

Salesforce Spring '07 Release Notes



Table of Contents

About the Release Notes.....	3
Summary of Spring '07 Features and Impact on Salesforce Users.....	3
Salesforce CRM	6
Group Edition featuring Google AdWords.....	6
Salesforce for Google AdWords.....	7
Customer Portal.....	10
Case Hierarchies.....	25
Additional Salesforce CRM Enhancements.....	27
Apex Platform	30
Search Enhancements.....	30
Time-Based Workflow.....	33
Lookup Relationships between Standard Objects.....	41
Outlook Edition 3.0 Limited Release.....	42
Email Relaying.....	44
Apex Web Services API 9.0.....	46
Apex Code Developer Preview.....	47
Additional Apex Platform Enhancements.....	48

About the Release Notes

The Release Notes are a comprehensive user guide for the latest release of Salesforce. Unlike a traditional release notes document that includes only a simple list of enhancements and known bugs, the Salesforce Release Notes give you everything you need to get up and running with the new features and enhancements in the latest release.

What's Included in the Release Notes

For every new major enhancement, the Release Notes provide:

- A brief, high-level description of the functionality
- Implementation tips to help you get started with setup and administration
- Best practice tips to help you maximize the benefit of the functionality
- Complete end-to-end instructions on how to set up and use the functionality

Beyond the major new features, the Additional Enhancements sections include a list and brief description of every other enhancement or functional change included in the latest release—everything from new merge fields you can use in formulas to improved icons for greater usability to additional fields that are available in standard reports.

Let the Release Notes be your guide to success with the latest release from salesforce.com!

Summary of Spring '07 Features and Impact on Salesforce Users

Spring '07 includes features that will immediately impact all Salesforce users when the release occurs. You may want to communicate these changes to the users in your organization before the release so that they are prepared for any changes that might affect them. Other features require direct action by a Salesforce administrator before your users can benefit from the new functionality.

The following table summarizes the Spring '07 features and whether they will have an immediate impact on users:

Feature	Enabled by Default?	Immediate User Impact
Group Edition featuring Google AdWords	Yes	All Team Edition organizations will be migrated to Group Edition.
Salesforce for Google AdWords	Yes	Salesforce for Google AdWords is automatically installed in all Salesforce organizations.
Customer Portal	No. An administrator must set up this feature.	None until an administrator enables the Customer Portal.
Case Hierarchies	No. An administrator must set up this feature.	None until an administrator exposes the new field and related list.
New Campaign Fields	Yes	Campaign fields available in reports for all users.
Customizable Forecasting Enhancements	Yes	Forecast enhancements that make it easier to override forecasts or view key information are available to all forecasting users.
Opportunity Cloning Enhancements	Yes	Opportunity cloning behavior now varies depending on whether products are involved.

Feature	Enabled by Default?	Immediate User Impact
Report Enhancements	Yes	Exporting reports to CSV (comma separated values) files for European locales and custom contract history reports are available to all users who have access to view and customize reports.
Salesforce PRM	No. An administrator must configure the new enhancements.	None until an administrator adds additional partner roles to the role hierarchy or customizes the "Change Owner" email template.
Search Enhancements	Some enhancements are automatically available to all users, and other enhancements must be set up by an administrator.	<p>The search results page has a different look and new capabilities that will greatly increase user productivity. The following will automatically appear for all users:</p> <ul style="list-style-type: none"> • Sort search results by column • Customize the columns that appear in each search results list • Limit a search to items only a user owns <p>The following enhancements must be configured by an administrator to display for all users:</p> <ul style="list-style-type: none"> • Filter search results by specific criteria • Limit the search scope • Display additional details in solution search results
Time-Based Workflow	No. An administrator must set up this feature.	None until an administrator sets up time-based triggers and actions.
Lookup Relationships between Standard Objects	No. An administrator must set up this feature.	None until an administrator sets up any lookup relationships between standard objects.
Outlook Edition 3.0 Limited Release	No. Only limited release program participants have access to download and use this new version.	None until a user installs the new version of Outlook Edition. To learn more about this limited release program, please contact your salesforce.com representative.
Email Relaying	No. An administrator must set up this feature.	None until an administrator configures Salesforce to route all Salesforce-generated email through your company's own email servers.
Apex Web Services API 9.0	Yes	All API enhancements are available to any user who is using API 9.0.
Apex Code Developer Preview	No	None.
Apex Mobile Licensing Enhancements	No. An administrator must set up this feature.	Administrators can more easily control the distribution of Apex Mobile licences in your organization.
Cloning Email Templates	Yes	All users can clone email templates to which they have access.

Feature	Enabled by Default?	Immediate User Impact
ConnectSAP and ConnectOracle Available for Download	No	If your organization has purchased ConnectSAP or ConnectOracle, only users with the appropriate permission can download them.
Data Loader Rebranded	No	Users will not experience the rebranded client until they download it.
Divisions on Custom Objects	No. An administrator must set up this feature.	None until an administrator enables divisions for a custom object.
Email Approvals	No. An administrator must set up this feature.	None until an administrators enables the ability to approve an approval request via email.
Formula Field Compiled Size Increased	No	None.
Long Text Area Custom Fields Increased	No. An administrator must set up this feature.	None until an administrator creates new long text area fields.
Outbound Message Queue	No	Only users with the "Customize Application" permission can view the outbound message queue.
Recent Item Hover Details	No. An administrator must set up this feature.	None until an administrator enables the ability to view hover details in the Recent Items area of the sidebar.
Sales Anywhere Decommissioned	Yes	Sales Anywhere is no longer available.
Special Date Fields Expanded	Yes	All users can now use additional special date tokens when defining search criteria for list views and reports, for example, "Close Date equals This Quarter."
User Interface: Classic User Interface Theme No Longer Supported	Yes	All users who were using the Classic user interface theme are automatically switched to the Salesforce user interface theme.

SALESFORCE CRM

Group Edition featuring Google AdWords

With Spring '07, Team Edition™ has been replaced with Group Edition featuring Google AdWords. In addition to the existing Team Edition functionality, Group Edition includes:

- [Read-only Dashboards](#)
- [Leads](#)
- [Web-to-Lead](#)
- [Salesforce for Google AdWords](#)

Implementation Tips

For information on getting started with Group Edition:

- Visit [Successforce](#) for more information on Group Edition featuring Google AdWords.
- Salesforce.com offers a quick start program—a brief professional consultation to help you get your Google AdWords programs set up with Salesforce lead tracking. For more information, contact salesforce.com at 1-800-NO-SOFTWARE.
- Visit the [Salesforce for Google AdWords blog](#) for tips and information on Salesforce for Google AdWords.
- Visit the [Google AdWords Learning Center](#) for information on implementing Google AdWords.

About Group Edition

Group Edition Features

Read-only Dashboards

All Group Edition users have access to read-only dashboards. Users cannot create, edit, or delete dashboards or dashboard components.



Note: When you sign up for Salesforce, your organization is in a trial status. This trial status contains many dashboards that are not available in Group Edition. Therefore, if you subsequently subscribe to Group Edition, the dashboards that you were able to view and edit in the trial become read-only.

For more information on dashboards, see [What is a Dashboard?](#).

Leads

Group Edition users have the same leads functionality as Professional Edition users, with the exception of mass email for leads and lead auto-response rules. For more information, see "Leads Home" in the Salesforce online help.

Web-to-Lead

Group Edition organizations can use Web-to-Lead to gather information from their company's website and automatically generate leads. Web-to-Lead is automatically enabled for all Group Edition organizations with the default lead owner defaulted to the user who originally signed up for Salesforce. For more information, see [Capturing Web Leads](#).

Salesforce for Google AdWords

Salesforce for Google AdWords is automatically installed into all Group Edition organizations and does not count against custom app limits.

Salesforce for Google AdWords

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

Salesforce for Google AdWords is an AppExchange app that connects Google AdWords with Salesforce, allowing you to track the effectiveness of your online advertising investments. With Spring '07, Salesforce for Google AdWords is automatically installed in all Salesforce organizations.

Implementation Tips

- For information on getting started with Salesforce for Google AdWords:
 - Visit [Successforce](#) for more information on Group Edition featuring Google AdWords.
 - Salesforce.com offers a quick start program—a brief professional consultation to help you get your Google AdWords programs set up with Salesforce lead tracking. For more information, contact salesforce.com at 1-800-NO-SOFTWARE.
 - Visit the [Salesforce for Google AdWords blog](#) for tips and information on Salesforce for Google AdWords.
 - Visit the [Google AdWords Learning Center](#) for information on implementing Google AdWords.
- Ensure that you complete all lead tracking setup steps. If lead tracking is not set up properly, you cannot see your tracked leads in Salesforce. For instructions, see https://sfma.salesforce.com/lead_tracking_setup/printable_instructions.

Best Practices

- Ensure that your advertisements show up on Google by avoiding the following:
 - Your Google AdWords account may not be active with valid billing information.
 - You may be bidding on a very competitive keyword.
 - Your ad may not be showing up on the first few pages of results due to a low ad rank.
 - Your campaign daily budget is too low.
 - You may be running geographic-targeted ads and searching outside of the targeted area.
 - Your ads may be disapproved or flagged for editorial review by Google.
- When setting up lead tracking, we recommend adding the tracking code to the bottom of all pages of your website so that you can maximize your lead tracking capabilities and capture leads from as many sources as possible. At a minimum, you should add the tracking code to all landing pages and Web-to-Lead forms.
- Make sure that the Salesforce tracking code is at the bottom of your pages just before the closing body tag, even if other tracking codes are present on the page. Your tracking code must be in this position to be effective.
- After your website is configured for lead tracking, Salesforce for Google AdWords automatically tracks inbound website-generated leads and populates the `Lead Source` field. It is currently not possible to configure or change this option. If you need to track custom lead source information from your website, we recommend that you create a custom field on leads.
- You can only link one Google AdWords account to one Salesforce organization. Salesforce does not support linking a Google Client Manager (also known as an AdWords MCC) account that contains multiple sub-accounts.

About Salesforce for Google AdWords

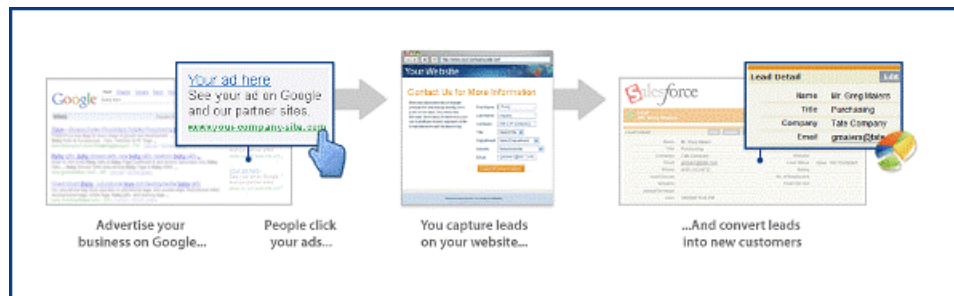
What is Salesforce for Google AdWords?

Google AdWords™ (<http://adwords.google.com>) is an online advertising service used to create advertisements that display on major search engines, including Google. Many Salesforce customers advertise online with Google AdWords as a mechanism to generate leads.

Salesforce for Google AdWords connects Salesforce with Google AdWords, allowing you to track the effectiveness of your online advertising investments. With Salesforce for Google AdWords, you can:

- Take advantage of Google AdWords as a lead generation tool
- Correlate clicks on Google advertisements with Salesforce leads
- Track the results of Google AdWords campaigns from Salesforce
- Analyze which keywords and advertisements are generating leads, sales opportunities, and new customers
- Measure effectiveness using the Google AdWords dashboard and intelligently optimize your AdWords campaigns

How Does It Work?



Use Google AdWords to create an online advertisement, including a series of keywords that will trigger your advertisement to display on www.google.com and other major search engines. When a user clicks on your advertisement in Google, they are directed to a landing page, an existing page on your corporate website or a page that you have designed specifically for your Google advertisements. Landing pages typically contain an offer and a Web-to-Lead form. An offer is something that entices a user to fill out a Web-to-Lead form, such as "send me more information" or "download a whitepaper."

When a user enters information into a Web-to-Lead form, a lead is created in your Salesforce organization. You can easily recognize leads that come from your Google AdWords campaigns by the value in the `Lead source` field. Leads that originate from Google AdWords have a `Lead source` value of Google AdWords and an activity record that shows the Google AdWords campaign, ad group, ad headline, and keyword that drove the lead to your website.

With every new lead, a Google AdWords dashboard and several Google AdWords reports are updated in Salesforce. Use the dashboard and reports to analyze the effectiveness of your Google AdWords investment. In addition, when leads are converted into sales opportunities, you can easily track how your Google AdWords investment is generating pipeline and resulting in closed deals.

After analyzing Google AdWords reports and dashboard, you can go back into Google AdWords and adjust your advertisements accordingly for optimal performance.

For additional information on Google AdWords, see the [Google AdWords Learning Center](#).

Setting Up Salesforce for Google AdWords

Getting started with Salesforce for Google AdWords is simple. Review the following sections to set up Salesforce for Google AdWords:

1. "Registering for Google AdWords" in the Salesforce online help
2. "Setting Up Your Website for Lead Tracking" in the Salesforce online help
3. "Tracking Leads and Measuring ROI" in the Salesforce online help

Registering for Google AdWords

In Salesforce, click the Google AdWords Setup tab to create a new Google AdWords account or link to an existing one:

- Option A: To create a new Google AdWords account, enter an email address, password, currency, and time zone, and click **Create New Account**. For additional instructions and information, see Registration: New Google AdWords Account.
- Option B: To link an existing Google AdWords account to Salesforce, enter your AdWords Customer ID, and click **Link Account**. For additional instructions and information, see Registration: Linking an Existing Google AdWords Account.

Setting Up Your Website for Lead Tracking

To convert your website visitors into leads, you must capture website visitor information. This can be accomplished with a basic Web-to-Lead form, an HTML form that you can add to any page of your website. Web-to-Lead forms capture website visitor information and automatically create new leads in Salesforce.

Once your new or existing Google AdWords account is active and linked to Salesforce, click **Set up Lead Tracking** on the Google AdWords Setup tab, and then follow these basic steps:

1. To create a simple Web-to-Lead form for your website, click **Create Web-to-Lead Form**, select the fields you want to capture, enter the URL of the page to display after the website visitor submits information, and click **Generate**. Copy and paste the HTML code to post to your website, or click **Complete Printable Instructions** to send the information to your webmaster.
2. After the Web-to-Lead form is posted to your website, you must insert a JavaScript tracking code on all pages of your website. The tracking code captures details of your website visitors and correlates that information with leads generated from your website. The tracking code provides details on exactly where your website-generated leads originate, and which aspects of your Google AdWords campaigns are generating results for your business. Click **View Instructions** on the Lead Tracking Setup page for more information on how to do this.
3. Finally, confirm that everything is set up correctly. From the Lead Tracking Setup page on the Google AdWords Setup tab, click **Test Your Setup**.
4. Click **Done** when you have finished.

For more detailed instructions, see Setting Up Lead Tracking.

Tracking Leads and Measuring ROI

Website lead tracking provides the ability for Salesforce customers to correlate Google AdWords investments with the resulting leads, opportunities, and sales. You can see the value and results that website lead tracking provides in the following locations:

- **Lead Source:** Salesforce automatically populates the `Lead Source` field on leads based on where the lead originated, whether it came from a user clicking on your ad or keyword in a search engine, a website referral, an organic lead, or a user directly entering your URL.



Caution: Salesforce automatically populates the `Lead Source` field on leads generated as a result of your Google campaigns. If you need to track custom lead source information from your website, we recommend that you create a custom field.

- **Lead Source Details:** When the `Lead Source` field is updated, Salesforce also creates a Lead Source Detail activity record that provides additional details about a lead's origin, such as campaign, ad group, keyword, referring URL, or search engine.
- **Reports:** Salesforce includes 17 standard Salesforce for Google AdWords reports that track leads, opportunities, and closed deals generated by Google AdWords campaigns, ad groups, text ads, and keywords. To view Google AdWords reports, click the Reports tab. From the Folder drop-down list, select Google AdWords Reports.
- **Dashboards:** Salesforce includes a one-stop search marketing dashboard that helps you to track your Google AdWords performance for lead and pipeline generation, closed opportunities, and AdWords ROI.

Customer Portal

With Spring '07, salesforce.com introduces a powerful, new Customer Portal to step up the self-service experience for your customers. The Customer Portal enables you to fully exploit the capabilities of the Web as the ideal channel to deliver superior self-service while at the same time lowering the cost of serving your customers. Because the Customer Portal is 100-percent hosted by salesforce.com just like the Salesforce application itself, you get the same service delivery benefits and none of the maintenance and infrastructure headaches that come with hosting a portal yourself.

The Customer Portal is only available through a limited release program. For more information about activating a Customer Portal for your organization, please contact salesforce.com.

Implementation Tips

- Customize the list views available to Customer Portal users.
Customer Portal users can automatically see any list view with visibility settings marked `This view is accessible by all users`. We recommend that you create specific list views on all objects accessible to portal users, and then assign portal users to only the list views you want them to view.
- Customize the search layouts available to Customer Portal users.
The search layouts in your Salesforce organization are the same search layouts used in your Customer Portal. Verify that search layouts on objects accessible to portal users only include fields you want them to view in search results.
- Set up case assignment rules to automatically assign cases created by portal users to Salesforce users and queues by using the criteria "Current User: License Type contains Customer Portal".
- Create workflow alerts to automatically respond to portal users when they create a case on your Customer Portal.
- We recommend that you do not add a header *and* a logo to your portal because they may not display properly together.
- You can position the logout link anywhere on the header by using the HTML tag: "`Logout`".
- To display a custom object in your Customer Portal, the `Available for Customer Portal` checkbox must be selected for the custom object. You cannot assign a portal profile to a custom object unless this checkbox is selected.
- Only the following objects can display as tabs in your Customer Portal: home, cases, solutions, Web tabs, documents, and custom objects.
- For implementation tips for specific portal pages, see [Setup Tips and Considerations for Customer Portal Pages](#) on page 18.
- Person accounts are not currently supported in the Customer Portal.

Best Practices

- Verify that portal users are not added to any queues and are not included in any public groups added to queues. Portal users added to queues may be able to access records from accounts with which they are not related.
- If your organization uses sharing rules that share to Roles and Subordinates, then verify that none of the users in Roles and Subordinates owns an account with contacts enabled to use your Customer Portal. This is to ensure that no records owned by a Salesforce user are shared with a portal user.

- Changes to the color theme of your Customer Portal are visible to portal users when they refresh their browsers. Therefore, we recommend updating your portal color theme at times when users are least likely to visit your Customer Portal.
- Allow portal users to view Web tabs in your Customer Portal. Simply create Web tabs and assign them to Customer Portal profiles.
- Allow portal users to view a Documents tab in your Customer Portal. Simply grant Customer Portal users access to the folders on your Salesforce Documents tab that contain the files you want them to view.
- We recommend that you decide which portal license type is best for a Customer Portal user before you assign him or her to a license type. This is because you cannot change the license type to which a portal user is assigned.
- If you plan to use the same communication template for different objects, such as the Change Owner to Portal User Template, then we recommend that you include text and merge fields on the template that are appropriate for both objects. For example, if your organization has a Warranty custom object and a Training custom object, and you want to use the Change Owner to Portal User Template for both, then the text and merge fields on the template should read: "A new record has been assigned to you. Id: {!Training.Id}{!Warranty.Id}." When the template is sent, only the relevant merge fields will display.

About The Customer Portal

Setting Up Your Customer Portal

User Permissions Needed	
To set up and update the Customer Portal:	"Customize Application"

A Customer Portal is similar to a Self-Service portal in that it provides an online support channel for your customers—allowing them to resolve their inquiries without contacting a customer service representative. However, a Customer Portal provides significantly richer functionality than a Self-Service portal. This is because a Customer Portal has functionality similar to Salesforce. With a Customer Portal, you can customize and deliver a visually stunning user interface to your customers, and use the following Salesforce features to help you and your customers succeed:

- Determine which pages and fields customers see with page layouts and field-level security
- Manage customers with profiles, roles, and sharing rules
- Provide and organize documents via a Documents tab
- Display and collect data that is unique to your organization with custom objects
- Display custom s-controls and content from other websites via Web tabs

Setting up your Customer Portal consists of the following steps:

1. Enable your Customer Portal. For more information, see [Enabling Your Customer Portal](#).
2. Configure your Customer Portal's settings and communication templates. For more information, see [Enabling Customer Portal Login and Settings](#).
3. Customize the fonts and colors of your Customer Portal. For more information, see [Customizing Your Customer Portal Fonts and Colors](#).
4. Customize page layouts for your Customer Portal. For more information, see [Customizing Your Customer Portal Pages](#).
For setup tips and general information about Customer Portal pages, see [Setup Tips and Considerations for Customer Portal Pages](#).
5. Customize the list views available to Customer Portal users. For more information, see "Creating Custom List Views" in the Salesforce online help.

Customer Portal users can automatically see any list view with visibility settings marked `This view is accessible by all users`. We recommend that you create specific list views on all objects accessible to portal users, and then assign portal users to only the list views you want them to view.

6. Customize the search layouts available to Customer Portal users. For more information, see "Setting Page Layouts" in the Salesforce online help.

The search layouts in your Salesforce organization are the same search layouts used in your Customer Portal. Verify that search layouts on objects accessible to portal users only include fields you want them to view in search results.

7. Set up case assignment rules to automatically assign cases created by portal users to Salesforce users and queues by using the criteria "Current User: License Type contains Customer Portal". For more information, see "Setting Up Assignment Rules" in the Salesforce online help.



Note: For case assignment rules to work on the Customer Portal, select the `Show Case Assignment checkbox` and `Select Case Assignment checkbox by default` checkboxes on case page layouts assigned to portal profiles. Portal users cannot view these checkboxes on the Customer Portal.

8. Create workflow alerts to automatically respond to portal users when they create a case on your Customer Portal. For more information, see "Managing Workflow Alerts" in the Salesforce online help.



Note: Case auto-response rules do not apply to cases created by Customer Portal users. For more information about auto-response rules, see "Setting Up Auto-Response Rules" in the Salesforce online help.

9. Configure user access to your Customer Portal. For more information, see [Configuring User Access to the Customer Portal](#).

10. Add a link on your organization's website to the Customer Portal.

Users can navigate to your Customer Portal after you copy the `Login URL` from your portal's settings and paste it into the HTML of your website. For more information on your portal's settings, see [Enabling Customer Portal Login and Settings](#).

11. Enable your Customer Portal for user login. For more information, see [Enabling Customer Portal Login and Settings](#).
12. Enable contacts to use your Customer Portal. For more information, see [Enabling the Customer Portal for Contacts](#).

To learn more about implementing a Customer Portal, see "Preparation for Setting Up Your Portal" in the Salesforce online help.



Note: Contact salesforce.com about activating a Customer Portal for your organization.

Enabling Your Customer Portal

User Permissions Needed	
To enable the Customer Portal:	"Customize Application"

To enable the Customer Portal for your organization:

1. Click **Setup** ► **Customize** ► **Customer Portal** ► **Settings**.
2. Click **Edit**.
3. Select the `Enable Customer Portal` checkbox.
4. Click **Save**.
5. Continue setting up the portal for your customers. For more information, see "Enabling Customer Portal Login and Settings" in the Salesforce online help.

When you enable the Customer Portal, the following items are automatically added to your organization:

- The Customer Portal Manager and Customer Portal User profiles

You can assign Customer Portal users to these profile to define the functions they can perform in the portal.

- The **Enable Customer Portal User** and **View Customer Portal User** buttons on contact records

You can use these buttons to enable contacts to use your Customer Portal and to view the user information of contacts already enabled for your Customer Portal.

- The "All Customer Portal Users" and "All Internal Users" groups

The "All Customer Portal Users" group automatically contains all Customer Portal users in your organization; the "All Internal Users" group automatically contains all Salesforce users in your organization. You can use these groups to easily create sharing rules that grant all of your Customer Portal or Salesforce users access to specific data.



Note: After you enable the Customer Portal, you cannot disable it. However, you can prevent users from logging into your Customer Portal. For more information, see [Enabling Customer Portal Login and Settings](#).

Enabling Customer Portal Login and Settings

User Permissions Needed	
To enable login and settings for the Customer Portal:	"Customize Application"

1. Click **Setup** ► **Customize** ► **Customer Portal** ► **Settings**.
2. Click **Edit** next to the name of the portal you want to customize.
3. Set the following options:

Setting	Description
Name	Name of the Customer Portal as displayed on the Portal Setup page. The name of the Customer Portal is not displayed on portal pages, but it does display in the browser title bar.
Description	A description of the Customer Portal as displayed on the Portal Setup page. The description of the Customer Portal is not displayed in the portal.
Login Enabled	Allows users to log in to the Customer Portal. We recommend that you do not select this checkbox until you have completed the steps described in Setting Up Your Customer Portal .
Login URL	The URL of the Web page that will be displayed when users log in to your Customer Portal. You can click this URL to log in to your portal and interact with it. Insert this URL into your website so users can access the login page to your Customer Portal.

Setting	Description
Logout URL	The URL of the Web page that will be displayed when users log out of the Customer Portal, for example, "http://www.acme.com." If a logout URL is not specified, then portal users return to the login page when they log out of the Customer Portal.
Top-Level Category for Portal	<p>The top-level category accessible by customers in the Customer Portal, if solution categories are enabled for your organization. Customers can view all solutions marked <code>Visible in Self-Service Portal</code> in this category and its subcategories. For more information, see "Managing Categories" in the Salesforce online help.</p> <p>Leave this blank to let customers view all solutions marked <code>Visible in Self-Service Portal</code> in all categories.</p>
From Email Address	The email address from which all Customer Portal communication templates will be sent, for example, "support@acme.com." Salesforce sends the emails automatically, but they will appear to portal users as if they were sent from this email address. If a portal user responds to a communication template, the response will be sent to this address.
From Email Name	The name that will be associated with the "From" Email Address, for example, "Acme Customer Support."
New User Template	The email template used to send a username and initial password to all newly-enabled Customer Portal users. By default, a sample template is automatically selected for you. To create your own template or modify the sample, see "Managing Email Templates" in the Salesforce online help. This template must be marked as "Available for Use."
New Password Template	The email template used to send a new password to existing Customer Portal users when you reset their passwords. By default, a sample template is automatically selected for you. To create your own template or modify the sample, see "Managing Email Templates" in the Salesforce online help. This template must be marked as "Available for Use."
Lost Password Template	The email template used to send a new password to existing Customer Portal users when they reset their own passwords by clicking Forgot your password? on the login page of the Customer Portal. By default, a sample template is automatically selected for you. To create your own template or modify the sample, see "Managing Email Templates" in the Salesforce online help. This template must be marked as "Available for Use."
New Comment Template	The email template used to send a notification to Customer Portal users when a public comment is added to one of their cases. To create your own template, see "Managing Email Templates" in the Salesforce online help. This template must be marked as "Available for Use."

Setting	Description
Change Owner to Portal User Template	The email template used to send a notification to Customer Portal users when they become the new owner of a record in the portal. To create your own template, see "Managing Email Templates" in the Salesforce online help. This template must be marked as "Available for Use."
Header	<p>A text or HTML file that allows you to incorporate your organization's branding into the header of your Customer Portal. Click the lookup icon (🔍) to choose a file that has been uploaded to a publicly accessible folder on the Documents tab.</p> <p>The files you include in the <code>Header</code> and <code>Footer</code> lookup fields can have a combined size of up to 10 KB.</p> <p>We recommend that you do not add a header <i>and</i> a logo to your portal because they may not display properly together.</p> <p>You can position the logout link anywhere on the header by using the HTML tag: "<code>Logout</code>".</p>
Footer	<p>A text or HTML file that allows you to incorporate your organization's branding into the footer of your Customer Portal. Click the lookup icon (🔍) to choose a file that has been uploaded to a publicly accessible folder on the Documents tab.</p> <p>The files you include in the <code>Header</code> and <code>Footer</code> lookup fields can have a combined size of up to 10 KB.</p>
Logo	<p>An image file that allows you to incorporate your organization's branding into the top left header of your Customer Portal. Click the lookup icon (🔍) to choose a file that has been uploaded to a publicly accessible folder on the Documents tab and marked as an <code>Externally Available Image</code>.</p> <p>The file you include in the <code>Logo</code> lookup field can be up to 20 KB.</p> <p>We recommend that you do not add a header <i>and</i> a logo to your portal because they may not display properly together.</p>



Tip: If you plan to use the same communication template for different objects, such as the Change Owner to Portal User Template, then we recommend that you include text and merge fields on the template that are appropriate for both objects. For example, if your organization has a Warranty custom object and a Training custom object, and you want to use the Change Owner to Portal User Template for both, then the text and merge fields on the template should read: "A new record has been assigned to you. Id: {!Training.ID}{!Warranty.Id}." When the template is sent, only the relevant merge fields will display.

4. Click **Save** to save your Customer Portal settings.

Customizing Your Customer Portal Fonts and Colors

User Permissions Needed	
To change the fonts and colors of the Customer Portal:	"Customize Application"

You can customize the fonts and colors of the Customer Portal to reflect your company's branding. Your portal's fonts and colors are specified in a portal "color theme." Select a predefined color theme and optionally, customize it to better match your branding.

1. Click **Setup** ► **Customize** ► **Customer Portal** ► **Settings**.
2. Select the name of your Customer Portal.
3. Click **Change Portal Fonts and Colors**.
4. Select a color theme from the `Color Theme` drop-down list. Select `Custom` from the `Color Theme` drop-down list to create your own theme from scratch.
5. Optionally, customize the hexadecimal values of any theme you select. When you customize a theme, it is automatically renamed `Custom` when saved. You can customize the following options:

Theme Value	Description
<code>Section Header</code>	Background color of all headings, including search, recent items, related lists, solution categories, documents folders, and the selected tab.
<code>Section Bottom Border</code>	Border underneath search, related lists, recent items, solution categories, documents folders, and Create New drop-down list.
<code>Section Left Border</code>	Border to the left of search, related lists, recent items, solution categories, documents folders, and Create New drop-down list.
<code>Section Right Border</code>	Border to the right of search, related lists, recent items, solution categories, documents folders, and Create New drop-down list.
<code>Section Top Border</code>	Border above search, related lists, recent items, solution categories, documents folders, and Create New drop-down list.
<code>Section Background Color</code>	Background color of search, related lists, recent items, solution categories, documents folders, and Create New drop-down list.
<code>Page Background</code>	Portal background color, excluding search, related lists, recent items, solution categories, documents folders, and Create New drop-down list.
<code>Section Header Text</code>	Text color and font on the headers of search, related lists, recent items, solution categories, and document folders.
<code>Page Text</code>	Text color, size, and font on all portal items, except for tabs, buttons, and headers.
<code>List Header Underline</code>	Color of the lines underneath column headings on related lists.

Theme Value	Description
List Separator Color	Color of the lines between records on list views.
List Row Highlight	Color of a record when a user mouses over it.
Current Tab Font Color	Font color of the tab users have selected.
Other Tab Font Color	Font color of the tabs users have not selected.
Page Bottom Border	Color of the line bordering the bottom of the portal.
Current Tab Background Color	Background color of the tab users have selected.
Current Tab Border Color	Border color of the tab users have selected.
Other Tab Background Color	Background color of the tabs users have not selected.
Other Tab Border Color	Border color of the tabs users have not selected.

6. Click **Save** to save all changes to the theme values.



Tip: Changes are visible to Customer Portal users when they refresh their browsers. Therefore, we recommend updating your portal color theme at times when users are least likely to visit your Customer Portal.



Note: To customize the header, footer, and logo of your Customer Portal, see [Enabling Customer Portal Login and Settings](#).

Customizing Your Customer Portal Pages

User Permissions Needed	
To modify page layouts:	"Customize Application"
To assign page layouts to profiles:	"Manage Users"

You customize your Customer Portal pages just as you customize pages in Salesforce: with page layouts.

Page layouts control the layout and organization of buttons, fields, s-controls, custom links, and related lists. They also help determine which fields are visible, read only, and required. Page layouts can include s-controls that run when a user clicks a custom link or button, or that are rendered within a field section when the page displays.

Customer Portal users view the layouts assigned to their profile when they log in to your Customer Portal. You can customize the following object's page layouts for your portal:

- Home
- Tasks
- Events
- Cases
- Assets
- Solutions
- Custom Objects

Customizing Portal Page Layouts

To work with page layouts, go to **Setup > Customize**, click the appropriate kind of record, and select **Page Layouts**. For more information, see "Setting Page Layouts" in the Salesforce online help.



Note: By default, Customer Portal users have "Read" permissions on accounts, contacts, and assets so that they can view their account name and choose a contact and asset for the cases they create on your portal.

To work with page layouts for custom objects, click **Setup > Build > Custom Objects**, select a custom object, and choose a page layout from the Page Layouts section. For more information, see "Building Page Layouts for Custom Objects" in the Salesforce online help.



Note: To display a custom object in your Customer Portal, you must:

- Select the `Available for Customer Portal` checkbox on the custom object. You cannot assign a portal profile to a custom object page layout unless this checkbox is selected. For information on modifying this setting, see "Defining Custom Objects" in the Salesforce online help.
- Add the tab of the custom object to the Service & Support app. For more information, see "Managing Custom Apps" in the Salesforce online help.
- Grant user permissions to the custom object on profiles assigned to portal users. For more information, see "Creating and Editing Profiles" in the Salesforce online help.

Customizing the Documents Tab and Web Tabs

In addition to the objects above, you can allow Customer Portal users to view Web tabs and the Documents tab when they log in to your Customer Portal. Web tabs and the Documents tab do not have page layouts to customize.

- To allow portal users to view Web tabs, simply create Web tabs and assign them to Customer Portal profiles. For more information, see "Creating Web Tabs" in the Salesforce online help.
- To allow portal users to view a Documents tab, grant Customer Portal users access to the folders on your Salesforce Documents tab that contain the files you want them to view. For more information, see "What is a Document Library?" in the Salesforce online help and "Creating and Editing Folders" in the Salesforce online help.



Tip: If you add Web tabs or the Documents tab to your Customer Portal:

- Set the tab visibility settings on those tabs to Default On for portal profiles so portal users can view them. For more information, see "Creating and Editing Profiles" in the Salesforce online help.
- Add Web tabs or the Documents tab to the Service & Support app so that the tabs are accessible to users in your Customer Portal. For more information, see "Managing Custom Apps" in the Salesforce online help.

For setup tips and general information about Customer Portal pages, see "Setup Tips and Considerations for Customer Portal Pages" in the Salesforce online help.

Setup Tips and Considerations for Customer Portal Pages

Consider the following setup tips and general information about Customer Portal pages:

Customer Portal Tabs

Only the following objects can display as tabs in your Customer Portal:

- Home
- Cases
- Solutions
- Web tabs

- Documents
- Custom objects

Setting Up Cases

When setting up your Customer Portal, clone the Case Layout and rename it Portal Case Layout. This allows you to easily differentiate between case page layouts for internal users and case page layouts for portal users.

By default, new cases are accessible in the Customer Portal, but you can include the `visible in self-service` checkbox on case page layouts so that you can deselect the checkbox to prevent a case from being displayed.

Do not select the `Show Case Email Notification` and `Show Case Email Notification by default` checkboxes on case page layouts. These features only apply to Salesforce users.

Do not add the `Internal Comments` field to case page layouts assigned to portal profiles because portal users may view comments intended only for Salesforce users.

Include the `Asset` field on case page layouts if you want portal users to be able to associate cases with an asset related to their account.

Include the `Contact Name` lookup field on case page layouts so that users with "Edit" permissions on that field can change a case's contact to another portal user in the same account.

Do not select the `Show solution information section`, `Show Contact Notification` checkbox, and `Select Contact Notification` checkbox by default checkboxes on close case page layouts because their functions only apply to Salesforce users.

Create case record types to set the default value of the `Case Origin` picklist field for cases logged on your Customer Portal. For more information, see "Creating Record Types" in the Salesforce online help.

For case assignment rules to work on the Customer Portal, select the `Show Case Assignment` checkbox and `Select Case Assignment` checkbox by default checkboxes on case page layouts assigned to portal profiles. Portal users cannot view these checkboxes on the Customer Portal.

Portal users can view all the values in the `Type`, `Status`, `Priority`, and `Case Reason` picklist fields unless you create record types for cases that contain separate picklist values for them. For more information, see "Managing Record Types" in the Salesforce online help.

Cases

Portal users cannot edit the value of the `Status` picklist field on cases.

Portal users can edit and delete attachments they have added to their cases, but they cannot edit and delete attachments added to cases by Salesforce users.

The **Delete** and **Sharing** buttons on a case detail page are not available to portal users.

Case auto-response rules do not apply to cases created by Customer Portal users. For more information about auto-response rules, see "Setting Up Auto-Response Rules" in the Salesforce online help.

Portal users can view, search, and create notes and attachments on cases.

Solutions

The `Status` picklist field on solutions is not available to portal users.

The `Status` picklist field on a solution does not need to be set to Reviewed for a solution to be visible in the Customer Portal; a solution is visible in the Customer Portal if the `visible in self-service portal` checkbox is selected on a solution.

If you enable solution categories for your organization, then solution categories are also available in your Customer Portal. Uncategorized solutions do not display in the solution categories of your Customer Portal, but they do display in your portal's search and list views.

The top solutions feature is not available for your Customer Portal, but you can create links on your Customer Portal's home page to your organization's most relevant solutions.

Home Page

When designing home page layouts for your Customer Portal, we recommend adding the following components: Search, Solution Search, Recent Items; and a custom HTML Area component that includes your corporate branding in the wide column.

Create custom components to put on the home page layouts of your Customer Portal, such as links to custom list views, specific documents, and top solutions. For more information, see "Defining Home Page Components" in the Salesforce online help.

Custom component names do not display in the wide section of the home page in the Customer Portal. You can position the logout link anywhere on the header by using the HTML tag: "Logout". For more information on the header, see Enabling Customer Portal Login and Settings.

We recommend *not* adding the following components to your Customer Portal home page layouts because they are for Salesforce users: `Tasks`, `Calendar`, `Product Search`, `Recent Items`, `Dashboard Snapshot`, `Messages & Alerts`, and `Items To Approve`.

Activities

Portal users cannot be assigned to activities.

Portal users can view completed tasks and past events marked `visible in Self-Service` that are associated with objects they have permission to view.

Documents

Verify that none of your organization's internal documents are available in folders accessible to portal users. For more information, see "Managing Folders" in the Salesforce online help.

Custom Objects

When you deselect the `Available for Self-Service` checkbox on a custom object, the custom object is no longer available on the Customer Portal, and all of the user permissions for the custom object are automatically removed from portal profiles. If you select the `Available for Self-Service` checkbox on a custom object again, you must update the user permissions for the custom object on portal profiles.

Portal users can view, search, and create notes and attachments on custom objects.

Assets

Portal users cannot edit assets.

Portal users can only view assets associated with their accounts.

Assets are only visible to portal users if you include the `Assets` lookup field on case page layouts. From case detail pages, portal users can click the asset in the `Asset` field to view the asset.

Portal users can view and search attachments on assets.

Managing Customer Portal Users

User Permissions Needed	
To manage Customer Portal users:	"Edit Self-Service Users"
To create, edit, and delete profiles:	"Manage Users"
To create, edit, and delete page layouts:	"Customize Application"
To set field-level security:	"Customize Application"
To set sharing rules:	"Manage Users"

Because your Customer Portal has functionality that is similar to Salesforce, you manage your Customer Portal users in much the same way as you manage your Salesforce users. Just like for Salesforce users, you use the following features to manage the objects, data, and functions your Customer Portal users can access:

- Profiles—defines a user's permission to perform different functions
- Page layouts—controls the layout and organization of buttons, fields, s-controls, custom links, and related lists on record pages

- Field-level security—defines which fields users can access
- User roles—controls the level of visibility that users have to your data
- Sharing rules—allows you to selectively grant data access to defined groups of users

Consider how the following items affect how you manage Customer Portal users:

Customer Portal Profiles

The profile you assign to a Customer Portal user defines his or her permission to perform different functions within your organization's Customer Portal, such as whether the user can view, create, edit, or delete cases and custom object records. When you enable a Customer Portal, the Customer Portal Manager and Customer Portal User profiles are automatically created for your organization. The settings on the Customer Portal Manager and Customer Portal User profiles are the same. However, users associated with the Customer Portal Manager profile can be assigned greater access to data via the Customer Portal role hierarchy and sharing rules. Additionally, you can clone and customize each profile to suit the various support requirements of specific customers. Note that you can only configure Customer Portal profiles for custom object and customer support functionality, such as cases and solutions.

Customer Portal Sharing Rules

After you enable your Customer Portal, the "All Customer Portal Users" and "All Internal Users" groups are created. The "All Customer Portal Users" group automatically contains all Customer Portal users in your organization; the "All Internal Users" group automatically contains all Salesforce users in your organization. You can use these groups to easily create sharing rules that grant all of your Customer Portal or Salesforce users access to specific data. You can also create sharing rules between Customer Portal users and Salesforce users. Similarly, you can create sharing rules between Customer Portal users from different accounts, but only between users with the Customer Portal Manager license type. For more information, see "Setting Sharing Rules" in the Salesforce online help.

Customer Portal Role Hierarchy

A portal user role hierarchy is created for an account and its contacts when you enable the first Customer Portal user on that account. Then, whenever you enable a contact as a Customer Portal user, he or she is automatically assigned to the User role in the account's portal role hierarchy.

The portal role hierarchy includes three roles—Executive, Manager, and User—none of which can be customized. Similarly, you cannot create roles for your Customer Portal. Role hierarchies ensure that portal users from different accounts never see each other's data. However, you can create sharing rules so that users with the Customer Portal Manager license type from different accounts can see each other's data.

Accounts with different portal types—Customer Portal *and* PRM Portal—have a separate role hierarchy for each portal. Role names include the portal type with which they are associated. For example, if Account A has both a Customer Portal and a PRM portal, then roles for the Customer Portal are named "Account A Customer User" and roles for the PRM portal are named "Account A Partner User".

To view the roles assigned to your Customer Portal users, create a custom report, choose Administrative Reports, select Users as the data type, and add `Role` to your report columns. For more information, see "Administrative Reports" in the Salesforce online help.

Customer Portal License Types

Customer Portal users cannot perform all of the functions that a Salesforce user can. This is because Customer Portal users are assigned to license types that are separate from Salesforce user licenses. The Customer Portal includes two license types to which you can assign Customer Portal users—Customer Portal User and Customer Portal Manager. These license types only allow you to assign portal users to the available Customer Portal profiles.

License types also determine Customer Portal users' positions in the Customer Portal role hierarchy. The following table shows the Customer Portal license types with their associated profiles and positions in the Customer Portal role hierarchy:

License Type	Profile	Role
Customer Portal User	Customer Portal User profile or a profile cloned and customized from the Customer Portal User profile	<p>Can only be assigned to the User role</p> <p>Can only view and edit data they directly own and can view and edit cases where they are listed in the <code>Contact Name</code> field</p>
Customer Portal Manager	<p>Customer Portal Manager profile or a profile cloned and customized from the Customer Portal Manager profile</p> <p>Note that the settings on the Customer Portal Manager and Customer Portal User profiles are the same. However, users associated with the Customer Portal Manager profile can be assigned greater access to data via the Customer Portal role hierarchy and sharing rules.</p>	<p>Can be assigned to either the Executive, Manager, or User role</p> <p>Can view and edit data they directly own or data owned by or shared with users below them in the Customer Portal role hierarchy; and they can view and edit cases where they are listed in the <code>Contact Name</code> field</p> <p>Can have data shared to them just like other Salesforce users</p>



Note: After a Customer Portal user is assigned to a license type, you cannot change the license type to which he or she is assigned.

Working with Customer Portal Users

- To set up the Customer Portal for users, see [Configuring User Access to the Customer Portal](#).
- To enable Customer Portal users individually from the Contacts tab, see [Enabling the Customer Portal for Contacts](#).



Note: You can enable multiple contacts at once to access the Customer Portal through the API. For more information, see the [Apex Web Services API Developer's Guide](#).

- To change Customer Portal user information, including roles, see "Editing Customer Portal User Information" in the Salesforce online help.
- To reset Customer Portal user passwords, see "Resetting Customer Portal User Passwords" in the Salesforce online help.
- To view the license types of Customer Portal users, see "Viewing User License Types" in the Salesforce online help.
- To manage the profiles of Customer Portal users, see "Managing Profiles" in the Salesforce online help.
- To report on your Customer Portal users, see "Administrative Reports" in the Salesforce online help.



Note: Contact [salesforce.com](https://www.salesforce.com) about activating a Customer Portal for your organization.

Configuring User Access to the Customer Portal

User Permissions Needed	
To set up the Customer Portal:	"Customize Application"
To manage Customer Portal users:	"Edit Self-Service Users"
To create, edit, and delete profiles:	"Manage Users"
To set default sharing access:	"Manage Users"
To set sharing rules:	"Manage Users"
To enable Customer Portal users:	"Edit Self-Service Users"

When setting up a Customer Portal for the first time, configure the following before enabling users to access your portal:

1. Follow the steps to set up your portal as described in [Setting Up Your Customer Portal](#).
2. Customize Customer Portal profiles. For more information, see ["Managing Profiles"](#) in the Salesforce online help.
3. Set the organization-wide defaults in your organization's sharing model to Private on accounts, contacts, contracts, assets, and cases. This ensures that Customer Portal users can only view and edit data related to their accounts. For more information, see ["Setting the Sharing Model"](#) in the Salesforce online help.



Tip: To maintain Public organization-wide default behavior for Salesforce users, while ensuring that portal users can only view and edit data related to their accounts, you can create self-referencing sharing rules of "All Internal Users" to "All Internal Users". For more information, see ["Setting Sharing Rules"](#) in the Salesforce online help.

4. Optionally, set sharing rules for portal users. For more information, see ["Setting Sharing Rules"](#) in the Salesforce online help.



Note: If your organization uses sharing rules that share to Roles and Subordinates, then verify that none of the users in Roles and Subordinates owns an account with contacts enabled to use your Customer Portal. This is to ensure that no records owned by a Salesforce user are shared with a portal user.

5. Verify that portal users are not added to any queues and are not included in any public groups added to queues. For more information, see ["Editing and Deleting Queues"](#) in the Salesforce online help and ["Managing Groups"](#) in the Salesforce online help.

Portal users added to queues may be able to access records from accounts with which they are not related.

6. Enable contacts to use your Customer Portal. For more information, see [Enabling the Customer Portal for Contacts](#).



Note: Enable contacts to use your Customer Portal only after you have selected the `Login Enabled` checkbox on your portal's settings, and you have added your Customer Portal `Login URL` to your organization's website. For more information, see ["Setting Up Your Customer Portal"](#) in the Salesforce online help.

Enabling the Customer Portal for Contacts

User Permissions Needed	
To enable Customer Portal users:	"Edit Self-Service Users"

To allow a customer to access your Customer Portal, you must enable the customer's contact record as a Customer Portal user. You can enable Customer Portal users for contacts associated with accounts you have permission to edit.

1. Click the **Enable Customer Portal User** button on the contact detail page.
2. Verify the general information and locale settings, and enter any missing information. Note that the customer's `username` defaults to his or her `Email`.
3. Select a portal license type for the user. The license type you choose determines the user profile and role hierarchy options you can select for the user. The following table shows the Customer Portal license types with their associated profiles and positions in the Customer Portal role hierarchy:

License Type	Profile	Role
Customer Portal User	Customer Portal User profile or a profile cloned and customized from the Customer Portal User profile	Can only be assigned to the User role Can only view and edit data they directly own and can view and edit cases where they are listed in the <code>Contact Name</code> field
Customer Portal Manager	Customer Portal Manager profile or a profile cloned and customized from the Customer Portal Manager profile Note that the settings on the Customer Portal Manager and Customer Portal User profiles are the same. However, users associated with the Customer Portal Manager profile can be assigned greater access to data via the Customer Portal role hierarchy and sharing rules.	Can be assigned to either the Executive, Manager, or User role Can view and edit data they directly own or data owned by or shared with users below them in the Customer Portal role hierarchy; and they can view and edit cases where they are listed in the <code>Contact Name</code> field Can have data shared to them just like other Salesforce users



Note:

- After a Customer Portal user is assigned to a license type, you cannot change the license type to which he or she is assigned.
- The first time you enable a contact for the Customer Portal on an account, you cannot assign the contact to a portal role. The contact is automatically assigned to the User role, which you can update later.

4. Select `Generate new password and notify user immediately` to email a Customer Portal username and password to the customer.
5. Click **Save**.



Note: A contact can be either a PRM or Customer Portal user, but not both. If a user is a partner *and* a Customer Portal user, then you need to create two contact records for the user so that he or she can have a separate username and password for each portal.

However, a contact can be a Self-Service user as well as a PRM *or* Customer Portal user. Yet, any data created or owned by a Self-Service user can be visible to a PRM or Customer Portal user associated with the same contact.



Note: Person accounts are not currently supported in the Customer Portal.

To disable the Customer Portal for a customer:

1. Click the **View Customer Portal User** button on the contact detail page.
2. Click **Edit**, and deselect the `Active` checkbox.
3. Click **Save**.



Note: You cannot delete an active Customer Portal user; you can only deactivate his or her access to the Customer Portal. In addition, you cannot delete a contact associated with an active Customer Portal user.

Case Hierarchies

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

Spring '07 introduces the ability to link related cases in a case hierarchy. A case hierarchy allows users to view and create relationships between cases so they can better manage related customer inquiries. A case hierarchy displays cases that are associated with one another via a `Parent Case` field. When a case is associated with a parent case it signifies a relationship between cases, such as a grouping of similar cases for easy tracking, or a division of one case into multiple cases for various users to resolve.

Users can click **View Hierarchy** on a case detail page to view a visual representation of the cases in the hierarchy. Case detail pages also include a Related Cases related list, which displays all of the cases directly below a parent case in the hierarchy. From the Related Cases related list, users can create new cases that include information from the parent case, and users can mass update cases associated with the parent case.

Implementation Tips

- Add the `Parent Case` field to your case page layouts, and change its field-level security to editable for the appropriate users. Users cannot add a parent case to another case unless they have access to this field. For instructions on changing field-level security, see "Setting Field-Level Security" in the Salesforce online help.
- Make sure the `Case Number` field is displayed on your case page layouts. The **View Hierarchy** link displays next to this field; users cannot view the case hierarchy unless the `Case Number` field is visible to them.
- Add the Related Cases related list to your case page layouts in Salesforce. Note that you cannot add the Related Cases related list to Close Case page layouts or any case page layouts in the Self-Service portal.

Best Practices

- When reporting on cases, add the `Parent Case Number` field to your report. This field indicates if a case is associated with a parent case.
- When viewing a case detail page, you can create new cases automatically associated to the case by clicking the **New** button on the Related Cases related list.
- When clicking the **New** drop-down button on the Related Cases related list, you can choose to create a new case with information from the parent case so that you can avoid entering information that is the same for both cases.
- You can easily update all cases on the Related Cases related list by selecting the checkboxes next to the cases you wish to update and clicking either **Close**, **Change Owner**, or **Change Status**.

About Case Hierarchies

Viewing Case Hierarchies

User Permissions Needed	
To view cases:	"Read" on cases
To view parent cases:	"Read" on cases

A case hierarchy shows you cases that are associated with one another via the `Parent Case` field. When a case is associated with a parent case it signifies a relationship between cases, such as a grouping of similar cases for easy tracking, or a division of one case into multiple cases for various users to resolve. In the case hierarchy, cases are indented to show that they are related to the parent case above them.

- To view the hierarchy for a case, click **View Hierarchy** next to the `Case Number` field on the case detail page.
- To specify that a case is associated with another case, edit the case and type the case number of the parent in the `Parent Case` field. Alternatively, you can click the lookup icon to search for a case's case number.



Note: A parent case must exist before it can be entered and saved in the `Parent Case` field.

- To create a new case that is automatically associated with a case whose detail page you are viewing, click the **New** button on the Related Cases related list. From the **New** drop-down button, you can choose to create either a blank case or a case with information from the parent case. For more information on the Related Cases related list, see "Related Cases" in the Salesforce online help.

Related Cases

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

If set up by your administrator, case detail pages include a Related Cases related list, which displays all of the cases directly below a parent case in a case hierarchy. Cases can be associated with each other via the `Parent Case` lookup field on a case edit page. When a case is associated with a parent case it signifies a relationship between cases, such as a grouping of similar cases for easy tracking, or a division of one case into multiple cases for various users to resolve.

From the Related Cases related list, click:

- New** and choose from the drop-down button to create either a blank case or a case with information from the parent case.
- Edit** to modify an existing case.
- Cl** to close an existing case.

To perform mass actions from the Related Cases related list, select the checkboxes next to the cases you wish to update, and click:

- Close** to close the selected cases using the values you specify.

- **Change Owner** to assign the cases to the one user or queue you specify.
- **Change Status** to change the `status` of the cases to the value you specify.

For more information on mass actions on cases, see "Changing Multiple Cases" in the Salesforce online help.

Setting Up Case Hierarchies

User Permissions Needed	
To set up case hierarchies:	"Customize Application"

Administrators need to customize their organization before users can begin using case hierarchies. To implement case hierarchies for your organization:

1. Add the Related Cases related list to case page layouts. Users can create new related cases from this related list. For instructions on changing page layouts, see "Customizing Page Layouts" in the Salesforce online help.
2. Add the `Parent Case` and `Case Number` fields to your case page layouts.
3. Change the field-level security for the `Parent Case` field so that it is editable for the appropriate users. For instructions on changing field-level security, see "Setting Field-Level Security" in the Salesforce online help.
4. By default, your users have "Read," "Create," and "Edit," permissions on cases. If necessary, revise these permissions for your user profiles. Without the "Read" permission on cases, users cannot see any cases or case related lists in Salesforce. For more information on these profile permissions, see "Managing Profiles" in the Salesforce online help.

Additional Salesforce CRM Enhancements

New Campaign Fields

Spring '07 introduces two new campaign fields that are available for use on campaign reports and in the Campaign History related list. The `Member First Associated` and `Member First Responded` fields allow you to see the date a member was added to a campaign and the date a member initially responded to a campaign. You can add these fields to custom campaign reports and the following standard campaign reports:


- Campaign Call Down Report
- Campaign Member Analysis Report
- Campaign Leads Report
- Campaign Contacts Report

You can also add these fields to the Campaign History related list for leads and contacts.

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

Customizable Forecasting Enhancements

Enhancements to Customizable Forecasting increase the productivity of every forecast user, both sales representatives and managers. These enhancements make it easier to override forecasts or view key information:

- Single-click forecast overrides. To override a forecast amount or quantity, click the edit () icon.
- Single-click deal view. To view all the opportunities related to a forecast summary, click the opportunity subtab.
- View opportunities at all levels of the forecast hierarchy by clicking on the Opportunities subtab.
- Totals and adjusted totals for all rows in the forecast summary allow you to easily see and override them.

Lead Import Enhancements

The lead import wizard now offers an option to choose the record type that will be applied to all leads in your import file. For more information, see [Import My Organization's Leads](#).

Opportunity Cloning Enhancements

Spring '07 includes changes to how opportunities are cloned.

Cloning an opportunity varies if products are involved:

- If the opportunity does not have any associated products, click **Clone** on the opportunity to clone it.
- If the opportunity has associated products and your organization requires products on opportunities, click **Clone** to clone the opportunity and the associated products.
- If the opportunity has associated products and your organization does not require products on opportunities, select **Clone with products** from the **Clone** drop-down button to clone the opportunity and the associated products. Alternatively, select **Clone without products** to clone the opportunity without including the associated products.

Enter or change any information for the new opportunity, and click **Save**.

Report Enhancements

Spring '07 includes the following enhancements to reports:

Exporting Reports in CSV format

Now, when exporting reports in the CSV (comma separated values) format, the locale settings on your user detail page determine the field separator included in the exported file. For example, if your locale setting is English (United States), where the decimal separator is a '.' (period), then when you export a report in CSV format, the field separator will be a ',' (comma). However, if your locale setting is French (France), where the decimal separator is a ',' (comma), then when you export a report in CSV format, the field separator will be a ';' (semicolon). Yet users with a locale setting where the decimal separator is a ',' (comma) can choose *not* to have their locale settings determine the field separator included in the exported file by selecting **Comma Delimited (non-locale) .csv** from the **Export File Format** drop-down list. For more information about locale settings, see "Editing Your Personal Information" in the Salesforce online help.

Note that Excel does not display the field separator in CSV format.

Contract Field History Report

You can now create custom reports to analyze the history of fields that are set to be tracked on activated contracts. Use this report to see tracked fields' old and new values. You cannot use filter conditions to search the results of the Old Value and New Value fields.

To create a custom report on contract fields that are set to be tracked, click **New Custom Report** on the Reports tab, select **Contract Reports** as the data type, and choose **Contract History**. For more information on field history tracking, see "Tracking Field History" in the Salesforce online help.

Contracts are available in Professional, Enterprise, Unlimited, and Developer Editions

Report Data in Charts with Legends

If a chart report has more than 500 labels to display in a legend, then an error message will display instead of the chart. The error message states that the report has too many grouped values and should be corrected accordingly. This is because charts with more than 500 grouped values do not render well and are difficult to read.

This error message is only available on grouped and stacked bar and column charts, as well as grouped line charts.

Business Hours Fields in Case Reports

All users now have "Read" permissions on the business hours fields on case reports (`Business Hours Age` and `Business Hours Duration`). Before Spring '07, only users with the "View Setup and Configuration" permission could view and add business hours fields to case reports.

Salesforce PRM

Salesforce PRM allows you to leverage the power of Salesforce to extend the benefits of a CRM system to your indirect sales channels through a simple and easy-to-use portal. New features have been added to Salesforce PRM in Spring '07 to make working with your partners even more effective.

You can now use up to three different roles for each partner account. By having multiple roles, you can grant a partner sales manager visibility to all opportunities assigned to any partner user in the partner account, while partner sales reps can only see the opportunities they own. Using roles for partner users also allows you to:

- Create reporting hierarchies inside partner companies
- Allow partner sales managers to distribute leads to partner reps
- Simplify the process of sharing data with partners

In addition, you can now customize communications sent by Salesforce to your partners when a record owner changes.

Also, if your business processes support opportunity products, you can give your partner users the ability to view, edit, or add products to opportunities. For more information, see "About PRM Partner User Management" in the Salesforce online help. If you have configured opportunity products for your partner users, and they are unable to create or edit opportunity products, they may need to clear their browser cache.

Here are some tips for working with these new features:

- To ensure forecast data rolls up through all your partner roles, set a forecast manager for each partner role.
- Place a partner user higher in the partner role hierarchy to enable your partner organization's sales manager to manage the data for their organization.
- Be careful managing your role hierarchy. Partner users at a given role level are always able to view and edit all data owned by or shared with users below them in the hierarchy, regardless of your organization's sharing model.
- Because partner roles do not show up in the role hierarchy, manage your partner roles by using administrative reports.
- Customize the "Change Owner" communication template with your own branding and use it to notify partner users when you have assigned them a lead or other record.

Web-to-Lead and Web-to-Case Enhancements

You can now easily add and remove fields from your forms when setting up Web-to-Lead and Web-to-Case. You can also determine the order of fields on your form.

For information on setting up Web-to-Lead, see [Setting Up Web-to-Lead](#). For information on setting up Web-to-Case, see [Setting Up Web-to-Case](#).

APEX PLATFORM

Search Enhancements

Available in: **All Editions**

Spring '07 introduces many new enhancements to improve your search experience. Users can now:

- Customize the columns that appear in each search results list
- Filter search results by specific criteria
- Sort search results by column
- Limit a search to items only a user owns
- Limit the search scope
- Display additional details in solution search results

Implementation Tips

- Allow users to limit the scope of a sidebar search by enabling the object drop-down list for sidebar search.
- Set up search filter field layouts for each object so that users can filter their search results. These layouts apply to all users in your organization. You can select up to 10 fields to use as filters in search results. However, you should only select fields that will help users to further filter search results.
- Administrators should edit the search results layout and add up to 10 columns that users may want to see in their search results. Users can further customize those columns to view only those that are relevant to them.

Best Practices

- When entering search criteria, enter criteria that is as specific as possible. This will lead to faster searches and more consistent results.
- When your search results span multiple pages, you can use the sorting and filtering features to find your desired results more quickly.



Note: This release includes features that will immediately impact your users when Spring '07 is released. You may want to communicate this information to your users before the release so that they are prepared for the changes. For details, see [Customizing Columns](#), [Sorting Search Results](#), [Filtering Search Results](#), and [Sidebar Search Enhancements](#). For more information, visit the Successforce blog at <http://blogs.salesforce.com/guides/>.

About Search Enhancements

Search Results Enhancements

Customizing Columns

Administrators and users can now customize the columns that appear for each object in search results. Administrators use search layouts to determine the columns that are available for users to customize. Users can customize search result columns

only if search layouts are available for the object. Objects such as documents and reports do not have search layouts, and therefore, are not customizable.

Customized columns apply only to the logged-in user and are not visible to others within your organization.

Administrators can also overwrite all user column customizations for a particular object on the Search Results search layout.

To create or edit a search results layout:

1. Click **Setup** ► **Customize**, select the appropriate object, and choose **Search Layouts**.
2. Click **Edit** next to the Search Results layout.
3. Use the arrows to add or remove items from the layout, and to define the order in which the fields should display. You can select up to 10 fields. To select more than one item, use Ctrl+click or Shift+click to select multiple items in a range.
 - Select one or more items in the available list and click **Add** to add them to the layout.
 - Select one or more items in the selected list and click **Remove** to remove them from the layout.
 - Select one or more items in the selected list and click **Up** to move them higher in the list.
 - Select one or more items in the selected list and click **Down** to move them lower in the list.



Note: When editing a search results layout for an object, you can select the **Override the search result column customizations for all users** checkbox. If selected, all user column customizations within your organization will be overwritten and set to the organization-wide default settings.

To customize your personal search result columns:

1. Click the **My Columns** link in the appropriate results related list. If you have the System Administrator profile, click the **Customize** button and select My Columns from the drop-down.
2. Use the Add and Remove arrows to move columns to or from the Available Fields list to the Selected Fields list.
3. Use the Up and Down arrows to change the order of the columns.
4. Click **Save** when you are done.

Sorting Search Results

Users can now sort search results by column. Click any column, whose heading appears as a link, to sort the results in ascending order. Click the heading a second time to sort in descending order.

Sorting applies across all search results for a particular object, including those on subsequent pages.



Note:

You cannot sort the multi-select picklist field type. You will not be able to click on column headings for multi-select picklist fields.

Filtering Search Results

Administrators can create search filter layouts to allow users to filter search results for a specific type of record. Note that some objects, such as documents and reports, do not have search layouts and therefore cannot be filtered.

To enable filters by creating search filter layouts:

1. Click **Setup** ► **Customize**, select the appropriate object, and choose **Search Layouts**.
2. Click **Edit** next to the Search Filter Fields layout.
3. Use the arrows to add or remove items from the layout, and to define the order in which the fields should display. You can select up to 10 fields. To select more than one item, use Ctrl+click or Shift+click to select multiple items in a range.
 - Select one or more items in the available list and click **Add** to add them to the layout.
 - Select one or more items in the selected list and click **Remove** to remove them from the layout.

- Select one or more items in the selected list and click **UP** to move them higher in the list.
- Select one or more items in the selected list and click **DOWN** to move them lower in the list.

Once filters are enabled, administrators can customize filters for all users from the search results page. For information on enabling filters, see Customizing Search Layouts.

1. Click **Customize** and select Filters for All Users from the drop-down.
2. Use the Add and Remove arrows to move columns to or from the Available Fields list.
3. Use the Up and Down arrows to change the order of the columns.
4. Click **Save** when you are done.

To filter search results:

1. Click the **Show Filters** link in the appropriate results related list.
2. Enter filter criteria as necessary, and click **Apply Filters**.
 - To remove all filters and go back to the original search results, click **Clear Filters**.
 - To hide the filters, click **Hide Filters**.



Note: The state of filters for an object, either hidden or shown, is saved for a user each time the user filters, sorts, or pages through the search results list.

Additional Search Results Enhancements

Search results are dramatically improved in Spring '07. The search results page displays a separate list for each object with matching results. You can click on a link at the top of the page to jump directly to a particular list of results. Additionally, the link contains the number of results for that object. For example, if there is a link that says Contacts [25+], there are more than 25 contact records that match your search criteria. Click on that link to jump directly to the Contacts search results.

Each results list is dynamic, so that you can navigate to the next or previous page of the list, sort, and filter without refreshing the entire page. Furthermore, if any of these processes is taking a long time, you can cancel the process by clicking the **Cancel** button on the progress indicator.

Sidebar Search Enhancements

Limit to Items I Own

The `Limit to Items I Own` checkbox is now available in the sidebar search for all users. Use the **Limit to items I own** checkbox to only search within records for which you are the owner. If you choose this option in the Sidebar, this checkbox will remain selected for any search you perform during that session. If you do not want to search for only items you own, you must deselect this checkbox. The **Limit to items I own** checkbox is deselected by default.

Limit Searches to One Type of Object

Spring '07 introduces a new user interface setting that allows you to limit your sidebar searches to a single object type. Click **Setup > Customize > User Interface**, and select the `Enable Object Drop-Down List for Sidebar Search` checkbox to activate this functionality.

The object drop-down list for sidebar search allows you to limit users' sidebar searches by object. When you select `Enable Object Drop-Down List for Sidebar Search`, a drop-down list appears in the Search section. From this list users can select to search within a specific object or across all objects. In Advanced search, you can limit your search within specific objects by using the checkboxes in the Scope section.



Note: Once you choose to search for a record in a specific object, that object will be preselected the next time you search.

Solution Search Enhancements

Spring '07 introduces two new solution settings for changing the way solution search results display. To activate these settings:

1. Click **Setup** ► **Customize** ► **Solutions** ► **Solution Settings**.
2. Select the `Solution Summary` checkbox to enable solution search results to display up to 150 characters of the solution details in the solution search results.
3. Select the `Inline Category Breadcrumbs` checkbox to enable the results to display up to 150 characters of the breadcrumb trail of categories to which the solution belongs.

Time-Based Workflow

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

Workflow allows your teams to operate more efficiently using automated business processes for your standardized internal procedures. Now, Salesforce lets you increase this efficiency by configuring time-based workflow rules.

Previously, workflow rules only triggered immediate actions. Now, you can define rules that trigger time-dependent actions, executing relative to any date or date/time field on the object as specified in a time trigger. For example, use time-based workflow to generate critical date reminders that remind the opportunity owners when a large opportunity (amount greater than 1M US) is fourteen days away from the intended close date. Use the same rule to notify the executive sponsor and change the ownership of the opportunity if the close date is just 10 days away. You can also use time-based workflow for customer satisfaction tasks, such as scheduling a task for the case owner to follow up with the customer two days after a high priority case for a platinum customer is closed.

To configure a workflow rule with time-dependent actions, add a time trigger and associate it with multiple actions. The associated actions execute according to the time trigger when a record matches the workflow rule criteria. After the workflow rule is triggered, its time-dependent actions appear in a workflow queue that system administrators can use to manage pending actions.

Implementation Tips

- If you plan on configuring workflow rules that have time-dependent actions, first specify a default workflow user as follows:
 1. Click **Setup** ► **Customize** ► **Workflow & Approvals** ► **Settings**.
 2. Select a `Default Workflow User` that you want Salesforce to display with a workflow rule when the user that triggered the rule is not active.

If your organization uses time-dependent actions in workflow rules, you must designate a default workflow user. Salesforce displays this username in the `Created By` field for tasks, the `Sending User` field for email, and the `Last Modified By` field for field updates. Salesforce does not display this username for outbound messages. If a problem occurs with a pending action and the last user to edit the action is no longer active, the default workflow user receives notification email from Salesforce.
 3. Click **Save**.
- You cannot use formula fields that calculate time duration in workflow rules. However, you can use formula fields to calculate dates and date/times in time triggers. For example, you cannot use a formula field to calculate "Days Open" in a workflow rule, but you can create a time trigger that uses the `Create Date` field.

- When Salesforce triggers a workflow rule that has time-dependent actions, use the workflow queue to view pending actions and cancel them if necessary. To view pending actions:

- Click **Setup** ► **Monitoring** ► **Monitor the Workflow Queue**.
- Click **Search** to view all pending actions for all workflow rules, or set the filter criteria and click **Search** to view only the pending actions that match the criteria. For more information, see "Entering Filter Criteria" in the Salesforce online help.

To optionally cancel pending actions:

- Select the box next to the pending actions you want to cancel. Optionally, check the box in the column header to select all currently displayed items.
- Click **Delete**. Salesforce cancels the pending action(s).

- Define your time triggers using days as your unit of time. Time triggers do not support hours, minutes, or seconds.
- When defining a time trigger, use standard and custom date and date/time fields defined for the object.
- To ensure an organization does not monopolize shared resources, Salesforce limits the number of time triggers an organization can execute per day. The limits are as follows:
 - Enterprise Edition = 10,000 time triggers per day.
 - Developer Edition = 10,000 time triggers per day.
 - Unlimited Edition = 20,000 time triggers per day.

If an organization exceeds these limits, Salesforce defers the execution of the additional time triggers to the next day. For example, if a Unlimited Edition organization has 21,000 time triggers scheduled to execute on May 15th, Salesforce processes 20,000 time triggers on May 15th and the remaining 1,000 time triggers on May 16th.

- Time triggers are not necessarily executed in the order they are displayed in the workflow rule. Workflow rules list time triggers that use the `Days Before` field first, followed by time triggers that use the `Days After` field.
- If you use a date field in a time trigger, Salesforce executes the workflow rule when the value of the date field is the current day. If the criteria for a workflow rule contains a date field, and you update the date field on the record, Salesforce recalculates the time trigger as long as they have not yet fired or are recalculated to a date in the past. For example, if a workflow rule alerts the opportunity owner seven days before the opportunity close date and the close date is set to 2/20/2008, Salesforce sends the alert on 2/13/2008. If the close date is updated to 2/10/2008 and the time trigger has not yet fired, Salesforce reschedules the alert for 2/3/2008.
- If a workflow rule has a time trigger set for a day in the past, Salesforce queues the associated time-dependent actions to execute sometime within the next four hours, depending on system usage. For example, if a workflow rule on opportunities is configured to send an email alert seven days before the close date and you create an opportunity record with the close date set to today, Salesforce sends the email alert within four hours after you create the opportunity.
- Salesforce does not display time-dependent action controls on the workflow rule edit page if you set the workflow rule evaluation criteria to `Every time a record is created or updated`.
- Time-dependent actions remain in the workflow queue only as long as the rule criteria for the workflow rule is still valid. If a record no longer matches the rule criteria, Salesforce removes the time-dependent actions queued for that record. For example, an opportunity workflow rule may specify:
 - A criteria set to "Opportunity: Status not equals to Closed Won, Closed Lost."
 - An associated time-dependent action with a time trigger set to seven days before the opportunity close date.

If a record that matches the criteria is created on July 1st and the `Close Date` is set to July 30th, the time-dependent action is scheduled for July 23rd. However, if the opportunity is set to "Closed Won" or "Closed Lost" before July 23rd, the time-dependent action is automatically removed from the queue.

- If you delete a record that has pending actions, the pending actions are deleted from the workflow queue and cannot be restored, even if you undelete the record.
- Time-dependent actions can automatically be queued again if the record is updated and you set the evaluation criteria to `be when a record is created, or when a record is edited and did not previously meet the`

entry criteria. Using the previous example, if the opportunity status is changed from Closed Lost to Prospecting and the workflow rule evaluation criteria is set to `When a record is created, or when a record is edited and did not previously meet the entry criteria`, Salesforce reevaluates the time triggers and adds the appropriate actions to the workflow queue.

- If the evaluation criteria is set to `Only when a record is created`, the workflow rule evaluates its time triggers only once. If the record that fired the rule changes to no longer meet the evaluation criteria, the pending actions are removed from the queue and the rule is never reapplied to the record.
- You cannot archive a product or price book that has pending actions.
- You cannot convert a lead that has pending actions.
- If a time trigger uses a field that is null, Salesforce ignores the time trigger.
- You can deactivate a workflow rule at any time. If the rule has pending actions in the workflow queue, editing the record that triggered the rule removes the pending actions from the queue. If you do not edit the record, the pending actions are processed even though the rule has been deactivated.
- You can add actions to existing time triggers.
- You cannot add or remove time triggers if any of the following are true:
 - The workflow rule is active.
 - The workflow rule is deactivated but has pending actions in the queue.
 - The workflow rule trigger type is set to `Every time a record is created or edited`.
- Existing workflow rules are not affected by time-dependent actions; Salesforce lists all existing actions in the Immediate Workflow Actions list.

Best Practices

- Test your workflow rules in your Salesforce Sandbox before activating them in your Salesforce organization.
- Give users the "Modify All Data" permission if they are responsible for using the workflow queue to monitor or cancel pending workflow actions.

About Time-Based Workflow

Managing Workflow Rules

User Permissions Needed	
To create or change workflow rules:	"Customize Application"

Automate your organization's standard processes by configuring workflow rules. For example, use workflow rules to automatically send sales management an email when a sales representative qualifies a large deal or assign follow-up tasks to a support representative when a case is updated.

Workflow automates the following types of actions for your organization:

- **Email Alerts** - Send an email to one or more recipients you specify. For example, automatically send sales management an email alert when a sales representative qualifies a large deal.
- **Workflow Tasks** - Assign a new task to a user, role, or record owner. For example, automatically assign follow-up tasks to a support representative one week after a case is updated.
- **Field Updates** - Update the value of a field on a record. For example, automatically change the Owner field on a contract three days before it expires.

- Outbound Messages - Send a secure configurable API message (in XML format) to a designated listener. For example, automatically initiate the reimbursement process for an approved expense report by triggering an outbound API message to an external HR system.

Configure your organization's workflow by creating workflow rules. Each workflow rule consists of:

- Criteria that determine when Salesforce executes the workflow rule. Any change that causes a record to match this criteria can trigger the workflow rule—even changes to hidden fields.
- Immediate actions to take when a record matches the criteria. For example, Salesforce can automatically send an email that notifies the sales team when a new high-value opportunity is created.
- Time-dependent actions that Salesforce queues when a record matches the criteria and executes according to your time triggers. For example, Salesforce can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the specified close date. When Salesforce triggers a workflow rule that has time-dependent actions, you can use the workflow queue to monitor the pending actions and cancel them if necessary.

To get started using workflow rules, click **Setup** ► **Customize** ► **Workflow & Approvals** ► **Workflow Rules**.

- Click **New Rule** to create a new workflow rule.
- Select an existing rule to view details about it, create a cloned rule, activate and deactivate it, or view and edit actions associated with it and their time triggers if any exist.
- Click **Edit** to make changes to an existing workflow rule.
- Click **Del** to delete a workflow rule.



Note: You cannot delete a workflow rule that has pending actions in the workflow queue. Wait until all pending actions are processed, or use the workflow queue to cancel the pending actions.

- Click **Activate** to set a rule into action. Click **Deactivate** to prevent the rule from firing when its conditions are met. You can deactivate a workflow rule at any time. However, if a record using the rule has pending actions, updating the record removes them from the queue.



Note: You cannot add time-dependent workflow actions to active workflow rules. Deactivate the workflow rule first, add the time-dependent workflow action, and reactivate the rule.

Notes on Using Workflow Rules

Consider the following when configuring workflow rules:

- Each workflow rule applies to a single object, such as leads, accounts, or opportunities. For the maximum number of workflow rules allowed on an object, see "App Setup Limits" in the Salesforce online help.
- Workflow rules can only trigger workflow actions that are relevant to the object to which the workflow rule applies. For example, if a workflow rule applies to accounts, it can only trigger field updates that affect fields on account records.
- Workflow rules can be triggered any time a record is saved or created, depending on your rule criteria. However, rules created after saving records are not triggered by those records retroactively.
- Workflow rules on custom objects are automatically deleted if the custom object is deleted.
- Workflow rules trigger automatically and are invisible to the user. Alternatively, approval processes allow users to submit records for approval. For more information on approval processes, see "What Are Approval Processes?" in the Salesforce online help.
- You cannot create email alerts for workflow rules that apply to activities.
- Saving or creating records can trigger more than one rule.

- The following will not trigger workflow rules:
 - Intellisync for salesforce.com
 - Mass replacing picklist values
 - Mass updating address fields
 - Mass updating divisions
 - Changing the territory assignments of accounts and opportunities
- Any changes you make to records while using Offline Edition will be evaluated by workflow rules when you synchronize.



Tip: Salesforce processes any rules in the following order:

1. Validation rules
2. Assignment rules
3. Auto-response rules
4. Workflow rules (with immediate actions)
5. Escalation rules

Workflow field updates that run based on an approval process or time-dependent action do not trigger any rules.



Tip: If you plan on configuring workflow rules that have time-dependent actions, you must specify a default workflow user. Salesforce associates the default workflow user with a workflow rule if the user who initiated the rule is no longer active.



Note: For notes on using time-dependent actions and time triggers, see "Time-Dependent Action and Time Trigger Considerations" in the Salesforce online help.

Creating Workflow Rules

User Permissions Needed
To create or change workflow rules, alerts, tasks, field updates, "Customize Application" and outbound messages:

To create a new rule:

1. Select the object to which the workflow rule to applies.
2. Configure the workflow rule settings and criteria.
3. Configure the workflow actions.
4. Activate the workflow rule.

Select the object for your workflow rule

1. Click **Setup** ► **Customize** ► **Workflow & Approvals** ► **Workflow Rules** to access the workflow rules list page.
2. On the workflow rules list page, click **New Rule**.
3. Choose the object to which you want this workflow rule to apply. A workflow rule can apply to standard or custom objects.



Note: You cannot create email alerts for workflow rules on activities.

4. Click **Next**.

Configure rule settings and criteria

1. Enter a rule name.
2. Optionally, enter a description for the rule.
3. Choose a trigger type:

When a record is created, or when a record is edited and did not previously meet the rule criteria

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.

Only when a record is created

Choose this option to ignore updates to existing records.

Every time a record is created or edited

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



Note: You cannot add time-dependent actions to the rule if you choose **Every time a record is created or edited**.

4. Enter your rule criteria. If your organization uses multiple languages, enter filter values in your organization's default language. For more information on using filter criteria, see "Entering Filter Criteria" in the Salesforce online help.
5. Click **Save & Next**.



Tip: If an account workflow rule should only apply to person accounts, use the rule criteria "Is Person Account equals True." To make an account workflow rule exclusive to business accounts, use "Is Person Account equals False."

Configure workflow actions

Add immediate and time-dependent actions to the workflow rule.



Note: Workflow rules can only be associated with workflow actions that are relevant to the object to which the workflow rule applies. For example, a workflow rule for accounts can only be associated with field updates for accounts.

Configure immediate actions

To add an immediate workflow action to a workflow rule:

1. Click **Add Workflow Action** in the Immediate Workflow Actions section.
2. Choose one of the following options from the **Add Workflow Action** drop-down button:

New Task

Allows you to create a task and associate it with this rule. See "Creating Workflow Tasks" in the Salesforce online help.

New Alert

Allows you to create an email alert and associate it with this rule. See "Creating Workflow Alerts" in the Salesforce online help.



Note: Activity workflow rules cannot be associated with workflow alerts.

New Field Update

Allows you to define a field update and associate it with this rule. See "Defining Field Updates" in the Salesforce online help.

New Outbound Message

Allows you to define an outbound message and associate it with this rule. See "Defining Outbound Messages" in the Salesforce online help.

Select Existing Action

Allows you to select an existing action and associate it with this rule. See "Selecting Existing Actions" in the Salesforce online help.

3. Configure additional immediate or time-dependent actions.
4. Click **Done** when your changes are complete.

Configure time-dependent actions

Tip: Time-dependent actions and time triggers are complex features with several contingencies to consider before implementation. To review these considerations, see "Time-Dependent Action and Time Trigger Considerations" in the Salesforce online help. Also, before configuring workflow rules with time-dependent actions, specify a default workflow user.

To add a time-dependent workflow action to this workflow rule:

1. Create a time trigger to specify when Salesforce executes the workflow action. To create the time trigger:
 - a. Click **Add Time Trigger**.
 - b. Set the time trigger by specifying a number of days before or after a date relevant to the record, such as the date the record was created or modified. If the workflow rule is in effect when this time occurs, the time trigger fires the workflow action.
 - c. Click **Save**. The Time-Dependent Actions section displays the new time trigger.



Note: The **Add Time Trigger** button is disabled if any of the following are true:

- The rule criteria is set to *Every time a record is created or edited*. Change the rule criteria to enable this button.
- The rule is activated. Deactivate the rule to enable this button.
- The rule is deactivated but has pending actions in the workflow queue. Cancel the pending actions to enable this button. See "Monitoring the Workflow Queue" in the Salesforce online help.

2. Choose one of the following options from the **Add Workflow Action** drop-down button:

New Task

Allows you to create a task and associate it with this rule. See "Creating Workflow Tasks" in the Salesforce online help.

New Alert

Allows you to create an email alert and associate it with this rule. See "Creating Workflow Alerts" in the Salesforce online help.



Note: Activity workflow rules cannot be associated with workflow alerts.

New Field Update

Allows you to define a field update and associate it with this rule. See "Defining Field Updates" in the Salesforce online help.

New Outbound Message

Allows you to define an outbound message and associate it with this rule. See "Defining Outbound Messages" in the Salesforce online help.

Select Existing Action

Allows you to select an existing action and associate it with this rule. See "Selecting Existing Actions" in the Salesforce online help.

3. Configure additional immediate or time-dependent actions.
4. Click **Done** when your changes are complete.

Activate the workflow rule

Salesforce does not trigger a workflow rule until you activate it. To activate a workflow rule, click **Activate** on the workflow rule detail page. Click **Deactivate** to prevent a rule from triggering or if you want to edit the time-dependent actions and time triggers associated with the rule.

Managing Workflow Actions

User Permissions Needed
To create or change workflow rules, alerts, tasks, field updates, "Customize Application" and outbound messages:

To manage your workflow actions:

1. Click **Setup** ► **Customize** ► **Workflow & Approvals** ► **Workflow Rules** to access the workflow rules list page.
2. Click the name of the rule with the workflow actions you want to edit.
3. Click **Edit** in the Workflow Actions section.
4. Manage your workflow actions as follows:
 - Click **Edit** next to any workflow action or time trigger to modify it.
 - Click **Remove** next to any workflow action to remove it from the rule. This disassociates the workflow action from the workflow rule but does not delete the workflow action.
 - Click **Delete** next to any time trigger to remove it from the rule. This deletes the time trigger and removes its associated actions from the workflow rule but does not delete the workflow actions. The workflow actions are still available when you click **Add Workflow Action** and choose the **Select Existing Action** option.
 - Click **Add Workflow Action** in the Immediate Workflow Actions section to add an immediate workflow action to the workflow rule.
 - Click **Add Time Trigger** to add a time trigger to the workflow rule.
 - Click **Add Workflow Action** next to a time trigger to add time-dependent workflow actions to the time trigger.
5. Click **Done**.

Monitoring the Workflow Queue

User Permissions Needed	
To manage the workflow queue:	"Modify All Data"

When Salesforce triggers a workflow rule that has time-dependent actions, use the workflow queue to view pending actions and cancel them if necessary.

To view pending actions:

1. Click **Setup** ► **Monitoring** ► **Monitor the Workflow Queue**.
2. Click **Search** to view all pending actions for all workflow rules, or set the filter criteria and click **Search** to view only the pending actions that match the criteria.



Tip: When setting the filter criteria, you can:

- Select **Type** and enter the name of a standard or custom object (such as opportunity or account) to search for pending actions triggered by that type of object.
- Select **Related To** and enter the name of a record to search for pending actions triggered by that record.
- Select **Evaluation Date** and enter a date to search for pending actions scheduled to occur on that date.

For more information on filters, see "Entering Filter Criteria" in the Salesforce online help.

To optionally cancel pending actions:

1. Select the box next to the pending actions you want to cancel. Optionally, check the box in the column header to select all currently displayed items.
2. Click **Delete**. Salesforce cancels the pending action.

Lookup Relationships between Standard Objects

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

Now, you can build custom lookup relationships between standard objects. This includes linking a standard object to itself, such as creating a lookup relationship to link campaigns to other campaigns.

Implementation Tips

- Lookup relationships between standard objects are not available in reports.
- Standard-to-standard lookup relationships are available on accounts, person accounts, assets, campaigns, cases, contacts, contracts, leads, opportunities, products, and solutions.

You can also create lookup relationships from opportunity products but not to them. Additionally, you can create lookup relationships to the users object but not from it.

- Lookup relationships between standard objects do not cause notes, attachments, and activities to roll up to parent records.
- Only active campaigns display in lookup fields to campaigns.
- When a parent record is deleted, child records are not deleted with it, yet the relationship to them is removed.
- When a parent record is restored from the Recycle Bin, the relationship to its child record is not restored.
- Lookup relationships for assets are special. Whenever a parent record is restored from the Recycle Bin, any relationships to an asset are restored with it. Also Salesforce displays the appropriate error message whenever a user clicks the link to a related asset if that asset is in the Recycle Bin.
- If your organization uses person accounts, account and contact lookup fields and their corresponding related lists appear on person account page layouts.
- Unlike master-detail relationships, lookup relationships have no effect on record deletion, ownership, or security.
- You can create a relationship from an object to itself but it must be a lookup relationship and a single record cannot be linked to itself. However, a record can indirectly relate to itself.

Best Practices

- Use distinct field labels and names to distinguish custom lookup relationship fields from standard ones.
- You can create self relationships between standard objects as a means of indicating a parent and child relationship.
- To create a lookup relationship from users to users, create a hierarchical relationship instead. You cannot create a lookup relationship from the users object to another object.
- If your organization uses person accounts, you can create the following types of lookup relationships:
 - Account to account
 - Account to contact
 - Contact to contact
 - Contact to account

About Standard-to-Standard Lookup Relationships

Creating Lookup Relationships

To create a lookup relationship between standard objects:

1. Click **Setup** ► **Customize**, select the appropriate object link from the **Customize** menu, and then click **Fields**.
2. Click **New** in the Custom Fields & Relationships section of the page.
3. Select `Lookup Relationship`, and click **Next**.
4. Choose the object that you want to associate with it.
5. Enter a field label and name, and click **Next** to continue.



Note: The field name can only contain characters, letters, and the underscore (`_`) character, must start with a letter, and cannot end with an underscore or contain two consecutive underscore characters. Use the field name for merge fields in custom links, custom s-controls, and when referencing the field from the API.

6. In Enterprise, Unlimited, and Developer Editions, set the field-level security to determine whether the field should be visible or read only for specific profiles, and click **Next**.
7. Choose the page layouts that should display the field as an editable field, and click **Next**.
8. Enter a related list label for the related list that displays information about the associated records. You can choose to put the related list on any page layouts for that object.

To change the label of the custom related list as it will appear on the page layouts of the associated object, edit the `Related List Label`.

To add the new related list to page layouts that users have already customized, check `Append related list to users' existing personal customizations`.

9. Click **Save** to finish or **Save & New** to create more custom fields.

Outlook Edition 3.0 Limited Release

Available in: **Personal**, **Group**, **Professional**, **Enterprise**, and **Unlimited** Editions

Outlook Edition is a free plug-in for Microsoft® Outlook® that improves productivity and data quality by allowing users to interact with Salesforce conveniently from Outlook. With Spring '07, customers who want early access to the next version of

Outlook Edition can participate in a limited release program for Outlook Edition 3.0. Outlook Edition 3.0 builds on the existing functionality of Outlook Edition 2.0. To learn more about this limited release program, please contact your salesforce.com representative.



Note: Outlook Edition 3.0 is not yet generally available. Currently, Outlook Edition 2.0 is the latest generally available version. For information on Outlook Edition 2.0, please see "What is Outlook Edition?" in the Salesforce online help.

Implementation Tips

- Outlook Edition 3.0 can be customized according to your organization's security and business needs. As an administrator, you can control which commands display in Outlook Edition menus, whether users can modify field mappings, and so on. For more information, see the [Administering Outlook Edition 3.0](#) tip sheet.
- Distribute the [Using Outlook Edition 3.0](#) tip sheet to all users who will have Outlook Edition 3.0. This document provides concise procedural instructions for working successfully with the plug-in.
- In Enterprise and Unlimited Editions, administrators can set which profiles have access to Outlook Edition. This setting is a drop-down list in the Desktop Integration Clients section at the bottom of the profile edit page. Ensure that the option for Outlook Edition is not set to **Off (access denied)** if that profile has users who require Outlook Edition. For more information, see "Setting User Permissions for Desktop Clients" in the Salesforce online help and the [Administering Salesforce Desktop Clients](#) tip sheet.
- *Person accounts* are not supported with Outlook Edition. For more information, see "What is a Person Account?" in the Salesforce online help.

About Outlook Edition 3.0

New Enhancements

Outlook Edition 3.0 offers several exciting new enhancements, including:

Uploading email attachments to Salesforce

When adding a sent or received email message to Salesforce, you can simultaneously upload that email's attachments as well. Uploaded email attachments are associated with a Salesforce record of your choice.

Associating Outlook events, tasks, and contacts with Salesforce records

You can associate calendar events, tasks, and contacts with Salesforce records. For example, you can associate the Outlook task "Call Jane Doe to confirm meeting time" with the Salesforce contact "Jane Doe."

Associating Outlook items to custom objects

You can associate Outlook items with custom objects. For example, if your Salesforce organization has the custom object Expense Reports, in Outlook you can associate an email, event, or task with an existing expense report record. (As always, you can alternatively associate the item with an account, asset, campaign, case, contact, contract, lead, or opportunity.)

Viewing associated Salesforce records in the toolbar

When you select an Outlook item that is associated with a Salesforce record, a dynamic button in the Outlook Edition toolbar displays the name of the associated record. Clicking the button opens that record's detail page in Salesforce. For example, if an Outlook calendar event is associated with the opportunity "Acme - 10 widgets," then selecting that event creates a button labeled **Opportunity: Acme - 10 widgets** in the Outlook Edition toolbar.

Quickly creating new Salesforce records

Where appropriate, Quick Create links allow you to create new accounts, contacts, or leads directly from Outlook Edition dialog boxes. You are only prompted to enter a minimal amount of information for the new record.

System Requirements

The system requirements for Outlook Edition 3.0 are as follows:

- Microsoft Windows 2000, XP Professional SP1, XP Professional SP2, or Vista
- Microsoft Outlook XP (2002), 2003, or 2007

Email Relaying

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

Configure email relaying to route all Salesforce-generated email through your company's own email servers to avoid the appearance of email spoofing. Email relaying also lets you:

- Store copies of all email as required by government regulations in various industries
- Apply existing content filters that scan messages for data and content that is not approved to be sent through company email
- Run outbound email through antivirus software before sending it to customers
- Append data such as company-wide disclaimers at the bottom of email messages
- Use Transport Layer Security (TLS), a protocol for secure email communication, to ensure the security and authenticity of both inbound and outbound email

About Email Relaying

Setting Up Email Relaying

User Permissions Needed	
To configure email relaying:	"Modify All Data"

Email relaying is using an email server to send email that did not originate on the email server. Companies set up email relaying to:

- Route all email through their own email servers to avoid the appearance of email spoofing by Salesforce. Email spoofing is the forging of email headers to make messages appear as if they came from someone other than the original sender.
- Store copies of all email as required by government regulations in various industries.
- Apply existing content filters that scan messages for data and content that is not approved to be sent out through company email.
- Run outbound email through antivirus software before sending it to customers.
- Append data such as company-wide disclaimers at the bottom of email messages.

- Use Transport Layer Security (TLS), a protocol for secure email communication, to ensure the security and authenticity of both inbound and outbound email.


You can set up email relaying for Salesforce-generated email by configuring Salesforce to automatically route email through your company's Simple Mail Transfer Protocol (SMTP) server.



Note: Contact salesforce.com to enable email relaying for your organization.

To enable and configure email relaying:

1. Click **Setup** ► **Security Controls** ► **Email Relay Activation**.
2. Configure the following settings:

Setting	Description
Email Host	<p>The host name or IP address of your company's SMTP server. Obtain this information from your email administrator.</p> <p> Important: If you plan to use Transport Layer Security (TLS) with this connection, enter the host name instead of the IP address. TLS requires the host name for verifying certificates.</p> <p>For host names, use the following format:</p> <pre><mail server>.<domain>.<domain extension></pre> <p>For example:</p> <pre>mail.acme.com</pre>
Port	<p>The port number of your company's SMTP server. Obtain this information from your email administrator.</p>
TLS Setting	<p>Specifies whether Salesforce will use TLS for SMTP sessions. Select one of the following options:</p> <ul style="list-style-type: none"> • Preferred: If the remote server offers TLS, Salesforce upgrades the current SMTP session to use TLS. If TLS is unavailable, Salesforce continues the session without TLS. • Required: Salesforce continues the session only if the remote server offers TLS. If TLS is unavailable, Salesforce terminates the session without delivering the email. • Preferred Verify: If the remote server offers TLS, Salesforce upgrades the current SMTP session to use TLS, and verifies the certificate is signed by a valid certificate authority and that the common name presented in the certificate matches the domain or mail exchange of the current connection. If TLS is available but the certificate is not signed or the common name does not match, Salesforce continues the session without

Setting	Description
	<p>TLS. If TLS is unavailable, Salesforce continues the session without TLS.</p> <ul style="list-style-type: none"> <code>Required Verify</code>: Salesforce continues the session only if the remote server offers TLS, the certificate is signed by a valid certificate authority, and the common name presented in the certificate matches the domain or mail exchange to which Salesforce is connected. If any of these criteria are not met, Salesforce terminates the session without delivering the email.
<code>Restrict Relay to Domains</code>	Specifies whether to restrict the email relaying functionality to certain domains. If you select this option, enter the names of those domains separated by commas in the text field below. This causes Salesforce to route email to your company's SMTP server only if the email is addressed to one of the listed domains. If you select the checkbox but do not list any domains, Salesforce routes all email to your company's SMTP server.
<code>Active</code>	Enables email relaying for your organization. If you deselect this checkbox, Salesforce keeps the email relaying configuration but does not route email to your company's email server.

3. Click **Save**.



Note: Salesforce recommends sending a test message each time you change the email relaying configuration.

Apex Web Services API 9.0

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

The Apex Web services API and related toolkits have been improved for Spring '07:

- The AJAX Toolkit and Web services API have been updated to 9.0.
- The AJAX shell uses dynamic HTML to display results.
- ConnectSAP and ConnectOracle are available for download from **Setup ► Data Management** in the Salesforce application for Unlimited Edition and Enterprise Edition organizations.
- Request limits for trial organizations will be 5,000 calls per 24 hours and maximum of 5 concurrent requests at one time.
- The number of API requests sent in the last 24 hours is now displayed in **Setup ► Company Profile ► Company Information** in the Salesforce application, allowing administrators to anticipate request limits and take appropriate action.
- You can now try to resend (retry) or delete actions on queued outbound messages from **Setup ► Monitoring ► View the Outbound Message Queue** in the Salesforce application.
- A new `sendEmail` call allows you to immediately send an email message via the API.
- You can use date literals such as `THIS_WEEK` when filtering with SOQL SELECT.

SSL Authentication for Delegated Authentication and Outbound Messaging

In Spring '07, delegated authority and outbound message endpoints can authenticate connections from Salesforce using two-way SSL authentication. Upon request from the customer endpoint, Salesforce will authenticate itself using a client certificate. The client certificate can be downloaded from **Setup > Integrate > Apex API**.

For complete details about Apex Web Services API 9.0 enhancements, visit the Apex Developer Network at https://wiki.apexdevnet.com/index.php/Apex_Wiki.

Apex Code Developer Preview

Available in: **Developer** Edition

Salesforce offers extensive customization capabilities for the data model with custom fields, objects, and relationships. Now with Apex Code that customization can be dramatically extended to encompass the business rules that surround the data, enabling organizations to completely model their unique processes with the power and flexibility of the Apex on-demand platform.

- **Triggers for insert, update, and delete events**

Attach your rules to the various save events of nearly all object types to prevent duplicate records, enhance data relationships for better reporting, increase data visibility, create records in related objects, introduce assignment rules, and more.



Note: As of May 9, 2007, single-row triggers are no longer supported. All trigger invocations must include the `bulk` keyword. Any code that does not include `bulk` will be invalid. In addition, every trigger now returns arrays for the following:

- `Trigger.new`
- `Trigger.old`

- **Create your own service-oriented apps**

Move multi-operational transaction processing into Apex Code and expose your own Web service calls to establish the integrity of your logical transaction.

- **Advanced testing framework**

Write and execute automated functional tests in Apex Code that return comprehensive success or failure information including code coverage.

- **Debug console**

View debug statement output and profiling details from the Salesforce user interface when your Apex Code is invoked or executed directly within the console.

For details about Apex Code syntax and code samples, see the *Apex Code Language Reference* at http://www.salesforce.com/us/developer/docs/apexcode/salesforce_apex_language_reference.pdf.



Note: Apex Code is available as a preview in Developer Edition only in Spring '07. The feature is subject to change before it is generally available. Pricing and packaging details have not been determined.

Additional Apex Platform Enhancements

Apex Mobile Licensing Enhancements

Now you can control the distribution of Apex Mobile licenses in your organization. A separate Apex Mobile license is required for each user who uses a mobile device to access Salesforce. For organizations using Unlimited Edition, salesforce.com provides one Apex Mobile license for each Salesforce license. Organizations using Professional, Enterprise, or Developer Edition must purchase Apex Mobile licenses separately. To allocate Apex Mobile licenses to users within your organization, you can select the `Apex Mobile User` checkbox when editing a user's personal information. Because Apex Mobile licenses apply to users rather than mobile devices, a user with a single license can have multiple devices using the same login if necessary. For more information, see "Editing Users" in the Salesforce online help.

Apex Mobile is available in Unlimited Edition and available for an additional cost in Professional, Enterprise, and Developer Editions.

Cloning Email Templates

Spring '07 introduces the ability to clone email templates, allowing your teams to quickly and efficiently create custom email templates by copying an existing template.

Cloning an email template involves saving an existing email template with a new name. To clone an email template:

1. To manage your personal email templates, click **Setup** > **Email** > **My Templates**. If you have permission to manage public email templates, click **Setup** > **Communication Templates** > **Email Templates**.
2. Click the name of an email template in the list.
3. Click **Clone**.
4. Choose a folder in which to store the template.
5. Check the `Available For Use` checkbox if you would like this template offered to users when sending an email.
6. Enter an `Email Template Name`.
7. Enter a `Description` for the template. Both template name and description are for internal use only.
8. Click **Save**.

ConnectSAP and ConnectOracle Available for Download

If your organization has purchased ConnectSAP or ConnectOracle, these client applications are now available for download via **Setup** > **Data Management**.

ConnectOracle is a lightweight, easy to implement, packaged integration solution for Salesforce and Oracle e-Business Suite 11i. ConnectSAP is a lightweight, easy to implement, packaged integration solution for Salesforce and SAP R3® that delivers an integrated and consistent view of relevant customer data in both systems.



Note: Contact salesforce.com to learn more about purchasing and using ConnectSAP and ConnectOracle.

Data Loader Rebranded

The client application for the bulk insert and export of Salesforce records has recently been renamed from "AppExchange Data Loader 8" to "Apex Data Loader 9."

Apex Data Loader is available in Enterprise, Unlimited, and Developer Editions.

**Tip:**

If you experience login issues in the command line interface after upgrading to a new version of the Apex Data Loader, please try re-encrypting your password to solve the problem. For information on the password encryption utility, see "Encrypting From the Command Line" in the Salesforce online help.

Divisions on Custom Objects

If your organization uses divisions to segment data, you can now apply divisions to custom object records. To enable a custom object for divisions, select the `Enable Divisions` option on the custom object edit page. Salesforce adds a `Division` field to the custom object, and if the custom object is the master in a master-detail relationship, any custom objects on the detail side also get the `Division` field and inherit their division from the master record. For more information on divisions, see "Overview of Divisions" in the Salesforce online help.



Note: When you enable divisions for a custom object, Salesforce initially assigns each record for that custom object to the global division.

When you create a custom object record:

- If the custom object is enabled for divisions, the record adopts your default division.
- If the custom object is on the detail side of a master-detail relationship with a divisions-enabled custom object, it adopts the division of the master record.

Divisions are available in Professional, Enterprise, and Unlimited Edition. Contact salesforce.com to enable divisions for your organization.

Email Approvals

Users can now respond to email approval requests by sending a reply email with the word "approve," "approved," "yes," "reject," "rejected," or "no" in the first line of the email body, and optionally adding comments in the second line. Users can still click a link in the email to access the approval page as well. This feature is especially useful for organizations with users who receive approval requests on mobile devices.

To enable email approval response:

1. Click **Setup** ► **Customize** ► **Workflow & Approvals** ► **Settings**.
2. Select the `Enable Email Approval Response` checkbox.
3. Click **Save**.



Note: If email approval response is enabled, be sure the email template you use describes how to correctly use both response options: clicking the link and replying by email. If the user does not respond correctly (for example, if the user misspells "approve" or types it on the wrong line), Salesforce does not register the user's response.

Email approval response is available in Enterprise, Unlimited, and Developer Editions.

Formula Field Compiled Size Increased

To allow you to build more complex formula fields, the maximum size of the code generated for a formula field has now been expanded to 5 K.

Long Text Area Custom Fields Increased

Enterprise, Developer, and Unlimited Editions now offer up to 25 long text area custom fields per object. The maximum allowed for Group and Professional Edition remains five while Personal Edition is allowed one.

New Merge Field for Opportunities

In multi-currency organizations, the following field is now available for use as a merge field in custom buttons and links, email templates, and s-controls:

Field Label	Merge Field Name
Opportunity Currency	CurrencyIsoCode

Office Edition Support for Vista and Office 2007

Office Edition now supports the Microsoft Vista operating system and the Office 2007 suite.

Outbound Message Queue

You can now retry or delete actions on queued outbound messages from **Setup ► Monitoring ► View the Outbound Message Queue**.

Outbound messaging is available in Enterprise, Unlimited, and Developer Editions.

Recent Item Hover Details

Spring '07 introduces more convenient ways to get to your information instantly without extra clicks. Hover details display an interactive overlay containing detailed information about a record when users mouse-over a link to that record in the Recent Items list on the sidebar. Users can quickly view information about a record before clicking **View** for the record's detail page or **Edit** for the edit page. The fields displayed in the hover details are determined by the record's mini page layout. To configure your mini page layouts, see "Defining Mini Page Layouts" in the Salesforce online help. The fields that display in document hover details are not customizable. Note that the ability to customize your mini page layouts is available only in Enterprise, Unlimited, and Developer Editions. The `Enable Hover Details` checkbox is not selected by default, but users with the "Customize Application" permission can enable it for your entire organization by selecting the checkbox when you click **Setup ► Customize ► User Interface**.

Sales Anywhere Decommissioned

The Sales Anywhere product is no longer available and contracts will not be offered or renewed. For assistance with existing Sales Anywhere implementations, please contact iAnywhere directly.

We now recommend Apex Mobile as a complete mobile solution for Salesforce users.

Special Date Fields Expanded

The set of special date fields used when defining search criteria for list views, reports, and other areas has been expanded to include:

- Quarter
- Year
- Fiscal Quarter
- Fiscal Year

These new date fields accept modifiers and offsets similar to other special date fields. For example, you can specify NEXT YEAR, THIS QUARTER, LAST 2 FISCAL YEARS, and NEXT 6 FISCAL QUARTERS.

Starting a New Trial

With Spring '07, administrators can start a new trial with a blank template for any Professional or Group Edition trial organization that meets the following conditions:

- Less than 1000 rows of data
- No additional user licenses added by salesforce.com
- No additional functionality enabled by salesforce.com



Note: By choosing to start a new trial, you are abandoning your current trial organization including all existing data and customizations. You will no longer be able to access the trial or data. Only usernames will be preserved.

To start a new trial:

1. Click **Setup** ► **Data Management** ► **Start a New Trial**. This link is available only during your trial period.
2. Select your language and template preferences.
3. Enter the requested text stating that you want to abandon your current trial organization and all of its data. This includes both sample data and data you have entered.
4. Check the box to confirm that you acknowledge that all of your data for the current trial will be lost.
5. Click **Submit**.
6. When the confirmation page appears, click **Submit**.

User Interface: Classic User Interface Theme No Longer Supported

With Spring '07, all users are automatically upgraded to the Salesforce user interface theme. While your users still see the Salesforce Classic user interface theme using Offline Edition, they can view the new user interface theme in all other areas without any customizations from you.

Index

- C**
 - Cases
 - hierarchies [26](#)
 - related cases [26](#)
 - Contacts
 - enabling Customer Portal [23](#)
 - Customer Portal
 - enabling [12](#)
 - enabling access for contacts [23](#)
 - setting up [11](#)
 - user management [20](#)
 - user setup [23](#)
 - Customizing
 - workflow rules [35](#)
- E**
 - Editing
 - workflow rules [35](#)
 - Email
 - relaying [44](#)
- G**
 - Google AdWords
 - See also Salesforce for Google AdWords [9](#)
- L**
 - Leads
 - generated by Google AdWords [8](#)
- P**
 - Parent cases
 - viewing [26](#)
- S**
 - Salesforce for Google AdWords
 - getting started [9](#)
 - overview [8](#)
 - process diagram [8](#)
 - setting up [9](#)
 - Support
 - Customer Portal user management [20](#)
- V**
 - Viewing
 - case hierarchies [26](#)
 - related cases [26](#)
- W**
 - Workflow
 - immediate actions [35](#)
 - queue [40](#)
 - rules [35](#)
 - time triggers [35](#)
 - time-dependent actions [35](#)

