields

User Permissions Needed	
To edit territories:	"Manage Territories" OR You are a forecast user, Forecast users can manage territories is selected, and you are working below your position in the territory hierarchy.

Here is a description of the standard fields (in alphabetical order) that make up a territory.

Field Name	Description
Account Access	Choose how much access users assigned to this territory have to accounts assigned to this territory: view only, view and edit, or view, edit, transfer and delete.
Case Access	Choose how much access users assigned to this territory have to cases that are associated with accounts in this territory, regardless of who owns the cases: no access, view only, or view and edit.
Confine Opportunity Assignment	Select this checkbox to prevent the opportunities in this territory from being moved out of this territory and this territory's children when territories are reorganized.
Forecast User	The user to whom forecasts from child and lower-level territories roll up. Only modifiable by clicking Change on the territory detail page. Not available for territories that do not have child territories. If enabled via the Territory Settings page, a forecast user can administer lower territories in the hierarchy.
Opportunity Access	Choose how much access users assigned to this territory have on opportunities that are associated with accounts in this territory, regardless of who owns the opportunities: no access, view only, or view and edit.
Parent Territory	Territory immediately above this territory in the territory hierarchy. The parent territory must be an existing territory. Use the lookup icon to select the parent territory.
Territory Description	Description of territory. Name of territory. Up to 1,000 characters are allowed in this field.

Field Name	Description
Territory Name	Name of territory. Up to 40 characters are allowed in this field.
Sharing Groups	Read-only and only displays on the territory detail page. For every territory, two sharing groups are created; one for the territory, and another for the territory and its children. Click Territory to see the users who are in the sharing group for a territory. Click Territory and Subordinates to see the users who are in the sharing group for a territory and its children. For more information, see Managing Users in Territories on page 67 and "Viewing Group Membership" in the online help.

Creating Custom Territory Fields

User Permissions Needed	
To create or edit custom territory fields:	"Manage Territories" OR You are a forecast user, Forecast users can manage territories is selected, and you are working below your position in the territory hierarchy.

You can add up to 500 custom territory fields to tailor territories for your company's unique requirements. To create or edit custom fields on territories:

1. Click **Setup | Customize | Territories | Fields**.

From this page, you can view details of standard fields, create or edit custom fields, or define field dependencies.

2. See "Adding Fields" in the online help for instructions on creating custom fields.

Note

Territories do not have customizable page layouts. New custom fields are added in alphabetical order at the bottom of the territory detail page.

Deleting Territories

User Permissions Needed	
To delete territories:	Manage Territories" OR You are a forecast user, Forecast users can manage territories is selected, and

User Permissions Needed	
	you are working below your position in the territory hierarchy.

To delete a territory:

1. Click **Setup | Manage Territories | Hierarchy**.
2. Click **Del** next to a territory in the hierarchy. Alternatively, select the name of a territory and click **Delete**.

Note

When a territory that has no users is deleted, its account assignments are also deleted.

If a territory has users where `Active in Territory` is selected, you cannot delete the territory.

Managing Users in Territories

User Permissions Needed	
To assign users to territories:	"Manage Territories" AND "Manage Users"

A territory can have an unlimited number of users, and a user can be assigned to an unlimited number of territories.

In the context of a specific territory, users have both an `Active` status and an `Active in Territory` status:

Active

An active user is able to log in to Salesforce.

Deactivated users, such as employees who are no longer with your company, are disabled from logging in to Salesforce. Deactivated users do not appear in forecasts or territories but continue to own opportunities. Opportunities owned by deactivated users remain in the territories to which they were assigned, but do not appear in forecasts.

A user's active status is set on their personal information accessible via **Setup | Manage User | Users**.

Active in Territory

Users with `Active in Territory` checked on the territory detail page have open opportunities, closed opportunities, or no opportunities at all in that territory. Users with `Active in Territory` deselected have been transferred out of or removed from the territory, but retain ownership of opportunities in the old territory.

To view the territories to which you belong, view the Territories related list on your personal information page accessible via **Setup | My Personal Information | Personal Information**. Administrators can view this related list for any user via **Setup | Manage Users | Users**.

Adding Users to Territories

To add users to a territory:

1. From a territory detail page, click **Add Users**.
2. Choose a view from the drop-down list, or click **Create New View** to build a new custom view. See "Creating Custom List Views" in the online help.
3. Click **Select** and **Deselect** to move users between the Available and Selected areas. Also, you can:
 - Click a letter to view users who correspond to that letter.
 - Click **All** to display all users who match the criteria of the current view.
 - Click **select shown** to move all users that are shown on the current list page to the Selected area below.
 - Click **deselect shown** or **deselect all** to move users from the Selected area to the Available area.
4. When the users in the Selected area includes all users that you want to assign to the territory, click **Assign**.

Removing Users from Territories

From the Assigned Users related list on a territory detail page, click **Remove** to remove a user from the territory. One of the following results will occur:

- If the user has either no opportunities or only closed opportunities, then he or she is removed from the territory.
- If the user has open opportunities and the parent territory has a forecast user, then the forecast user of the parent territory is assigned the user's open opportunities. Also, the forecast user is assigned to the territory with `Active in Territory` unchecked. The user is removed from the territory.
- If the user has open opportunities and the parent territory does not have a forecast user, then the user remains in the territory with `Active in Territory` unchecked.

Transferring Users Between Territories

The user transfer wizard allows you to move a user from one territory to another, and choose which open opportunities the user will continue to own.

To transfer a user to another territory:

1. Click **Transfer** next to the desired user in the Assigned Users related list on the territory detail page.
2. Click **Select** next to the territory to which you are transferring the user. If necessary, expand or collapse nodes in the territory hierarchy to display the desired destination territory.

3. Choose a list view of the user's open opportunities and click the links provided to move opportunities to the Selected area. When the Selected area shows the opportunities that you want the user to retain after the transfer, click **Transfer**.

Note

The forecast user of the parent territory of the user's former territory takes ownership of any open opportunities that the user does not keep. If there is no forecast user in the parent territory of the user's former territory, then the user retains ownership of those opportunities.

If you transfer the forecast user out of a territory, that territory will no longer have a forecast and any opportunity overrides for that territory that were created by forecast users above it in the territory hierarchy will be deleted. See "Overriding Customizable Forecasts" in the online help.

Adding Forecast Users to Territories

User Permissions Needed	
To assign forecast users to territories:	"Manage Users" AND "Manage Territories"

Consider the following before assigning the forecast user for a territory:

- A territory can have only one forecast user. See "Assigning Users in Your Forecast Hierarchy" in the online help.
- Forecasts from child and lower-level territories roll up to forecast users.
- If a territory has no forecast user, there is no forecast for that territory.
- Territories that have no child or lower-level territories do not have forecast users.
- Forecast users can receive opportunities when users are transferred out of or removed from a territory.
- Forecast users can receive opportunities when account assignment rules are run.
- On the territory settings page, you can enable forecast users to act as delegated administrators for territories below them in the hierarchy.

To assign or change the forecast user for a territory:

1. On the territory detail page, click **Change** next to the Forecast User field.
2. Select a name from the drop-down list to specify the territory's forecast user.

On the right, a tree view of the territory hierarchy allows you to see the child and lower-level territories whose forecasts will roll up to the forecast user.

3. Click **Save** to finish.

Managing Account Assignment Rules

User Permissions Needed	
To manage account assignment rules:	"Manage Territories" OR You are a forecast user, Forecast users can manage territories is selected, and you are working below your position in the territory hierarchy.

About Account Assignment Rules

You can create account assignment rules that automatically move accounts into territories based on any standard or custom account field, such as zip code, state, industry, revenue, or number of employees. Each rule consists of multiple rows of criteria that specify exactly how the accounts are assigned.

Account assignment rules are governed by the following:

- A territory can have inherited account assignment rules, meaning that the rules were created somewhere higher in the territory hierarchy and consequently also impact the given territory.
- A territory can have locally defined account assignment rules, meaning that the rule was created at the given territory.
- If a territory does not have any inherited or locally-defined account assignment rules, then it will only contain accounts that were manually added. See [Manually Assigning Accounts to Territories on page 72](#).
- If an account matches both inherited and locally-defined account assignment rules for a territory, then the account will be assigned to the territory and also evaluated for its child territories.
- If an account matches a territory's inherited account assignment rules but not the territory's locally-defined rules, then the account will not be assigned to the territory, but will be evaluated for its child territories.

Working with Account Assignment Rules

Click **Run Rules** on the territory detail page to evaluate the active inherited and locally-defined rules shown on the page against all existing accounts in your organization. When you click **Run Rules**, an icon displays next to the button to indicate that rules are being processed. The icon also displays for all subordinate territories. An email confirmation is sent when processing is complete.

Warning

For data quality reasons, do not modify or create any territories while the processing icon displays.

Click **Manage Rules** on the territory detail page to access the Manage Account Assignment Rules page, where you can create, edit, preview, and run account assignment rules:

- Click **New** to create a new rule, or **Edit** to edit an existing rule. See [Creating and Editing Account Assignment Rules on page 71](#).
- Use the **Active** checkbox to set a locally-defined rule as active or inactive.

Active rules run automatically when new accounts are created and existing accounts are edited. They run whether you are using the online application, the import wizards, the AppExchange API, or any Salesforce client such as Offline Edition. Active rules also run when you click **Save & Run Rules** on either the Preview Account Assignment Rules page or the Manage Account Assignment Rules page. Inactive rules never run.

- Click a rule name to see the details of that rule, including its active status and criteria. From a rule detail page you can edit, delete, or clone a rule.
- Click **Preview** to see the accounts that would be assigned to this territory and its child territories if the rules currently marked active were run. See [Previewing Account Assignments on page 72](#).
- Click **Save** to save the current active status of locally-defined rules.
- Click **Save & Run Rules** to save the current active status of locally-defined rules and evaluate the inherited and locally-defined rules shown on the page against all existing accounts in your organization.

Note

Running account assignment rules affects accounts in the Recycle Bin.

Creating and Editing Account Assignment Rules

User Permissions Needed	
To create or edit account assignment rules:	"Manage Territories" OR You are a forecast user, Forecast users can manage territories is selected, and you are working below your position in the territory hierarchy.

A territory can have a maximum of 15 account assignment rules, including both active and inactive rules. To create or edit an account assignment rule:

1. Click **Setup | Manage Territories | Hierarchy**.
2. Select the territory you want to modify.
3. Click **Manage Rules** in the Account Assignment Rules related list.
4. Click **New** to create a new account assignment rule. To edit an existing account assignment rule, click **Edit**.
5. Enter a name for the rule. Rule names must be unique and can have a maximum of 80 characters.
6. Define criteria that accounts must match to be included in the territory. See "Entering Filter Criteria" in the online help for more information on using filter criteria.

7. Optionally, check the `Apply to child territories` box that makes the rule applicable to child territories
8. Optionally, check the `Active` box to activate the rule.

Active rules run automatically when new accounts are created and existing accounts are edited. They run whether you are using the online application, the import wizards, the AppExchange API, or any Salesforce client such as Offline Edition. Active rules also run when you click **Save & Run Rules** on either the Preview Account Assignment Rules page or the Manage Account Assignment Rules page. Inactive rules never run.

9. Click **Save** to finish, or **Save & New** to save the rule and begin defining another rule.

Previewing Account Assignments

User Permissions Needed	
To preview account assignments in territories:	"Manage Territories" OR You are a forecast user, <code>Forecast users can manage territories</code> is selected, and you are working below your position in the territory hierarchy.

Before running account assignment rules, preview a list of the accounts that would be assigned to the territory and territories below it in the territory hierarchy if the rules currently marked active were run:

1. From the territory detail page, click **Manage Rules | Preview**.
2. Click **Save** to save the active status of the rules. Click **Save & Run Rules** to save the active status of the rules and evaluate the rules against all existing accounts in your organization.

Note

Running account assignment rules affects accounts in the Recycle Bin.

Manually Assigning Accounts to Territories

User Permissions Needed	
To manually add accounts to territories:	"Manage Territories" and "Edit" on accounts OR You are a forecast user, <code>Forecast users can manage territories</code> is selected, you are working below your position in the territory hierarchy, and you have "Edit" on accounts.

As an alternative to creating and running account assignment rules, you can add accounts to territories manually:

1. On the territory detail page, click **Add Accounts** on the Manually Assigned Accounts related list.
2. Choose a view from the drop-down list, or click **Create New View** to build a new custom view. See "Creating Custom List Views" in the online help.
3. Click **Select** and **Deselect** to move accounts between the Available and Selected areas. Also, you can:
 - Click a letter to view accounts that correspond to that letter.
 - Click **All** to display all accounts that match the criteria of the current view.
 - Click **select shown** to move all accounts that are shown on the current list page to the Selected area below.
 - Click **deselect shown** or **deselect all** to move accounts from the Selected area to the Available area.
4. When the accounts in the Selected area includes all accounts that you want to manually add to the territory, click **Assign**.

Note

Manually added accounts are not affected by account assignment rules.

Changing the Territories of an Account

User Permissions Needed	
To change the territories of an account:	"Manage Territories" OR You are a forecast user, Forecast users can manage territories is selected, and you are working below your position in the territory hierarchy.

To modify an account's manually assigned territories:

1. From the account detail page, click **Change** next to the Territories field.
2. At the Rule-based territory assignments list, view the territories that contain the account due to active account assignment rules. You cannot use this page to remove the account from these territories; to do so you must modify the account assignment rules that evaluated the account. For more information, see [Managing Account Assignment Rules on page 70](#).
3. If the account has existing manual assignments to one or more territories, the names of those territories will appear in the Selected territories list.
4. Click **Select** and **Deselect** to move territories between the Available territories list and the Selected territories list.
5. Optionally, click **Horizontal View** or **Vertical View** in the drop-down list to place the Selected territories list either alongside or below the Available territories list.

- When the Selected territories list contains the territories to which the account should be manually assigned, click **Save** to finish and return to the account detail page.

Changing the Territory of an Opportunity

User Permissions Needed	
To change an opportunity's territory:	"Edit" on opportunities

If you have edit access to an opportunity, you can change the territory that is associated with the opportunity:

- On the opportunity detail page, click **Change** next to the Territory field.
- Choose a territory from the Opportunity Territory drop-down list.

The drop-down list shows:

- Territories where both the opportunity owner and the account on the opportunity are assigned to the territory.
- Territories to which you have administrative access that are also associated with the account on the opportunity.
- Territories to which you have administrative access that are above the account on the opportunity in the territory hierarchy.

- Click **Save** to finish and return to the opportunity detail page.

Territory Reports

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

Use the reports in the **Territory Reports** folder to analyze your Salesforce territories. For more information, see [Managing Territories on page 61](#).

Special Features of Territory Reports

- The Territory report lists all territories in your organization. Optionally, select **No Users** in the Users drop-down list to see the territories in your organization that do not have any assigned users.
- The User Territory report, User Multiple Territory report, and User Missing Territory report summarize the users who have been assigned to any territories, more than one territory, or no territories, respectively.

- The Account Territory report, Account Multiple Territory report, and Account Missing Territory report summarize the accounts that have been assigned to any territories, more than one territory, or no territories, respectively.
- The Opportunity Territory report summarizes the opportunities that are in territories. To see opportunities owned by users who are not currently active in the opportunity's territory, customize the Opportunity Territory report with the following advanced filter: `Active in Territory equals "False."` The Opportunity Missing Territory report summarizes the opportunities that are associated with accounts that do not have a territory.

Integrated Campaign Builder

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

The integrated campaign builder is a powerful new set of marketing features designed to help companies better create and manage campaigns, as well as understand campaign results for campaign list members. Marketers will easily be able to identify and manage campaign members, quickly adding, modifying, and analyzing members from reports, list views, contacts, leads, or from within campaigns. Creating highly targeted campaign segments has never been easier - all without the use of Microsoft Excel!

The integrated campaign builder includes the following new functionality:

- Add or update up to 50,000 campaign members directly from a campaign, contact, or lead report
- Add or update campaign members directly from a contact or lead list view
- Filter contact and lead list views by a campaign and optionally also by a campaign member status
- Mass email contacts or leads associated with a campaign by filtering your mass email list views by a campaign and optionally also by a campaign member status
- Add existing contacts or leads to a campaign using a simple two-step wizard
- Update the status of contacts or leads on a campaign using a simple two-step wizard

The integrated campaign builder also includes these familiar features:

- Import up to 50,000 new leads and associate them with a campaign
- Use the campaign update wizard to update the member status of up to 3,000 existing contacts or leads on a campaign

Implementation Tips

- Make sure your marketing staff has the appropriate user permissions to use the integrated campaign builder.
 - Users will need to have the `Marketing User` checkbox selected on their personal information plus the "Edit" permission for campaigns and the "Read" permission for contacts and leads.
 - The "Import Leads" permission is also required to use the campaign import wizards, and the "Edit" permission for contacts and leads is needed to update an individual's campaign member status from the contact or lead detail page.

Best Practices

- When filtering your contact or lead list views by a campaign, add the campaign name to the name of the list view, such as, "NY City Tour - Responded Leads."
- When adding or updating contacts or leads for a campaign from a report, make sure your report has 50,000 or fewer records. You can easily do this for large campaigns by filtering your report using portions of the alphabet for contact and lead names. For example, first filter the report by contact names that start with A-M and then by N-Z.

About the Integrated Campaign Builder

Managing Campaign Members

Salesforce provides a variety of ways in which you can manage the contacts and leads that you are targeting with your campaigns. You can choose which method to use based on your business needs; for example, you can add and update up to 50,000 campaign members at a time through contact and lead reports, or you can add contacts or leads to a campaign one at a time from their detail pages. Note that campaigns are included with Enterprise, Unlimited, and Developer Editions, and are available for an additional cost with Professional Edition.

Adding New Campaign Members

You can add new members to a campaign:

- From a campaign, contact, or lead report - see [Adding Campaign Members from Reports on page 77](#)
- From a list view of existing contacts or leads - see [Adding Contacts or Leads from a List View to a Campaign on page 78](#)
- From the Manage Members page - see [Mass Adding Contacts or Leads to a Campaign on page 79](#)
- From a CSV import file of new leads - see "Lead Import Wizard" in the online help
- From an individual contact or lead record - see "Updating Campaign History" in the online help

See "How can I add contacts and leads to my campaigns?" in the online help for more information.

Updating the Status of Existing Campaign Members

You can update the status of existing campaign members:

- From a campaign, contact, or lead report - see [Adding Campaign Members from Reports on page 77](#)
- From a list view of existing contacts or leads - see [Adding Contacts or Leads from a List View to a Campaign on page 78](#)
- From the Manage Members page - see [Mass Updating the Status of Campaign Members on page 80](#)

- From a CSV import file of existing members - see "Campaign Update Wizard" in the online help
- From an individual contact or lead record - see "Updating Campaign History" in the online help

Example Uses

- Create follow-up campaigns - Create a custom list view of contacts or leads that is restricted to an earlier campaign and a certain member status, such as "Attended". Then add items from the generated list to a follow-up campaign. See [Adding Contacts or Leads from a List View to a Campaign on page 78](#).
- Leverage reporting functionality - Customize a standard report or build a new custom report that returns a list of contacts or leads that you want to target. With the click of a button, you can add the entire list to a campaign. See [Adding Campaign Members from Reports on page 77](#).

Adding Campaign Members from Reports

User Permissions Needed	
To add campaign members from a contact report:	Marketing User checked in your user information AND "Edit" on campaigns AND "Read" on contacts
To add campaign members from a lead report:	Marketing User checked in your user information AND "Edit" on campaigns AND "Read" on leads

To add up to 50,000 contacts or leads from a report to a campaign:

1. Click **Add to Campaign** from a campaign, contact, or lead report that returns lead or contact records.
If your report returns more than 50,000 records, the button will be disabled. You can modify your report to return fewer records.
2. Use the lookup icon to choose a campaign to which the report results will be added.
3. Choose a member status for the contact or leads you are adding to the campaign.
4. Choose whether or not to override the member status of contacts or leads who already exist in the campaign.

If you choose to override the status of existing campaign members, you will be updating their member statuses to whatever value you selected in the previous step.

5. Click **Add to Campaign**.
6. Review the confirmation screen.
7. Click **Done** to return to the report.

Note

You cannot add converted leads to campaigns. If any converted leads are included in a report, they will be ignored during the add to campaign process.

Campaigns are included with Enterprise, Unlimited, and Developer Editions, and are available for an additional cost with Professional Edition.

Adding Contacts or Leads from a List View to a Campaign

User Permissions Needed	
To add multiple existing contacts to a campaign:	Marketing User checked in your user information AND "Edit" on campaigns AND "Read" on contacts
To add multiple existing leads to a campaign:	Marketing User checked in your user information AND "Edit" on campaigns AND "Read" on leads

To add existing contacts or leads to a campaign from a list view:

1. Navigate to a list view of contacts or leads, such as the "My Contacts" list view. Note that you can create custom list views that restrict results according to campaign name and optionally also by campaign member status. See "Creating Custom List Views" in the online help.
2. Select up to 250 checkboxes currently displayed on the page and click **Add to Campaign**.
3. In the first step of the wizard, enter the name of the campaign you want to update, or click the lookup icon to search for and select an existing campaign.
4. Choose a campaign member status value to assign to the new members.
5. Click **Add to Campaign**.
6. In the second step of the wizard, review confirmation messages about the contacts or leads you selected. If a selected contact or lead already existed in the campaign, then its member status value will have been updated.

- Click **Done** to exit the wizard and return to the list view.

Campaigns are included with Enterprise, Unlimited, and Developer Editions, and are available for an additional cost with Professional Edition.

Mass Adding Contacts or Leads to a Campaign

User Permissions Needed	
To add multiple existing contacts to a campaign:	Marketing User checked in your user information AND "Edit" on campaigns AND "Read" on contacts
To add multiple existing leads to a campaign:	Marketing User checked in your user information AND "Edit" on campaigns AND "Read" on leads

To add existing contacts or leads to a campaign from a campaign detail page:

- View the campaign you want to update.
- Click **Manage Members**.
- Click either **Add Members - Existing Contacts** or **Add Members - Existing Leads**.
- In the first step of the wizard, choose a campaign member status value to assign to the new members.

Note that the name of the campaign from which you navigated is automatically populated.

- Click **Next**.
- In the second step of the wizard, you see a list of the existing contacts or leads who are not associated with your campaign:
 - Select up to 250 checkboxes currently displayed on the page and click **Add to Campaign**. This immediately saves those contacts or leads as campaign members with the chosen status.
 - Click the letter links or the **Next Page** and **Previous Page** links to view other list pages, and continue adding contacts or leads in the same manner.

Note

A confirmation message keeps a running tally of the total number of contacts or leads added during this session of the wizard. Any members already added during this wizard session are shown with a read-only check mark next to them.

- c. Optionally, modify the display by choosing a different list view or creating a new list view. Note that you can define custom list views that restrict results according to campaign name and optionally also by member status. See "Creating Custom List Views" in the online help.

- 7. When you have added all desired contacts or leads to your campaign, click **Done** to exit the wizard.

Campaigns are included with Enterprise, Unlimited, and Developer Editions, and are available for an additional cost with Professional Edition.

Mass Updating the Status of Campaign Members

User Permissions Needed	
To update the member status of multiple existing contacts:	Marketing User checked in your user information AND "Edit" on campaigns AND "Read" on contacts
To update the member status of multiple existing leads:	Marketing User checked in your user information AND "Edit" on campaigns AND "Read" on leads

To update the campaign member status of existing contacts or leads from a campaign detail page:

1. View the campaign you want to update.
2. Click **Manage Members**.
3. Click either **Update Status - Existing Contacts** or **Update Status - Existing Leads**.
4. In the first step of the wizard, choose a campaign member status value to assign.
Note that the name of the campaign from which you navigated is automatically populated.
5. Click **Next**.
6. In the second step of the wizard, you see a list of the contacts or leads who already exist in your campaign:
 - a. Select up to 250 checkboxes currently displayed on the page and click **Update Status**. This immediately saves those contacts or leads with the chosen status.

- b. Click the letter links or the **Next Page** and **Previous Page** links to view other list pages, and continue updating contacts or leads in the same manner.

Note

A confirmation message keeps a running tally of the total number of contacts or leads added during this session of the wizard. Any members already added during this wizard session are shown with a read-only check mark next to them.

- c. Optionally, modify the display by choosing a different list view or creating a new list view. Note that you can define custom list views that restrict results according to campaign name and optionally also by member status. See "Creating Custom List Views" in the online help.
7. When you have updated all desired contacts or leads in your campaign, click **Done** to exit the wizard.

Campaigns are included with Enterprise, Unlimited, and Developer Editions, and are available for an additional cost with Professional Edition.

Recurring Events

Available in: All Editions

Winter '06 delivers full functionality for managing recurring events in Salesforce. With this new capability, you can schedule recurring events such as standing meetings to ensure consistent communications with customers, prospects, or colleagues. Recurring events can be synchronized with Microsoft® Outlook® to ensure that all events in Salesforce and Outlook are exactly the same.

Implementation Tips

- If you do not want to use recurring events in your organization, click **Setup | Customize | Activities | Recurring Event Settings** and deselect **Enable creation of recurring events**. All recurring events created before disabling recurring events will still exist, but users will not be able to create new recurring events.

Best Practices

- You can edit or view an event and an event series by clicking one of the events in the series. Be sure to click the View Series subtab to view or edit the series information. When you want to view or edit an individual event, click the View Event subtab.
- When you edit the details for an event that is part of a recurring event series in Offline Edition or in Outlook, you will be editing the individual event occurrence, not the event series. Make all changes to the series within Salesforce.
- When you add a resource to a recurring event, the resource must be available for all events or you cannot save the series. If you run into resource conflicts, add the resource to individual events rather than the series.

- If you change the time or recurrence of a series of group events, the response status of all invitees to the series will be set to **Not Responded**. All responses for future event occurrences in the series will also be set to **Not Responded**. Send updates to all your invitees so they know the details of the events have changed and to remind them to accept or decline the series.
- Editing a recurring event series does not affect events that have already occurred. To change those events, edit the individual events rather than the series.
- While creating an event series, you can check the availability of invitees for the next occurrence of the event series. To see whether invitees are available for other occurrences, check their calendars before creating the series.

About Recurring Events

Enabling Recurring Events

User Permissions Needed	
To enable or disable creation of recurring events:	"Customize Application"

Enabling recurring events allows users to create events that repeat at specified intervals. You can choose to enable or disable this feature for all of your users.

1. Select **Setup | Activities | Recurring Events Settings**.
2. Select `Enable creation of recurring events`.

Creating Recurring Events

User Permissions Needed	
To create recurring events:	"Edit Events"

To create recurring group events, see [Creating Recurring Group Events on page 83](#).

To create a recurring event:

1. From the Calendar section of the home page, click **New Event**. Alternatively, from the Open Activities related list of an associated record, click **New Event**.
2. Enter the details of your event.
3. Select the `Create recurring series of events` checkbox.
4. Select the frequency of recurrence.

Note

Depending on the type of event series you are creating, the maximum number of occurrences is as follows:

- Daily: 100

- Weekly: 53
- Monthly: 60
- Yearly: 10

-
5. Set the start date and end date.
 6. Click **Save**. Alternatively, click **Save & New Task** to save the event and create a new task or **Save & New Event** to save and create an additional event.

Creating Recurring Group Events

User Permissions Needed	
To create recurring events:	"Edit Events"

1. From the Calendar section of the home page, click **New Event**. Alternatively, from the Open Activities related list of an associated record, click **New Event**.
2. Enter the details of your event.
3. Select the `Create recurring series of events` checkbox.
4. Select the frequency of recurrence.

Note

Depending on the type of event series you are creating, the maximum number of occurrences is as follows:

- Daily: 100
- Weekly: 53
- Monthly: 60
- Yearly: 10

-
5. Set the start date and end date.
 6. Click **Add Invitees** in the Invite Others section.
 7. Search for invitees by:
 - a. Selecting the type of item to search from the drop-down list, for example, users, leads, contacts, or resources.
 - b. Entering a name or part of a name.
 - c. Clicking **Go!**.
 8. Check the boxes next the people you want to invite and click **Insert Selected**.
To add more invitees, specify a new search and select more people as needed.

Note

You can have a maximum of 100 invitees and resources for a recurring group event

9. Click **Done** to add the selected people to the event.
10. Review the calendar of each invitee and adjust the date and time of the event, if necessary.
The availability of invitees is indicated in color on their calendars: free time is grey, busy time is blue, and out-of-office time is purple.
11. Click **Save & Send Invitation**.
Invited leads and contacts receive email containing a link to a web page where they can accept or decline the invitation for the event or event series. You will also receive an email summary of the event. If an invited resource is available at the given time, it will automatically accept the invitation. You cannot double-book resources.

Editing Recurring Events

User Permissions Needed	
To edit recurring events:	"Edit Events"

If you want to set or change your response to an event or a series of events, see "Responding to Group Events" in the online help.

To change the details of an event that is part of a series of events:

1. Select an event from the Calendar on the home page or from the Open Activities or Activity History related list of a record.
2. Click the View Event subtab.
3. Click **Edit Event**.
4. Change the event fields.
5. If this is a group event, choose whether to send an email update to all invited users or just the users you added or deleted during editing. Click **Save & Send Update** to save the event and send an update email, or just click **Save** to save your changes without sending an email. All changes will be reflected on the calendars of users that have accepted the event.

To change the details of a series of events:

1. Select an event from the Calendar on the home page or from the Open Activities or Activity History related list of a record.
2. Click the View Series subtab.
3. Click **Edit Series**.
4. Modify the fields for this series of events. Changes made will not affect events in the series that have occurred in the past.

Warning

If you change any of the details in recurrence section of the series, all events that were part of the series will be deleted and new events will be created. Any changes made to individual events that have not yet occurred, including any responses from invitees, will be lost.

5. If the series includes invitees, and you want to notify all the invitees of the changes, click **Save & Send Update**. If you do not want to send updates to all invitees, click **Save**.

Note

If you have changed the time or frequency of the events in the series, and you do not send updates, the response status (accepted, declined, or not responded) for each invitee will not change. If the invitee did not decline the original invitation, the events will be added to the invitee's calendar. If you extend the end date but make no other changes, existing events responses will not be changed unless you send updates.

Note

Changes made to a future event that is part of a series of recurring events will be overwritten if the series frequency is changed.

Deleting Recurring Events

Only the event or series owner can delete an event or series of events. If you have been invited to a group event or a series of group events, to remove them from your calendar, decline the event or series of events. See "Responding to Group Events" in the online help for more information.

To delete a single event in a series of events:

1. Select an event from the Calendar on the home page or from the Open Activities or Activity History related list of a record.
2. Click the View Event subtab.
3. Click **Delete Event**. A warning dialog will be displayed. If you are sure you want to delete only this event in the series, click **OK**.

Note

When an event owner deletes a recurring group event, all invited users receive an email notifying them that the event has been canceled.

Deleted events are moved to the Recycle Bin. If they are restored, all the details of the event will be restored as well.

To delete a series of events:

1. Select an event from the Calendar on the home page or from the Open Activities or Activity History related list of a record.
2. Click the View Series subtab.
3. Click **Delete Series**. A warning dialog will be displayed. If you are sure you want to delete every future event in the series, click **OK**.

Note

Deleting a series of events does not delete events that have already occurred.

Note

When an event owner deletes a series of recurring group events, all invited users receive a single email notifying them that the series of events has been canceled.

If a series has been deleted and no events in the series have occurred in the past, the series is placed in the Recycle Bin. Individual events that were part of the series are not placed in the Recycle Bin.

If you restore a series from the Recycle Bin, individual events will be created. Those individual events will have the details as defined by the series, as well as any event-specific details that were set on the event before the series was deleted.

Enhanced Reporting

Available in: All Editions

It's now easier than ever to find and manage your reports. New streamlined analytics functionality helps users quickly search all their available reports to find precisely the ones they are looking for. There is also a new Recent Reports subtab that keeps an up-to-the-minute list of all your recently viewed custom reports, plus the ability to retrieve deleted reports and dashboards from the Recycle Bin.

Implementation Tips

- The Report Folders section of the Reports tab mimics the functionality available by clicking **Setup | Customize | Reports**. If you have the "Manage Public Reports" permission, you can view, edit, and manage all of your organization's public report folders directly from the Reports tab. The setup option is still available for your convenience too.
- To restore deleted reports and dashboards, click the **Recycle Bin** link in the sidebar.

Best Practices

- Search for custom reports directly from the Reports tab by entering keywords and clicking **Find Report**. You can also search for custom reports using the sidebar Search or Advanced Search.
- Click the Recent Reports subtab and select a view option from the drop-down list to quickly see the last ten to twenty-five custom reports that you viewed, created, or modified.
- To view a complete list of your report folders, click the All Reports subtab. This subtab shows your reports and report folders similarly to the pre-Winter '06 Reports tab.

About Enhanced Reporting

Reports Home

User Permissions Needed	
To create and customize report folders:	"Manage Public Reports"

User Permissions Needed	
To run and customize reports:	"Run Reports" AND "Read" on the records included in reports

Clicking on the Reports tab displays the reports home page.

Note

If the Reports tab is not visible, you can customize your display to show it. See "Customizing Your Display" in the online help for more information.

- Enter keywords to search for a custom report and click **Find Report**. This search looks for matches in the Report Name and Description fields.
- In the **Report Folders** section, select a folder to view all the reports contained in that folder. Click **Edit** to change the folder's access settings. Click **Create New Folder** to create a new report folder.

The Folder drop-down list includes all report folders you can access. However, if you have the "Manage Public Reports" permission, you can view, edit, and manage all of your organization's public report folders. You can also access report folders via **Setup | Customize | Reports**. See "Creating and Editing Folders" in the online help.

The **Report Folders** section is not available in Personal and Team Editions.

- The All Reports subtab lists all of the report folders you can access. Click **Reorder Folders** to change the order of your folders in the All Reports subtab. The order of your folders in the Folder drop-down list displays alphabetically except for Unfiled Public Reports and My Personal Custom Reports, which display at the top of the list. The order of your folders in the Folder drop-down list cannot be changed. Click **Collapse All** to hide all the reports in all folders. Click **Expand All** to display all of the reports in all of the folders. Select the arrow next to a folder name to display or hide the reports in that folder. See "Standard Report Folders" in the online help.
- The Recent Reports subtab displays a list of the custom reports that match the criteria in the drop-down list. Click any report name in the list to run the report. Toggle the **Show 25 items** and **Show 10 items** links to change the number of items that display. The fields you see are predefined and cannot be changed. The drop-down list choices are:

Recent Reports Choice	Description
Recently Viewed	The last ten or twenty-five custom reports you viewed, with the most recently viewed report listed first. This list includes records that you and other users can access.
Recently Created	The last ten or twenty-five custom reports created by you, with the most recently created report listed first. This list includes records that you and other users can access.
Recently Modified	The last ten or twenty-five custom reports modified by you, with the most recently modified report listed first. This list includes records that you and other users can access.

Recent Reports Choice	Description
	fied report listed first. This list includes records that you and other users can access.

- Click **Create New Custom Report** to create a new custom report. See "Creating a Custom Report" in the online help.
- Click the report name to run the report. See "Running Reports" in the online help.
- Click **Edit** next to a report to customize the report's properties. See "Customizing Reports" in the online help.
- Click **Del** to remove the report from the report folder. All deleted reports are moved to the Recycle Bin.
- Click **Export** to export a report directly to an Excel spreadsheet or CSV (comma separated values) file. See "Printing and Exporting Reports" in the online help.

Searching for Reports

User Permissions Needed	
To view reports:	"Read" on the records included in reports

To find specific custom reports:

1. Enter your search terms in the Reports tab and click **Find Report**.
Alternatively, use the sidebar Search box to find reports or click **Advanced Search** in the sidebar to use the Advanced Search functionality. See "Search Fields" in the online help for a complete list of the fields that are searched for reports.
2. Click **Find Report**.
The search returns a list of items that match your search terms.
3. From the list of search results, select a report to jump directly to that report. You can also click **Edit** to customize the report, **Del** to delete it, or **Export** to export the report data directly to Excel.

See "Search" in the online help for more information and tips on searching.

New Outlook Edition

Available in: Personal, Team, Professional, Enterprise, and Unlimited Editions

Many Salesforce users also rely on Microsoft® Outlook® for desktop email, contact management, and scheduling. Seamless integration between Salesforce and Outlook is critical for reducing administrative time in using the two applications. Winter '06 provides the next generation of integration between Microsoft Outlook and Salesforce to enable users to easily synchronize information between them. Combined email, contact, calendar event, and task integration between Outlook and Salesforce make working in both environments simple and transparent.

With Outlook Edition 2.0, you can continue to add Outlook emails as tasks in Salesforce, create cases from emails, use Salesforce right within Outlook, plus you can now:

- Synchronize your contacts, tasks, and calendar events with Salesforce.
- Specify the direction of synchronization and whether you want Outlook or Salesforce to take precedence.
- Use a convenient conflict resolution tool to resolve any conflicts during synchronization.
- Schedule synchronizations so your information is automatically kept up to date.
- Map custom fields in Salesforce to fields in Outlook.
- Select a record in Outlook and view it in Salesforce using your browser.
- Use convenient shortcut menus for common tasks.
- Customize new Outlook Edition configuration options.
- Let your IT department control which options users can customize.

Implementation Tips

- If you use Intellisync for salesforce.com to synchronize your Salesforce data, perform one final synchronization before installing Outlook Edition.
- Uninstall any previous versions of Outlook Edition and Intellisync for salesforce.com before installing Outlook Edition.
- After installing Outlook Edition, make sure to run the Intellisync Upgrade Utility (included with Outlook Edition) before synchronizing your data with Outlook Edition.
- As an administrator, determine whether you want to restrict users' access to configure different options within Outlook Edition. See the [Advanced Outlook Edition Administration](#) tip sheet for details.

Best Practices

- Create a contact folder in Outlook specifically for synchronization with Salesforce.
- When creating a new contact in Outlook, use the **Lookup Account** button to ensure duplicate accounts are not created.
- Any change to `Account Name` on a contact record should be done in Salesforce.
- For Outlook 2003, use "Cached Exchange Mode" for better performance.

- To manually flag the emails you have added to Salesforce, use the built-in email flags of Outlook 2003. See the [Outlook Edition 2.0 Release Notes](#) for detailed instructions.

About Outlook Edition 2.0

View the [Outlook Edition 2.0 Release Notes](#) for more details about Outlook Edition features and enhancements.

Offline Edition 2.0

Since its introduction, Salesforce users have relied on Offline Edition to manage their customer data when working without Internet connectivity. Offline Edition 2.0 expands this capability by allowing users to capture and manage leads in the field. Offline Edition 2.0 also leverages custom objects with support for master-detail custom related lists offline. It also facilitates user adoption by automating the onerous task of resolving data conflicts. Finally, the new architecture of Offline Edition allows users to carry more data with them and ensures that the information will be safe in the event that an unauthorized user gains access to the computer.

Implementation Tips

- Install the new Offline Edition. You do not need to uninstall the old version but we recommend doing so to avoid confusing the two.
- While other browsers are supported in Salesforce, Offline Edition only supports Internet Explorer.
- Deploy Offline Edition to all your users at once using a zipped MSI package. See "Deploying Offline Edition System-Wide" in the online help.

Best Practices

- Check **Update tab names** on the login page if your tab names have changed in Salesforce and you want them automatically updated in Offline Edition.

See the [Offline Edition 2.0 Release Notes](#) for information on what's new in Offline Edition.

Additional Salesforce SFA Enhancements

Activities

- To create an event, select **Event** from the Create New drop-down list in the sidebar.
- The setting to show event details on group calendar views, previously set via **Setup | Customize | Activities | Calendar Details**, is now obsolete. The details of an event now display when you mouse-over the event time in a group calendar view.

- To create a calendar suitable for printing when viewing events, including the multi-user view, click **Printable View**. In the printable view you can change the event or task view to include the desired dates or task types.

Contact and Lead List Views

Contact and lead list views for performing mass actions now include a master checkbox which you can use to quickly select or deselect all the records in the list view. This makes it easier and faster to add a list of contacts or leads to a campaign or to make mass changes to the status of a list of leads.

Customizable Forecasts

- Product family is now included in standard forecast reports.
- Forecast history report includes information on whether an item has been overridden and any override comments.

Documents

There is a new `Externally Available` checkbox on documents that indicates if a document is an image that may be embedded in an HTML email template, such as a logo in a letterhead, without requiring a Salesforce username and password to view. This checkbox also indicates if the document is an image used as a custom home page component or custom app logo, which do require a Salesforce username and password to view. Note that the `Externally Available` and `Internal Use Only` checkboxes are mutually exclusive; you cannot select both.

Email

- You can now copy and paste text with apostrophes from Word documents into Salesforce email templates without the apostrophes being converted into question marks when you email the template.
- When changing the owner of a record, the return email address displayed in the change owner notification is now the email address displayed in the `Email Address` field of your email settings.
- Mass email attachment links now include the file name and extension of the attachment to ensure proper downloading.
- Mass email contacts or leads associated with a campaign by filtering your mass email list views by a campaign and optionally also by a campaign member status. See [Integrated Campaign Builder on page 75](#) for more information.
- Clicking **Check Spelling** on an outbound email now opens the spell checker popup window in your chosen Salesforce language. Note that the spell checker is not available for Asian languages.

Merge Fields

The `{!Lead_ConvertedDate}` merge field is now available to show the converted date of a lead. This merge field is useful in custom formula fields which you can then include in lead reports. Note that this merge field shows a blank value when used in email templates, mail merge templates, and custom links, since converted leads are only visible in reports.

Opportunity Products

To ensure that opportunity products use the price from the associated price book, remove the `Sales Price` field from the opportunity products page layout.

To use a quantity of one for all opportunity products, remove the `Quantity` field from the opportunity products page layout.

The user permission "Edit Opportunity Product Sales Prices" allows administrators to control whether users can change the sales price on products

Reporting & Analytics

- The `Report Question` field has been renamed `Report Description`. The field still provides you with the same function of allowing you to enter a description of a custom report as you are saving it.
- When filtering your reports by standard long text area fields, such as `Description` or `Solution Details`, the first 1000 characters of the field are now searched for matches. Note that this may alter your report results since previously only the first 255 characters were searched.
- When you display a standard long text area field in your report, now the first 1000 characters of the field are shown. When you display a custom long text area field in your report, the first 255 characters are shown.
- The standard report types below now have the following enhancements:

Activity Reports

- The `Assigned Role Display` field now appears in the Activity Info column section of activity reports, not the Account General column section.

Forecast Reports

- If you are using custom fiscal years you can create forecast reports for all defined period lengths, including fiscal weeks.
- If you are using custom fiscal years, you can only create forecast reports for defined fiscal periods.

Opportunity Reports

- Opportunity reports now include the `Opportunity Quantity` field.

Opportunity with Forecast Reports

- Opportunity Forecast reports now include two forecast date fields, `Forecast Date` and `Forecast Date (2)`. Select both of these column on the report if you want to group by two fiscal periods. For example, you may want to group the dates by fiscal quarter and fiscal period. If so, use `Forecast Date` for the first grouping and `Forecast Date (2)` for the second.
- Opportunity Forecast reports now include the following fields: `Amount`, `Amount Actual`, `Amount Actual Overridden`, `Product Unit Price`, `Product Unit Price Actual`, `Product Unit Price Overridden`, `Amount Actual`, `Quantity`, `Quantity Actual`, and `Quantity Overridden`.
- `Amount Overridden`, `Product Unit Price Overridden`, and `Quantity Overridden` are boolean values that indicate if overrides have been made.
- `Amount`, `Quantity`, and `Product Unit Price` are the values that will be used in forecasts and reflect any opportunity forecast override.
- `Amount Actual`, `Product Unit Price Actual`, and `Quantity Actual` are the values on the opportunity or schedule and do not include any overrides.

Opportunity with Products Reports

- Use the new Opportunities with Sales Teams and Products report to see a list of sales teams associated with opportunities where specific products have been sold. Note that sales teams and products must be enabled for you to run the report.
- Use the new Opportunities with Contact Roles and Products report to see a list of contacts associated with opportunities where specific products have been sold. Note that products must be enabled for you to run the report.
- On Opportunities with Products reports, you can now report on the following opportunity product fields: `Opportunity Product: Created Date`, `Opportunity Product: Created By`, `Opportunity Product: Created Alias`, `Opportunity Product: Last Modified Date`, `Opportunity Product: Last Modified By`, `Opportunity Product: Last Modified Alias`.

Service & Support Reports

- You can now include the `Solution ID` field in solution reports.
- The Cases with Emails report now includes the following fields for you to report on: `Is Incoming`, `Has Attachment`, `From Name`, `From Address`, `To Address`, `CC Address`, `BCC Address`.
- The Case History report, which displays the length of time since a case last changed status or owner, has been renamed `Case Lifecycle` to accommodate the new `Case History` report, which lists the changes to fields where history has been set to tracked.

Support for Older Versions of Intellisync for salesforce.com and Outlook Edition

In an effort to provide all our customers with the fastest, most reliable, and scalable service possible, it is necessary for us to discontinue support for two previously distributed products. After the Winter '06 release, you will no longer be able to use these products:

- Intellisync for salesforce.com - prior to version 2.0.2.33
- Outlook Edition - prior to version 114

If you are using a version that will no longer be supported, upgrade to a more recent version prior to Winter '06. After the Winter '06 release, you will no longer be able to download Intellisync for salesforce.com. At that time, you will need to download and install Outlook Edition 2.0 to synchronize your Outlook data with Salesforce.

To find your version number:

- Intellisync for salesforce.com
 1. Launch Intellisync for salesforce.com from your Windows desktop or Start menu.
 2. For older versions of Intellisync for salesforce.com, the version number is displayed in the lower right corner of the window, for example v030515. Otherwise, click **Help | About Intellisync for salesforce.com**.
- Outlook Edition
 1. Launch Microsoft® Outlook®.
 2. Click **Help | About salesforce.com Outlook Edition**.

Web-to-Lead

You can now generate web forms that include record types for leads. When generating HTML, select the `Lead Record Type` field if you want users submitting web-generated leads to select specific record types.

SALESFORCE SERVICE AND SUPPORT

Suggested Solutions

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

Both customer satisfaction and support rep productivity get a big boost when customers and support reps are able to find answers and resolve issues quickly. Support reps using the Cases tab, and customers using the Self-Service portal, can now quickly find the solution that best fits their case via an automated match. For new cases, the suggested solutions feature looks for other cases with similar keywords and then returns the solutions that were used to solve those cases to the inquiring customer or support rep. The self-learning algorithm continuously improves the accuracy of the results as more cases are resolved, increasing the number of cases that are handled entirely through the Self-Service portal without support rep interaction and cutting down the time it takes support reps to find the best solution.

Implementation Tips

- Enable the **View Suggested Solutions** button for cases by customizing your Support Settings via **Setup | Customize | Cases | Support Settings**. Enable suggested solutions for the Self-Service portal by customizing your portal pages.
- When writing solutions, include the language and terms with which users describe their cases. This increases the likelihood that suggested solutions will return the most relevant results because terminology will be consistent with the self-learning algorithmic search.
- Limit suggested solutions results in the Self-Service portal to three to five. More than three to five solutions can be overwhelming to users.
- Add the suggested solutions mail merge field, `{!Case_Suggested_Solutions}`, to your auto-response email templates. This merge field provides outbound emails with direct links to the subject and description of each solution that may help customers answer their inquiries.
- Add the `Closed by Self-Service User` field to your case page layouts so support reps can easily see which cases were closed by Self-Service users via suggested solutions. This field is always read-only for support reps; Salesforce updates it automatically.

Best Practices

- Support reps should be diligent about associating appropriate solutions to case. The suggested solutions feature matches solutions based on existing case-solution relationships. As support reps continue to associate cases with the appropriate solutions, the accuracy of suggested solutions will improve.
- Advise support reps to use the **View Suggested Solutions** button on the Solutions related list of a case. This quickly displays solutions relevant to that case, allowing support reps to solve their cases faster.
- Report on the `Closed by Self-Service User` field in your case reports to see how many cases have been closed by users via suggested solutions in the Self-Service portal.

About Suggested Solutions

What are Suggested Solutions?

User Permissions Needed	
To enable suggested solutions:	"Customize Application"
To modify Self-Service pages:	"Manage Self-Service Portal" AND "Customize Application"

The suggested solutions feature displays up to ten relevant solutions that may help users and customers solve a particular case from the case detail page and the Self-Service portal.

Suggested solutions can lower support costs by:

- Reducing the time it takes for customer support reps to solve cases
- Improving customer support reps' productivity by offering them proactive access to all solutions for any case
- Enabling customers to solve and close their own cases.

The solutions displayed are not simply found via a keyword search. Rather, the following variables are entered into a formula that automatically scores the relevancy of each solution to the particular case:

- Word frequency in all solutions
- Word frequency in similar cases with related solutions
- Word similarities to self-closed cases and solutions rated useful by Self-Service users

You can enable suggested solutions for the following:

Cases tab

Users can click **View Suggested Solutions** from the case detail page to view a list of solutions relevant to their case.

To enable suggested solutions for cases, see "Customizing Support Settings" in the online help.

Self-Service portal

Customers can view solutions relevant to their case when they submit a case or view cases online.

Customers can self-close their cases using suggested solutions.

When customers log new cases or click the **View Suggested Solutions** button on an existing case in the Self-Service portal, a list of suggested solutions is displayed. When customers select a solution from the list, they can click **Yes** after **Does this Solution help you answer your question?** and then select a reason as to why they closed their case. The case will close with an indication on the *Closed by Self-Service User* case field. If the customer clicks **No**, they will be returned to the list of suggested solutions. If no suggested solutions are found, the Suggested Solutions Page is bypassed, and the customer is directed to their case.

To enable the Suggested Solutions Page for the Self-Service portal, see [Customize the Suggested Solutions Page on page 97](#).

Case auto-response rules and emails

Your support team can help customers solve their own cases without the assistance of customer support reps. Simply create email auto-responses for cases submitted via email, Web-to-Case, or the Self-Service portal. Within the auto-response email template, include the suggested solutions merge field, `{!Case_Suggested_Solutions}`, which provides outbound emails with direct links to the subject and description of each solution that may help customers answer their inquiries.

To set up auto-response rules for cases, see "Setting Up Auto-Response Rules" in the online help and "Managing Email Templates" in the online help.

Note

Sending mass emails using templates with the suggested solution merge field could take several minutes and is not recommended.

The `Closed by Self-Service User` field, along with a `Closed When Created` field, can be added to case page layouts (see "Customizing Page Layouts" in the online help). These fields are automatically set by Salesforce and cannot be modified. You can run reports on the `Closed by Self-Service User` and `Closed When Created` fields to see how cases have been closed.

- Report on the `Closed by Self-Service User` field to see how many cases have been closed by users via suggested solutions on the Self-Service portal
- Report on the `Closed When Created` field to see how many cases have been immediately saved and closed upon creation by support reps.

Note

Suggested solutions is not available for the public knowledge base because public knowledge base users do not have an authenticated login that allows them to create or access cases.

Customize the Suggested Solutions Page

User Permissions Needed	
To modify Self-Service pages:	"Manage Self-Service Portal" AND "Customize Application"

You can enable and customize the Suggested Solutions Page from the Self-Service Portal Pages related list. The Suggested Solutions Page displays up to ten relevant solutions that may help users solve a particular case. When submitting a case or viewing cases in the Self-Service portal, users can view suggested solutions and close their cases themselves. See [What are Suggested Solutions? on page 96](#) for more information.

To customize the Suggested Solutions Page:

1. Click **Edit** on the Suggested Solutions Page line.
2. Select `Show Suggested Solutions Page` to enable the page in the Self-Service portal.
3. Select a `Self-Closed Case Status` to show in the `Status` field for cases closed by Self-Service users. You must select at least one "Closed" value for this field.

To customize the `Status` field, see "Modifying Picklists" in the online help.

4. Choose the maximum number of suggested solutions to display to users at one time. You can show a maximum of ten.
5. Select the `Self-Closed Case Reasons` that Self-Service users can choose from when they self-close their cases.

To customize the values associated with the `Case Reason` field, see "Modifying Picklists" in the online help.
6. Check `Show Message` to display a message on this page.
7. If you enabled the message, enter your message in the text box, using the formatting toolbar to format the size, color, or font. See "Using the Format Toolbar" in the online help for descriptions of the HTML formatting buttons.

Optionally, check `Show HTML` to view your page message in HTML code.
8. Optionally, insert any merge fields for data that you want to replace dynamically. See "Valid Merge Fields" in the online help.
9. Click **Save**.
10. To see how your Suggested Solutions Page will look, click **Preview** on the Suggested Solutions Page line. If you have customized the Self-Service style sheet, the preview shows your custom styles.

Tracking Field History

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

Tracking information is key to managing your business processes effectively, such as who changed the information, when it was changed, and the before and after values. Now, administrators can select the information on cases, contracts, and solutions 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 case, contract, or solution history. The new extended history data is available for reporting, which allows easy construction of audit trail reports. History data is also available when using the AppExchange API.

Implementation Tips

- Track the case and solution fields that are a part of your case workflow and knowledge management processes to verify that your support processes are being followed correctly.
- Track custom case fields to gain insight into how your support reps are handling case data that is unique to your customer support center.

Best Practices

- Run the Case History and Solution History custom reports to see both the old and new values of the field histories that are set to tracked.
- Do not delete a custom field where history is set to tracked 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 Tracking Field History

Tracking Field History

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

You can select which standard and custom fields to track on the History related list of cases, solutions, and contracts. 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 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** and select **Cases, Solutions, or Contracts**.
2. Click **Fields**.
3. Click **Set History Tracking**.
4. Choose the fields you want tracked in the History related list of the record detail page.
 - 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 online help.
 - Changes to the `Closed When Created` field on cases are only tracked when the field is updated via the AppExchange API.

5. Click **Save**.

Note

When you delete a custom field, all of the field history data is deleted and changes are no longer tracked.

Additional Service & Support Enhancements

Assignment and Escalation Rules

- You can now have up to 3000 rule entries for each assignment and escalation rule.
- You can now configure escalation rules to escalate a case after 30 minute intervals.

Case Comments

- You can now add the most recent public case comment to email and mail merge templates. From the `Select Field` drop-down on the Edit Text Email Template page, choose `Most Recent Public Case Comment` or enter the following merge field value: `{!Last_Case_Comment}`.
- You can now search case comments in Advanced Search.

Case List Views

Case list views for performing mass actions now include a master checkbox which you can use to quickly select or deselect all the records in the list view. This makes it faster to mass change the status or owner for a list of cases.

Email-to-Case

- Icons now display the inbound and outbound status of emails on the Email related list of cases.
- An attachment icon also displays for emails with attachments.
- You can now select a `Notify` checkbox on Email-to-Case settings that allows case owners to automatically receive email notifications when emails arrive for their existing cases. Email notifications assign a task to the case owner to respond to the new email. Responding to the email closes the task. To disable email notifications at any time, simply deselect the checkbox.
- A new `Enable HTML Email` checkbox is now available when setting up Email-to-Case. With this setting enabled, users are warned before they view incoming HTML email content so that they can avoid opening potentially malicious HTML. With this setting disabled, users will see text instead of HTML on email message detail pages, and when users reply to an email, the text version of the email will be copied to the email editor, instead of the HTML

version. With Winter '06, this setting is automatically enabled for all existing organizations. Organizations that sign up after Winter '06 will have this setting disabled by default.

- The Cases with Emails report now includes the `Has Attachment` field so you can report on emails that have attachments.

First Call Resolution

A new `Closed When Created` checkbox field is now available for cases to track which cases are solved immediately after being logged. Salesforce automatically marks this field when a support rep closes a case using the **Save & Close** button. You can report on this field in your case reports.

Self-Service Portal

- There is now a **Forgot your password?** link on the Login Page of the Self-Service portal. When users click this link, they receive a temporary password via email. In the email, your organization's name is displayed as the "From" email name and your organization's Automated Case User's email address as the "From" email address.
- You can now select the `New Cases Visible in Self-Service Portal` setting in Self-Service setup to automatically set the `Visible in Self-Service Portal` checkbox for all new cases, including cases created via Email-to-Case, Web-to-Case, and the Self-Service portal. Regardless of this setting, users creating new cases can manually set the `Visible in Self-Service Portal` checkbox on a case.
- `Created By` and `Last Modified By` fields are now available on the Self-Service user page so that you can see when a Self-Service user was created and when their details were last modified. With these fields, you can create a list view on Self-Service users to see when they were created and modified.
- You can display dependent fields in your Self-Service portal by adding them to your portal's page layouts. Use dependent fields on the Log a Case Page to filter the available picklist values based on the value a Self-Service user chooses in a controlling field. See [Dependent Picklists on page 23](#) for more information.
- You can now add the Case Attachments related list to the View Cases page to allow Self-Service users to view the files they've added to their cases. Be aware that this related list also shows any files that support reps have added to the case.
- You can now add the Case Activities related list to the View Cases page to allow Self-Service users to view public, completed activities related to their cases. You also need to set field-level security to visible for the `Visible in Self-Service Portal` checkbox on activity page layouts so support reps will be able to display or hide completed activities in the Self-Service portal by clicking `Make Public` or `Make Private` in the case's Activity History related list.
- Only solutions marked `Visible in Self-Service` with a "Reviewed" Status will appear in the Top Solutions List on the Home Page of the Self-Service portal. If a solution included in the Top Solutions List has either of these values changed, it is automatically removed from the Top Solutions List, both within Salesforce setup and the Self-Service portal.
- When adding solutions to the Top Solutions List, you can only choose solutions marked `Visible in Self-Service` with a "Reviewed" Status.

Web-to-Case

You can now generate web forms that include record types for cases. When generating HTML, select the `Case Record Type` field if you want users submitting web-generated cases to select specific record types.