Salesforce.com Summer '10 Release Notes

Last updated: July 20, 2010

Table of Contents

About the Release Notes

The Release Notes are a comprehensive user guide for the latest release of Salesforce.com. Unlike a traditional release notes document that includes only a simple list of enhancements, the Salesforce.com 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 email enhancements, to new report types, to security and packaging enhancements.

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

Your Feedback Matters

We know how important the Release Notes, online help, and documentation are to your company's success with Salesforce.com. To continually improve the content we deliver to you, we want to know what works and what doesn't. Let us know!

- Feedback forms—Every HTML documentation page, both in the online help and in our developer guides at Developer Force, includes a feedback form for you to submit your suggestions, corrections, and feedback about the documentation. Let us know what you think!
- IdeaExchange—We're listening to your ideas too. Summer '10 includes some of your top ideas. Visit IdeaExchange for a complete list of ideas coming in Summer '10.

Want to be notified whenever we publish new documentation or make significant updates to existing documentation? Follow us on Twitter: @salesforcedocs.

Summary of Summer '10 Features and Impact on Salesforce.com Users

Summer '10 has features that immediately impact all users after the release. You may want to communicate these changes to your users beforehand so they are prepared. Other features require direct action by an administrator before users can benefit from the new functionality.

The following table summarizes the Summer '10 features and their impact on users. Review the feature details for the applicable Salesforce.com Editions.

Collaboration Cloud Enhancements

Salesforce Chatter

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Salesforce Chatter			✅	
Chatter in the Mobile Application				✅

Sales Cloud Enhancements

Campaigns

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Campaign Sales Alerts		✅		
Lead and Contact Fields Available in Campaign Member Custom Formula Field	✅			
Enhanced Campaign History	✅			

Email

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Cloud Scheduler			✅	
Deleting Attachments Sent as Links		✅		
Warning When Sending Emails to Contacts or Leads Who Don't Receive Mass Emails		✅		
Multiple Email Addresses for Contacts and Leads		✅		
Email Compliance Footers		✅		
New Merge Field for Converting Articles to PDF Attachments		✅		

Opportunities and Quotes

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Quotes Template Editor—Beta		✅		
Quotes Available in Professional Edition Organizations	✅			
Opportunities with Quotes and Quote Line Items Report	✅			
Opportunities with Quotes and Quote PDFs Report	✅			
Opportunity Reports Have New Opportunity Owner Columns	✅			
Opportunity Stage Picklist Value Update Behavior Enhanced	✅			
New Opportunity Page—Pilot				✅

Partner Relationship Management

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
New: PRM Portal Implementation Guide	✅			
Partner Portal Lead Inbox Home Page Component			✅	

Salesforce CRM Content

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Salesforce CRM Content Included in All Organizations			✅	
Enable or Disable Salesforce CRM Content for Your Organization		✅		
Autoassign Salesforce CRM Content Feature Licenses		✅		
Salesforce CRM Content Search Includes Salesforce Chatter Files			✅	
Previews for Microsoft Office 2007 Files—Pilot	✅			
Content Delivery Recipients Can Preview Microsoft 2007 Files—Pilot		✅		
Post Content to Chatter Feeds with New Workspace Privilege		✅		

Salesforce Mobile

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Chatter in the Mobile Application				✅
Salesforce Mobile for BlackBerry Enhancements			✅	

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Salesforce Mobile for iPhone Enhancements			☑	
Windows Mobile Peripheral Support			☑	
Support for Attachments in Salesforce Mobile for Windows Mobile			☑	
Mobile Views Enhancement			☑	

Other Sales Cloud Enhancements

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Previews Available for Chatter Feed Attachments in the Notes and Attachments Related List	☑			

Service Cloud Enhancements

Community

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Answers Available in Force.com Sites			☑	
Escalating a Question to a Case		☑		
Creating an Article from a Reply		☑		
Workflow Support for Questions		☑		
Data Categories Visible to Users Without Roles		☑		
Community Members Can Delete Their Posts	☑			

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Standard Users Can Change Their Community Nicknames	✅			
New API Object for Data Category Selections			✅	

Customer Portal

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Enabling High Volume Customer Portal Users				✅

Salesforce Knowledge

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Creating an Article While Closing a Case		✅		
Creating an Article from a Reply		✅		
Sending Articles as PDF Attachments on Case Email		✅		
Using Suggested Articles to Solve Cases		✅		
Customizing Access for Article Managers		✅		
Following Articles in Salesforce Chatter Feeds		✅		
New Custom Report Options		✅		
Data Categories Visible to Users Without Roles		✅		
Email Notification of Assigned Articles	✅			
Article Previews for all Channels	✅			

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Showing Article Summaries in List Views		✅		
File Fields Supported in Custom Templates		✅		
New API Object for Articles			✅	
New API Object for Data Category Selections			✅	
New Metadata API Component for Article Types			✅	

Custom Cloud Enhancements

Administration and Sharing

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Enhanced Security for Custom Fields in Portal Profiles		✅		

Analytics

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Dynamic Dashboards		✅		
Drag-and-Drop Dashboard Builder		✅		
Dashboard Table Summaries	✅			
Report Builder Enhancements—Developer Preview		✅		

Apex and Visualforce

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Force.com Apex Code Enhancements			✅	
Well-formed XML Required for All Visualforce Pages and Components		✅		
Ability to Add Dependent Picklists		✅		
View State Inspector—Pilot				✅
Postback Requests Return ID Parameter		✅		
Rendering of Contact Information Detail Page Prohibited for Person Accounts		✅		
Removed Rendering of Related List Hover Panels		✅		
String Literals for `value` Attribute in `<apex:attribute>` Must Evaluate to an Object Type		✅		

Customization

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Rich Text Area Enhancements	✅			
Dependent Lookups and Other Lookup Filters Enhancements—Beta		✅		

Globalization and User Interface Enhancements

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Globalization Enhancements				✅
New User Interface Theme Enabled	✅			

Packaging

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Push Patch Updates				✅
Changes to Deleted Components in a Managed Package			✅	
Packageable Remote Site Settings			✅	

Security

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Increased Security When Logged in as Another User	✅			
Default Certificate Key Size Changed	✅			
Maximum Number of Certificates Now Enforced	✅			
New Custom Page URL for SAML Errors		✅		
Download SAML Metadata			✅	
Invalid SAML Assertion Used to Populate SAML Assertion Validator		✅		
New Encryption, Decryption, and Key Generating Methods			✅	
Callback URL Now Takes Protocols Other than HTTPS			✅	
Remote Access Applications and Packaging Changes	✅			
Sites Single Sign-On			✅	
My Domain on Sandbox				✅

Sites

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Sites Single Sign-On			☑	
Administrator Preview for Force.com Sites		☑		
Rewriting URLs for Sites			☑	
New `Cookie` Class for Force.com Sites			☑	
New `getCookies` and `setCookies` Methods for `PageReference` to create and store cookies in Apex.			☑	

Web Services API and Developer Tools

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Adobe Flash Builder for Force.com General Availability			☑	
Web Services API Enhancements			☑	
Bulk API Enhancements			☑	
Force.com Development as a Service			☑	

Workflow and Approvals

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Approval Email Settings			☑	
Workflow Support for Questions		☑		

Documentation Enhancements

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
New: PRM Portal Implementation Guide	✅			
New: Salesforce.com Limits Quick Reference	✅			

COLLABORATION CLOUD

Salesforce Chatter

> **Note:** Salesforce Chatter is enabled by default for organizations created after June 22, 2010. For existing organizations, you must enable Salesforce Chatter.

Summer '10 introduces Salesforce Chatter, a collaboration application that helps you connect with coworkers inside your Salesforce.com organization and share business information securely and in real time. Salesforce Chatter includes the following features:

Profiles

Every user now has a Chatter profile that can be customized with a photo, contact information, and description. View your profile on the new Profile tab or by clicking your name at the top of any page, on the header bar of the Home tab, or in a Chatter feed. View profiles for other people in your organization on the new People tab or by clicking a person's name in a Chatter feed or on a record detail page.

Chatter Groups

Use Chatter groups to collaborate with specific people. Create public or private groups, depending on who you want to be able to join your group and see group activities.

Profile Tab

Use the Profile tab to view and update your own profile and to update your status.

People Tab

Use the People tab to see a list all of the people in your organization, search for people, view profiles, and follow and unfollow people.

Groups Tab

The Groups tab provides a list of Chatter groups in your organization. From the Groups tab, you can search for and join groups.

Salesforce Chatter App

Use the Salesforce Chatter app, available in the app menu in the top right corner of any page, to easily access the People and Profile tabs.

Feeds

View Chatter feeds to see updates from people and records. You can also post to feeds and comment on updates. Feeds appear:

- On Chatter profiles, where you can see updates by a single user. View your own profile to see your updates and to update your status.
- On record detail pages, where you can see updates to a single record.
- On the Home tab, where you can see your updates, status updates of people you follow, and updates to records you follow.
- On Chatter groups, where you can see updates to a group by its members. You'll only see feeds for public groups and private groups you're a member of.

Feed Attachments

Share files and links by attaching them to a post on a Chatter feed. Attachments can include all file types, from traditional business documents such as Microsoft® PowerPoint presentations to audio files, video files, Web pages, and Web links.

Feed Tracking

Enabling feed tracking for objects, such as opportunities or accounts, allows people to follow records of that object type. Following a record means that you see updates to that record in your Chatter feed on the Home tab. Administrators can enable feed tracking in **Setup ➤ Customize ➤ Chatter ➤ Feed Tracking**. Additionally, administrators can select the fields that are tracked for each object, so that people can see changes to those fields in their Chatter feed. For details on tracking knowledge base articles in Chatter feeds, see Salesforce Knowledge Enhancements on page 66.

Follow and Unfollow Links

You can toggle the **Follow** and **Unfollow** links on profiles and records. When you follow a person or record, status updates or changes to the record display in your feed on the Home tab. When you unfollow a person or record, you no longer see feed updates from that person or record.

Stop Automatically Following Records Checkbox

You automatically follow records that you own. Select the `Stop automatically following records` checkbox in **Setup ➤ My Chatter Settings ➤ My Feeds** to stop automatically following records you own.

Email Notifications

You can receive email notifications when updates occur in Salesforce Chatter, including when people: follow you, post on your profile, comment on your status or a change you make, comment on a post on your profile, or comment after you comment in a feed. Administrators can enable email notifications by selecting `Allow Emails` in **Setup ➤ Customize ➤ Chatter ➤ Settings**. To enable and edit your own email notifications, click **Setup ➤ My Chatter Settings ➤ My Chatter Emails**.

Salesforce Chatter for the Mobile Application

You can access a subset of Salesforce Chatter features on your BlackBerry or iPhone. For more information, see Salesforce Chatter for the Mobile Application on page 31.

Weekly Export

You can export Salesforce Chatter feed data in **Setup ➤ Data Management ➤ Data Export**.

Salesforce Chatter API

Use the Salesforce Chatter API objects to build collaborative apps for the Force.com platform. For more information, see New Objects on page 117.

File and Data Storage

Salesforce Chatter feed data, including posts and tracked changes, are counted against data storage usage. Chatter feed posts and comments account for .25KB of data storage. Salesforce Chatter user photos are counted against file storage.

Implementation Tips

- Quickly access the Salesforce Chatter People, Profile, and Groups tabs using the Salesforce Chatter app, available in the app menu in the top right corner of any page.
- Review "Setting Up Salesforce Chatter" in the Salesforce.com online help and "Using Salesforce Chatter" in the Salesforce.com online help for information on enabling and using Salesforce Chatter.
- Salesforce Chatter isn't supported:

  - Using Microsoft® Internet Explorer version 6.0
  - For portal users
  - In the console

Best Practices

- Get started by filling out your profile, including your contact information and a picture.
- Use the People tab to find people to follow. You'll see their status updates in the Chatter feed on the Home tab.
- Follow records you're interested in. You'll see posts and field updates, depending on how your administrator has configured feed tracking, in the Chatter feed on the Home tab.

About Salesforce Chatter

Salesforce Chatter Overview

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

[Watch a Demo](#) (English only, 3:30 minutes)

Salesforce Chatter is a collaboration application that helps you connect with coworkers inside your Salesforce.com organization and share business information securely and in real time. Salesforce Chatter works in accordance with all of the security and permission settings in your Salesforce.com organization. Salesforce Chatter is enabled by default for organizations created after June 22, 2010. For existing organizations, you must enable Salesforce Chatter.

You can use Chatter to share information and learn about your colleagues with profiles, connect with people using groups, and use feeds to keep up with the latest record updates. You can easily find the Salesforce Chatter People, Profile, and Groups tabs in the Salesforce Chatter app, available in the app menu in the top right corner of any page. If your administrator has added these tabs to other apps, you'll see the tabs in those apps unless you previously customized your display. In that case, you'll need to add the tabs to those apps.

Salesforce Chatter is not supported:

- Using Microsoft® Internet Explorer version 6.0

- For portal users
- In the console

Salesforce Chatter includes limits on:

- The number of posts, comments, and tracked field changes stored on the Salesforce.com servers
- How long posts, comments, and tracked field changes are stored on the Salesforce.com servers
- The number of posts, comments, and tracked field changes an organization can make per day
- The number of email notifications that can be sent per organization per hour

These limits are subject to change at any time. Contact salesforce.com for more information.

Salesforce Chatter Terminology

The following terminology is used for Salesforce Chatter:

Chatter Feed

A list of recent activities in Salesforce.com. Chatter feeds display:

- On the Home tab, where you can see your updates, status updates of people you follow, and updates to records you follow and groups you're a member of
- On profiles, where you can see updates made by the person whose profile you're viewing
- On records, where you can see updates to the record you're viewing
- On Chatter groups, where you can see updates to the group you're viewing

Chatter Group

Chatter groups let you share information with specific people. For example, if you're working on a project and want to share information only with your team members, you can create a Chatter group for your team. Chatter groups include a list of members, a Chatter feed, and a photo. You can create the following types of Chatter groups:

- Public: Anyone can see the group's updates, but only members can post updates. Anyone can join a public group.
- Private: Only members can see and post updates. The group's owner or managers must add members.

Comment, Salesforce Chatter

A reply to an update in a Chatter feed.

Feed Tracking, Salesforce Chatter

Administrator settings that determine which records can be followed and which fields can be tracked in Chatter feeds. Enabling an object for feed tracking allows people to follow records of that object type. Enabling fields for feed tracking allows users to see updates on the Chatter feed on the Home tab when those fields are changed on records they follow.

Follow

A subscription to a user or record that lets you see related updates in your Chatter feed on the Home tab. Follow a user to see status updates. Follow a record to see posts, comments, and field changes.

People

Users in your Salesforce.com organization. A list of people is available on the People tab in Salesforce Chatter.

Post

A top-level comment in a Chatter feed.

Profile, Salesforce Chatter

>   A personal page for each Salesforce.com user that includes contact information, following and followers lists, a Chatter feed, and a photo.

Record Update

>   An update in a Chatter feed that is the result of a field change on a record that is being followed.

Status Update

>   An update made by posting to the Chatter feed on your profile or Home tab, usually to tell other people what you're working on. Your status update displays on your Home tab, on your profile, and in the Chatter feeds of people following you.

Unfollow

>   To stop following a user or record and stop seeing their updates in your Chatter feed on the Home tab.

Update

>   A single activity that displays in a Chatter feed, such as a status update, post, or field change.

Enabling Chatter

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

User Permissions Needed	
To enable Salesforce Chatter:	"Customize Application"

Enable Salesforce Chatter to turn on Chatter feeds, groups, and profiles so people in your organization can collaborate with each other in real time.

> **Note:** Salesforce Chatter is enabled by default for organizations created after June 22, 2010. Existing organizations must enable Salesforce Chatter.

1. Click **Setup ➤ Customize ➤ Chatter ➤ Settings**.
2. Click **Edit**.
3. Select Enable.
4. Optionally select Allow Emails so users can choose to receive email notifications about Salesforce Chatter updates.
5. Click **Save**.

Consider the following tips for enabling Salesforce Chatter:

*   Enabling Salesforce Chatter also enables the new user interface theme, which updates the look and feel of Salesforce.com.
*   When Chatter is enabled for organizations with 15 or fewer users, all users automatically follow each other.
*   After enabling Salesforce Chatter for your organization, you can also enable it for the mobile application so users can access their feeds from an iPhone or BlackBerry device. Salesforce Chatter doesn't require setup for Mobile Lite users; however, you must enable Salesforce Chatter for Salesforce Mobile users by including the News Feed object in your mobile configurations' data sets.

Customizing Chatter Feed Tracking

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

User Permissions Needed	
To customize fields tracked in feeds:	"Customize Application"
To view the field tracking setup page:	"View Setup and Configuration"

Feed tracking is available for objects and fields:

- Enable objects for feed tracking so people can follow records of that object type and see Chatter feed updates when records of that object type are created. For example, if you enable the account object, people can follow account records and will see feed updates when they create accounts. Additionally, enabling feed tracking for leads allows people to see Chatter feed updates when leads are converted.
- Enable fields for feed tracking so people can see Chatter feed updates about changes to fields on records they follow. For example, if you enable the `Billing Address` field on accounts, people will see updates when `Billing Address` is changed on accounts they follow.

Sharing rules and field-level security determine visibility of record changes in Chatter feeds; you must be able to see a record in order to see changes to that record in feeds.

You can configure feed tracking for users, Chatter groups, custom objects, and the following standard objects: accounts, article types, assets, campaigns, cases, contacts, contracts, leads, opportunities, products, and solutions.

1. Click **Setup ➤ Customize ➤ Chatter ➤ Feed Tracking**.
2. Select an object.
3. Select `Enable Feed Tracking`. The user and Chatter group objects don't have this checkbox.
4. Select up to 20 fields to track. You can't select fields for article types.
5. Click **Save**.
6. Optionally repeat steps 2 through 5 for additional objects.

Consider the following feed tracking tips:

- To stop tracking an object, deselect `Enable Feed Tracking`. You can't disable feed tracking for the user or Chatter group objects.
- You must track the owner field to enable a new record owner to automatically follow that record. For example, if the `Account Owner` field isn't tracked and someone changes the owner of an account , the new owner won't automatically follow the account.
- To restore the default feed tracking settings for an object, click **Restore Defaults**.
- If leads are tracked, but accounts, contacts, or opportunities are not, users won't be able to follow or see updates related to the accounts, contacts, and opportunities created during lead conversion.
- The following standard field types can't be tracked:

    - Auto-number, formula, and roll-up summary fields
    - Encrypted and read-only system fields
    - The `Expected Revenue` field on opportunities

- The `Solution Title` and `Solution Details` fields on solutions; these fields display only for translated solutions in organizations with multilingual solutions enabled

Profile Overview

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

Customize your profile with a photo and information about yourself so people in your organization can learn more about you. View your profile on the Profile tab or by clicking your name at the top of any page, on the header bar of your Home tab, in a feed, or on a record detail page.

View other people's profiles by clicking their name in the People tab, a feed, or on a record detail page. If hover details are enabled, you can also see contact details by hovering over names in the recent items list and owner fields on records.

The Profile, and People, and Groups tabs are available by default in the Salesforce Chatter app. Select this app from the app menu in the top right corner of any page. If your administrator has added these tabs to other apps, you'll see the tabs in those apps unless you previously customized your display. In that case, you'll need to add the tabs to those apps.

From your profile, you can:

- Edit your contact information
- Add additional information about yourself in the About Me section
- Update your status in the `What are you working on?` field
- Upload or delete a profile photo
- See who's following you and who you're following
- See your recent updates in your Chatter feed
- View, download, and search files you've posted in Chatter.

When using profiles, consider these tips:

- Your status displays on your profile, Home tab, hover details, and in the Chatter feed on the Home tab of people following you. Click **Clear** to remove your status from these locations. Clearing your status does not remove it from feeds. Click **Delete** under your status in a feed to remove it from feeds.
- You can optionally attach files and links to your status updates.
- Your contact information is also visible in your user detail and is subject to validation or other rules set by your administrator. Click the **User Detail** link on your profile to view your user detail page.
- When you change your email address in your contact information, a confirmation is sent to the new address. You must click the link provided in that email for the change to take effect.
- To search the contents of other people's About Me, click **Advanced Search...** in the sidebar of the Home tab or an object tab, enter a search term, and select `Users` as the scope.
- Portal users don't have profiles.
- For organizations using Salesforce to Salesforce, the Connection User may display in feeds, but does not have a profile.
- Users with the "Manage Users" permission can edit profiles and photos for other users.

Updating Chatter Group and Profile Photos

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

Upload a photo to your profile so people can see who you are, or upload a photo for Chatter groups that you own or manage.

1. View your profile or a group detail page:

    -   View your profile by clicking your name at the top of any page or by clicking the Profile tab
    -   View a group detail page by clicking the group name on the Groups tab

2. Click **Update Photo**.
3. Click **Browse…**.
4. Select a file to upload and click **Open**.

    Note: Photos can be JPG, GIF, or PNG format up to 4 MB.

5. Drag the dotted lines in the photo to create a thumbnail image that will display next to your name or the group's name around the application.
6. Click **Save**.

To delete a photo, click **Delete**, then click **OK**.

Using the Following and Followers Lists

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

The Following and Followers lists on your profile show you who and what you are following and who is following you, respectively. You can also view Following and Followers lists on other people's profiles to see who and what they are following and who is following them. Click **Show All** in either section to view the full list in alphabetical order.

Note: When your administrator initially turns on Chatter you automatically follow some users and records in your organization.

You can filter Following lists by users or objects, for example, accounts or contacts. In your Following list, click **Unfollow** to stop following a person or record. In another person's Following list, you can also click **Follow** to follow a person or record.

In any Followers list, click **Follow** to follow a person, or **Unfollow** to stop following them.

In both lists, use the **Next** and **Previous** links to see more of the list. Click **Done** to close the window.

Using the Files Added List

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

> **Note:** Microsoft Office 2007 file previews are currently available through a pilot program.

The Files Added list on a profile shows the five files the profile owner posted most recently in Salesforce Chatter and Salesforce CRM Content. You can preview or download files directly from this list.

To see a list of all the files someone has posted in Chatter orSalesforce CRM Content, or to search for a specific file, click **Show All**. You can preview, download, sort, or search for files. If you can't find the file you're looking for, enter characters of the name of the file in `Search files...` and click **Go!**. The search results are filtered based on the characters entered.

Note the following about the Files Added by list:

• Only files posted by the profile owner are listed, including files posted to the owner's profile and other people's profiles.
• Only files you have access to are listed.

> **Note:** Not all files can be previewed, such as copy-protected PDFs. For files that can't be previewed, the **View** option isn't available and files appear as generic file type icons in the feed. Some Microsoft Office 2007 features don't display correctly in previews.

Chatter Feeds Overview

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

Chatter feeds show you recent activities performed by people and on records in your Salesforce.com organization. Salesforce Chatter feeds display:

• On Chatter profiles, where you can see updates by a single user. View your own profile to see your updates and to update your status.
• On record detail pages, where you can see updates to a single record.
• On the Home tab, where you can see your updates, status updates of people you follow, and updates to records you follow.
• On Chatter groups, where you can see updates to a group by its members. You'll only see feeds for public groups and private groups you're a member of.

Depending on how your administrator has configured feed tracking, you can see feed updates for:

• Record field changes, for example:

  - Changes to record owner
  - Closed opportunities and cases

• Created records
• Converted leads

- People's status updates
- Chatter feed comments and posts
- Shared files and links
- Posts, comments, and files on Chatter groups you're a member of

You must follow people and records to see their updates in your Chatter feed on the Home tab. Sharing rules and field-level security determine visibility of record changes in Chatter feeds; you must be able to see a record in order to see changes to that record in feeds.

Using Chatter Feeds

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

You can view Chatter feeds in the following locations:

- On Chatter profiles, where you can see updates by a single user. View your own profile to see your updates and to update your status.
- On record detail pages, where you can see updates to a single record.
- On the Home tab, where you can see your updates, status updates of people you follow, and updates to records you follow.
- On Chatter groups, where you can see updates to a group by its members. You'll only see feeds for public groups and private groups you're a member of.

To use Chatter feeds:

- Show or hide Chatter feeds using the **Show Chatter** and **Hide Chatter** links at the top of a feed. If enabled by your administrator, related list hover links display below Chatter feeds.
- Post to Chatter feeds by typing in the text box at the top of a feed. You can also attach files and links to posts. Anyone who can see a record can see your post on the record's feed. Additionally, people following a record can see your post in their Chatter feed on the Home tab. Posts to other people's profiles can be viewed by anyone.
- Update your status by posting to the Chatter feed on the Home tab or on your profile. Anyone can see your status update by looking at your profile, and people following you can see your status update in their Chatter feed on the Home tab.
- Click **Comment** to comment on feed updates.
- Click **Delete** to delete posts and comments. You can delete posts and comments you've made and posts and comments made by other people on the Chatter feed on your profile, on records you own, and on posts you've made in other feeds. Users with the "Modify All Data" permission can delete all comments and posts.
- Click **Unfollow** in the Chatter feed on the Home tab to stop following people or records.

Attaching a File or Link to a Chatter Feed

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

You can share files and links with people by attaching them to posts in a Chatter feed on the Home tab, a profile, a group, or a record. You can attach files from your computer, from Chatter feeds, or from Salesforce CRM Content workspaces.

Attachments can include all file types, from traditional business documents such as Microsoft® PowerPoint presentations to audio files, video files, Web pages, and Web links.

To attach a file to a post:

1. Enter your post in the field at the top of the feed. If you don't enter any text, a generic update is posted with your attachment.
2. Click **File** below your post.
3. Attach a file:

   - To attach a file from your computer, click **Upload a file from your computer**.
   - To attach a file from a Chatter feed or from a group or workspace that you're a member of, click **Select a file from Salesforce**, find your file, and click **Attach**. Attaching a file from a group or workspace doesn't create a copy of the file, it creates a reference to the file. So if you update the file in Salesforce CRM Content, the updates are reflected in the feed. Links, Google docs, documents (from the Documents tab), and attachments (from the Notes and Attachments related list, for example) aren't included in the list of files to attach.

4. Enter the `Name` of the file and a `Description`.
5. Click **Share**.

   Note:

   - The upload may take some time depending on your file size.
   - The size limit for a file attached from your computer to a feed is 25 MB.
   - When you attach a file to feed on a record, the file is also added to the record's Notes and Attachments related list. If you don't see the Notes and Attachments related list on your page layout, contact your administrator.
   - When you attach a file to a record's Notes and Attachments related list, the file is not added to the record's feed.
   - Feed attachments are not included in the sidebar search.
   - On some objects, the *Notes and Attachments* related list is titled *Attachments* because the object does not offer notes. Also, the same related list may be titled *Google Docs, Notes, and Attachments* or *Google Docs and Attachments* depending on the setting in your org. References to the Notes and Attachments related list include all versions of the related list, regardless of title.
   - Salesforce.com is not responsible for content posted by users.

To attach a link to a post:

1. Enter your post in the field at the top of the feed. If you don't enter any text, a generic update is posted with your attachment.
2. Click **Link** below your post.
3. Enter the URL to share.
4. Enter the `Link Name`.
5. Click **Share**.

Searching for Files to Attach to a Chatter Feed

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

Search for files in Chatter feeds or in Salesforce CRM Content. Enter the characters of the name of the file in `Search files...` and click **Go!**. Salesforce CRM Content performs a full-text search of the following document types in Salesforce

Chatter and in your workspace(s): rich text format (RTF), UTF-8 encoded TXT, HTML, XML, Adobe® PDF, and Microsoft® Office 97 through Microsoft Office 2007 Word, Excel, and PowerPoint files. Wildcard searches (*) are not supported.

Note the following about the files included in the Select a File to Attach list:

- Files posted to Chatter feeds on the Home tab, a profile, a group (that you're a member of), or a record are listed.
- Files from workspaces that you're a member of and where you have `Post Content to Chatter Feeds` or `Manage Workspace` checked in your workspace permission definition are listed.
- Links, Google docs, documents (from the Documents tab), and attachments (from the Notes and Attachments related list, for example) aren't included in the list.

Viewing and Editing Chatter File Details

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

Note: Microsoft Office 2007 file previews are currently available through a pilot program.

You can view and edit the properties of a file posted on a Chatter feed through Salesforce CRM Content. Clicking on a Chatter file name on the Workspaces, Content, or Subscriptions tab opens the content details page, which provides the following options:

- Click **Download** to open or save the file.
- Click **Subscribe** or **Subscribed** to toggle your subscription on or off.
- Click **Edit** ➤ **Edit Content Details** to edit the file's title, description, and language. These edits are reflected in the feed.
- Click **Edit** ➤ **Upload New Version** to replace the file with a new version. This edit is reflected in the feed.
- Click **Edit** ➤ **Delete Content** to delete the file. Deleting a Chatter file from the content details page deletes the file from Salesforce CRM Content and from Chatter. To restore deleted content, click on the **Recycle Bin** link in any tab. Select the content and click **Undelete**.
- Click the Preview subtab to view the following types of files:

  - Microsoft® Office 97 through Microsoft Office 2007 Word, Excel, and PowerPoint. Some Microsoft Office 2007 features don't display correctly in previews.
  - Adobe® PDF. Copy-protected PDFs can't be previewed.
  - JPG, BMP, GIF, and PNG

- Click the Versions subtab to view a list of all file versions and the reason-for-change statements provided by the authors.
- Click the Downloads subtab to view a list of all Salesforce CRM Content users who have downloaded the file.
- Click the Subscribers subtab to view a list of all Salesforce CRM Content users subscribed to the file.

Note: The **Edit** option is only available to the owner of the file.

Downloading and Viewing a File in a Chatter Feed

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

Note: Microsoft Office 2007 file previews are currently available through a pilot program.

Not only can you download and save files posted to Salesforce Chatter feeds, you can also preview files in your browser without downloading them.

There are several places in Chatter where you can download and preview files:

- On any Chatter feed, click **Download** next to the file, or to preview the file, click the file icon or click **View**.
- On a profile, you can download or preview a file from the Files Added list by clicking the Download or View icons next to the file.
- On a group, you can download or view a file from the Recent Files list by clicking the Download or View icons next to the file.
- In the Notes and Attachments related list on a record, click **Download** next to the feed attachment, or to preview the file, click **View** next to the feed attachment.

Note: Not all files can be previewed, such as copy-protected PDFs. For files that can't be previewed, the **View** option isn't available and files appear as generic file type icons in the feed. Some Microsoft Office 2007 features don't display correctly in previews.

Clicking **View** next to a Chatter file opens the file in your browser with the enhanced document viewer. The enhanced document viewer provides the following capabilities for viewing documents:

- In addition to using the next page (▶), previous page (◀), first page (|◀), and last page (▶|) icons on the document toolbar, you can navigate page-by-page through a document by right-clicking and choosing **Next Page** and **Previous Page**.
- You can use the scroll bar to move continuously through a document without needing to click the **Next Page** and **Previous Page** icons. Continuous scrolling is not available for PowerPoint files.
- You can jump directly to a page by entering the page number in the page field and pressing Enter.
- From the right-click menu you can choose **Fit Width** to expand the width of the document, or **Fit Full Page** to view the whole page of the document. The fit width icon (⟷) and fit full page icon (⤢) are also available on the toolbar.
- From the right-click menu you can choose **Full Screen** to view the document in full screen mode, or **Exit** to exit full screen mode. The full screen icon (⬜) and exit icon (✖) are also available on the toolbar.
- From the right-click menu you can **Zoom In** or **Zoom Out**. The zoom-in icon (🔍) and zoom-out icon (🔍) are also available on the toolbar.
- You can use the keyboard arrow keys to navigate page-by-page through a document. Click on the document viewer and use the keys as follows:
  - Right-arrow key: moves a PowerPoint document forward one slide and moves a PDF, Word, or Excel document forward one page.
  - Left-arrow key: moves a PowerPoint document backward one slide and moves a PDF, Word, or Excel document backward one page.

- Up-arrow key: moves a PowerPoint document forward one slide and scrolls a PDF, Word, or Excel document up the page.
- Down-arrow key: moves a PowerPoint document backward one slide and scrolls a PDF, Word, or Excel document down the page.

Deleting a File or Link from a Chatter Feed

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

There are different ways to delete Salesforce Chatter files and links depending on where they appear. You can't delete files and links posted by other people.

Deleting a File or Link from a Chatter Feed on the Home Tab, a Profile, or a Group

To delete a file or link on a Chatter feed, you must delete its post. Before deleting a post on the Home tab, a profile, or a group, consider the following:

- If the file was attached from your computer, deleting the post also deletes the file on the post.
- If the file was attached from a Chatter feed, group, or a Salesforce CRM Content workspace, deleting the post also deletes the file on the post, but doesn't delete the file from its original location.
- If the file was attached to a post and is shared in other locations, deleting the post also deletes the file on the post and other locations where it's been shared.

Deleting a File from a Chatter Feed on a Record

There are two ways to delete a file on a Chatter feed on a record:

- Delete the file on a Chatter feed by deleting its post. This deletes the file, the post, and deletes the file from the Notes and Attachments related list.
- Delete the file by clicking **Del** next to the feed attachment on the Notes and Attachments related list. Restore the file by clicking on the **Recycle Bin**, selecting the file, and clicking **Undelete**. Before deleting a feed attachment on the Notes and Attachments related list, consider the following:
  - If the file was attached from your computer, deleting it from the Notes and Attachments related list also deletes it from the post.
  - If the file was attached from a Chatter feed, group, or a Salesforce CRM Content workspace, deleting it from the Notes and Attachments related list also deletes it from the post and from the workspace.

Deleting a File from a Content Detail Page

When you post a file in Chatter, the file also appears in Salesforce CRM Content. To delete the file from Chatter and Salesforce CRM Content, click the name of the file on the Workspaces, Content, or Subscriptions tab. From the content details page, click **Edit ➤ Delete Content** to delete the file. Deleting a Chatter file from the content details page deletes the file from Salesforce CRM Content and from Chatter. To restore deleted content, click on the **Recycle Bin** link in any tab. Select the content and click **Undelete**. Only the owner of the file can edit or delete it.

Editing Salesforce Chatter Email Notifications

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

If your administrator has enabled email notifications, you can choose to receive notifications when Salesforce Chatter activities occur.

1. Click **Setup ➤ My Chatter Settings ➤ My Chatter Emails**.
2. Select `Receive Emails` to receive email notifications.
3. Select the desired checkboxes to receive an email notification when people:

    -   Follow you
    -   Post on your profile
    -   Comment on your status or a change you make, such as a post on a profile
    -   Comment on posts on your profile
    -   Comment after you comment in a Chatter feed

4. Click **Save**.

Consider the following tips for email notifications:

-   When `Receive Emails` is selected, you automatically receive email notifications when you're added to Chatter groups.
-   If you select `Comments on a post on my profile`, you won't receive a notification when someone comments on changes to your profile by an administrator.
-   If you select `Comments after me`, you will only receive email notifications for up to four comments after you.
-   Salesforce Chatter includes limits the number of email notifications that can be sent per organization per hour. These limits are subject to change at any time.

Salesforce Chatter Groups Overview

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

The Groups tab displays a list of Salesforce Chatter groups in your organization. Chatter groups let you collaborate with specific people. For example, if you're working on a team project, you can create a Chatter group for your team to share project-related files and information with each other. There are two types of Chatter groups:

-   Public: Anyone can see the group's posts, comments, and files, but only members can add posts, comments, and files. Anyone can join a public group.
-   Private: Only members can see and add posts, comments, and files. People with the "Modify All Data" and "View All Data" permissions can see posts, updates, and files. The group's owner or managers must add members.

On the Groups tab:

-   Search for groups by typing two or more letters of a group name in the quick find box at the top of the page. The list automatically filters based on what you type.
-   Click **New Group** to create a new group.

- Click **Join** in the Membership column next to a public group to join the group.
- Click **Ask Owner** in the Membership column next to a private group to view the group owner's profile. You can then ask the owner to add you to the group.
- Click **X** in the Membership column next to a group you're a member of to leave the group.
- Click a group name to view the group detail page. You can view detail pages for all groups, but you'll only see updates and files for public groups, and for private groups that you're a member of.
- Click a group owner's name to see his or her profile.
- Click the Group, Owner, or Membership column headers to sort the list. The list is automatically sorted by the Membership column to show you the groups you own, manage, and are a member of.

> **Note:** The Profile, and People, and Groups tabs are available by default in the Salesforce Chatter app. Select this app from the app menu in the top right corner of any page. If your administrator has added these tabs to other apps, you'll see the tabs in those apps unless you previously customized your display. In that case, you'll need to add the tabs to those apps.

Creating Chatter Groups

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

To create a Chatter group:

1. Click **New Group** on the Groups tab.
2. Enter a group name and description.

    > **Note:** You own groups you create. To assign a new owner, finish creating the group, then edit the group settings.

3. Select an access level:

    - Public: Anyone can see the group's posts, comments, and files, but only members can add posts, comments, and files. Anyone can join a public group.
    - Private: Only members can see and add posts, comments, and files. People with the "Modify All Data" and "View All Data" permissions can see posts, updates, and files. The group's owner or managers must add members.

4. Click **Save**.

Using the Recent Files List

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

> **Note:** Microsoft Office 2007 file previews are currently available through a pilot program.

The Recent Files list on a Salesforce Chatter group shows the five most recent files posted to that group. You can preview or download files directly from this list.

To see a list of all the files posted to a group or to search for a specific file, click **Show All**. You can preview, download, sort, or search for files. If you can't find the file you're looking for, enter characters of the name of the file in `Search files...` and click **Go!**. The search results are filtered based on the characters entered. Only files you have access to are listed in the Files Shared with list. For example, you won't see files from groups you're not a member of.

> **Note:** Not all files can be previewed, such as copy-protected PDFs. For files that can't be previewed, the **View** option isn't available and files appear as generic file type icons in the feed. Some Microsoft Office 2007 features don't display correctly in previews.

File Previews in Feeds on Records

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

If Salesforce Chatter is enabled and files have been posted to a feed on a record, you can now preview those files in the record's feed and Notes and Attachments related list. In the feed, click the file icon or click **View**. In the related list, click **View** next to a feed attachment to display a preview of the file. Not all files can be previewed, such as copy-protected PDFs. For files that can't be previewed, the **View** option isn't available and files appear as generic file type icons in the feed. Some Microsoft Office 2007 features don't display correctly in previews.

> **Note:** On some objects, the *Notes and Attachments* related list is titled *Attachments* because the object does not offer notes. Also, the same related list may be titled *Google Docs, Notes, and Attachments* or *Google Docs and Attachments* depending on the setting in your org. References to the Notes and Attachments related list include all versions of the related list, regardless of title.

Chatter in Salesforce CRM Content

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

Salesforce CRM Content Search Includes Salesforce Chatter Files

Clicking the Content tab displays files, content packs, Web links, and Google docs published in your Salesforce CRM Content workspaces. If Salesforce Chatter is enabled, files posted to Chatter groups and other Chatter files are also displayed on the Content tab. The top twenty most recently modified items are listed by default. You can filter the list using the Filter Your Results sidebar.

From the Search drop-down list, restrict your search to a specific workspace or choose to search in all workspaces. If Salesforce Chatter is enabled, you can restrict your search using:

- All Files—All workspaces and Chatter groups you're a member of and files posted to the Chatter feed on the Home tab and on profiles.
- Chatter Files—All Chatter groups you're a member of and files posted to the Chatter feed on the Home tab and on profiles.

- My Chatter Groups—All Chatter groups you're a member of.
- My Workspaces—All workspaces you're a member of and your personal workspace.

In the Filter Your Results sidebar, filter your search results by file format, featured content, author, tag, workspaces, content type, language, or a custom field. If Salesforce Chatter is enabled, you can also filter your search results by Chatter groups. The number in parentheses next to each filter type shows you how many matching files, content packs, Web links, and Google docs are in the search results.

Post Content to Chatter Feeds with New Workspace Privilege

The `Post Content to Chatter Feeds` privilege makes content from a workspace accessible on Salesforce Chatter feeds. From a Chatter feed, users can select a file from a workspace they are a member of and post it to a feed. Administrators enable this privilege when creating or editing a workspace permission. This privilege is off by default for existing organizations and on by default for new organizations.

> **Note:**
> - Both Salesforce CRM Content and Salesforce Chatter must be enabled.
> - Links, Google docs, documents (from the Documents tab), and attachments (from the Notes and Attachments related list, for example) aren't included in the list of files to attach.

Chatter in the Mobile Application

Available in: **All** Editions

> **Note:** Chatter Mobile is currently available through a pilot program. For information on enabling Chatter Mobile for your organization, contact salesforce.com.

If you're away from your desk, use Chatter in the mobile application on your BlackBerry or iPhone to stay connected with coworkers. An administrator must enable Chatter for Salesforce Mobile users; Chatter doesn't require setup for Mobile Lite users.

Salesforce Chatter in the mobile application consists of the Chatter, Profile, and People tabs. The feed that displays on the online application's Home tab appears on the mobile application's Chatter tab.

Not all of the functionality in Chatter is available from your mobile device. In the mobile application, you can:

- View and refresh Chatter feeds
- View coworkers' profiles
- Update your status
- View and edit your profile
- Post updates
- Follow and unfollow people and records

In the mobile application, you can't:

- Upload profile photos
- View Following or Followers lists
- Attach files to posts

- View files attached to posts
- Attach links to posts (although you can type a URL in the body of a post)
- Refresh feeds while working offline

Setting Up Chatter for Mobile

Chatter is automatically available in Mobile Lite. You can enable Mobile Lite for your organization by editing your mobile settings. The mobile settings also let you control whether Mobile Lite users have access to all available CRM tabs, or just to dashboards and Chatter.

To enable Chatter for Mobile Lite:

1. Click **Setup ➤ Mobile Administration ➤ Mobile Settings**.
2. Click **Edit**.
3. Select `Enable Mobile Lite` to allow users without a mobile license to install and run Mobile Lite, the free, restricted version of Salesforce Mobile.

   Starting with Spring '09, Mobile Lite is enabled by default in all new organizations.

4. Optionally select `Enable Limited Configuration` to restrict the features available in Mobile Lite to dashboards and Chatter. If you select this option, Mobile Lite users only have access to the Chatter, Profile, People, and Dashboards tabs.

   Starting with Summer '10, `Enable Limited Configuration` is enabled by default in all new organizations. To provide Mobile Lite users with all the available CRM tabs, deselect the option.

Mobilizing feeds in your organization's mobile configurations enables Chatter in Salesforce Mobile. To enable Chatter for Salesforce Mobile:

1. Click **Setup ➤ Mobile Administration ➤ Mobile Configurations**, and then click the name of a mobile configuration.
2. In the Data Sets related list, click **Edit**.
3. Click **Add...**.
4. In the popup window, select News Feed, then click **OK**.
5. Enter the maximum number of updates across all feeds that this configuration can transfer to mobile devices:

   a. The value defaults to 100, but you can enter any number up to 100.
   b. Use the Order By drop-down list to specify which records are synchronized. You can order by the `Last Feed Activity Date` or `Created Date` fields. Updates are sorted chronologically in descending order; you can't change the sort order.

      If the limit is reached, Salesforce.com synchronizes the updates in accordance with the Order By and Sort settings. For example, if the settings are Created Date and Descending, Salesforce.com transfers the most recently created updates to mobile devices and removes the same number of updates that were least recently created.

6. Click **Done** when you're finished.
7. Optionally modify other mobile configurations and mobilize Chatter feeds.
8. Optionally reorder the tabs in the mobile application. If you add Chatter feeds to a mobile configuration, you can't remove any Chatter tabs from that configuration, but you can change the tab order.

Using Chatter in the Mobile Application

Refer to the user guides to find out how to use Chatter on your BlackBerry or iPhone:

- Salesforce Mobile User Guide for BlackBerry
- Salesforce Mobile User Guide for iPhone

Chatter in Salesforce Knowledge

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

User Permissions Needed	
To enable feed tracking:	"Customize Application"
To view published articles:	"View Articles"
To create, edit, assign, publish, archive, and delete articles:	"Manage Articles"

Salesforce Knowledge users can receive updates about articles in their Chatter feeds. To enable feed tracking for article types:

1. Click **Setup ➤ Customize ➤ Chatter ➤ Feed Tracking**.
2. Select an article type. Each article type appears by name in the Object list. For example, if your organization has three article types named `Offer`, `FAQ`, and `Warranty`, all three appear alphabetically in the Objects list.
3. Select `Enable Feed Tracking`, then click **Save** when you're done with the page.

Unlike other objects, individual fields on article types are not tracked. After a user opens a published article and clicks **Follow** in the header, posts about that article on the user's home page feed can include:

- If the article is removed from the knowledge base for edit (unpublished). ***Three Months Free — Al Smith*** *unpublished this offer*
- If the article is republished. ***Three Months Free — Al Smith*** *published a new version of this offer*
- If the article is republished and flagged as new by the publisher. ***Three Months Free — Al Smith*** *published this new offer*
- If the article is archived. ***Three Months Free — Al Smith*** *archived this offer*

The title link in all posts about a specific article opens the current version of that article in the knowledge base, whether published, archived, or draft. A user without the "Manage Articles" permission who is following an article will not see posts if the article's status changes from published to draft. When the article is republished, posts about the article resume. Users with the "Manage Articles" permission see all posts about articles they follow except for article deletions. If an article is deleted from the knowledge base, all posts about the article disappear from feeds regardless of user.

SALES CLOUD

Cloud Scheduler

Available in: **All** Editions

Cloud Scheduler allows you to request meetings with your customers, and have your customers select when they can meet before you confirm the meeting.

When you use Cloud Scheduler to request a meeting, Salesforce.com creates a unique Web page for your meeting that displays the proposed meeting times. When invitees visit the page, they select the times that work for them, and send you a reply. Salesforce.com tracks all the responses so you can pick the best time to meet when you confirm the meeting.

Implementation Tips

- Cloud Scheduler isn't supported using Microsoft® Internet Explorer version 6.0.
- For users to request meetings using Cloud Scheduler, administrators must:

  1. Enable the new user interface theme.
  2. Add the **New Meeting Request** button to the Open Activities related list for contacts, leads and person accounts.

  The "Setting Up Cloud Scheduler" section below describes how to enable the new user interface and add the **New Meeting Request** button.

Best Practices

Before you request a meeting, note the following:

- You must have at least read access to the contacts, leads and person accounts that you request a meeting with.
- Each invitee must have an email address specified in their record so Salesforce.com can send them a meeting request.
- You can invite up to 50 people to a meeting.
- We recommend you install Connect for Outlook or Connect for Lotus Notes so you can sync your calendar events between Salesforce.com and Outlook or Lotus Notes.

  When proposing meeting times, it's helpful to have your Salesforce.com calendar up-to-date so you can see your free and busy times.

About Cloud Scheduler

Cloud Scheduler Overview

Watch a Demo (2:45 minutes)

The following sections provide an overview of how to request a meeting with your customers.

Step 1: You Request a Meeting and Propose Meeting Times

Go to the contact or lead detail page of the customer you want to request a meeting with, and click **New Meeting Request** on the Open Activities related list. The Meeting Request page opens.

1. Click **To** to invite other Salesforce.com users, leads, contacts, or person accounts to the meeting.
2. Click in the calendar to propose up to five meeting times, or let Salesforce.com propose times for you.

Step 2: Invitees Pick the Times They Can Meet

Salesforce.com emails a meeting request to the invitees so they can pick the times they are available.
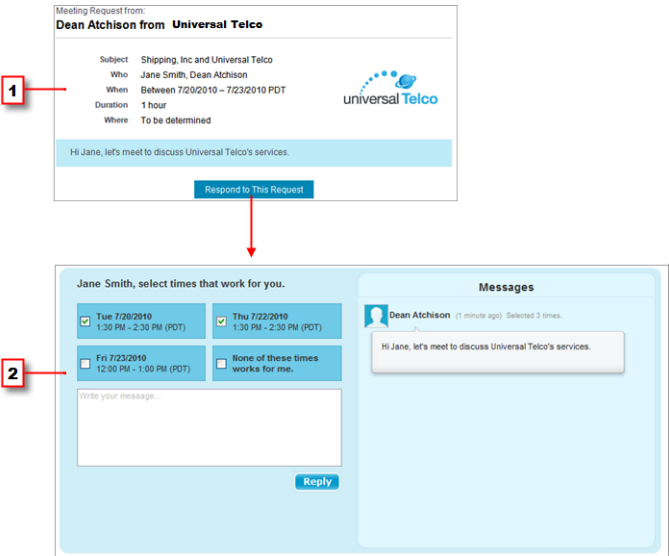
1. In the meeting request, invitees click **Respond to This Request** to open your meeting's Web page.
2. On the meeting Web page, invitees pick the proposed times that work for them and send you a reply.

Step 3: You Confirm the Meeting

Salesforce.com keeps track of all the responses so you can see when each invitee is available. You then select the best time to meet and confirm the meeting.

Setting Up Cloud Scheduler

User Permissions Needed	
To customize page layouts and activity settings:	"Customize Application"

To let your users request meetings with customers:

1. Enable the new user interface theme:

    a. Click **Setup ➤ Customize ➤ User Interface**.

    b. Select `Enable New User Interface Theme`.

    c. Click **Save**.

2. Add the **New Meeting Request** button to the Open Activities related list for contacts, leads, and person accounts:

    a. Click **Setup ➤ Customize**.

    b. Select either Contacts or Leads (whichever object you want your users to request a meeting with).

    If you have person accounts enabled and want users to request meetings with them, add the **New Meeting Request** button and the `Email` field to the page layout, which is located at **Setup ➤ Customize ➤ Accounts ➤ Person Accounts ➤ Page Layouts**.

    c. Click **Page Layouts**.

    d. Click **Edit** next to the page layout.

    e. Click **Related Lists** in the upper left corner.

    f. Double-click the Open Activities related list. You can also click the wrench icon (🔧).

    g. Expand the Buttons section, and select `New Meeting Request`.

    h. Click **OK**.

    i. Click **Save**.

3. Make sure users have the "Send Email" and "Edit Events" user permissions (these permissions are automatically selected in most standard profiles). For more information, see "Viewing Profile Lists" in the Salesforce.com online help.

If users don't have this permission, they:

- Won't see the **New Meeting Request** button on the Open Activities related list
- Can't edit, reschedule, or cancel requested meetings

4. (Optional) Add your company logo to the meeting requests sent to invitees:

    a. Upload your logo to the Documents tab, and make it externally available. Note the following guidelines:

      - The image must be in `GIF`, `JPEG`, or `PNG` format and be less than 20 KB.
      - For best results, use an image that is no more than 130 pixels wide by 100 pixels high at 72 pixels per inch. Images that are larger than these dimensions may not display correctly in some email clients due to automatic resizing.
      - If your custom logo is in the Shared Documents folder on the Documents tab, other users can replace it and indirectly change the logo that appears in meeting invitations. We recommend uploading the logo to your personal folder on the Documents tab so only you can replace it.

    b. Click **Setup ➤ Customize ➤ Activities ➤ Activity Settings**.

    c. Select `Show Custom Logo in Meeting Requests`.

    d. Select your logo, and click **Submit**.

5. (Optional) Add the Requested Meetings subtab to the Calendar section of the Home tab so that users can see a list of the meetings they've requested but not confirmed:

    a. Click **Setup ➤ Customize ➤ Activities ➤ Activity Settings**.

    b. Select `Show Requested Meetings in the Calendar Section on the Home Tab`.

    c. Click **Submit**.

6. (Optional) Enable your Partner users to request meetings:

    a. Update your custom Partner User profiles:

    i. Include the "Send Email" and "Edit Events" user permissions.

    ii. Verify that the tab visibility for the Contacts and Leads tabs is Default On.

  b. At the bottom of the partner portal detail page, click **Edit Profiles** and activate the custom Partner Userprofile.

  c. Assign the custom Partner User profile to your Partner users:

    i. To create a new partner portal user, click **Work with Portal** and choose **Enable Partner Portal Login** on the contact detail page.

    ii. To update an existing user, click **Work with Portal** and choose **View Partner User** on the contact detail page. You can then edit the user and assign the custom profile.

    iii. Click **Save**.

Field-Level Security Requirements

In most cases, you don't need to change field-level security settings to allow users to request meetings. However, if your organization has changed the default field-level security settings for certain profiles, refer to the following table to make sure those changes don't prevent users from requesting meetings.

Object	Field	Required Field-Level Security Setting	Description
Event	Name	Visible (with Read-Only *not* selected)	If this field isn't set to Visible, the **New Meeting Request** button doesn't display on the Open Activities related list, and an "insufficient privileges" message appears when trying to change (confirm or reschedule) or view a requested meeting.
			If this field is set to Visible and Read-Only, the **New Meeting Request** button doesn't display on the Open Activities related list, and requested meetings open as read-only (preventing users from confirming or rescheduling the meeting).
	Description	Visible	By default, when a requested meeting is confirmed, the last message sent from the meeting organizer appears in the Description field for the new group event.
			However, if field-level security for the Description field isn't set to Visible, then the last message doesn't appear in the Description field even if field-level security is later set to Visible.

Using Cloud Scheduler

Requesting a Meeting With Contacts, Leads or Person Accounts

Available in: **All** Editions

User Permissions Needed	
To request a meeting:	"Edit Events"
	AND
	"Send Email"

To request a meeting:

1. Go to the detail page for the contact, lead, or person account you want to invite to a meeting.
2. Click **New Meeting Request** from the Open Activities related list.

   If this button doesn't display, ask your Salesforce.com administrator to add it.

3. Click **To** to invite other Salesforce.com users, leads, contacts, or person accounts to the meeting.

   a. Select the type of invitee from the drop-down list.

   Person accounts are returned in contact searches and can be added as invitees.

   b. Enter a name or part of a name in the text field, or leave the field blank to expand the search.

   c. Click **Go!**.

   d. In the Search Results area, select the boxes next to the people you want to invite and click **Insert Selected**.

   To add more invitees, perform a new search and select more people as needed.

   If there's a warning icon (⚠) next to a person's name, you can't invite them to the meeting because they don't have an email address specified in their record. Once you add an email address to their record, you can invite them to meetings.

   e. Click **Done**.

   To remove someone you just invited, click "x" next to their name in the `To` field. You can remove all invitees except the first contact, lead or person account that you requested a meeting with.

4. Enter a subject and location.

   The default subject is a combination of the account name for the lead or contact and the company name specified in your personal information. For example, if you're meeting with a contact from the Sterling company and you work for ACME, the default subject is `Sterling and ACME`. The default location is always `To be determined`.

5. Select one of the following tabs:

   - **I propose meeting times**—Propose up to five meeting times by picking times in the calendar. See "Tips for Proposing Meeting Times" in the Salesforce.com online help

- **Let Salesforce.com propose meeting times**—Choose the duration and time frame of the meeting and let Salesforce.com propose up to five meeting times for you. See "Tips for Letting Salesforce.com Propose Meeting Times" in the Salesforce.com online help

6. Click **Next**.
7. Write a message to the invitees, and click **Send**.

   Note the following:

   - Your email signature is automatically added to your message.
   - After you click **Send**, Salesforce.com emails a meeting request to the invitees.

     In the meeting request, invitees click **Respond to This Request** to open your meeting's Web page. On the meeting Web page, invitees pick the proposed times that work for them and send you a reply.
   - Your meeting's Web page displays all messages between you and the invitees. This includes messages that invitees write when responding to your request.
   - The meeting appears on the Open Activities related list for the person you requested a meeting with, but not on the Open Activities related list for any of the other contacts or leads you invited to the meeting. For example, if you requested a meeting with Jane Smith and then clicked the **To** field to invite John Doe, the requested meeting only appears on the Open Activities related list for Jane Smith and not John Doe.

Tips for Proposing Meeting Times

When you request a meeting with customers, you can either propose meeting times or let Salesforce.com propose times for you.

When you propose meeting times:

- Proposed times aren't saved to your Salesforce.com calendar. The meeting only appears in your calendar after you confirm the meeting.
- When the invitees view your meeting request, the proposed times are shown in your time zone. Proposed times aren't shown in the invitees' time zones.
- You can't propose a time that occurs in the past (before the black line in the calendar).
- The calendar's shaded areas show when you and the other invited Salesforce.com users are busy based on your Salesforce.com calendars. Darker shades show when multiple Salesforce.com users are busy at the same time.
- Use the `Duration` field to change the length of your meeting.
- To remove a time you proposed, hover over the proposed time and click "x".

Tips for Letting Salesforce.com Propose Meeting Times

When you request a meeting with customers, you can either propose meeting times or let Salesforce.com propose times for you.

When Salesforce.com proposes meeting times:

- You won't know which times are proposed until after you send the meeting request. Once the first invitee views your request, Salesforce.com checks the calendars of all Salesforce.com users invited to the meeting and proposes meeting times based on their availability.

Salesforce.com tries not to propose the same times that invitees have already selected for other unconfirmed meetings. For example, if you request a meeting for the next five business days and your invitees respond that they can meet on Tuesday and Wednesday from 2:00 to 3:00 p.m., and then you request another meeting for the same time frame, Salesforce.com won't propose times for Tuesday and Wednesday from 2:00 to 3:00 p.m. unless your calendar is completely booked with confirmed meetings and other events.

- By default, Salesforce.com proposes meeting times between 9:00 a.m. and 5:00 p.m. in your time zone. However, if you have changed the `Start of day` and `End of day` fields in your Personal Information Settings page, Salesforce.com uses those settings instead.

One of the benefits of letting Salesforce.com propose meeting times happens when there's a long delay between the time you send the meeting request and when the first invitee views it. For example, if you request a meeting with a contact on a Monday and that contact doesn't view your request until Thursday, Salesforce.com proposes times from Thursday forward instead of when the meeting request was sent.

> **Note:** If you don't want to meet at a specific time of day (like your lunch hour), schedule a recurring event in your Salesforce.com calender to block out that time.

The following table describes the settings that control how Salesforce.com proposes meeting times.

Field	Description
`Duration`	The length of your meeting.
`Time Frame`	How far in advance Salesforce.com proposes meeting times: • Next 5 Business Days/Next 10 Business Days—Salesforce.com tries to spread out the proposed times over the specified time frame. For example, if your time frame is Next 5 Business Days and the first invitee views the request on a Monday, Salesforce.com tries to propose a time for each day of that week. If some of your days are booked, Salesforce.com condenses the proposed times into fewer days. Business days exclude Saturdays and Sundays. • Whenever—Salesforce.com tries to propose five meeting times over the next five business days, and if it can't propose enough times, it extends the range over the next 10 business days. If Salesforce.com still can't find five times to propose, it looks for available times over the next four weeks. When you select this option, some of the times Salesforce.com proposes could be seven weeks away (5 business days + 10 business days + 20 business days = 7 weeks).

Confirming a Requested Meeting

Available in: **All** Editions

User Permissions Needed	
To confirm a meeting:	"Edit Events"
	AND
	"Send Email"

Note: The request a meeting feature isn't supported in Microsoft® Internet Explorer version 6.0.

After you request a meeting, wait for the invitees to reply with the times they can meet. When this happens, the meeting organizer receives an email notification, and the meeting in Salesforce.com is automatically updated with the times the invitees selected. You can then choose the best time to meet and confirm the meeting.

The meeting confirmation page displays as read-only to users without the "Edit Events" permission and users without the "Edit" permission on the contact or lead record associated with a proposed meeting.

To confirm a meeting:

1. Open your meeting using one of the following methods:

- From the Calendar section on the Home tab, click the Requested Meetings subtab and then click the subject of your meeting.
- From the Open Activities related list for the contact, lead, or person account you requested a meeting with, click the subject of your meeting.
- From the email notification that you received when an invitee responded to your meeting request, click **View Response and Schedule Meeting**.

2. Select a time, and click **Confirm**.

The **Confirm** button displays after you select a meeting time. If you don't select a time, the **Send Update** button displays instead so you can send the invitees a message without confirming a meeting time.

Use the following tools to help you pick a time:

- Green check marks show when each invitee can meet.
- Free shows when you are available based on your Salesforce.com calendar.
- If none of the times work for the invitees, reschedule the meeting to propose new times.

3. Optionally, enter a message to the invitee.
4. Click **Send** to confirm the meeting.

Salesforce.com then:

- Emails the invitees with the final date and time of the meeting.

- Converts the requested meeting to a new group event. The last message you sent to the invitees appears in the event's `Description` field, but all other messages between you and the invitees aren't saved.

  This group event appears in the "Open Activities related list" in the Salesforce.com online help and in the Calendar section on the Home tab.

> **Note:** If your administrator added required fields to events, you're prompted to update those fields before the meeting is converted to an event.

Cancelling a Requested Meeting

Available in: **All** Editions

User Permissions Needed	
To cancel a meeting:	"Edit Events"
	AND
	"Send Email"

> **Note:** The request a meeting feature isn't supported in Microsoft® Internet Explorer version 6.0.

If you requested a meeting that hasn't been confirmed, you can cancel the meeting and Salesforce.com automatically sends a cancellation notice to the invitees. However, if you confirmed the meeting then it has been converted to a group event that you can delete like all other activities.

To cancel a requested meeting:

1. From the Calendar section on the Home tab, click the **Requested Meetings** subtab.

   If you're administrator hasn't added the **Requested Meetings** subtab, go to the detail page for the person you requested a meeting with. For example, if you requested a meeting with the contact Jane Smith, go to her contact detail page and view the Open Activities related list.

2. Click the subject of the requested meeting, and click **Cancel Meeting**.

   You can also click **Del** next to the meeting from the Open Activities related list.

   > **Note:** If **Close** is the only button on the page, you don't have permission to modify the requested meeting. Either ask the organizer to change the meeting details for you, or contact your Salesforce.com administrator to grant you the required permissions.

3. Click **OK** to confirm the cancellation.

   Salesforce.com emails a meeting cancellation to all invitees. Cancelled meetings are permanently removed and aren't stored in the Recycle Bin.

Rescheduling a Requested Meeting

Available in: **All** Editions

User Permissions Needed
To reschedule a meeting: "Edit Events"   AND   "Send Email"

Note: The request a meeting feature isn't supported in Microsoft® Internet Explorer version 6.0.

If you requested a meeting that hasn't been confirmed, you can reschedule it and propose new times. However, you can't propose new times for a confirmed meeting because it's been converted to a group event. To reschedule a group event, edit the event to change its date and send an update to the invitees.

To reschedule a requested meeting:

1. Open your meeting using one of the following methods:

    *   From the Calendar section on the Home tab, click the Requested Meetings subtab and then click the subject of your meeting.
    *   From the Open Activities related list for the contact, lead, or person account you requested a meeting with, click the subject of your meeting.
    *   From the email notification that you received when an invitee responded to your meeting request, click **View Response and Schedule Meeting**.

2. Click **Reschedule** and propose new times.

    Once the invitees reply to your updated request, you can confirm the meeting.

    Note: If **Close** is the only button on the page, you don't have permission to modify the requested meeting. Either ask the organizer to change the meeting details for you, or contact your Salesforce.com administrator to grant you the required permissions.

Adding and Removing Invitees from a Requested Meeting

Available in: **All** Editions

User Permissions Needed	
To add and remove invitees from a requested meeting:	"Edit Events"
	AND
	"Send Email"

Note: The request a meeting feature isn't supported in Microsoft® Internet Explorer version 6.0.

You can add and remove invitees to a requested meeting if it hasn't been confirmed. Confirmed meetings are converted to group events. You can edit group events to add and remove invitees.

To add or remove invitees from a requested meeting:

1. Open your meeting using one of the following methods:

    -   From the Calendar section on the Home tab, click the Requested Meetings subtab and then click the subject of your meeting.
    -   From the Open Activities related list for the contact, lead, or person account you requested a meeting with, click the subject of your meeting.
    -   From the email notification that you received when an invitee responded to your meeting request, click **View Response and Schedule Meeting**.

2. Do either of the following:

    -   Click **To** to invite other Salesforce.com users, leads, contacts, or person accounts to the meeting.
    -   Click "x" next to an invitee's name to remove them from the meeting.

        You can remove all invitees except the first contact, lead or person account that you requested a meeting with.

    The calendar automatically updates based on the Salesforce.com users you added or removed from the meeting.

    Note: If **Close** is the only button on the page, you don't have permission to modify the requested meeting. Either ask the organizer to change the meeting details for you, or contact your Salesforce.com administrator to grant you the required permissions.

3. Click **Send Update**.
4. Enter a message. For example, you might want to inform your invitees who you're adding or removing from the meeting.
5. Click one of the following:

    -   **Send to All Invitees**—Sends an update to all existing and added invitees and a cancellation notice to removed invitees.
    -   **Send Only to Changed Invitees**—Sends an update to added invitees and a cancellation notice to removed invitees.

Quotes Template Editor—Beta

You asked for it! This enhancement is from an idea on the IdeaExchange.

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

Note: This release contains a beta version of the quotes template editor that is production-quality but has known limitations, including the following.

- You can't add repeating headers and footers, page breaks, or page numbers to templates.
- All templates include a quote acceptance section, but you can't customize it or remove it from the template.
- You can use only one logo for all templates. The logo does not repeat on multiple-page quotes.
- You can't preview your template as you're creating it or making edits. The only way to view the output is to create a quote PDF from the quote detail page.
- All quote templates you create and save are immediately available for users to select when they create quote PDFs. You can't prevent access by deactivating a template.

To standardize the look and feel of your quotes, you can use either the standard quote template or custom templates that you create. Sales reps can choose a template when they create the quote PDFs they send to customers.

The quotes template editor looks and works a lot like the enhanced page layout editor: you can drag quote fields directly onto the template layout, and present information from quotes and other objects, such as quote line item, in table format.

Best Practices

- All quote templates you create and save are immediately available for users to select when they create quote PDFs. Make sure to communicate clearly which templates should be used, and delete any templates that should not. Consider adding the word "DRAFT" to the title of any template that's not yet ready for use.

About the Quotes Template Editor

Quotes Template Editor Overview—Beta

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

Note: This release contains a beta version of the quotes template editor that is production-quality but has known limitations, including the following.

- You can't add repeating headers and footers, page breaks, or page numbers to templates.
- All templates include a quote acceptance section, but you can't customize it or remove it from the template.
- You can use only one logo for all templates. The logo does not repeat on multiple-page quotes.

- You can't preview your template as you're creating it or making edits. The only way to view the output is to create a quote PDF from the quote detail page.
- All quote templates you create and save are immediately available for users to select when they create quote PDFs. You can't prevent access by deactivating a template.

User Permissions Needed	
To create quote templates:	"Customize Application"
To view quote templates:	"View Setup and Configuration"

Caution: All quote templates you create and save are immediately available for users to select when they create quote PDFs. Make sure to communicate clearly which templates should be used, and delete any templates that should not.

Use the quotes template editor to design custom templates for the quotes you send to your customers.

You can add and arrange sections containing the content you want to share—such as standard and custom quote fields. The list element lets you add fields from other standard or custom objects, such as quote line item, that have lookup relationships with the quote object.

All quote templates (both standard and custom) include a standard quote acceptance information section. If you upload a logo for your quotes, you'll see it at the top of your template. If not, your company name will appear.

Users can select quote templates from their quote records, generate quote PDFs, and email them to their customers.

The quotes template editor looks and works a lot like the enhanced page layout editor, so if you're familiar with editing page layouts, you'll find the template editor just as easy to use.

Customizing Quote PDFs with the Quotes Template Editor

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

User Permissions Needed	
To create quote templates:	"Customize Application"
To view quote templates:	"View Setup and Configuration"

Use the quotes template editor to design custom templates for the quotes you send to your customers.

Navigating the Quotes Template Editor

The template editor has two parts: a palette at the top and a template layout below.

The palette contains the elements you can add to the layout, including list and section, and fields that you can add to sections.

- Click ◢◣ beneath the palette to expand or collapse it.
- Use `Quick Find` to easily locate items on the palette.

- Use CTRL+click and SHIFT+click to select multiple fields.

Working with the Quotes Template Editor

- To add an element to the template, drag it from the palette to the layout. Use a section to add and arrange fields from the quote object. Use a list to create a table with fields from another object, such as quote line item.
- To remove an element from the layout, drag it back to the palette, or hover over its title bar and click ✕.
- If you want to change, hide, or show the title of a section or list after it's in place, click its wrench icon 🔧. Edit the title and select or deselect `Hide Title`.
- To step backward or forward, click **Undo** and **Redo**.
- To change the properties of a list or section on the layout, double-click its title bar or click 🔧.
- To rename the template, click **Quote Template Properties**.
- To save your changes and continue editing the template, click **Quick Save**.
- To save your changes when you're finished editing the template, click **Save**. Don't navigate away from the template before clicking **Save** or you'll lose your changes.

Creating Quote Templates

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

User Permissions Needed	
To create quote templates:	"Customize Application"
To view quote templates:	"View Setup and Configuration"

Use the quotes template editor to design custom templates for the quotes you send to your customers.

1. Click **Setup ➤ Customize ➤ Quotes ➤ Templates**.
2. Click `New` and select an existing template, such as `Standard Template`, on which to base your new template.
3. Give your new template a name and click **Save**.
4. On the template editor, drag the elements you want, and then fill in the details. If you want:

   - One or more quote fields, use a section and add fields to it.
   - A table of quote fields or fields from a different object, such as quote line item, use a list.

5. Click **Quick Save** to save your changes and continue working on the template. Click **Save** when you're finished.

Tip: To test out a new template, open a quote and "create a PDF" in the Salesforce.com online help using that template.

Viewing and Editing Quote Templates

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

User Permissions Needed	
To create quote templates:	"Customize Application"
To view quote templates:	"View Setup and Configuration"

1. Click **Setup ➤ Customize ➤ Quotes ➤ Templates** .
2. Click **Edit** for the template you want.
3. If you need to edit the template name, click **Quote Template Properties** and enter the new name in the `Template Name` field. Click **OK**.
4. Add or edit sections (for fields) or lists as needed.
5. If you want to change, hide, or show the title of a section or list after it's in place, click its wrench icon 🔧. Edit the title and select or deselect `Hide Title`.

Adding Fields to Quote Templates

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

User Permissions Needed	
To create quote templates:	"Customize Application"
To view quote templates:	"View Setup and Configuration"

Use a section to add standard and custom quote fields to your quote template.

> **Note:**
>
> In some cases, a field may not appear on the quote template editor's palette or on a PDF created from a template.
>
> - If you're unable to view or update the field because of field-level security settings, that field won't appear on the quotes template editor or any PDFs you create. Read-only fields will appear.
> - A field that appears on the quote page layout but does not have a value for a given quote will appear on the quote template editor's palette, but won't appear on PDFs created from that quote.
> - If a field is not on the quote page layout, it won't appear on the template editor or any quote PDFs for quotes that use that page layout.
> - Quote line item fields that don't contain data won't appear as columns in your list when you create a PDF, even if your template includes that field. For example, if no quote line items offer a discount, the `Discount` column won't appear, even if the list includes the `Discount` field.

1. Drag a field section from the palette to the template.
2. Enter a title for the section. Select **Hide Title** if you don't want it to appear on the template or PDF. Click **OK**.
3. Drag the fields you want into the new section. Press CTRL+click to select multiple fields and SHIFT+click to select a range.
4. If you want to change, hide, or show the title of a section or list after it's in place, click its wrench icon 🔧. Edit the title and select or deselect `Hide Title`.

Adding Lists to Quote Templates

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

User Permissions Needed	
To create quote templates:	"Customize Application"
To view quote templates:	"View Setup and Configuration"

Use lists in your quote template to arrange and display fields from quote line item and any other standard or custom object that has a lookup relationship to the quote object. A list looks like a table, with field names appearing as columns.

> **Note:**
>
> In some cases, a field may not appear on the quote template editor's palette or on a PDF created from a template.
>
> - If you're unable to view or update the field because of field-level security settings, that field won't appear on the quotes template editor or any PDFs you create. Read-only fields will appear.
> - A field that appears on the quote page layout but does not have a value for a given quote will appear on the quote template editor's palette, but won't appear on PDFs created from that quote.
> - If a field is not on the quote page layout, it won't appear on the template editor or any quote PDFs for quotes that use that page layout.
> - Quote line item fields that don't contain data won't appear as columns in your list when you create a PDF, even if your template includes that field. For example, if no quote line items offer a discount, the `Discount` column won't appear, even if the list includes the `Discount` field.

1. Drag a list from the palette to the template.
2. Enter a title for the list. Select **Hide Title** if you don't want it to appear on the template or PDF.
3. In the `Object` field, select the object whose fields you want to appear in the list.
4. Use the **Add** and **Remove** arrows to move columns from the Available Fields list to the Selected Fields list and use the **Up** and **Down** arrows to change the order of the columns. A list can include up to 10 fields.
5. Click **OK**.
6. If you want to change, hide, or show the title of a section or list after it's in place, click its wrench icon 🔧. Edit the title and select or deselect `Hide Title`.

Creating Quote PDFs

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

User Permissions Needed	
To create quote PDFs:	"Edit" on quotes

You can generate quote PDFs to print or email to customers. You can generate a quote PDF from either the standard template, which comes built in, or a custom template you design. Quote PDFs use the language and locale of the running user.

> **Note:**
>
> In some cases, a field may not appear on the quote template editor's palette or on a PDF created from a template.
>
> - If you're unable to view or update the field because of field-level security settings, that field won't appear on the quotes template editor or any PDFs you create. Read-only fields will appear.
> - A field that appears on the quote page layout but does not have a value for a given quote will appear on the quote template editor's palette, but won't appear on PDFs created from that quote.
> - If a field is not on the quote page layout, it won't appear on the template editor or any quote PDFs for quotes that use that page layout.
> - Quote line item fields that don't contain data won't appear as columns in your list when you create a PDF, even if your template includes that field. For example, if no quote line items offer a discount, the `Discount` column won't appear, even if the list includes the `Discount` field.

Creating Quote PDFs from the Standard Template

If you haven't created any custom templates or generated any PDFs, you start from the standard template.

1. On the quote detail page, click **Create PDF** to generate a preview.
2. Click **Save to Quote** to save the PDF to the Quote PDFs related list. The PDF name is the quote name plus a version number, such as `AcmeQuote_V1`.

   You can also save and email your quote directly from the preview page.

Creating Quote PDFs by Selecting a Template

If you've already created a PDF, you can select a template from a list of those you've recently used. If you haven't created a PDF, or you want to use a template that's not listed, you can search for the one you want. The standard template is always available.

1. On the quote detail page, click the **Create PDF** drop-down list.
2. Either select your template from the Recent Templates list (if available), or click `Choose Template` and search for the one you want.

   > **Tip:** To bypass the list of recent templates and select a different one, click the **Create PDF** button on the quote detail page.

3. Click **Create PDF** to generate a preview.

4. Click **Save to Quote** to save the PDF to the Quote PDFs related list. The PDF name is the quote name plus a version number, such as `AcmeQuote_V1`.

   You can also save and email your quote directly from the preview page.

Adding a Logo to Quote PDFs

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

User Permissions Needed	
To upload new logos:	"Create" on documents
To replace logos:	"Edit" on documents

To add your organization's logo to quote PDFs, upload the logo to the Shared Documents folder on the Documents tab. This ensures that all users can access it. If you don't add a logo, quote PDFs display your organization's name. Your logo will appear on quotes from all templates, including the standard template and any custom templates you create.

Logo requirements:

- The unique name must begin with `QUOTE_PDF_LOGO`. The PDF will use the most recently modified logo that begins with this unique name.
- You can upload documents that have file names of up to 255 characters including the extension.
- The maximum logo height is 150 pixels. The logo will automatically scale to this height in the PDF.
- The maximum logo size is 5 MB. To reduce load time and limit PDF size, we recommend 200 KB or smaller.
- The logo must be in `GIF`, `JPEG`, or `PNG` format.
- For the best display on-screen, we recommend you use an image with a transparent background.
- If you need to replace the logo image for quote PDFs, select the image on the Documents tab's Recent Documents related list. On the Document Detail page, click `Replace Document` and upload the new file.

Emailing Quote PDFs

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

User Permissions Needed	
To email quote PDFs:	"Edit" on quotes

When you create a quote PDF, you can email it to your customer for approval. The quote must have a status that allows emailing.

1. Start by generating the email. You can:

- Click **Save and Email Quote** on the "PDF preview" in the Salesforce.com online help.
- Click **Email Quote** on the quote detail page.
- Click **Email** next to the PDF in the Quote PDFs related list.

An email task opens with the current quote PDF attached.

> **Tip:** To email a previous version, click **Email** next to that version in the Quote PDFs related list.

2. Enter the customer's email address, a subject, and body text, and then click **Send**.

Tips for Using the Quotes Template Editor

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

User Permissions Needed	
To create quote templates:	"Customize Application"
To view quote templates:	"View Setup and Configuration"

Understanding Template Field Names

To help you understand the information you'll get when you select fields for your template, some field names provide additional information that does not appear on PDFs created from the template.

Object	Object Field	Template Field Name	PDF Field Name
User	`First Name, Last Name`	`Prepared By (Name)`	`Prepared By`
User	`Email`	`Prepared By (Email)`	`E-mail`
User	`Phone`	`Prepared By (Phone)`	`Phone`
User	`Fax`	`Prepared By (Fax)`	`Fax`
Company Information	`Address`	`Organization (Address)`	`Company Address`
Quote Documents	Hidden. The date the PDF was generated and saved in the quote documents object.	`Quote PDF (Created Date)`	`Created Date`

Creating a Totals Section

Use a totals section to show grand total amounts for your quote. To create a totals section, you have a couple of options.

- Select `Standard Template` when you create a new template. The standard template contains a totals section, and you can modify it as you wish.

- Drag a section onto the layout of any template, then drag total-related fields (such as `Subtotal` and `Grand Total`) to the right half of the section. Hide the title if you are placing the section directly beneath a list.

> **Note:** Fields within sections have different alignment than columns within lists, so if you place your totals section beneath a list, its field values will not line up beneath the rightmost list values.
>
> For example, your template might include a list of quote line items, including a `Total Price` column at the far right that shows the total for each line item. If you add a totals section beneath the list, and include `Subtotal`, `Total Price`, and `Grand Total` fields, their values will show the total of all line items, but the amounts will not line up beneath the list's `Total Price` column.

Testing Quote Templates

To test out a new template, open a quote and "create a PDF" in the Salesforce.com online help using that template.

Making Templates Available for Use

All quote templates you create and save are immediately available for users to select when they create quote PDFs.Make sure to communicate clearly which templates should be used, and delete any templates that should not. Consider adding the word "DRAFT" to the title of any template that's not yet ready for use.

New Opportunity Page—Pilot

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

User Permissions Needed	
To view opportunities:	"Read" on opportunities
To edit opportunities:	"Edit" on opportunities

> **Note:** The new opportunity page is available through a pilot program. For information on enabling this feature for your organization, contact salesforce.com.

Watch a Demo (1.5 minutes)

Summer '10 includes a new opportunity detail page so you can get to the information you need and update the details more quickly.

Key features:

- Highlights panel—lets you view key information at a glance. You can quickly assess deal status and make better-informed decisions about each opportunity.
- Chatter feeds— lets you see an opportunity's latest updates and comments, or review an opportunity's history.
- Recommendations—lets you tap into your sales organization's knowledge by connecting you with people who won similar deals.
- Drag and drop side tabs—let you quickly and easily navigate and personalize your page.

For more information, see "Using Opportunities — New Opportunity Page Pilot" in the Salesforce.com online help.

Mobile Enhancements

Summer '10 includes many new features that improve the capabilities of the mobile application, including:

- Chatter in the Mobile Application
- Salesforce Mobile for BlackBerry Enhancements
- Salesforce Mobile for iPhone Enhancements
- Windows Mobile Peripheral Support
- Support for Attachments in Salesforce Mobile for Windows Mobile
- Mobile Views Enhancement

To enjoy the product improvements, existing users must upgrade to the latest version of the mobile application. New users must install the application. Refer to the user guides for installation and upgrade instructions:

- Salesforce Mobile User Guide for BlackBerry
- Salesforce Mobile User Guide for iPhone

About Mobile Enhancements

Salesforce Mobile for BlackBerry Enhancements

Improved User Experience for Related List Search

Summer '10 streamlines the experience of searching for related items by maintaining focus on the related list. For example, when searching for contacts related to an account, the application displays the search results in the related list instead of switching to the Contacts tab. To search for an item's related records:

1. Open a record, then open the menu and select a related list.
2. Click **Search server for more**.

   The mobile application retrieves any related records from Salesforce.com and displays the search results.

3. To download a related item to your device, simply open the item. From the Search Results view, highlight the item and press ENTER or select **Open** from menu.
4. Press Escape to return to the search results and download additional related items.

   The mobile application can't automatically download all the related items because a large amount of records could force the device to exceed the total data limit set by your Salesforce.com administrator.

Configurable Reports Tab

With Summer '10, administrators can decide whether mobile configurations include the Reports tab in Salesforce Mobile. Previously, the Reports tab was hard-coded in the mobile application. To configure the Reports tab:

1. From the reports home page in Salesforce.com, click **Create New Folder**.
2. In the `Report Folder` field, enter: `Mobile Reports`.

The server does not load reports on the mobile device unless the folder is named `Mobile Reports`. Be sure to check for any typos in the name before saving the folder. Additionally, Salesforce.com does not require folder names to be unique. Mobile users can see any report stored in folders named Mobile Reports unless you restrict access with the folder visibility option.

3. Choose a `Public Folder Access` option. This option does not affect the ability of mobile users to run reports.
4. Optionally, select any unfiled reports and click **Add** to store them in the Mobile Reports folder. You can also add reports to the folder after saving the folder.
5. Choose a folder visibility option.

   - `This folder is accessible by all users` gives every user in your organization the ability to see the list of mobile reports from their devices.
   - `This folder is accessible only by the following users` lets you grant access to a desired set of users.

   Do not make the folder private unless you want to hide mobile reports from all users, including yourself.

6. Click **Save**.
7. To add a report to the Mobile Reports folder, click the report name on the reports home page, and then click **Save As**. Save the report in the Mobile Reports folder.

   After saving the report, you can edit the options to make the report easier to view on a mobile device. For example, you might reduce the number of columns or enter additional filtering criteria.

8. Click **Setup ➤ Mobile Administration ➤ Mobile Configurations**, and then click the name of a mobile configuration.
9. In the Mobile Tabs related list, click **Customize Tabs** to define mobile tabs for the first time. If you have already set up the mobile tabs, click **Edit**.
10. Select **Reports** from the Available Tabs list, and click the **Add** arrow to add it to the mobile configuration. The Available Tabs list includes standard object tabs and custom object tabs. It can also include web and Visualforce tabs.

    ⚠ **Caution:** If you have not yet customized tabs in the mobile configuration, you must select all the tabs that should appear in the mobile application, not just the Reports tab.

11. In the Selected Tabs list, choose the Reports tab and click the **Up** and **Down** arrows to define where the Reports tab should appear in the mobile application.
12. Click **Save**.

    📝 **Note:** Reports are not currently available in Salesforce Mobile for iPhone.

Salesforce Mobile for iPhone Enhancements

Enhanced Search Capabilities

With Summer '10, it's easier than ever to find the specific piece of data you need. The Search tab now supports both local and remote search, which means your searches return records stored locally on your device and records online in Salesforce.com. Search results include matches found for any mobilized object, separated by object type.

Performance Improvements

Summer '10 introduces performance improvements that make the application faster. For customers with large data sets, the application more efficiently fetches data in the background and allows use of the application without interruption. Additionally, it's more obvious when the application is synchronizing.

Windows Mobile Peripheral Support

Available in: **All** Editions

With Summer '10, you can now use Salesforce CRM's mobile capability for Windows for field service management.

The mobile application includes functionality for field service professionals by providing integration with the barcode scanner and magnetic stripe card reader in select Motorola Windows Mobile devices. Windows Mobile users can:

- Use the barcode scanner to populate fields or search for records.
- Swipe credit cards to capture payment information.
- Capture signatures.
- Attach new or existing images to records.

Using peripherals with the mobile application requires Windows Mobile 6 Professional and a minimum of Salesforce Mobile version 11.0. At least 5 MB of free memory should be available on the device. The mobile application can integrate with the peripherals on these Windows Mobile devices:

- MC55
- MC75
- MC90
- MC95

This feature requires setup in Salesforce.com before you can use it in the mobile application. For detailed information about setting up peripherals and using them in Salesforce.com for Windows Mobile, see the *Windows Mobile Peripheral Support Implementation Guide*.

Note: Not all components of the Windows Mobile peripherals feature are available in Mobile Lite. Enabling image attachment requires the ability to edit a mobile configuration's data sets, and enabling signature capture requires the ability to mobilize custom objects. With Mobile Lite, you can't edit data sets or mobilize custom objects. Organizations using Mobile Lite can only set up barcode and credit card fields.

Support for Attachments in Salesforce Mobile for Windows Mobile

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

Available for an additional cost in: **Professional** and **Enterprise** Editions

Summer '10 extends the functionality of Salesforce Mobile for Windows Mobile. Now mobile users can view the Attachments related list and attach images to records. An administrator must mobilize attachments in order for users to access the Attachments related list in the Windows Mobile client application.

Note: Attachments are not currently available in Salesforce Mobile for BlackBerry or iPhone. Attachments are also not available in Mobile Lite.

Mobilizing Attachments

User Permissions Needed	
To view mobile configurations:	"View Setup and Configuration"
To create, change, or delete mobile configurations:	"Manage Mobile Configurations"

To enable attachments in the mobile application, include the attachments object in your organization's mobile configurations. Mobile users access attachments from a record's Attachments related list. Currently the only type of attachment users can add to from the mobile application are image files. Users can either take pictures, or select existing pictures from their phone's photo album.

To mobilize attachments:

1. Click **Setup ➤ Mobile Administration ➤ Mobile Configurations**, then click the name of a mobile configuration.
2. In the Data Sets related list, click **Edit**.
3. In the data tree, click the name of a parent data set.
4. Click **Add...** to add a child data set.
5. In the popup window, select Attachment, then click **OK**.

   As long as you mobilize attachments for one object, the Attachments related list appears in the mobile application for every object that supports attachments.

6. Continue adding attachments as a child data set until you're finished.
7. Click **Done**.

Attaching Images in the Mobile Application

The Attachments related list is available in the mobile application for certain types of records. To view a list of a record's attachments, open a record, scroll down, and select **Attachments**. You can also highlight or open a record and select **Actions ➤ Related To ➤ Attachments**.

With the appropriate permissions, you can edit an attachment's details or delete an attachment. The only type of attachment you can add to Salesforce.com from the mobile application is an image file. The mobile application lets you attach JPG, BMP, PNG, and GIF files under 5 MB. You can either take a picture, or select existing images from your device's My Pictures folder.

To attach a new image file to a record:

1. Open a record, or highlight it in a list view.
2. Select **Actions ➤ Attach Images ➤ New Image**.
3. Take a picture by selecting **Capture**.
4. If you like the preview, select **Accept**. If not, select **Retake**.
5. Enter the attachment's file name.
6. Optionally, enter details about the attachment, then select **Save**.

To attach existing image files to a record:

1. Open a record, or highlight it in a list view.
2. Select **Actions ➤ Attach Images ➤ Existing Images**.
3. Select the checkboxes next to the pictures you want to upload.

   Folders and images are sorted in descending order by the last modified date. Use the Up icon to navigate through the folder structure. Image selection doesn't persist across folders, so you can only upload images from one folder at a time.

4. Select **Upload**:

   - To accept the default attachment file name and field values and immediately upload the images to Salesforce.com, select **Quick Upload**.
   - To edit the information about each image attachment, select **Edit Details**.

5. If you chose **Edit Details**, enter information about the first image attachment. You can preview the image if you want to see it before completing the fields on the page.
6. Select **Save**.
7. If you're uploading multiple images, continue entering the attachment details and clicking **Save** until you're done with all the images.

   If you cancel while editing the attachment details for multiple images, all pending attachment records are be discarded, but the images you already uploaded are submitted to Salesforce.com.

Mobile Views Enhancement

Summer '10 offers greater flexibility in the filter criteria for mobile views. Now administrators can use the $User.ID global variable in custom fields with a lookup to the user object. Previously, it was only possible to use the global variable in standard fields with a lookup to the user object. The $User.ID global variable lets you reference the current user in the filter criteria for a mobile view. For more information about the $User.ID global variable, see "Merge Fields for Mobile Filter Criteria" in the Salesforce.com online help.

Additional Sales Cloud Enhancements

Campaign Enhancements

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

Campaign Sales Alerts

You can now create alerts to lead and contact owners when the leads and contacts are added to a campaign, or create alerts to respond to a campaign using campaign member workflow email alerts.

From **Setup ➤ Create ➤ Workflow & Approvals ➤ Email Alerts**, click **New Email Alert** and set the following:

1. Choose Campaign Member as the `Object`.
2. Choose Related Lead or Contact Owner as the `Recipient Type`. When this `Recipient Type` is selected, the `Available Recipients` defaults to Lead or Contact Owner.
3. Add Lead or Contact Owner to `Selected Recipients`.

For more information on creating email alerts, see "Creating Email Alerts for Workflow, Approvals, or Milestones" in the Salesforce.com online help.

Lead and Contact Fields Available in Campaign Member Custom Formula Field

When you create a new campaign member custom formula field, Lead and Contact are now available in **Advanced Formula ➤ Insert Field ➤ Campaign Member**. Now you can display lead and contact custom field information on campaign member page layouts with the formula field enhancements. Click the **Advanced Formula** tab to use functions and view additional operators and merge fields. See "Building Formulas" in the Salesforce.com online help.

Enhanced Campaign History

You can now add campaign member custom fields to the lead or contact Campaign History related list. From the Campaign History related list on a contact, lead, or person account, you can add, edit, update, and remove campaign members. To add campaign member custom fields to the Campaign History related list, see "Customizing Related Lists" in the Salesforce.com online help.

Email Enhancements

Available in: **All** Editions

Mass email not available in: **Personal**, **Contact Manager**, and **Group** Editions

Deleting Attachments Sent as Links

Attachments are sent as links when:

- Attachments of any size are sent using mass email
- An email's attachments total 3 MB or more

You can find and delete attachments sent as links. Recipients who subsequently click on the attachment link see a message asking them to contact the email sender to view the attachment. You can search only within your organization's email retention period (typically 30 days, but contact salesforce.com Support for your organization's details).

To find and delete email attachments sent as links:

1. Click **Setup ➤ Email Administration ➤ Attachments Sent as Links**
2. Enter either of these:

    - File name (optional), username, and date range:

        - Optionally, attachment file name, including the file extension (for example, `ThisYearResults.pdf`). You can use wildcards (for example, `ThisYearRes` would find `ThisYearResults.pdf`).
        - Sender's username
        - Date range during which the email was sent

    - Attachment URL: Click the attachment link (`.html`) in the email to open it in a browser, and copy and paste the URL.

3. Click **Search**.

    - Search results show up to 100 matching entries.
    - If the attachment was sent using mass email, search results show one entry for every 100 emails sent—delete one of these entries to delete the attachment.

4. In Search Results, click **Del** next to the attachment you want to delete. Recipients who subsequently click on the attachment link see a message asking them to contact the email sender to view the attachment.

Note: You cannot recover deleted attachments from the Recycle Bin.

Warning When Sending Emails to Contacts or Leads Who Don't Receive Mass Emails

When you click **Send an Email** on contact or lead detail pages, Salesforce.com now warns you if `Email Opt Out` is selected for the contact or lead. `Email Opt Out` excludes the contact or lead from receiving mass emails.

Multiple Email Addresses for Contacts and Leads

If contacts or leads have multiple email addresses, users can now choose an address when clicking **Send an Email**. To specify multiple email addresses, create a custom field using the Email custom field type and place it on the appropriate contact or lead page layouts. See "Custom Field Types" in the Salesforce.com online help.

Email Compliance Footers

You can create personalized footers or disclaimers that appear at the bottom of all outgoing email messages sent from Salesforce.com or the API. You can create a separate email footer for each encoding and choose default footers for single and mass email. The defaults are used when no footer matches an outgoing email's encoding. To create an email footer:

1. Click **Setup ➤ Email Administration ➤ Email Footers**.
2. Click **New**.
3. Enter a name.
4. Choose if you want the footer to be available for single emails, mass emails, or both.
5. Select the email encoding. The email encoding determines which emails the footer appears on. For each encoding you can have one active single email footer and one active mass email footer.
6. Enter the text of the footer.

   Note: Footers are text only; HTML tags aren't rendered. Maximum is 32 KB.

To select default footers:

1. Click **Setup ➤ Email Administration ➤ Email Footers**.
2. Using `Default for Single Mail` and `Default for Mass Mail`, select default footers.
3. Click **Save**.

   Note: If you don't click **Save**, your default footer choice is lost when you leave the page.

Notes & Attachments Enhancements

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

Previews Available for Chatter Feed Attachments in the Notes and Attachments Related List

If Salesforce Chatter is enabled for your organization and files have been posted to a feed on a record, you can now preview those files in the record's Notes and Attachments related list. In the Notes and Attachments related list, click **View** next to a feed attachment to display a preview of the file. Not all files can be previewed, such as copy-protected

PDFs. For files that can't be previewed, the **View** option isn't available and files appear as generic file type icons in the feed. Some Microsoft Office 2007 features don't display correctly in previews.

> **Note:** On some objects, the *Notes and Attachments* related list is titled *Attachments* because the object does not offer notes. Also, the same related list may be titled *Google Docs, Notes, and Attachments* or *Google Docs and Attachments* depending on the setting in your org. References to the Notes and Attachments related list include all versions of the related list, regardless of title.

Opportunities and Quotes Enhancements

Opportunities available in: **All** Editions that signed up prior to the Summer '09 Release in June 2009

Available in **Group**, **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions that signed up during or after the Summer '09 Release in June 2009

Quotes available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Quotes Available in Professional Edition Organizations

With Summer '10, quotes are included in all Professional Edition organizations. Quotes are automatically available for organizations that subscribe during Summer '10 or later. Existing organizations will be upgraded with Summer '10. To learn more about quotes, see "Quotes Overview" in the Salesforce.com online help.

Opportunities with Quotes and Quote Line Items Report

View details about the quotes associated with opportunities, and the line items for each quote. The default settings provide the most commonly used information from each object, but you can customize the report to see any opportunity, quote, or quote line item field.

Opportunities with Quotes and Quote PDFs Report

View details about the quote PDFs created for each quote associated to an opportunity. The default settings show you the most commonly used information from each object, but you can customize the report to view other information, such as who created or last modified each listed quote PDF.

Opportunity Reports Have New Opportunity Owner Columns

The following fields are now available as columns in all opportunity reports. They appear in the custom report wizard within a new section called Opportunity Owner Information.

- `Opportunity Owner Email`
- `Opportunity Owner: Manager`
- `Opportunity Owner: Company`
- `Opportunity Owner: Title`
- `Opportunity Owner: Department`
- `Opportunity Owner: Division`
- `Opportunity Owner: Profile`
- `Opportunity Owner: Active`

Also, `Owner Role` and `Opportunity Owner Alias` now appear in the Opportunity Owner Information section.

Opportunity Stage Picklist Value Update Behavior Enhanced

The `Stage` picklist affects the `Type` and `Forecast Category` values of an opportunity. Specifically, changing the `Type` or `Forecast Category` for a `Stage` picklist value updates all opportunities that have that stage value.

Partner Portal Enhancements

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

Partner Portal Lead Inbox Home Page Component

Include the Partner Portal Lead Inbox component on home page layouts assigned to partner portal users. When a user logs in to your portal they see a list of leads for their lead queues. The user can click **Accept** next to a lead to take ownership of it and follow up.

> **Note:** Partner portal users must click **Accept** next to a lead to access complete lead details.

After you add the component to home page layouts assigned to portal users, you can choose the columns that show up:

1. Click **Setup ➤ Customize ➤ Partners ➤ Settings**.
2. Click the name of your partner portal.
3. Click **Customize Lead Inbox**.
4. Add, remove, or rearrange fields from the Selected Fields list.

   > **Note:** We recommend hiding important lead fields, such as `Company Name` and `Lead Name`, from partner portal users so that they aren't selectively choosing which leads to accept.

5. Click **Save**.

   > **Note:** Partner portal users can view details in the Leads tab prior to accepting leads from the Lead Inbox component; PRM portal users cannot view details until they accept a lead from the Available Leads list on the PRM portal home page.

Salesforce CRM Content Enhancements

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

Salesforce CRM Content Included in All Organizations

In Summer '10, the Salesforce CRM Content feature license is included in all organizations at no additional cost.

To turn on Salesforce CRM Content for an organization, administrators can now select `Enable Salesforce CRM Content` from **Setup ➤ Customize ➤ Salesforce CRM Content ➤ Settings**.

To give users access to Salesforce CRM Content, administrators now have two options:

- To assign feature licenses to users automatically, click **Setup ➤ Customize ➤ Salesforce CRM Content ➤ Settings** and select `Autoassign feature licenses to existing and new users`.
- To assign feature licenses to users manually, click **Setup ➤ Manage Users ➤ Users** and click **Edit** next to the user's name. Select the `Salesforce CRM Content User` checkbox and click **Save**.

To set up Salesforce CRM Content for your organization, see "Setting Up Salesforce CRM Content" in the Salesforce.com online help.

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Enable or Disable Salesforce CRM Content for Your Organization

Administrators can now turn Salesforce CRM Content on or off for their organization by selecting or deselecting `Enable Salesforce CRM Content` from **Setup ➤ Customize ➤ Salesforce CRM Content ➤ Settings**. This setting is enabled by default for existing organizations, and disabled by default for new organizations.

Autoassign Salesforce CRM Content Feature Licenses

Administrators can now assign feature licenses to users automatically by selecting `Autoassign feature licenses to existing and new users` from **Setup ➤ Customize ➤ Salesforce CRM Content ➤ Settings**. If this option is checked, Salesforce.com automatically attempts to assign Salesforce CRM Content feature licenses to all existing users. If there aren't enough licenses available, no licenses are assigned. Contact salesforce.com to request additional feature licenses. When a new user is created, a Salesforce CRM Content feature license is automatically assigned as long as licenses are available. A feature license corresponds to the `Salesforce CRM Content User` checkbox on the user detail page.

Salesforce CRM Content Search Includes Salesforce Chatter Files

Clicking the Content tab displays files, content packs, Web links, and Google docs published in your Salesforce CRM Content workspaces. If Salesforce Chatter is enabled, files posted to Chatter groups and other Chatter files are also displayed on the Content tab. The top twenty most recently modified items are listed by default. You can filter the list using the Filter Your Results sidebar.

From the Search drop-down list, restrict your search to a specific workspace or choose to search in all workspaces. If Salesforce Chatter is enabled, you can restrict your search using:

- All Files—All workspaces and Chatter groups you're a member of and files posted to the Chatter feed on the Home tab and on profiles.
- Chatter Files—All Chatter groups you're a member of and files posted to the Chatter feed on the Home tab and on profiles.
- My Chatter Groups—All Chatter groups you're a member of.
- My Workspaces—All workspaces you're a member of and your personal workspace.

In the Filter Your Results sidebar, filter your search results by file format, featured content, author, tag, workspaces, content type, language, or a custom field. If Salesforce Chatter is enabled, you can also filter your search results by Chatter groups. The number in parentheses next to each filter type shows you how many matching files, content packs, Web links, and Google docs are in the search results.

Previews for Microsoft Office 2007 Files—Pilot

In Salesforce CRM Content, you can now preview Microsoft Office 2007 files, including PowerPoint, Word, and Excel. The document viewer allows users to view a document without downloading, whether the document be a content delivery sent to a lead, prospect, or colleague, or a document viewed internally in Salesforce CRM Content.

To enable this feature for your organization, click **Setup ➤ Customize ➤ Salesforce CRM Content ➤ Settings** and select `Enable Office 2007 previews in Content—Pilot`. This setting is enabled by default. Note that copy-protected PDFs can't be previewed and some Microsoft Office 2007 features don't display correctly in previews.

Content Delivery Recipients Can Preview Microsoft 2007 Files—Pilot

With Summer '10, content delivery recipients can now preview Office 2007 files. A content delivery can be created from the Content Deliveries related list on most Salesforce objects. Salesforce CRM Content users can also create a content delivery from the content details page or the Related Content related list. Be sure to preview your content delivery to verify that you are happy with the quality of the preview.

If you are enabling content deliveries for your organization and want recipients to be able to preview Office 2007 files, click **Setup ➤ Customize ➤ Content Deliveries Settings**, and select `Enable recipients to preview Office 2007 content deliveries`. This setting is off by default. Note that copy-protected PDFs can't be previewed and some Microsoft Office 2007 features don't display correctly in previews.

Post Content to Chatter Feeds with New Workspace Privilege

The `Post Content to Chatter Feeds` privilege makes content from a workspace accessible on Salesforce Chatter feeds. From a Chatter feed, users can select a file from a workspace they are a member of and post it to a feed. Administrators enable this privilege when creating or editing a workspace permission. This privilege is off by default for existing organizations and on by default for new organizations.

> **Note:**
> - Both Salesforce CRM Content and Salesforce Chatter must be enabled.
> - Links, Google docs, documents (from the Documents tab), and attachments (from the Notes and Attachments related list, for example) aren't included in the list of files to attach.

SERVICE CLOUD

Salesforce Knowledge Enhancements

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

Salesforce Knowledge enhancements in Summer '10 include:

Creating an Article While Closing a Case

When closing a case, users can now capture important information and help solve future cases more quickly by creating a new draft article. Once the article is reviewed and published, it is automatically attached to the case and available in the knowledge base.

Creating an Article from a Reply

Seamlessly integrate your answers community with your knowledge base by allowing community members to convert helpful replies into articles. After a reply is promoted to the knowledge base, members browsing or searching the answers community can click a link on the reply to read the published article. If the article is not yet published, the reply provides the name of the draft article, the author who promoted the reply, and the date and time the article was created.

Sending Articles as PDF Attachments on Case Email

If your organization uses Email-to-Case or On-Demand-Email-to-Case, you can create an email template that gives support reps a fast and easy way to send knowledge base articles to contacts. The template automatically converts articles associated with the case into PDF attachments on an email.

Using Suggested Articles to Solve Cases

Searching the knowledge base is more efficient than ever for case users. Rather than creating a new case and then using the search function on the Articles related list, if autosuggestion is enabled a list of potentially relevant articles appears as soon as a new case is saved. Salesforce Knowledge automatically searches for keywords in articles that match a keyword in the case subject. Autosuggestion is available for all channels except the public knowledge base.

Customizing Access for Article Managers

Previously, users who had access to the Article Management tab could perform all the actions found there, including creating, editing, publishing, assigning, and deleting articles. In Summer '10, administrators can control access to article actions on a more granular level by assigning public groups to specific actions. For example, you might create a public group called Superusers and assign it to the Delete Articles action, meaning only article managers who are members of Superuser can delete articles.

Following Articles in Chatter Feeds

Using Salesforce Chatter to stay up-to-date on important information now includes the latest changes to your knowledge base. If feed tracking is enabled for one or more article types, you can follow published articles that belong to the tracked types. Posts about an article you're following appear on your home page feed and the profile feed of the article manager who updated the article.

New Custom Report Options

Two new custom report types are available to help you improve the knowledge base: Cases with Articles and Knowledge Keyword Search. Reports created from these report types reveal which articles are helping solve cases and which topics users are hoping to find when searching for information. Also, you can now include statistics about article views on reports created from the Knowledge Articles custom report type.

Data Categories Visible to Users Without Roles

Previously, visibility of data categories and articles associated with them depended on user role. In organizations that use roles, users who were not assigned to a role, such as high-volume Customer Portal users, could only see uncategorized articles. With the addition of default visibility settings in Summer '10, you can designate certain data categories as visible to all users while still restricting access as needed for each role.

Email Notification of Assigned Articles

Rather than rely on article reviewers to constantly monitor their draft article lists, you now have a `Send Email` option to notify the reviewer when you assign one or more articles. The email alert contains your instructions, the due date, and links to each article. If you're assigning multiple articles with more than one article type, a notification is sent for each article type.

Article Previews for all Channels

Article managers can now preview any article for all audiences. Click **Preview** next to an article on the Article Management tab to view the article in the Internal App, Customer Portal, Partner Portal, or Public Knowledge Base. The Customer Portal and Partner Portal options are only available in the preview menu if portals are enabled in your organization.

Showing Article Summaries in List Views

You can now decide whether each article's `Summary` field appears on lists in the Articles tab. Summary information on the list view can help users decide whether an article is worth opening, thus saving valuable time. On **Setup ➤ Customize ➤ Knowledge ➤ Settings**, choose the list-view behavior for each channel.

File Fields Supported in Custom Templates

The File custom field allows authors to attach a file to an article. Previously, only standard templates supported the File field; if an article had a file, the attachment did not appear when the article was viewed in a custom template. Now, you can add markup to the custom template's Visualforce page that will render the contents of File fields as links in the published article. See "Creating Custom Article-Type Templates" in the Salesforce.com online help for more information.

New API Object for Articles

With `KnowledgeArticle` you can now retrieve a Salesforce Knowledge article independent of its version (status). Unlike KnowledgeArticleVersion, the ID of a KnowledgeArticle record is identical irrespective of the article's version (status). For more information, see the *Web Services API Developer's Guide*.

New API Object for Data Category Selections

A data category selection represents a data category that classifies an article. This object can be used to associate an article with data categories from a data category group or to query the category selections for an article. The object name is variable and has a syntax of *Article*__DataCategorySelection, where *Article* is the `Object Name` for the article type associated with the article. For example, `Offer__DataCategorySelection` represents the association between the `Offer` article type and its data categories. Every article is associated with an article type. For more information, see the *Web Services API Developer's Guide*.

New Metadata API Component for Article Types

You can now deploy article types in Salesforce Knowledge using the ArticleType component. An ArticleType is defined as a custom object and is stored in the `objects` folder. ArticleTypes have a suffix `__kav` (instead of `__c` for custom objects). For more information, see the *Metadata API Developer's Guide*.

`create()` call support for KnowledgeArticleVersion

The KnowledgeArticleVersion object now supports the `create()` call.

About the Salesforce Knowledge Enhancements

Creating an Article While Closing a Case

You asked for it! This enhancement is from an idea on the IdeaExchange.

User Permissions Needed	
To edit Salesforce Knowledge settings:	"Customize Application"
To modify page layouts:	"Customize Application"
To create articles:	"View Articles"
	AND
	`Knowledge User` checked on the user detail page
To create cases:	"Create" on cases

To quickly capture information that helped solve a case, users can close a case and be taken directly to a draft article. When the article is published, it is automatically attached to the original case and is available in the knowledge base for easy search and reference.

To enable the **Save and Create Article** button on the close-case page:

1. Click **Setup ➤ Customize ➤ Knowledge ➤ Settings**.
2. Select `Allow users to create an article when closing a case`. You must also choose:

   - A default article type. This determines which fields appear on the draft article. By default the `Title` field on all articles contains the case subject.
   - An article assignee. All draft articles created when a case is closed are sent to this user for review. The assignee can edit, publish, delete, or reassign the article. If the article is published, the Articles related list on the case contains the attached article.

3. When you're done with the Settings page, click **Save**.
4. Click **Setup ➤ Customize ➤ Cases ➤ Page Layout** and edit each close-case layout:

   - Click **Layout Properties**.

- Select the `Enable submissions during case close` checkbox and choose **Submit Articles**. You can only submit articles or solutions, not both.
- Click **Save**.

Creating an Article from a Reply

User Permissions Needed	
To edit Salesforce Knowledge settings:	"Customize Application"
To view the Answers tab:	"Read" on questions
To ask and reply to questions:	"Create" on questions
To promote a reply:	"Manage Articles"
	AND
	"Edit" on questions

You can turn a particularly helpful reply in your answers community into an article in your knowledge base. After the reply is promoted to an article, it has a status message showing its association with the draft article. When the article is published, the message on the reply includes a link to the article. The message disappears only if the article is deleted from the knowledge base.

To enable the **Promote to Article** button on a reply:

1. Click **Setup ➤ Customize ➤ Knowledge ➤ Settings**.
2. Select `Allow users to create an article from a reply`. You must also choose:

   - A default article type. The article type determines which fields appear on the draft article. By default, on all draft articles the `Title` contains the question and the `Summary` contains the reply.
   - An article assignee. All draft articles created from a reply are sent to this user for review. The assignee can edit, publish, delete, or reassign the article.

3. When you're done with the Settings page, click **Save**.

Sending Articles as PDF Attachments on Case Email

You asked for it! This enhancement is from an idea on the IdeaExchange.

User Permissions Needed	
To set up Email-to-Case or On-Demand Email-to-Case:	"Customize Application"
To enable Email-to-Case or On-Demand Email-to-Case:	"Modify all Data" AND "Customize Application"
To customize page layouts:	"Customize Application"
To create or change HTML email templates:	"Edit HTML Templates"
To create or change public email template folders:	"Manage Public Templates"
To create or change Visualforce email templates:	"Customize Application"

If articles are associated with a case, users working on the case can attach PDF versions of the articles to an email simply by choosing a template you create. This capability is available if Email-to-Case or On-Demand-Email-to-Case is set up and the Email related list is visible on case page layouts.

To create an email template that converts articles to PDF format and attaches them to the message:

1. Click **Setup ➤ Communication Templates ➤ Email Templates**.
2. Click **New Template** to create a template from scratch or click **Edit** next to an existing template. The new or edited template must include the `Articles as PDFs` case field.
3. For example, If you want to edit the *SUPPORT: Case Response with Solution (SAMPLE)* template to include articles instead of solutions, complete these steps:

    a. Click **Edit** next to the *SUPPORT: Case Response with Solution (SAMPLE)* template.
    b. Change the `Email Template Name` to *SUPPORT: Case Response with Article (SAMPLE)*.
    c. Modify the `Template Unique Name` as needed.
    d. Choose **Case Fields** from the Select Field Type drop-down menu.
    e. Choose **Articles as PDFs** from the Select Field drop-down menu.
    f. Copy the value from the `Copy Merge Field Value` field and paste it in the email body.

4. Click **Save**.

    On the case detail page in the Emails related list, users can now click **Send an Email** and choose the new template. Articles associated with the case are automatically converted to PDF attachments, and the attachments can be previewed or deleted if needed before the email is sent.

    Note: Article fields restricted by field-level security are not included in the PDF version. Also, fields in the Properties section of an article, including `First Published`, `Last Modified`, `Last Published`, and `Summary`, are not included in the PDF version.

Using Suggested Articles to Solve Cases

User Permissions Needed	
To change support settings:	"Manage Cases"
	AND
	"Customize Application"
To view articles:	"View Articles"

Suggested articles help knowledge base users solve cases quickly. As soon as a new case is saved, the search engine automatically looks for articles that have keywords in common with the case subject. The user working the case can scan the articles and attach them to the case if needed, or initiate another search with different keywords. Articles attached to the case appear on the Articles related list, which also provides a **Find Articles** button to search the knowledge base at any time.

To enable suggested articles:

1. Click **Setup ➤ Customize ➤ Cases ➤ Support Settings**.
2. Click **Edit** and choose **Enable suggested articles**. Suggested articles and suggested solutions cannot be enabled at the same time.
3. Choose each audience (channel) that should receive suggested articles when submitting a case. Suggested articles are available for the internal app and the portals.
4. When you're done with the Support Settings page click **Save**.

Customizing Access for Article Managers

User Permissions Needed	
To create public groups and assign them to article actions:	"Customize Application"
	AND
	"Manage Users"
	AND
	"Manage Salesforce Knowledge"

The "Manage Articles" user permission provides Salesforce Knowledge users with full access to the Article Management tab, including the ability to create, edit, assign, publish, archive, and delete articles. Administrators can use public groups and the Article Actions page to restrict article-management tasks to specific users:

1. Click **Setup ➤ Customize ➤ Knowledge ➤ Article Actions** and decide which users need to perform which actions. For example, you might decide that a group named Publishers needs to publish, archive, and delete articles and that a group named Editors needs to edit and assign articles.
2. Create a public group for each set of users.

> **Note:** Although you can add any Salesforce.com user to a public group, only users with the "Manage Articles" user permission will be able to perform article actions.

3. Assign the public groups to article actions:

   a. On the **Setup ➤ Customize ➤ Knowledge ➤ Article Actions** page click **Edit**.
   b. For the action you want to modify, select the appropriate radio button and choose a public group. If you do not modify an article action, all users with the "Manage Articles" permission can perform that action. You cannot restrict the Create Articles, Edit Draft Articles, or Assign Articles to Other Article Manager actions.
   c. Click **OK** and **Save**.

Following Articles in Salesforce Chatter Feeds

User Permissions Needed	
To enable feed tracking:	"Customize Application"
To view published articles:	"View Articles"
To create, edit, assign, publish, archive, and delete articles:	"Manage Articles"

Salesforce Chatter users who have access to the knowledge base can receive updates about articles in their Chatter feeds. To enable feed tracking for article types:

1. Click **Setup ➤ Customize ➤ Chatter ➤ Feed Tracking**.
2. Select an article type. Each article type appears by name in the Object list. For example, if your organization has three article types named `Offer`, `FAQ`, and `Warranty`, all three appear alphabetically in the Objects list.
3. Select `Enable Feed Tracking`, then click **Save** when you're done with the page.

Unlike other objects, individual fields on article types are not tracked. After a user opens a published article and clicks **Follow** in the header, posts about that article on the user's home page feed can include:

- If the article is removed from the knowledge base for edit (unpublished). *Three Months Free — Al Smith* *unpublished this offer*
- If the article is republished. *Three Months Free — Al Smith* *published a new version of this offer*
- If the article is republished and flagged as new by the publisher. *Three Months Free — Al Smith* *published this new offer*
- If the article is archived. *Three Months Free — Al Smith* *archived this offer*

The title link in all posts about a specific article opens the current version of that article in the knowledge base, whether published, archived, or draft. A user without the "Manage Articles" permission who is following an article will not see posts if the article's status changes from published to draft. When the article is republished, posts about the article resume. Users with the "Manage Articles" permission see all posts about articles they follow except for article deletions. If an article is deleted from the knowledge base, all posts about the article disappear from feeds regardless of user.

New Custom Report Options

User Permissions Needed	
To create or update custom report types:	"Manage Custom Report Types"

Two new custom report types are available in Summer '10: Cases with Articles and Knowledge Keyword Search. The Cases with Articles custom report identifies which articles have helped solve cases. The Knowledge Keyword Search custom report lists the terms that users entered when searching the knowledge base and tells you whether each search returned any results. This information reveals potential subjects for new articles and provides insight into user expectations. Summer '10 also provides statistics about article views for the Knowledge Articles custom report.

To get started using the Cases with Articles custom report, on the Reports tab click **Create New Custom Report** or **Create New Custom Report With Report Builder**. To get started with the Knowledge Keyword Search custom report, you must go to **Setup ➤ Create ➤ Custom Report Types** and define the custom report before it will be available on the Reports tab. For detailed information, see "Reporting on Articles" in the Salesforce.com online help.

Data Categories Visible to Users Without Roles

User Permissions Needed	
To create data categories:	"Manage Data Categories"
To modify category group visibility settings on roles:	"Manage Users"
To modify default category group visibility settings:	"Manage Data Categories"

In organizations that do not use roles, all data categories are visible. Once a role hierarchy is created, *category group visibility settings* determine the individual data categories and categorized articles that a Salesforce Knowledge user can see. There are two types of settings:

- Role-based visibility settings
- Default visibility settings

Role-based visibility settings restrict access to categorized articles by mapping data categories to roles. Users can only see the data categories permitted by their role. If your organization uses roles but does not assign one to every user, Summer '10 now provides *default visibility settings* that allow you to give category visibility to users without roles. For example, although High-Volume Customer Portal users don't have roles, they can view categorized articles if the associated categories are visible by default.

To modify the default visibility for data categories:

1. Click **Setup ➤ Customize ➤ Data Categories ➤ Default Data Category Visibility**. All active and inactive category groups are listed.
2. Pick a category group and click **Edit**.
3. Choose **All** to make all the categories in the category group visible by default, **None** to make none of the categories visible by default, or **Custom** to make some of the categories visible by default.

4. If you chose Custom, move categories from the Available Categories area to the Selected Categories area as needed. Selecting a category implicitly includes its child and parent categories as well. Move categories from the Selected Categories area back to the Available Categories area to remove default visibility.

Community Enhancements

Ideas communities available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Answers communities available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Summer '10 enhancements for ideas and answers communities include:

Answers Available in Force.com Sites

You can now expose your answers community publicly using Force.com Sites.

Escalating a Question to a Case

Administrators and trusted community members who have permission to create cases can escalate an unanswered or problematic question to a new case. After the case is created, a message on the original question indicates the case association with a link to the case and the latest status.

Promoting a Reply to an Article

Community members who have permission to create articles for Salesforce Knowledge can choose to convert a particularly helpful reply into a new article in the knowledge base. See Salesforce Knowledge Enhancements for more information.

Workflow Support for Questions

You can now set up workflow rules for questions to help you monitor your answers community. Workflow rules can trigger for numerous conditions, such as a question that has gone unanswered for a certain length of time and questions with replies that have no best answer.

Data Categories Available to Users Without Roles

Previously, visibility of data categories (and therefore categorized questions) depended on user role. In organizations that use roles, users who were not assigned to a role, such as high-volume Customer Portal users, could only see uncategorized questions. With the addition of default visibility settings in Summer '10, you can designate certain data categories as visible to all users while still restricting access as needed for each role.

Community Members Can Delete Posts

Members of an answers community can delete their questions and replies. Previously, only administrators had permission to delete.

All Users Can Change Their Community Nicknames

Previously, only administrators could modify the `Community Nickname` field on the user detail page.

New API Object for Data Category Selections

A data category selection represents a data category that classifies a question. This object can be used to associate a question with a data category from a data category group or to query the categorization for a question. For more information, see the *Web Services API Developer's Guide*.

About the Community Enhancements

Answers Available in Force.com Sites

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

User Permissions Needed	
To create and edit Force.com sites:	"Customize Application"
To edit public access settings for Force.com sites:	"Manage Users"

Force.com sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring users to log in with a username and password. You can also configure login settings that allow users to log into your portal from your public Force.com site. For example, users browsing through your answers site can register and login directly from that site, and as authenticated users, they can then ask questions, post replies, vote on a reply, and participate in the answers community. When users successfully log in, they leave the public site and enter the associated portal seamlessly.

After exposing your answers community in a Customer Portal, set up your site. The following steps highlight the information pertinent to answers communities. For detailed information about how to customize and manage sites, see the Force.com Sites Implementation Guide.

1. If you're setting up Force.com Sites for the first time, click **Setup ➤ Deploy ➤ Sites** and register and enable your Force.com domain.

2. On the Sites page, click **New** to create a new site for your answers community. Enter the site details as needed while noting the following:

   - You must use AnswersHome as the `Active Site Home Page`.
   - For `Site Template`, you can choose your own custom template, the site template provided, or choose to leave it blank. If you use the site template provided, be aware that it overrides the styling of your Customer Portal on the pages that reference the site template. If you do not use the site template, then the login, registration, and password reset pages inherit the styling of the Customer Portal.

3. On the site detail page:

   - Click **Edit** on the Site Standard Pages related list and move `Answers Pages` from the Available Pages list to the Selected Pages list. Click **Save** to return to the site detail page.
   - If you want to configure login settings, click **Login Settings** and then **Edit**. From the Enable Login For menu, choose the portal associated with your community. Your portal only appears in the menu if you selected `Log in Enabled` when creating the portal. Modify the other settings as needed.

4. To change the default error messages, click **Page Assignment**

5. To modify the permissions of guest users to your site, click **Public Access Settings**.

6. Click **Activate** on the site detail page when you're ready to make your site public.

Escalating a Question to a Case

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

User Permissions Needed	
To customize page layouts and change standard fields:	"Customize Application"

If a question remains unresolved or its reply isn't satisfactory, administrators and trusted community members can escalate the question to a case. After a case is created, the question detail page provides a link to the case for the life of the question. This link also shows the status of the case.

Note: Closing the case does not mark the question as resolved, and resolving the question does not close the case. In other words, the case and the question must be updated separately.

To enable an **Escalate to Case** button on questions:

1. Click **Setup ➤ Customize ➤ Cases ➤ Page Layouts**. Edit each case page layout to include the `Question` field.
2. Click **Setup ➤ Customize ➤ Cases ➤ Fields**. Click the `Question` field and then **Set Field-Level Security**. Make sure the field is visible for profiles that will escalate questions to cases, for example, System Administrator. (The profiles must also grant permission to create cases.)

Workflow Support for Questions

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

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

In Summer '10, you can create workflow rules for questions in your answers community. For example, you may want to create a workflow rule that sends the community administrator an email whenever a question has ten or more replies but no best answer. Questions do not support approval processes or workflow tasks. For detailed information, see "Creating Workflow Rules" in the Salesforce.com online help.

Data Categories Visible to Users Without Roles

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

User Permissions Needed	
To create data categories:	"Manage Data Categories"
To modify category group visibility settings on roles:	"Manage Users"
To modify default category group visibility settings:	"Manage Data Categories"

In organizations that do not use roles, all data categories are visible. Once a role hierarchy is created, *category group visibility settings* determine the individual data categories and categorized questions that a community member can see. There are two types of settings:

- Role-based visibility settings
- Default visibility settings

Role-based visibility settings restrict access to categorized questions by mapping data categories to roles. Users can only see the data categories permitted by their role. If your organization uses roles but does not assign one to every user, Summer '10 now provides *default visibility settings* that allow you to give category visibility to users without roles. For example, although High-Volume Customer Portal users don't have roles, they can view categorized questions if the associated categories are visible by default.

To modify the default visibility for data categories:

1. Click **Setup ➤ Customize ➤ Data Categories ➤ Default Data Category Visibility**. All active and inactive category groups are listed.
2. Pick a category group and click **Edit**.
3. Choose **All** to make all the categories in the category group visible by default, **None** to make none of the categories visible by default, or **Custom** to make some of the categories visible by default.
4. If you chose Custom, move categories from the Available Categories area to the Selected Categories area as needed. Selecting a category implicitly includes its child and parent categories as well. Move categories from the Selected Categories area back to the Available Categories area to remove default visibility.

Community Members Can Delete Their Posts

Ideas communities available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Answers communities available in: **Enterprise**, **Unlimited**, and **Developer** Editions

A user who posts a question or reply in an answers community can now delete the post if it has not received replies or votes. Once a question receives a reply, only administrators can delete the question. Also, only administrators can delete a reply that has received a reply or vote. Users cannot delete their votes.

Standard Users Can Change Their Community Nicknames

Ideas communities available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Answers communities available in: **Enterprise**, **Unlimited**, and **Developer** Editions

All users who can access their user detail page at **Setup ➤ My Personal Information ➤ Personal Information** can update the `Community Nickname` field. Previously, only administrators could edit this field.

Additional Service Cloud Enhancements

Enabling High Volume Customer Portal Users

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

With Summer '10, you can now enable contacts as High Volume Customer Portal users from the contact detail page.

High-volume Customer Portal users include both the High Volume Customer Portal User and Authenticated Website User license types. You can use these user licenses to add significantly more users to a Customer Portal. After you purchase these high-volume user licenses, you can assign them to portal-enabled contacts so that large numbers of users can log in to a Customer Portal without affecting its performance.

Note: The High Volume Customer Portal User user license is currently available through a pilot program, while the Authenticated Website User user license is generally available. For information on enabling High Volume Customer Portal users, contact salesforce.com.

For more information, see "Enabling the Customer Portal for Contacts and Person Accounts" in the Salesforce.com online help.

CUSTOM CLOUD

Adobe Flash Builder for Force.com General Availability

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

Available for an additional cost in: **Professional** Edition

Adobe® Flash® Builder for Force.com is generally available in Summer '10. Adobe Flash Builder for Force.com is an enhanced version of Adobe's Eclipse-based integrated development environment (IDE) with additional features for developing in Force.com Flex—a framework for creating Flex-based desktop and Web applications that leverage Salesforce.com logic, data, and security. The framework provides:

- Seamless handling of connected and disconnected states for desktop apps, including the detection of Internet connectivity
- Adobe's Data Management Services (DMS), which creates and manages local databases for desktop applications that operate online and offline
- Data synchronization between Salesforce.com and desktop applications
- Generated ActionScript classes that mirror your Salesforce.com enterprise WSDL and provide access to Salesforce.com objects
- MXML components to simplify the implementation of user interfaces that render Salesforce.com data, a specialized status bar, and popup notifications called *toasts*
- An engine and user interface for resolving data conflicts and errors in desktop applications

Force.com Flex is intended for developers with a working knowledge of MXML (Adobe's user interface markup language), ActionScript (Adobe's scripting language), Adobe Flash Builder 4, and the Force.com API. To obtain Adobe Flash Builder for Force.com, visit `http://developer.force.com/flashbuilder`.

Analytics Enhancements

Salesforce.com analytics enhancements in Summer '10 include:

Dynamic Dashboards

Previously, a dashboard could have a single, static *running user*, whose security settings determined data access for all dashboard viewers, regardless of their own personal security settings. With Summer '10, you can also set up *dynamic dashboards*, which run using the security settings of the logged-in user. All users see the same dashboard components, but each sees data according to his or her own access level. A single dynamic dashboard can display a standard set of metrics across all levels of your organization.

Drag-and-Drop Dashboard Builder

Summer '10 introduces dashboard builder: a powerful and interactive way to quickly create dashboards. Simply drag a component type onto a column, then drop a data source onto it. Quick Find and filters make it easy to find the data source you're looking for. To change the source or type, drop a different one onto the component. You can also drag

and drop to reorder components, edit component properties using the component editor, and directly edit the description, headers, titles, and footers.

Dashboard Table Summaries

In Spring '10, we released customizable dashboard tables with up to four columns. With Summer '10, you can show column totals on those tables.

Report Builder Enhancements—Developer Preview

In Spring '10, report builder became available as a Developer Preview. In Summer '10, we added new features to make report builder more powerful. Now you can create and edit summary reports, manage custom and advanced filters, and edit row count limits for tabular reports. Use the drag-and-drop interface to reorder columns, add and rearrange groupings, and change date granularities.

About Analytics Enhancements

Dynamic Dashboards

You asked for it! This enhancement is from an idea on the IdeaExchange.

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

User Permissions Needed	
To create, edit, and delete dynamic dashboards:	"Run Reports"
	AND
	"Manage Dynamic Dashboards"

Previously, a dashboard could only have a single, static *running user*. With Summer '10, the running user can be:

- **A specific user.** The dashboard runs using the security settings of that single, specific user. All users with access to the dashboard see the same data, regardless of their own personal security settings. This approach is perfect for sharing the big picture across a hierarchy, or motivating team members by showing peer performance within a team.
- **The logged-in user.** A *dynamic dashboard* runs using the security settings of the user viewing the dashboard. Each user sees the dashboard according to his or her own access level. This approach helps administrators share one common set of dashboard components to users with different levels of access.

Previously, to control data visibility, administrators would create a dashboard, then clone it for each level of data access. They'd have to assign a different running user for each level, and store the dashboards in different folders. With dynamic dashboards, administrators can accomplish the same thing without having to create and maintain all those extra dashboards and folders. A single dynamic dashboard can display a standard set of metrics across all levels of your organization.

Note: You can't schedule refreshes for dynamic dashboards. They must be refreshed manually.

Example Business Scenario

Let's say that your sales team consists of one vice president, four sales managers, and 40 sales reps—10 reps per manager. You've been asked to create dashboards that display the following metrics, restricted by role and hierarchy:

Role	Total Bookings	Close Rates by Competitor	Number of Activities by Meeting Type
Sales Rep	✅		✅
Sales Manager	✅	✅	
VP of Sales	✅	✅	

Sales reps should only see their own data; managers should only see data for the reps they manage; and the VP should see data across the entire team. In this scenario, you'd typically have to create *45* different dashboards—one for every single person. You'd also have to create multiple folders to manage access rights.

With dynamic dashboards, you can create just *two* dashboards and store them in a single folder:

- Create a dynamic dashboard for sales reps with the following components:

  - A gauge of total bookings
  - A table of activities by meeting type

- Create a dynamic dashboard for managers and the VP with the following components:

  - A gauge of total bookings
  - A column chart of close rates by competitor

All users only see data that they can access. Sales reps see their own bookings and activities. Managers see bookings and close rates for the reps they manage. The VP sees bookings and close rates for the whole team. Because the metrics are the same for managers and the VP, you can use the same dynamic dashboard for both roles. The dynamic dashboards feature reduces the number of required dashboards from 45 to two!

Setting Up Dynamic Dashboards

Before you get started, create folders accessible to all dashboard viewers to store dynamic dashboards and corresponding component source reports.

Tip: For source reports used in dynamic dashboards:

- Set the appropriate `View` option on the report run page. For example, if you choose "My Team's Opportunities," each dynamic dashboard viewer can see all opportunities for the team.
- To avoid restricting the dashboard's view of the data:

  - Make sure advanced filters don't include specific record owners (for example, `Opportunity Owner equals Frank Smith`).
  - Don't click **Save Hierarchy Level** when saving opportunity reports.

To create dynamic dashboards:

1. From the Dashboards tab, create a new dashboard or edit an existing one.
2. Click **Dashboard Properties**.
3. For the `Dashboard User` option, select `Run as logged-in user`.

4. Set the `View Edit Page as` field to preview the dashboard from the point of view of the selected user.

Use this feature to test what various users see before you send out the dashboard.

> **Note:** The `View Edit Page as` setting only affects the running user of the Dashboard Edit page, not the view page. For dashboards with a specific running user, view and edit pages display data as the same user.

5. Click **Save**.

Drag-and-Drop Dashboard Builder

You asked for it! This enhancement is from an idea on the IdeaExchange.

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

User Permissions Needed	
To create, edit, and delete dashboards:	"Run Reports"
	AND
	"Manage Dashboards"
To create, edit, and delete dashboards using the dashboard builder interface:	"Drag-and-Drop Dashboard Builder"

Summer '10 introduces dashboard builder: a powerful and interactive way to quickly create dashboards. Simply drag a component type onto a column, then drop a data source onto it. Quick Find and filters make it easy to find the data source you're looking for. To change the source or type, drop a different one onto the component. You can also drag and drop to reorder components, edit component properties using the component editor, and directly edit the description, headers, titles, and footers.
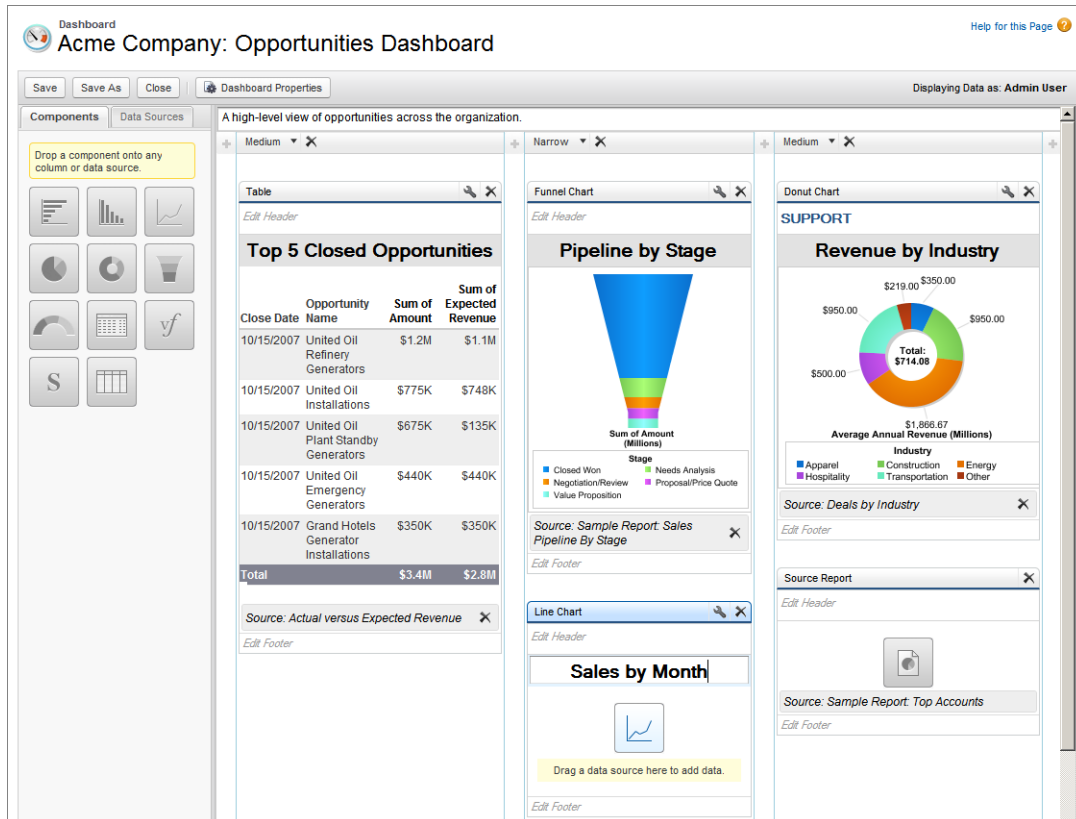
Figure 1: Example Dashboard Builder Interface

Customizing Dashboards with Dashboard Builder

To customize a dashboard, view it and click **Edit**. Dashboard builder has the following controls:

Dashboard-Level Controls

- Save or close the dashboard. You'll lose your changes if you close or navigate away from the dashboard builder without saving first.
- Click **Dashboard Properties** to change the title, folder, running user, and more.
- See the running user for the dashboard in the `Displaying data as` field.
- Click the text field at the top of the dashboard to add a description.

Column-Level Controls

- Click ✚ to add a new column. Dashboards can have up to three columns.
- Click ✖ for a column to delete it. Dashboards must have at least two columns. Before deleting a column, move its components to another column.
- Select **Narrow**, **Medium**, or **Wide** in the drop-down to set a column's width.

Component-Level Controls

- Add components by:
  - Dragging a component type onto a column, then dropping a data source (report, s-control, or Visualforce page) onto it. To change the source, simply drop a different one onto the component.

To hone in on the right data source, use Quick Find and the **Recent**, **My**, and **All** filters.

- Dragging a data source onto a column, then dropping a component type onto it. To change the type, simply drop a different one onto the source.

Each component must have a type and a data source. Visualforce components must use Visualforce pages as the data source.

> **Note:** Each folder can display up to 200 data sources. If you have more than 200, use Quick Find or filters to narrow the list.

- Drag and drop to rearrange components. Grab components by the header bar and drag them to the right location on the dashboard.
- Click ✎ to open the component editor.
- Click ✖ for a component to remove it from the dashboard.
- Click ✖ for a data source to remove it from the component.
- Click component header, title, and footer fields to edit them.

> **Note:** Hover details and drill-down aren't available while editing a dashboard. To use these functions, go to the dashboard's view page.

Setting Dashboard Properties with Dashboard Builder

To set dashboard properties:

1. Edit a dashboard and click **Dashboard Properties**.
2. Do the following:

   - Enter a title for the dashboard.
   - If you have the "Customize Application" permission, enter a unique name to be used by the API and managed packages. This name can contain only underscores and alphanumeric characters, and must be unique in your organization. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. The unique name lets developers change certain components' names or titles in a managed package and the changes are reflected in a subscriber's organization.
   - Select a folder to store the dashboard. The folder should be accessible by all of your intended viewers.
   - Choose the `Dashboard User` to set visibility settings for the dashboard:

     - Select `Run as specified user` and set the `Run as` field to show all dashboard users the same data, regardless of their personal security settings. Unless you have the "View All Data" permission, you can only choose yourself.
     - Select `Run as logged-in user` to show data to each user according to his or her access level. Optionally, set the `View Edit Page as` field to preview the dashboard from the point of view of the selected user. See "Setting Up Dynamic Dashboards" in the Salesforce.com online help.

   - Under Component Settings, select the title color and size, text color, and background fade. If you don't want a gradient, choose the same color for both `Starting Color` and `Ending Color`.

3. Click **Save**.
4. Edit the dashboard to organize the layout and add components.

Editing Components with Dashboard Builder

To edit a component:

1. Click ✎ to open the component editor.
2. Choose a component type or select `Use chart as defined in source report`. This option uses settings from the report chart for your dashboard component and disables certain settings in the component editor.

   > **Tip:** Use this option to show combination charts in your dashboard.

3. Enter the appropriate settings on the Component Data subtab for the component type you selected.

Field	Description
Grouping Display	For horizontal bar and vertical column charts, choose Side-by-Side, Stacked, or Stacked to 100%.
	For line charts, choose Line Grouped, Line Cumulative, or Line Grouped Cumulative.
Metric Label	For metrics, enter the label to associate with the grand total for the source report.
Display Units	Choose a scale for displaying your chart values. For table components, this setting applies only to the first column. For best results, choose Auto to let Salesforce.com select appropriate units.
Drill Down to	Select what happens when users click a dashboard component: • Source Report—Takes the user to the full source report for the dashboard component. • Filtered Source Report—When users click individual groups, axis values, or legend entries, they are taken to the source report filtered by what they clicked. For example, if you had a stacked vertical column chart of opportunities grouped by stage, with months as the X-axis, you could click an individual stage in a bar, a month on the X-axis, or a legend entry for a stage to drill down to the filtered source report. (Not available for metrics or tables.) • Other URL—Takes the user to the URL that you specify.

4. Enter the appropriate settings on the Formatting subtab for the component type you selected. For Visualforce pages and s-controls, set the `Height`.
5. Click **OK**.

Dashboard Table Summaries

You asked for it! This enhancement is from an idea on the IdeaExchange.

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

User Permissions Needed	
To create, edit, and delete dashboards:	"Run Reports"
	AND
	"Manage Dashboards"

In Spring '10, we released customizable dashboard tables with up to four columns. With Summer '10, you can show column totals on those tables.

To create a custom dashboard table component with totals:

1. Edit the table component and click **Customize Table**.

   Note: To customize a table, the source report must be summary or matrix and contain a chart.

2. Specify up to four columns to display in the table. Available columns can be any grouping or summary field in the chart, or the second-level grouping in the source report. Update the report's chart or groupings to make more columns available for the dashboard table.

3. Click **Show Total** for number and currency fields to include that column's sum in the table.

Top 5 Closed Opportunities			
Close Date	Opportunity Name	Sum of Amount	Sum of Expected Revenue
10/15/2007	United Oil Refinery Generators	$1.2M	$1.1M
10/15/2007	United Oil Installations	$775K	$748K
10/15/2007	United Oil Plant Standby Generators	$675K	$135K
10/15/2007	United Oil Emergency Generators	$440K	$440K
10/15/2007	Grand Hotels Generator Installations	$350K	$350K
Total		$3.4M	$2.8M

Figure 2: Example Dashboard Table with Totals

Report Builder Enhancements—Developer Preview

Available in: **Developer** Edition

User Permissions Needed	
To create custom reports:	"Create and Customize Reports"
To create, edit, and delete reports using the report builder interface:	"Report Builder"

In Spring '10, report builder became available as a Developer Preview. In Summer '10, we added new features to make report builder more powerful. Now you can create and edit summary reports, manage custom and advanced filters, and edit row count limits for tabular reports. Use the drag-and-drop interface to reorder columns, add and rearrange groupings, and change date granularities.

Note: For Developer Preview, report builder only works with tabular and summary reports, and functionality is limited. You can't use it for matrix reports.
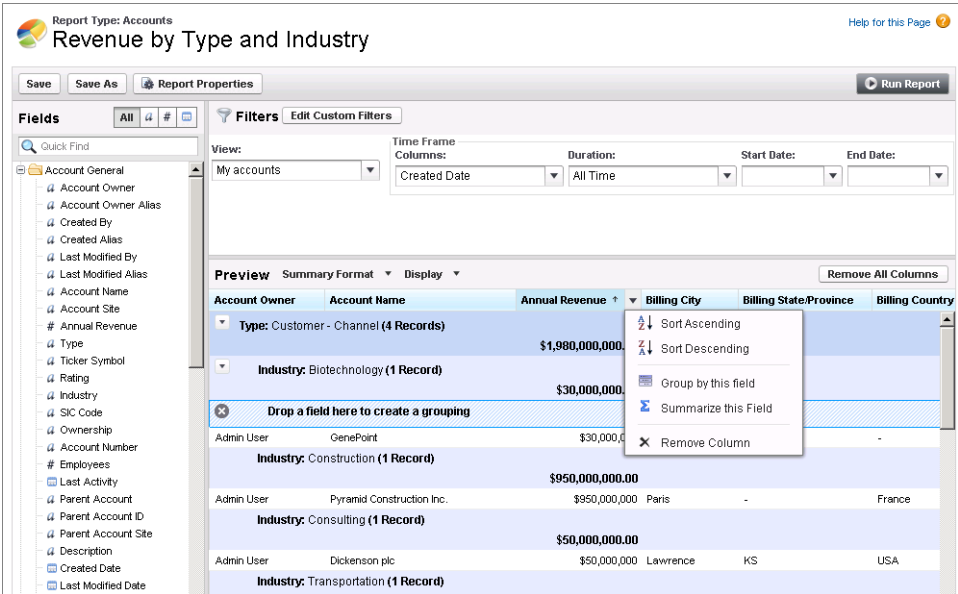
Figure 3: The Report Builder Interface

Creating Reports with Report Builder

To create a new report using report builder:

1. From the Reports tab, Click **Create Report Using Report Builder**.
2. Select the report type for the report, and click **Next**.
3. Customize your report, then save or run it.

Working with Report Builder

To customize an existing report using report builder, click the name of a report and click **Customize Using Report Builder**.

Using the report builder, you can:

- Save or run the report.
- Click **Report Properties** to change a report's name, description, or folder.
- Find fields using Quick Find and field-type filters.
- Add fields and formulas to the report by double-clicking or dragging them into the Preview pane.
- Set report filters in the Filters pane.
- Click the **Format** drop-down to change between tabular and summary formats.
- Click the **Show** drop-down to toggle the **Details**, **Drop Zones**, and **Chart** options, and edit **Conditional Highlighting** settings.
- Click **Add Chart** to define a chart for the report.
- Reorder columns by dragging them.
- Sort the report by a particular column.
- Summarize fields on summary reports.
- Add and reorder grouping levels on summary reports.
- Maximize the Preview pane by resizing or collapsing the Fields and Filters panes by dragging the divider or clicking the arrow.

Note: To optimize screen real estate, report builder uses a compressed page header. To view your application tabs, simply save and close the builder.

Working with Fields in Report Builder

The Fields pane lists all accessible fields in the selected report type, organized by the sections defined in the page layout. It also lists custom summary formulas and lets you create, edit, and delete them.

Finding Fields

Find a field by typing its name into the Quick Find search box. You can also filter the list by type:

- Click **All** to see all field types, as well as custom summary formulas.
- Click **a** to see just text fields.
- Click **#** to see just number fields.
- Click **▣** to see just date fields.

Adding and Removing Fields

To add a field to your report, double-click it or drag it into the Preview pane. Drag an entire folder to add all its fields. To remove a field, grab the column header and drag it back to the Fields pane. You can also click the column menu and choose **Remove Column**, or click **Remove All Columns**. You can't add non-summarizable fields when **Show ➤ Details** is deselected.

Adding and Removing Formulas

Formulas apply only to summary reports. To add a new formula to your report, double-click **Add Formula**. Once you define it, it's automatically added as a column in the preview. To edit a formula, hover over the name and click ✏.

To remove a formula from the preview, grab the column header and drag it back to the Fields pane, or click the column menu and choose **Remove Column**. Removing the formula from the preview doesn't delete it. To delete a formula, hover over the name and click 🗑, or click **Delete Formula** from the column menu.

Adding and Removing Summary Fields

For summarizable columns on summary reports, click the column menu and choose **Summarize this Field**. Select Sum, Average, Max, or Min. The summary field shows at all grouping levels and the grand total level.

To change or remove a summary, choose **Summarize this Field** and deselect all options.

> **Note:** If you drag a summarizable field to the preview while **Show Summaries Only** is enabled, the Summarize dialog appears automatically.

Adding and Removing Groupings

For summary reports, add a group by dropping a field onto the drop zone. If you can't see the drop zones, click **Show ➤ Drop Zones**. You can also click the column menu and choose **Group by this Field**. A summary report can have up to three grouping levels.

To remove a group, click ▼ for the top-level group and choose **Remove Group**. You can also grab the group and:

- Drag it to the column bar to remove the group, but keep the field as a column in the report.
- Drag it back to the Fields pane to remove both the group and the field from the report.

Ordering and Sorting Columns

Reorder report columns by grabbing the column header and dragging it to a new location. To sort your report by a column, click its column header. You can also click the column menu and choose **Sort Ascending** or **Sort Descending** from the drop-down list. Sort is disabled when **Show ➤ Details** is deselected.

Reordering Groups

For summary reports, to change the hierarchy of groups, drop a group above or below another group, or click ▼ and choose **Move Group Up** or **Move Group Down**.

Setting Filters in Report Builder

To limit the data shown in the report, set the view, time frame, and custom filters:

- Use the View drop-down to select your, your team's, or all records.
- Set the Time Frame options to filter by a column's duration, start date, and end date for a particular column.
- Click **Edit Custom Filters** to add, edit, or remove filters defined by field, operator, and value. You can also view and remove filters in the Filters pane. To create advanced filter conditions, click Add filter logic. Click Clear filter logic to remove conditions.

> **Note:** If you have Translation Workbench enabled, you can filter on translated strings by specifying the Filter Language for filter criteria that use contains, does not contain, or starts with operators.

Depending on your organization's setup, you may see additional filters, such as probability, hierarchy, territory, and others.

Tabular reports that have a limited row count can be used in dashboard tables and charts. To prepare a tabular report for use in a dashboard:

1. Click **Edit Custom Filters** or select **Limit Rows by this Field** in the column menu.
2. Set the Rows to Display option to 10, 25, or Custom. If you choose Custom, enter a number between one and 99.
3. Set the Sort By and Sort Order options. If you chose **Limit Rows by this Field** for a column, these options are already set.
4. Click **OK**.

5. Click **Dashboard Settings** in the toolbar
6. Choose a `Name` and `Value` to use in dashboard tables and charts. Tables show both name and value. Charts are grouped by name.
7. Click **OK**. You can now use this tabular report as the source report for a dashboard component.

Dependent Lookups and Other Lookup Filters Enhancements—Beta

You asked for it! This enhancement is from an idea on the IdeaExchange.

Available in: **All** Editions

> **Note:** Salesforce.com beta features are production-quality but are not functionally complete.

Lookup filters are administrator settings that restrict the valid values and lookup dialog results for lookup, master-detail, and hierarchical relationship fields. Administrators specify the restrictions by configuring filter criteria that compare fields and values on:

*   The current record (source)
*   The lookup object (target)
*   The user's record, profile, and role
*   Records directly related to the target object

Summer '10 includes significant enhancements to the lookup filters beta feature, including:

Dependent Lookups

A *dependent lookup* is a relationship field with a lookup filter that references fields on the source object. Similar to dependent picklists, the valid values in the dependent lookup change according to other values the user enters on the record.

Lookup Filter Definitions in Custom Field Wizard

You can create lookup filters for new relationship fields in step 3 of the custom field wizard.

Related Lookup Filters Lists for Target Objects

You can quickly see a list of the lookup filters that restrict the values of each target object. This is useful when creating similar filters for a target object. Also, lookup filters that reference fields on related objects count against the cross-object reference limit, which is the number of unique relationships allowed for a target object. The Related Lookup Filters list lets you see which lookup filters might impact that limit.

*   For standard objects, click **Setup ➤ Customize**, select the object from the **Customize** menu, and click **Related Lookup Filters**.
*   For custom objects, click **Setup ➤ Create ➤ Objects**, select one of the custom objects in the list, and scroll to the Related Lookup Filters related list.

These enhancements resulted in additions and changes to the current lookup filter administrator settings. In Summer '10:

- The new lookup filter criteria syntax prefixes fields with the relationship field label.
- When defining a filter, start typing in the filter criteria area and Salesforce.com displays the available options.
- To deactivate a filter, deselect the `Active` checkbox.
- Radio buttons for specifying required and optional filters replace the `Optional Filters` checkbox.

These changes do not impact your existing filters

About the Lookup Filters Enhancements

About Lookup Filters

Available in: **All** Editions

User Permissions Needed	
To manage lookup filters:	"Customize Application"

Note: Salesforce.com beta features are production-quality but are not functionally complete.

Improve user productivity and data quality with lookup filters.

Lookup filters are administrator settings that restrict the valid values and lookup dialog results for lookup, master-detail, and hierarchical relationship fields. Administrators specify the restrictions by configuring filter criteria that compare fields and values on:

- The current record (source)
- The lookup object (target)
- The user's record, profile, and role
- Records directly related to the target object

For example, you can:

- Restrict the `Account Name` field on opportunities to allow only accounts with a record type of Customer, filtering out Partner and Competitor.
- Restrict the `Account Name` field on opportunities to allow only active accounts.
- Restrict the `Contact` field on cases to allow only contacts associated with the account specified in the `Account Name` field on the case record.
- Restrict the `Account Name` field on cases to allow only users with the "International Sales" profile to create or edit cases for accounts outside the United States.

Tip: When you define a lookup filter, optionally click `Insert Suggested Criteria` to choose from a list of lookup filter criteria that Salesforce.com suggests based on the relationships between objects in your organization.

Administrators can make lookup filters required or optional.

- For fields with required lookup filters, only values that match the lookup filter criteria appear in the lookup dialog. Also, users can't save invalid values manually typed in the field when editing the record. If a user tries to save an invalid value, Salesforce.com displays an error message, which administrators can customize.
- For fields with optional lookup filters, only values that match the lookup filter criteria appear in the lookup dialog initially; however, users can click the **Show all results** link in the lookup dialog to remove the filter and view all search result values for the lookup field. Also, optional lookup filters allow users to save values that don't match the lookup filter criteria, and Salesforce.com does not display an error message if a user tries to save such values.

About Dependent Lookups

Available in: **All** Editions

User Permissions Needed	
To manage dependent lookups:	"Customize Application"

Note: Salesforce.com beta features are production-quality but are not functionally complete.

A *dependent lookup* is a relationship field with a lookup filter that references fields on the source object. For example, you can configure the case `Contact` field to only show contacts associated with the account selected in the case `Account Name` field.

When a user changes the value of a referenced field on the source object, Salesforce.com immediately verifies that the value in the dependent lookup still meets the lookup filter criteria. If the value doesn't meet the criteria, Salesforce.com displays an error message and users can't save the record until the value is valid.

If the referenced field on the source object is a lookup, master-detail, or hierarchy field, users can't change its value by typing. Instead, users must click the lookup icon and select a value in the lookup search dialog.

Defining Lookup Filters

Available in: **All** Editions

User Permissions Needed	
To define lookup filters:	"Customize Application"

Note: Salesforce.com beta features are production-quality but are not functionally complete.

To define a lookup filter:

1. You can create lookup filters for new relationship fields in step 3 of the custom field wizard. To create a lookup filter on an existing field:

   a. Navigate to the fields area of the object that contains the relationship field:

      • For standard objects, click **Setup ➤ Customize**, select the appropriate object from the **Customize** menu, and click **Fields**.
      • For custom objects, click **Setup ➤ Create ➤ Objects**, and select one of the custom objects in the list.

   b. Click **Edit** next to the name of the lookup or master-detail relationship field to which you want to apply the filter.

2. In the Lookup Filter Options section, click **Show Filter Settings**.

3. Specify the filter criteria a record must meet to be a valid value. To specify criteria, click `Insert Suggested Criteria` and choose from a list of suggested criteria, or manually enter your own criteria. To enter your own criteria:

   a. In the first column, click the lookup icon or start typing in the text box and select a field.
   b. In the second column, select an operator.
   c. In the third column, select `Value` if Salesforce.com should compare the field in the first column with a static value, or select `Field` if Salesforce.com should compare the field in the first column with the value of another field.
   d. In the fourth column, enter the value or select the field that Salesforce.com should compare with the field in the first column.

   Note:

   • To specify advanced filter conditions, click **Advanced Options**. See "Working with Advanced Filter Conditions" in the Salesforce.com online help.
   • You can select from fields on the current record, the lookup object, or the user record. You can also choose related fields that are one relationship away from the lookup object. Salesforce.com assists you by listing the available fields and relationships when you click the lookup icon or click inside the text boxes.
   • Lookup filter criteria can compare fields of different types as long as they are compatible.

4. Specify whether the filter is required or optional. For fields with optional lookup filters, only values that match the lookup filter criteria appear in the lookup dialog initially; however, users can click the **Show all results** link in the lookup dialog to remove the filter and view all search result values for the lookup field. Also, optional lookup filters allow users to save values that don't match the lookup filter criteria, and Salesforce.com does not display an error message if a user tries to save such values.

   For required lookup filters, specify whether you want Salesforce.com to display the standard error message or a custom message when a user enters an invalid value.

5. Optionally, enter text to display in the lookup search dialog. Consider text that guides users in their searches and explains the business rule that the lookup filter implements.

6. Leave `Active` selected.

7. Click **Save**.

   Important: When creating a lookup filter on a master-detail relationship field, verify that the current values of the field on all of the detail records meet the criteria you specify. If you specify criteria that an existing value doesn't meet, Salesforce.com prevents the user from saving changes to the detail record. If this occurs, the user must first modify the value on the master record to meet the criteria. For example, consider a custom object with a master-detail relationship field that points to accounts. If you define a lookup filter that excludes all accounts with a `Create Date` before 01/01/2009, verify that no existing records of that custom object have a master-detail relationship with any

account created before 2009. A quick way to do this is to create a report that shows all accounts with a `Create Date` before 01/01/2009.

If at some point you no longer need this lookup filter, return to this page and do one of the following:

Deactivate the lookup filter

Deactivating a lookup filter preserves the lookup filter configuration but:

- Prevents it from applying to the relationship field
- Prevents it from impacting the cross-object references limit
- Removes it as a dependency for fields referenced in the lookup filter criteria

To deactivate the lookup filter, deselect `Active`, then click **Save**.

Delete the lookup filter

Deleting a lookup filter permanently removes it. You cannot recover deleted lookup filters. To delete the lookup filter, click **Clear Filter Criteria**, then click **Save**.

Viewing a List of Lookup Filters for a Target Object

You can quickly see a list of all of the lookup filters that restrict the values of each target object. This is useful when creating similar filters for a target object. Also, lookup filters that reference fields on related objects count against the cross-object reference limit, which is the number of unique relationships allowed for a target object. The Related Lookup Filters list lets you see which lookup filters might impact that limit. To see which lookup filters affect the limit for a particular target object:

- For standard objects, click **Setup ➤ Customize**, select the object from the **Customize** menu, and click **Related Lookup Filters**.
- For custom objects, click **Setup ➤ Create ➤ Objects**, select one of the custom objects in the list, and scroll to the Related Lookup Filters related list.

Lookup Filter Examples

Available in: **All** Editions

User Permissions Needed	
To define lookup filters:	"Customize Application"

> **Note:** Salesforce.com beta features are production-quality but are not functionally complete.

Record Types in Lookup Filters

If the value of a relationship field should only consist of records with a particular record type, specify the record type in a lookup filter. For example, if the `Account Name` field on opportunities should only have accounts with a Customer Account custom record type, define the following lookup filter to restrict users to only creating or editing opportunities associated with accounts that have a Customer Account record type, excluding accounts with Partner Account and Competitor Account record types:

Filter Criteria

```
Account Name: Account Record Type equals value Customer Account
```

Custom Error Message

```
Account does not exist or is not a customer account.
```

Lookup Window Text

```
You can only associate customer accounts to an opportunity. Search results only
display customer accounts.
```

Record Status in Lookup Filters

If the value of a relationship field should only consist of records with particular status, specify the status in a lookup filter. For example, consider a Job Application object with a relationship field that points to the `Position` object. If the relationship field should only have open positions, define the following lookup filter to restrict users to only creating or editing job applications for positions with the `Status` field set to Open:

Filter Criteria

```
Position: Status equals value Open
```

Custom Error Message

```
Position does not exist or is not an open position.
```

Lookup Window Text

```
You can associate only open positions with job applications. Search results display
open positions only.
```

Profiles in Lookup Filters

When a business rule does not apply to users with every profile, use the `Current User Profile` global variable fields to define lookup filters that only affect users with a particular profile.

For example, the following lookup filter on the Case object `Account Name` field restricts users with a "Domestic Sales" profile to only creating or editing opportunities associated with accounts that have a billing country of "USA" while allowing other users to associate opportunities with any account:

Filter Criteria

1. `Current User Profile: Name equals value Domestic Sales`
2. `Account Name: Billing Country equals value USA`
3. `Current User Profile: Name not equal to value Domestic Sales`

Advanced Criteria

```
(1 AND 2) OR 3
```

Custom Error Message

```
Account does not exist or the account billing country is not USA. Domestic sales
reps can only create opportunities for accounts in the United States.
```

Lookup Window Text

```
Search results show only United States accounts in the for domestic sales
representatives.
```

You can modify the above example to simultaneously restrict users with a "Global Sales" custom profile to only associating opportunities to accounts with a non-US billing country:

Filter Criteria

1. `Current User Profile: Name equals value Global Sales`
2. `Account Name: Billing Country not equal to value USA`
3. `Current User Profile: Name equals value Domestic Sales`
4. `Account Name: Billing Country equals value USA`
5. `Current User Profile: Name not equal to value Global Sales, Domestic Sales`

Advanced Criteria

`(1 AND 2) OR (3 AND 4) OR 5`

Custom Error Message

```
Account does not exist or the account billing country is not in your sales area.
Sales reps can only create opportunities for accounts in their sales area.
```

Lookup Window Text

```
Search results only display accounts in your region.
```

> **!** **Important:** If you do not include line 5 in the filter criteria, users who are not in Global Sales or Domestic Sales cannot select or save any values on account records.

Roles in Lookup Filters

When a business rule does not apply to users in every role, use the `Current User Role` global variable fields to define lookup filters that only affect users with particular roles. For example, in a recruiting application that has a Position object with a lookup field to a Compensation Package object, you can restrict users from editing or creating positions that have an executive compensation plan unless they are executive administrators or vice presidents. To do this, define the following lookup filter on the Position object `Compensation Package Name` field:

Filter Criteria

1. `Current User Role: Name does not start with value VP`
2. `Current User Role: Name does not equal value Executive Administrator`
3. `Compensation Package: Plan Type does not equal value Executive`
4. `Current User Role: Name starts with value VP`
5. `Current User Role: Name equals value Executive Administrator`

Advanced Criteria

`((1 OR 2) AND 3) OR (4 OR 5)`

Custom Error Message

```
The compensation plan does not exist, or you have selected an executive compensation
plan but do not have access to create executive positions.
```

Lookup Window Text

```
Search results only display compensation plans that are relevant to positions you
are allowed to create.
```

> **Important:** Include the condition you are testing and the opposite condition. In this example, lines 1, 2, and 3 of the filter criteria ensure that users who are not VPs or Executive Administrators *cannot* select Executive compensation plans, while lines 4 and 5 ensure that VPs and Executive Administrators *can* select Executive compensation plans.

Blank Values in Lookup Filters

Your lookup filter criteria might reference a field that users often leave blank. You can design your lookup filter criteria to accept blank values by using the **Advanced Options** in the filter criteria to create an OR condition. For example, if you have a `Partner Contact` custom field on opportunities, restrict the field to only allow contacts that are associated to an account with a Partner Account record type, or private contacts not associated with any account.

Filter Criteria

1. `Partner Contact: Account: Account Record Type  equals value Partner Account`
2. `Partner Contact: Account: Account Name equals value`

Advanced Criteria

```
1 OR 2
```

Custom Error Message

```
The partner contact must be associated with a partner account, or must be a private
contact.
```

Lookup Window Text

```
Search results only display contacts from partner accounts or your private contacts.
```

User IDs in Lookup Filters

Using user IDs in optional lookup filters can significantly improve user efficiency by first showing lookup search dialog results that are most relevant to the user while still allowing users to see all results if necessary. For example, on a lookup field to accounts, you can create an optional lookup filter that restricts the search results to accounts that the user owns in the search lookup dialog results. If the user is looking for an account that someone else owns, the user can remove the filter.

Filter Criteria

```
Current User: User ID equals Field Account: Owner ID
```

Lookup Window Text

```
By default, search results only display accounts you own. To search all accounts,
click "Show all results."
```

Simple Dependent Lookups

If the value of a relationship field should depend on the value of another relationship field on the current record, specify the field to field comparison in the criteria. For example, if the case `Contact Name` field should only have contacts associated to the account specified in the case `Account Name` field, use the following lookup filter:

Filter Criteria

```
Contact Name: Account ID equals field Case: Account ID
```

Custom Error Message

```
Contact does not exist or is not associated to the case account.
```

Lookup Window Text

```
Search results only display contacts associated to the case account.
```

Note: When comparing lookup fields in lookup filter criteria, Salesforce.com always uses the ID of the relationship field, not the name.

Complex Lookup Filters and Dependent Lookups

Achieving complex business rules with lookup filters often involves combing your rules with advanced options and fields of various types. For example, consider an app for booking conference rooms that has the following data model:

Object	Fields
Meeting	• `Meeting Name` • `Office` lookup to the Office object • `Projector Required` checkbox • `Number of Participants` number field • `Conference Room` lookup to the Conference Room object
Conference Room	• `Conference Room Name` • `Has Projector` checkbox • `Number of Seats Available` number field • `Conference Room Location` lookup to the Office object
Office	• `Office Name`

The following lookup filter on the meeting `Conference Room` field restricts the valid values to conference rooms that have a projector if the meeting requires one, as well as the necessary number of seats:

Filter Criteria

1. `Meeting: Projector Required equals field Meeting Conference Room: Has Projector`
2. `Meeting: Projector Required equals value False`
3. `Conference Room: Number of Seats Available greater or equal field Meeting: Number of Participants`

Advanced Criteria

```
(1 OR 2) AND 3
```

Custom Error Message

```
Conference room not found or is insufficient for your meeting.
```

Lookup Window Text

```
Search results only display conference rooms that can support your meeting
requirements.
```

To refine the valid values even further, incorporate the office where the conference room is located:

Filter Criteria

1. `Meeting: Projector Required equals field Meeting Conference Room: Has Projector`
2. `Meeting: Projector Required equals value False`
3. `Conference Room: Number of Seats Available greater than field Meeting: Number of Participants`
4. `Meeting: Office equals Field Conference Room: Conference Room Location`

Advanced Criteria

`(1 OR 2) AND 3 AND 4`

Custom Error Message

`Conference room not found or is insufficient for your meeting.`

Lookup Window Text

`Search results only display conference rooms that can support your meeting requirements.`

Lookup Filters Limitations and Best Practices

Beta Limitations

- You cannot create filtered lookups on person account fields; however, lookup filter criteria can reference person account fields.
- Visualforce pages, the Salesforce to Salesforce invitation page, Ideas, and the `Division` field don't fully support dependent lookups. Fields on these pages with dependent lookups still appear and Salesforce.com still prevents the user from saving the record if the lookup is required; however, Salesforce.com does not dynamically filter lookup the dialog results or prevent users from entering invalid values.
- Some standard objects, such as Content, Products, or Cases, can't use dependent lookups. You can have a dependent lookup on a field on the Opportunity object, but it can't lookup to the Opportunity object.
- If you create a filtered lookup on a field that looks up to another object, both objects must be deployed into the organization at the same time.

Best Practices

Custom Help

Define custom help for fields with lookup filters to let users know about the business rule the filter enforces. For example, if the lookup filter restricts the `Account Name` on opportunities to only allow active accounts, define custom help that states `You can only associate active accounts with opportunities.`

Error Messages

Customize lookup filter error messages to guide users who type invalid values. For example, if the lookup filter restricts the `Account Name` on opportunities to only allow active accounts, define an error message that states `Value doesn't exist or isn't an active account.`

> **Important:** Salesforce.com translates the standard error message for required lookup filters, but not custom error messages. Use the Translation Workbench to translate lookup filter custom error messages. To restore the standard error message after modifying it, click **Reset to default message**.

Profile-Based Lookup Filters

Use `Current User Profile: ID` in filter criteria to define different filter criteria for different users, or to let administrators enter values that don't match the criteria. Avoid using `Current User Profile: Name` due to technical limitations on standard profiles. See "Lookup Filter Examples" in the Salesforce.com online help.

Record IDs vs. Record Names

To reference a specific record in filter criteria, use the ID of the record instead of its name. IDs are always unique whereas names are not.

Testing

After creating a lookup filter, test it to make sure it is not too restrictive. Some relationship fields may be read only to users with certain profiles; ensure your lookup filters don't prevent those users from editing records critical to their job functions.

Dependent Lookups on Page Layouts and Mini Page Layouts in the Console

When designing page layouts with dependent lookups:

- If a dependent lookup is above its controlling field on a layout, make its lookup filter optional or redesign the layout. Moving a required dependent lookup above its controlling field may confuse users who typically start from the top of a page when entering data.
- Ensure that both the controlling and dependent fields are visible so users can correct invalid values.

Lookup Filters and the Lookup Filter Fields Search Layout

Do not reference the same fields in both lookup filter criteria and the Lookup Filter Fields search layout. Users might assume that results from their custom search override administrator-controlled lookup filters.

Implementation Notes

- Salesforce.com supports lookup filters on relationship fields that point to:

  - Accounts
  - Assets
  - Contacts
  - Entitlements
  - Quotes
  - Service contracts
  - Users
  - Custom objects

  For example, you can define a lookup filter on opportunities that points to accounts, but not vice-versa.
- Lookup filter criteria can compare fields on the source object with different types of fields on the target object as long as the fields are compatible.

Source Object Field Type	Compatible Target Object Field Types
Currency	Currency, Roll-Up Summary
Date	Date, Date/Time, Roll-Up Summary
Date/Time	Date, Date/Time, Roll-Up Summary
Hierarchy	Hierarchy, Lookup, Master-Detail
Lookup	Hierarchy, Lookup, Master-Detail

Master-Detail	Lookup, Hierarchy, Master-Detail
Number	Number, Percent, Roll-Up Summary
Percent	Number, Percent, Roll-Up Summary
Picklist	Text, Text Area, Email, URL
Roll-Up Summary	Currency, Number, Date, Date/Time, Roll-Up Summary

- Lookup filter criteria cannot reference the following types of fields on the source object:

  - Autonumber
  - Encrypted
  - Formula
  - Long text area
  - Multi-select picklist
  - Roll-up summary
  - Text
  - Text area
  - URL

- On the Fields page, the 🝧 icon indicates all fields with active lookup filters. The 🝧 icon indicates that the lookup filter is required.
- If you enter `Current User Profile: Name` or `Profile: Name` in the Field column of your lookup filter criteria, Salesforce.com displays a lookup icon in that row. Click the lookup icon to select from a list of existing profiles rather than typing profile names.
- The lookup filters you create in Salesforce.com also appear in the partner portal and Customer Portal.
- Lookup filters are case-sensitive.
- If you convert a required lookup filter with a custom error message to optional, Salesforce.com deletes the message.
- If you create a lookup filter that invalidates an existing value for that field, the value persists; however, when a user edits the record, Salesforce.com displays an error message and requires the user to change the invalid value before saving.
- Salesforce.com prevents you from saving changes that cause required lookup filters on related records to contain invalid values.
- Lookup auto-completion does not work for fields referenced by lookup filter criteria.
- Salesforce.com ignores lookup filters when converting leads if the `Enforce Validation and Triggers from Lead Convert` checkbox on the Lead Settings page is deselected.
- Versions 16.0 and higher of the Salesforce.com API support lookup filters. Lookup filters are enforced when you load data through the API.
- If you configure a lookup filter to show inactive users only, the relationship field has no valid options because inactive users are never valid for relationship fields that point to the User object.
- In enhanced list views, you cannot change fields that a dependent lookup filter criteria references.
- Lookup filters do not support mass owner changes. If your lookup filter criteria reference the `Owner` field, performing a mass owner change can result in incorrect values that won't be noticed until you attempt to save the record.
- Lookup filters cannot reference formulas that reference global merge fields that lookup filters do not support.
- Salesforce.com does not display an error message if the value of a controlling field invalidates the value of a dependent master-detail relationship field.
- Salesforce.com does not support inline editing in list views for:

  - Fields on the source object that are referenced in dependent lookups.
  - Fields with dependent lookups.

Spanning Relationships in Lookup Filters

Filter criteria can include fields directly related to the target object (one level only). For example, on a lookup field pointing to contacts, a lookup filter can reference fields on the account related to the contact via the `Account Name` relationship field. The lookup field can also reference fields on the contact related to the contact via the `Reports To` relationship field.

For required lookup filters, each field referenced on a related lookup object counts against the number of unique relationships allowed for the referenced object, not the source object. For example, the two unique relationships described above count against the number allowed for the Contact object. Optional lookup filters don't count against the limit on the number of unique relationships allowed per object.

To see which lookup filters affect the limit for a particular target object:

- For standard objects, click **Setup ➤ Customize**, select the object from the **Customize** menu, and click **Related Lookup Filters**.
- For custom objects, click **Setup ➤ Create ➤ Objects**, select one of the custom objects in the list, and scroll to the Related Lookup Filters related list.

Lookup Filters vs. Validation Rules

Validation rules and lookup filters achieve similar ends, but offer different advantages. Use a lookup filter if:

- You want to improve user efficiency by limiting the number of available options in a lookup search dialog.
- You want to improve user efficiency by automating filters on lookup search dialogs that your users manually set.

Use a validation rule if:

- You're close to the maximum number of lookup filters allowed.
- You must implement a complex business rule that requires you to use a formula. Formulas can reference fields that basic filter criteria can't reference, such as fields on the parent of the source object. Formulas can also use functions. For example, use `ISNEW` if the rule should only apply on record creation, or `ISCHANGED` if the rule should apply when a field changes.

Other Limitations

- Lookup filter criteria can reference fields on accounts, assets, contacts, entitlements, quotes, service contracts, users, and custom objects, with the following exceptions:

  - Relationship fields on activities
  - System fields that are always read only, such as `Created By` and `Modified By`
  - Relationship fields that support queues, such as `Case Owner`, `Lead Owner`, and `Delegated Approver`

- Each object can have up to five active required lookup filters and an unlimited number of optional lookup filters. If you reach the limit of required lookup filters for an object, create optional filters instead and use validation rules to enforce your business rule when a user saves.
- Lookup filters on currency fields don't convert currencies. For example, if your organization uses multiple currencies and a lookup filter criteria is `Expected Revenue greater than 100000`, the lookup shows all records with an `Expected Revenue` field value greater than 100,000, regardless of the currency.
- You can't use special date values, such as "Today" or "This Month," in lookup filter criteria.
- You can't delete fields that are referenced in an active lookup filter.
- You can't change the field type of fields referenced by an active lookup filter.

Using Lookup Filters with Person Accounts

If your organization uses person accounts, note the following:

- Person Accounts don't support dependent lookups.

- Lookup filter criteria on `Account Name` only apply to business accounts, not person accounts. For example, if your lookup filter criteria is `Account Name does not contain book`, business accounts with "book" in the name, such as John's Bookstore, are not valid, but person accounts with "book" in the name, such as John Booker, are valid and appear in the lookup dialog for the `Account` field. If you need to filter on the name for a person account, use the `First Name` or `Last Name` fields instead.
- Use the `Is Person Account` field in your lookup filter criteria to restrict the valid values of a lookup field to one type of account (either person accounts or business accounts). For example, to restrict a lookup to only person accounts, include the following in your lookup filter criteria: `Is Person Account equals True`.
- You can't package lookup filters that reference standard fields specific to person accounts, such as the `Email` and `Title` fields.

Force.com Sites Enhancements

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

Summer '10 includes new features that improve the capabilities of Force.com sites. To access these features, sites must be enabled for your organization. Summer '10 enhancements for sites include:

Administrator Preview for Sites

With Summer '10, troubleshooting your site is easier with administrator preview. If you see errors on site pages and can't figure out the cause, use administrator preview mode to look at them in context and in greater detail.

Sites Single Sign-On

You asked for it! This enhancement is an idea from the IdeaExchange.

With Summer '10, your identity provider can use SAML with sites to do single sign-on. Single sign-on enables your organization's users to sign-on to Salesforce.com once, rather than several times for each integrated product.

Rewriting URLs for Sites

You asked for it! This enhancement is from an idea on the IdeaExchange.

Use the new `urlRewriter` interface for Apex to display user-friendly URLs and links to site visitors.

New `Cookie` Class for Force.com Sites

You asked for it! This enhancement is from an idea on the IdeaExchange.

The `cookie` class lets you access cookies for your Force.com site using Apex. Use this in conjunction with the new `getCookies` and `setCookies` Methods for `PageReference` to create and store cookies in Apex.

New `getCookies` and `setCookies` Methods for `PageReference` to create and store cookies in Apex.

Use `getCookies` to return a map of cookie names and cookie objects. Use `setCookies` to create cookie objects for your site.

About the Sites Enhancements

Administrator Preview for Force.com Sites

User Permissions Needed	
To create and edit Force.com sites:	"Customize Application"

With Summer '10, troubleshooting your site is easier with administrator preview. If you see errors on site pages and can't figure out the cause, use administrator preview mode to look at them in context and in greater detail.

> **Note:** Administrator preview mode is available for all active sites, including those with a branded custom Web address.

To access administrator preview mode:

1. Click **Setup ➤ Develop ➤ Sites**.
2. Click the name of the site you want to preview.
3. In the Site Detail section, click the **Preview as Admin** link. A new browser window opens with a preview of your site, and the enhanced error message appears at the bottom of the page.
4. Click **Logout of Administrator Preview Mode** to clear the administrator cookie and be redirected to the site's home page.

The detailed error messages in administrator preview mode are driven by the `<site:previewAsAdmin />` component in your Visualforce error pages. Starting with Summer '10, new organizations include the `<site:previewAsAdmin />` component by default in standard error pages. You must add the component manually to all custom error pages and pages from older organizations. We recommend that you add it right before the closing `</apex:page>` tag, like this:

```
    <site:previewAsAdmin />
</apex:page>
```

> **Note:** The `<site:previewAsAdmin />` component contains the `<apex:messages />` tag, so if you have that tag elsewhere on your error pages, you will see the detailed error message twice.

Sites Single Sign-On

User Permissions Needed	
To create and edit Force.com sites:	"Customize Application"

Enabling Single Sign-On for Sites

Single sign-on is a process that allows network users to access all authorized network resources without having to log in separately to each resource. Single sign-on allows you to validate usernames and passwords against your corporate user database or other client application rather than having separate user passwords managed by Salesforce.com.

You can set up Sites to use SAML single sign-on, so that a customer only has to login once.

To enable single sign-on for Sites using an identity provider:

1. Set up either a Customer Portal or a partner portal.
2. Set up your Sites.
3. If you are using the Customer Portal, set up your Sites to use Customer Portal.
4. In addition to the SAML sign-on information that must be gathered and shared with your identity provider, you must supply your information provider with the following:

   - Organization ID
   - Portal ID
   - Sites URL

   The following must be added as attributes to the SAML assertion sent from your identity provider:

   - `organization_id`
   - `portal_id`
   - `siteurl`

   To find these values:

   a. Click **Setup ➤ Company Profile ➤ Company Information** and copy the ID located in the `Salesforce.com Organization ID`.
   b. For the Customer Portal, click **Setup ➤ Customize ➤ Customer Portal ➤ Settings**, click the name of the Customer Portal, and copy the ID located in the `Portal ID`.

      For partner portals, click **Setup ➤ Customize ➤ Partners ➤ Settings**, click the name of the partner portal, and copy the ID located in the `salesforce.com Portal ID`.
   c. Click **Setup ➤ Develop ➤ Sites**, click the name of the Site, then copy the URL either located in the `Default Web Address`, the `Secure Web Address`, or the `Custom Web Address`, depending on which one you want your users to use when logging into Salesforce.com.

Service Provider Initiated SAML for Sites

Salesforce.com automatically provides single sign-on for Sites using SAML for when your company's identity provider initiates login.

If you wanted to use SAML for Sites for when a service provider initiates sign-on, you must first create a Visualforce page that provides a redirect to your server. The following is an example:

```
<apex:page showHeader="false" sidebar="false">
 <script>
     var PingSpURL =
"https://my.pingserver.com:9031/idp/startSSO.ping?PartnerSpId=salesforce.com.sp";
     var siteLoginPage =
"&TargetResource={!$Site.CurrentSiteUrl}siteLogin?startUrl={!$Site.OriginalUrl}";
     window.location = PingSpURL+siteLoginPage;
 </script>
</apex:page>
```

Rewriting URLs for Sites

User Permissions Needed	
To create and edit Force.com sites:	"Customize Application"

Create rules to rewrite URL requests typed into the address bar, launched from bookmarks, or linked from external websites. You can also create rules to rewrite the URLs for links within site pages. URL rewriting not only makes URLs more descriptive and intuitive for users, it allows search engines to better index your site pages.

For example, let's say that you have a blog site. Without URL rewriting, a blog entry's URL might look like this: `http://myblog.force.com/posts?id=003D000000Q0PcN`

With URL rewriting, your users can access blog posts by date and title, say, instead of by record ID. The URL for one of your New Year's Eve posts might be: `http://myblog.force.com/posts/2009/12/31/auld-lang-syne`

You can also rewrite URLs for links shown within a site page. If your New Year's Eve post contained a link to your Valentine's Day post, the link URL might show: `http://myblog.force.com/posts/2010/02/14/last-minute-roses`

To rewrite URLs for a site, create an Apex class that maps the original URLs to user-friendly URLs, and then add the Apex class to your site.

The following are the instance methods for the `urlRewriter` interface, which is part of Force.com sites.

Name	Arguments	Return Type	Description
generateUrlFor	System.PageReference[]	System.PageReference[]	Maps a list of Salesforce.com URLs to a list of user-friendly URLs. You can use `List<PageReference>` instead of `PageReference[]`, if you prefer. **!** **Important:** The size and order of the input list of Salesforce.com URLs must exactly correspond to the size and order of the generated list of user-friendly URLs. The `generateUrlFor` method maps input URLs to output URLs based on the order in the lists.
mapRequestUrl	System.PageReference	System.PageReference	Maps a user-friendly URL to a Salesforce.com URL.

Creating the Apex Class

The Apex class that you create must implement the Force.com provided interface `Site.UrlRewriter`. In general, it must have the following form:

```
global class yourClass implements Site.UrlRewriter {
    global PageReference mapRequestUrl(PageReference
            yourFriendlyUrl)
    global PageReference[] generateUrlFor(PageReference[]
            yourSalesforceUrls);
}
```

Consider the following restrictions and recommendations as you create your Apex class:

Class and Methods Must be Global

> The Apex class and methods must all be `global`.

Class Must Include Both Methods

> The Apex class must implement both the `mapRequestUrl` and `generateUrlFor` methods. If you don't want to use one of the methods, simply have it return null.

Rewriting Only Works for Visualforce Site Pages

> Incoming URL requests can only be mapped to Visualforce pages associated with your site. You can't map to standard pages, images, or other entities.

> To rewrite URLs for links on your site's pages, use the `!URLFOR` function with the `$Page` merge variable. For example, the following links to a Visualforce page named myPage:

> ```
> <apex:outputLink value="{!URLFOR($Page.myPage)}"></apex:outputLink>
> ```

> **Note:** Visualforce `<apex:form>` elements with `forceSSL="true"` aren't affected by the `urlRewriter`.

> See the "Functions" appendix of the Visualforce Developer's Guide.

Encoded URLs

> The URLs you get from using the `Site.urlRewriter` interface are encoded. If you need to access the unencoded values of your URL, use the `urlDecode` method of the `EncodingUtil` class.

Restricted Characters

> User-friendly URLs must be distinct from Salesforce.com URLs. URLs with a three-character entity prefix or a 15- or 18-character ID are not rewritten.

> You can't use periods in your rewritten URLs.

Restricted Strings

> You can't use the following reserved strings as part of a rewritten URL path:

- `apexcomponent`
- `apexpages`
- `ex`
- `faces`
- `flash`
- `flex`

- google
- home
- ideas
- images
- img
- javascript
- js
- lumen
- m
- resource
- search
- secur
- services
- servlet
- setup
- sfc
- sfdc_ns
- site
- style
- vote
- widg

Relative Paths Only

The `pageReference.getUrl` method only returns the part of the URL immediately following the host name or site prefix (if any). For example, if your URL is `http://mycompany.force.com/sales/MyPage?id=12345`, where "sales" is the site prefix, only `/MyPage?id=12345` is returned.

You can't rewrite the domain or site prefix.

Unique Paths Only

You can't map a URL to a directory that has the same name as your site prefix. For example, if your site URL is `http://acme.force.com/help`, where "help" is the site prefix, you can't point the URL to `help/page`. The resulting path, `http://acme.force.com/help/help/page`, would be returned instead as `http://acme.force.com/help/page`.

Query in Bulk

For better performance with page generation, perform tasks in bulk rather than one at a time for the `generateUrlFor` method.

Enforce Field Uniqueness

Make sure the fields you choose for rewriting URLs are unique. Using unique or indexed fields in SOQL for your queries may improve performance.

You can also use the `Site.lookupIdByFieldValue` method to look up records by a unique field name and value. The method verifies that the specified field has a unique or external ID; otherwise it returns an error.

Here is an example, where mynamespace is the namespace, Blog is the custom object name, title is the custom field name, and myBlog is the value to look for:

```
Site.lookupIdByFieldValue(Schema.sObjectType.
      mynamespace__Blog__c.fields.title__c,'myBlog');
```

Adding URL Rewriting to a Site

Once you've created the URL rewriting Apex class, follow these steps to add it to your site:

1. Click **Setup ➤ Develop ➤ Sites**.
2. Click **New** or click **Edit** for an existing site.
3. On the Site Edit page, choose an Apex class for URL Rewriter Class.
4. Click **Save**.

Note: If you have URL rewriting enabled on your site, all PageReferences are passed through the URL rewriter.

Code Example

In this example, we have a simple site consisting of two Visualforce pages: mycontact and myaccount. Be sure you have "Read" permission enabled for both before trying the sample. Each page uses the standard controller for its object type. The contact page includes a link to the parent account, plus contact details.

Before implementing rewriting, the address bar and link URLs showed the record ID (a random 15-digit string), illustrated in the "before" figure. Once rewriting was enabled, the address bar and links show more user-friendly rewritten URLs, illustrated in the "after" figure.

The Apex class used to rewrite the URLs for these pages is shown in Example URL Rewriting Apex Class, with detailed comments.

Example Site Pages

This section shows the Visualforce for the account and contact pages used in this example.

The account page uses the standard controller for accounts and is nothing more than a standard detail page. This page should be named myaccount.

```
<apex:page standardController="Account">
    <apex:detail relatedList="false"/>
</apex:page>
```

The contact page uses the standard controller for contacts and consists of two parts. The first part links to the parent account using the URLFOR function and the $Page merge variable; the second simply provides the contact details. Notice that the Visualforce page doesn't contain any rewriting logic except URLFOR. This page should be named mycontact.

```
<apex:page standardController="contact">
    <apex:pageBlock title="Parent Account">
        <apex:outputLink value="{!URLFOR($Page.mycontact,null,
                [id=contact.account.id])}">{!contact.account.name}
                </apex:outputLink>
    </apex:pageBlock>
    <apex:detail relatedList="false"/>
</apex:page>
```

Example URL Rewriting Apex Class

The Apex class used as the URL rewriter for the site uses the mapRequestUrl method to map incoming URL requests to the right Salesforce.com record. It also uses the generateUrlFor method to rewrite the URL for the link to the account page in a more user-friendly form.

```
global with sharing class myRewriter implements Site.UrlRewriter {
```

```
//Variables to represent the user-friendly URLs for
//account and contact pages
String ACCOUNT_PAGE = '/myaccount/';
String CONTACT_PAGE = '/mycontact/';
//Variables to represent my custom Visualforce pages
//that display account and contact information
String ACCOUNT_VISUALFORCE_PAGE = '/myaccount?id=';
String CONTACT_VISUALFORCE_PAGE = '/mycontact?id=';

global PageReference mapRequestUrl(PageReference
        myFriendlyUrl){
    String url = myFriendlyUrl.getUrl();

    if(url.startsWith(CONTACT_PAGE)){
        //Extract the name of the contact from the URL
        //For example: /mycontact/Ryan returns Ryan
        String name = url.substring(CONTACT_PAGE.length(),
                url.length());

        //Select the ID of the contact that matches
        //the name from the URL
        Contact con = [select id from Contact where name =:
                name LIMIT 1];

        //Construct a new page reference in the form
        //of my Visualforce page
        return new PageReference(CONTACT_VISUALFORCE_PAGE + con.id);
    }
    if(url.startsWith(ACCOUNT_PAGE)){
        //Extract the name of the account
        String name = url.substring(ACCOUNT_PAGE.length(),
                url.length());

        //Query for the ID of an account with this name
        Account acc = [select id from Account where name =:name LIMIT 1];

       //Return a page in Visualforce format
        return new PageReference(ACCOUNT_VISUALFORCE_PAGE + acc.id);
    }
    //If the URL isn't in the form of a contact or
    //account page, continue with the request
    return null;
}
global List<PageReference> generateUrlFor(List<PageReference>
        mySalesforceUrls){
    //A list of pages to return after all the links
    //have been evaluated
    List<PageReference> myFriendlyUrls = new List<PageReference>();

    //a list of all the ids in the urls
    List<id> accIds = new List<id>();

    // loop through all the urls once, finding all the valid ids
    for(PageReference mySalesforceUrl : mySalesforceUrls){
    //Get the URL of the page
    String url = mySalesforceUrl.getUrl();

        //If this looks like an account page, transform it
        if(url.startsWith(ACCOUNT_VISUALFORCE_PAGE)){
            //Extract the ID from the query parameter
            //and store in a list
            //for querying later in bulk.
                    String id= url.substring(ACCOUNT_VISUALFORCE_PAGE.length(),
                    url.length());
                    accIds.add(id);
        }
    }
```

```
    // Get all the account names in bulk
    List <account> accounts = [select name from Account where id in :accIds];

    // make the new urls
    Integer counter = 0;

    // it is important to go through all the urls again, so that the order
    // of the urls in the list is maintained.
    for(PageReference mySalesforceUrl : mySalesforceUrls) {

        //Get the URL of the page
        String url = mySalesforceUrl.getUrl();

        if(url.startsWith(ACCOUNT_VISUALFORCE_PAGE)){
          myFriendlyUrls.add(new PageReference(ACCOUNT_PAGE + accounts.get(counter).name));
          counter++;
        } else {
          //If this doesn't start like an account page,
          //don't do any transformations
          myFriendlyUrls.add(mySalesforceUrl);
        }
    }

    //Return the full list of pages
    return myFriendlyUrls;
  }

}
```
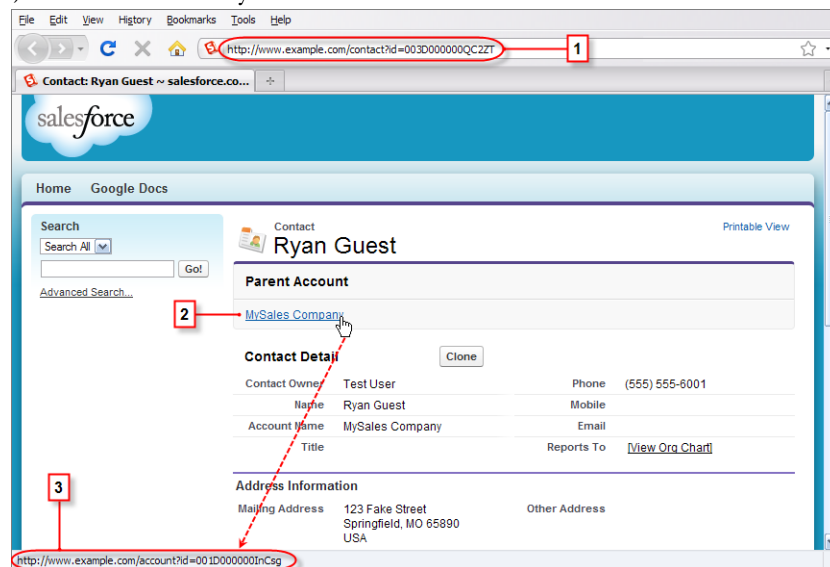
Before and After Rewriting

Here is a visual example of the results of implementing the Apex class to rewrite the original site URLs. Notice the ID-based URLs in the first figure, and the user-friendly URLs in the second.

Figure 4: Site URLs Before Rewriting

The numbered elements in this figure are:

1. The original URL for the contact page before rewriting
2. The link to the parent account page from the contact page
3. The original URL for the link to the account page before rewriting, shown in the browser's status bar
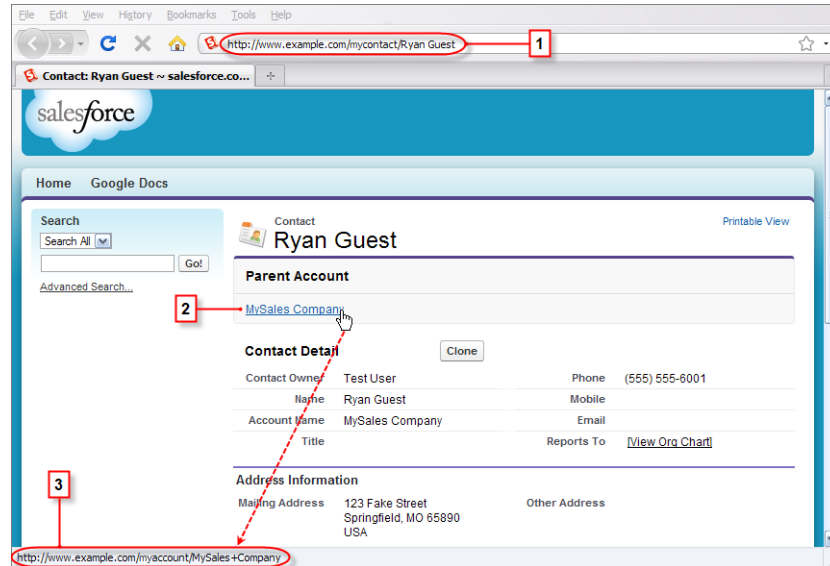
Figure 5: Site URLs After Rewriting

The numbered elements in this figure are:

1. The rewritten URL for the contact page after rewriting
2. The link to the parent account page from the contact page
3. The rewritten URL for the link to the account page after rewriting, shown in the browser's status bar

Force.com Apex Code Enhancements

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

Force.com Apex code includes the following enhancements in Summer '10. Refer to the Force.com Apex Code Developer's Guide for complete information about Apex.

The following enhancements are available for pilot only:

Improved System Log Console

> **Note:** The new version of the System Log console is currently available through a pilot program. For information on enabling the new version of the System Log console for your organization, contact salesforce.com.

The System Log console is a separate window that displays debugging information about a transaction, as well as its cumulative limits and source code. It can be considered a context-sensitive execution viewer, showing the source of an operation in a transaction, what triggered that operation, and what occurred afterward. You can use it for tracking code execution, workflow, validation rules, and other operations that were executed during the transaction. Access the System Log console from the Salesforce.com user interface by clicking **System Log** in the upper right corner of any page.

Note: The first time you access the System Log console, the old version displays. Click the **Try it now!** link to display the new System Log console. To return to the old version from the new System Log console, click **Switch to old System Log**.

New `getApplicationReadWriteMode` Method and `System.ApplicationReadWriteMode` enum for 5 Minute Upgrade

Note: 5 Minute Upgrade is currently available through a pilot program. For information on enabling 5 Minute Upgrade for your organization, contact salesforce.com.

Use the `System.ApplicationReadWriteMode` enum returned by the `getApplicationReadWriteMode` to programmatically determine if the application is in read-only mode during Salesforce.com upgrades and downtimes.

The following enhancements are generally available:

New `Cookie` Class for Force.com Sites

You asked for it! This enhancement is from an idea on the IdeaExchange.

The `cookie` class lets you access cookies for your Force.com site using Apex. Use this in conjunction with the new `getCookies` and `setCookies` Methods for `PageReference` to create and store cookies in Apex.

New `getCookies` and `setCookies` Methods for `PageReference` to create and store cookies in Apex.

Use `getCookies` to return a map of cookie names and cookie objects. Use `setCookies` to create cookie objects for your site.

New `urlRewriter` Interface for Force.com Sites

Use `urlRewriter` to display user-friendly URLs and links to site visitors. Create rules to rewrite URL requests typed into the address bar, launched from bookmarks, or linked from external websites. You can also create rules to rewrite the URLs for links within site pages. URL rewriting not only makes URLs more descriptive and intuitive for users, it allows search engines to better index your site pages.

New `isFeedEnabled` Method for `DescribeSObjectResult`

Returns `true` if Salesforce Chatter feeds are enabled for the object, `false` otherwise.

New Encryption, Decryption, and Key Generating Methods

You asked for it! This enhancement is an idea from the IdeaExchange.

The `Crypto` class has the following new methods.

- `decrypt`—used to decrypt data
- `decryptWithManagedIV`—used to decrypt data with Salesforce.com managing the initialization vector.
- `encrypt`—used to encrypt data.
- `encryptWithManagedIV`—used to encrypt data with Salesforce.com managing the initialization vector.
- `generateAesKey`—used to generate an Advanced Encryption Standard (AES) key.

Sets Now Take Both Primitives and sObjects

Prior to Summer '10, you could only create Sets using primitive data types, such as String or Integer. As of Summer '10, you can create sets of sObject data types, such as account or lead.

```
Account a1 = new account(name='MyAccount');
Set<Account> accountSet = new Set<Account>{a1};
```

sObject `Clone` Method Improvements

The sObject `Clone` method now uses the user running the Apex code for the CreateBy value, and the current date and time for CreatedDate. This is only applicable for Apex code saved using Salesforce.com API version 19.0 and later.

Batch Apex Limit of 250,000 `execute` Method Calls Lifted

Prior to Summer '10, you could only call the batch Apex `execute` method 250,000 times in a 24 hour period per organization. This limit has been removed.

Total Heap Size Increased

As of Summer '10, the total heap size has increased as follows:

- In a trigger context, heap size is now 300,000.
- In an anonymous block, Visualforce controller, or WSDL method, heap size is now 3,000,000.
- In a test method, heap size is now 1,500,000.

New Status Details Column for Monitoring Apex Jobs

If one or more errors occur during batch processing, the Status Details column gives a short description of the first error. A more detailed description of that error, along with any subsequent errors, is emailed to the user who started the running batch class.

SOQL Subqueries Respect `IsDeleted` Field

Prior to Summer '10, subqueries in SOQL returned all records, regardless of the status of the `IsDeleted` field. Now, subqueries respect the `IsDeleted` field, and only return deleted records when `IsDeleted = true` is explicitly stated as part of the query.

Trigger Execution Order Applies to Record Owner Changes in the User Interface

Starting in Summer '10, when a user changes a record owner through the Salesforce.com user interface, any record owner changes specified in `before` triggers are executed after the new record owner is assigned. That is, the `before` triggers take precedence over users' actions. This is in accordance with the behavior described in "Triggers and Order of Execution" in the Force.com Apex Code Developer's Guide.

Visualforce Enhancements

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

Custom controllers and standard controller extensions are not supported in **Group** or **Professional** Editions.

Summer '10 introduces several new features that enhance the capabilities of previous versions of Visualforce. For detailed information on these new features, see the Visualforce Developer's Guide.

The following enhancements are now available in Visualforce:

Well-formed XML Required for All Visualforce Pages and Components

Visualforce pages and components created using Salesforce.com API version 19.0 or higher must be written as well-formed XML. In general, this means that elements must be correctly nested, non-empty elements must have an end tag, empty elements must be terminated with a closing slash ("/"), and so on. The World Wide Web Consortium (W3C) provides an article on the specifications of well-formed XML.

The following exceptions are allowed:

- Code that violates well-formed XML is permitted inside JavaScript. For example, you don't need to use `<![CDATA[]]>` tags in Visualforce.
- Code that violates well-formed XML is permitted inside expressions. For example, you don't need to escape quotation marks inside formulas.
- XML directives that are normally required at the beginning of a page—such as `<?xml version="1.0" encoding="UTF-8"?>`—can occur inside top-level container tags, like `<apex:page>` and `<apex:component>`.

Visualforce pages and components that don't meet well-formed XML requirements won't save.

Ability to Add Dependent Picklists

You asked for it! This enhancement is an idea from the IdeaExchange.

Starting with the Summer '10 release, you can add your organization's dependent picklists to Visualforce pages with Salesforce.com API version 19.0 or higher. This implementation requires no additional custom controller or JavaScript logic.

To use this feature, define a field dependency between picklist, multi-picklist, radio button, or checkbox fields on any object. Then, place these fields on your page using the `<apex:inputField>` component.

Consider the following when using dependent picklists in Visualforce pages:

- You can mix controlling and dependent fields across various field types, such as picklists, multi-picklists, radio buttons, and checkboxes.
- There's a limit of 10 dependent picklist pairs per page. This is totalled across all objects. Thus, you could have five dependent picklists on Account, and five on Contact, but no more. However, you can repeat the same pair of dependent picklists, such as in an iterative tag like `<apex:repeat>`, without counting more than once against your limit.

A full tutorial can be found in the "Getting a Quick Start with Visualforce" chapter.

View State Inspector—Pilot

Note: This release contains a pilot version of the View State tab that is production-quality but has known limitations. You must contact Salesforce.com Support to enable this feature.

The Summer '10 release adds a new View State tab to the Visualforce development mode footer. The View State tab lists which Visualforce elements are contributing to the size of your view state. You can use this tab to monitor the performance of Visualforce pages where users submit data using forms. By minimizing your view state size, you can reduce load times.

Note: The View State tab should be used by developers that understand the page request process. Familiarize yourself with the order of execution in a Visualforce page before using the tab.

To enable the View State tab:

1. Click **Setup ➤ My Personal Information ➤ Personal Information**, and click **Edit**.
2. Select the `Development Mode` checkbox if it isn't selected.
3. Select the `Show View State in Development Mode` checkbox.
4. Click **Save**.

Note: Since the view state is linked to form data, the View State tab only appears if your page contains an `<apex:form>` tag. In addition, the View State tab displays only on pages using custom controllers or controller extensions.

The new "Tools for Visualforce Development" chapter contains more information about the View State tab, including its beta limitations.

Postback Requests Return ID Parameter

For Visualforce pages with a Salesforce.com API version 19.0 or later, `<apex:form>` actions return only the ID query parameter on a postback request. Previous page versions returned no parameter after post requests.

Rendering of Contact Information Detail Page Prohibited for Person Accounts

For Visualforce pages created with Salesforce.com API version 18.0 or earlier, it was possible to render the detail page for contact information associated with a person account. Beginning with API version 19.0, the detail page for contact information can no longer be rendered. The detail page for the associated person account is rendered instead.

Removed Rendering of Related List Hover Panels

Starting with Visualforce pages created with Salesforce.com API version 19.0, the `<apex:relatedList>` component won't generate hover panels.

String Literals for `value` Attribute in `<apex:attribute>` Must Evaluate to an Object Type

For Visualforce pages with a Salesforce.com API version 19.0 or later, the `value` attribute on the `<apex:attribute>` component must evaluate to an equivalent object reference. String literals that don't evaluate to an object type aren't accepted, and the custom component won't save.

For example, the following code:

```
<apex:component name="myComponent">
  <apex:attribute name="myAttribute" type="Integer" />
</apex:component>

. . .

<c:myComponent myAttribute="NotAnInteger" />
```

won't compile. Furthermore, references to `null` must instead be changed to `{!null}` to evaluate correctly.

Web Services API Enhancements

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

The Web services API version 19.0 contains new features and bug fixes that improve the capabilities of applications that leverage the Force.com platform. Considerable effort has been made to ensure backwards capability for applications that have been written against previous versions of the API, starting with API 2.5.

The new API provides a number of powerful enhancements that further improve any integration already in place between Salesforce.com and your other systems.

After the Summer '10 release, the 18.0 version of the WSDL file is no longer available. Instead, all requests for a WSDL return the 19.0 version. Remember to save WSDL files with your project, as the enterprise WSDL is custom to your organization. Salesforce.com maintains backwards compatibility with previous versions of our API in accordance with our stated support policy. We recommend that developers migrate to the latest version of the API as often as is feasible in order to receive the benefit of new enhancements from release to release. Developers with integrations on API versions prior to version 2.5 should plan to migrate to the most recent API in preparation for the eventual end of support for the older API versions.

Generally Available Enhancements

The Web services API has been improved for Summer '10 (API version 19.0):

New Objects

The following new objects have been added in API version 19.0:

- The `Article__`DataCategorySelection object associates an article with data categories from a data category group.
- The QuestionDataCategorySelection object associates a question with a data category from a data category group.
- The KnowledgeArticle object provides read–only access to an article independent of its version.
- The ApexLog object represents a debug log.
- The SlaProcess object represents an entitlement process associated with an entitlement.
- The following Salesforce Chatter objects were added in API version 18.0 as part of a Salesforce Chatter limited release. To access these objects, Salesforce Chatter must be enabled for your organization.

  Note: A feed is a list of recent activities in Salesforce.com, which can include status updates, changes to record fields, and posts about records. Feeds are a useful way to stay up-to-date with what's going on in Salesforce.com.

  - The AccountFeed object represents a single feed item in an account record feed.
  - The AssetFeed object represents a single feed item in an asset record feed.
  - The CampaignFeed object represents a single feed item in a campaign record feed.
  - The CaseFeed object represents a single feed item in a case record feed.
  - The ContactFeed object represents a single feed item in a contact record feed.
  - The ContractFeed object represents a single feed item in a contract record feed.
  - The EntitySubscription object represents a subscription for a user following a record.
  - The FeedComment object represents a comment added to a feed by a user.
  - The FeedPost object represents the following types of changes in a NewsFeed, UserProfileFeed, or record feed, such as AccountFeed: status updates, posts, link posts, and content posts.
  - The FeedTrackedChange object represents an individual field change in a feed.

- The LeadFeed object represents a single feed item in a lead record feed.
- The NewsFeed object represents a single feed item in the news feed on a user's home page. A news feed shows recent changes to records which the user is following.
- The OpportunityFeed object represents a single feed item in an opportunity record feed.
- The Product2Feed object represents a single feed item in a product record feed.
- The SolutionFeed object represents a single feed item in a solution record feed.
- The UserFeed object represents a single feed item in a user record feed.
- The UserProfileFeed represents a user profile feed, which tracks all actions by a user on records that can be tracked in a feed. This feed is displayed on the user profile page.

- The following Salesforce Chatter objects were added in API version 19.0. To access these objects, Salesforce Chatter must be enabled for your organization.

  - The CollaborationGroup object represents a Salesforce Chatter group.
  - The CollaborationGroupFeed object represents a single feed item in a Salesforce Chatter group feed.
  - The CollaborationGroupMember object represents a single member of a Salesforce Chatter group.

Changed Objects

The following objects have been changed in API version 19.0:

- The AsyncApexJob object includes an `ExtendedStatus` field that displays more details about the first error that occurred with a batch job.
- The Entitlement object includes a `SlaProcessId` field that displays the ID of an associated entitlement process.
- The EntitlementTemplate object includes a `SlaProcessId` field that displays the ID of an associated entitlement process.
- The Event object includes the `GroupEventType` field to identify the type of event. Valid values are `0` (Non-group Event), `1` (Group Event), and `2` (Proposed Event).
- Only users with the "Modify All Data" permission can delete a FeedPost of `Type TrackedChange`.
- The KnowledgeArticleVersion object now supports the `create()` call.

Changed Calls

The result objects returned by `describeSObjects()` and `describeGlobal()` in API version 19.0 and later include a new `feedEnabled` property that indicates whether Salesforce Chatter feeds are enabled for an object.

The `FIELD_INTEGRITY_EXCEPTION` has been renamed to `FIELD_FILTER_VALIDATION_EXCEPTION`.

New Concurrent API Request Limit

The limit for production and sandbox instances for concurrent requests (calls) has been reduced from 50 to 25. The method used to track concurrent API requests counting against this limit has been modified to only track requests lasting longer than 20 seconds.

New DataCategoryGroupReference Field Type

The DataCategoryGroupReference field type applies to category group and category unique name used to classify articles in Salesforce Knowledge and questions in the Answers feature. You can use the `describeDataCategoryGroups()` and `describeDataCategoryGroupStructures()` calls to retrieve the category groups and categories associated to these objects.

SOQL Subqueries Respect `IsDeleted` Field

Prior to Summer '10, subqueries in SOQL returned all records, regardless of the status of the `IsDeleted` field. Now, subqueries respect the `IsDeleted` field, and only return deleted records when `IsDeleted = true` is explicitly stated as part of the query.

API Migration Issues

The following technical notes are available to assist you in migrating from earlier versions:

- Release 18.0: Web services API Developer's Guide Version 18.0
- Release 17.0: Web services API Developer's Guide Version 17.0
- Release 16.0: Web services API Developer's Guide Version 16.0
- Release 15.0: Web services API Developer's Guide Version 15.0
- Release 14.0: Web services API Developer's Guide Version 14.0
- Release 13.0:
  `http://wiki.developerforce.com/index.php/What%27s_New_in_Force.com_Web_Services_API_Summer_%2708`
- Release 12.0:
  `http://wiki.developerforce.com/index.php?title=What%27s_New_in_Force.com_Web_Services_API_Spring_%2708`
- Release 11.0:
  `http://wiki.developerforce.com/index.php/What%27s_New_in_Force.com_Web_Services_API_Winter_%2708`
- Release 10.0:
  `http://wiki.developerforce.com/index.php/What%27s_New_in_Apex_Web_Services_API_Summer_%2707`
- Release 9.0:
  `http://wiki.developerforce.com/index.php/What%27s_New_in_Apex_Web_Services_API_Spring_%2707`
- Release 8.0: `http://www.salesforce.com/developer/tech-notes.jsp?tn=TN-19`
- Release 7.0: `http://www.salesforce.com/developer/tech-notes.jsp?tn=TN-17`
- Release 6.0: `http://www.salesforce.com/developer/tech-notes.jsp?tn=TN-15`
- Release 5.0: `http://www.salesforce.com/developer/tech-notes.jsp?tn=TN-13`
- Release 4.0: `http://www.salesforce.com/developer/tech-notes.jsp?tn=TN-10`

Documentation for these earlier versions is also available. See
`wiki.developerforce.com/index.php/Earlier_Reference_Documentation` on Developer Force for links to online and PDF versions.

Bulk API Enhancements

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

The REST-based Bulk API is optimized to process a large number of records asynchronously. It allows you to load large batches of data that are processed in the background. The Bulk API has been improved for Summer '10 (API version 19.0):

Download Schema for Multiple API Versions

The Bulk API service is described by an XML Schema Document (XSD) file. With Summer '10, you can download the schema file for API versions prior to the current release. You can download the schema file for API version 18.0 and later. For example, if your organization is on the `na2` instance and you want to download the schema file for API version 18.0, use the following URI:

```
https://na2.salesforce.com/services/async/18.0/AsyncApi.xsd
```

Improved Retry Handling for Batch Timeout and Lock Errors

With API version 19.0, the Bulk API has improved logic for retrying batches with errors. Previously, timeouts and lock contention errors resulted in a failed batch, which required the user to submit a new batch or run a new job to process the remaining records. In API version 19.0, the Bulk API places the remainder of the batch back in the queue for later processing up to 10 times when processing fails due to either lock contention or timeouts.

Support for Relationship Fields in XML Batches

With API version 19.0, the Bulk API now supports relationship fields in XML batches.

For more information, see Preparing XML Files.

Support for Polymorphic Relationship Fields in Batches

With API version 19.0, the Bulk API now supports polymorphic relationship fields in CSV and XML batches. For more information, see Preparing CSV Files and Preparing XML Files.

`BatchInfo stateMessage` Field Enhancement

The `stateMessage` field now contains all the reasons associated with a `Failed` batch state. If there are multiple failures, the message may be truncated. If so, fix the known errors and re-submit the batch.

Permanent Deletion of Records

The `operation` field in `JobInfo` now supports a `hardDelete` option. When this value is specified, deleted records are not kept in the Recycle Bin. Instead, the records become immediately eligible for deletion, and don't count toward the storage space used by your organization. This may improve performance. To perform this operation, a user must have the "Bulk API Hard Delete", permission. It is disabled for all profiles by default and is only available for Salesforce user licenses. The Hard Delete operation is also available in Data Loader.

Monitoring Batch Details in Jobs

Previously, you could monitor the status of Bulk API jobs that were in progress or recently completed by clicking **Setup ➤ Monitoring ➤ Bulk Data Load Jobs**. With Summer '10, the job detail page also includes details for all the batches in the job. The related list provides **View Request** and **View Response** links for each batch.

The job detail page also includes new `Apex Processing Time (ms)`, `API Active Processing Time (ms)`, `Retries`, and `Total Processing Time (ms)` fields. The timing fields help you understand where time is spent when the Bulk API processes your data.

New Resource for Getting a Batch Request

With API version 19.0, you can get a batch request by sending a GET request to a new resource URI. For more information on the new resource, see the Bulk API Developer's Guide.

New Resource Fields

The following fields are new in API version 19.0:

Resource	Field	Description
BatchInfo	apexProcessingTime	The number of milliseconds taken to process triggers and other processes related to the batch data. If there are no triggers, the value is 0. This doesn't include the time used for processing asynchronous and batch Apex operations.
BatchInfo	apiActiveProcessingTime	The number of milliseconds taken to actively process the batch, and includes apexProcessingTime. This doesn't include the time the

Resource	Field	Description
		batch waited in the queue to be processed or the time required for serialization and deserialization.
BatchInfo	numberRecordsFailed	The number of records that were not processed successfully in this batch.
BatchInfo	totalProcessingTime	The number of milliseconds taken to process the batch. This excludes the time the batch waited in the queue to be processed.
JobInfo	apexProcessingTime	The number of milliseconds taken to process triggers and other processes related to the job data. This is the sum of the equivalent times in all batches in the job. This doesn't include the time used for processing asynchronous and batch Apex operations. If there are no triggers, the value is 0.
JobInfo	apiActiveProcessingTime	The number of milliseconds taken to actively process the job and includes apexProcessingTime, but doesn't include the time the job waited in the queue to be processed or the time required for serialization and deserialization. This is the sum of the equivalent times in all batches in the job.
JobInfo	numberRecordsFailed	The number of records that were not processed successfully in this job. This is the sum of the failures for all batches in the job.
JobInfo	totalProcessingTime	The number of milliseconds taken to process the job. This is the sum of the total processing times for all batches in the job.

Force.com Development as a Service

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

Force.com Development as a Service (DaaS) provides the tools and technologies used by professional developers who build applications for the Force.com platform, as well as those who migrate application changes between development organizations and production. The DaaS feature area includes support for creating, retrieving, and deploying changes to your organization's metadata.

New Metadata Types

The following metadata types are new in Metadata API version 19.0:

Metadata Type	Description
RemoteSiteSetting	Represents a remote site setting. Before any Visualforce page, Apex callout, or JavaScript code using XmlHttpRequest in an s-control or custom button can call an external site, that site must be registered in the Remote Site Settings page, or the call will fail.
ArticleType	Represents the metadata associated with an article type. An ArticleType is defined as a custom object and is stored in the objects folder. ArticleTypes have a suffix __kav (instead of __c for custom objects).

Metadata Type	Description
ArticleType Layout	Represents the metadata associated with an article type page layout. Article type layouts determine which fields users can view and edit when entering data for an article, they also determine which sections appear when users view articles.

Updated Metadata

The following metadata fields have been added or changed in Metadata API version 19.0:

Metadata Type or Related Object	Field	Change	Description
Profile	ProfileFieldLevelSecurity	Updated	The hidden field is set to true by default for portal profiles
Dashboard	dashboardType	New	Determines the way visibility settings are set for a dashboard. The vaild values are: • SpecifiedUser—All users see data at the access level of one specific running user, regardless of their own security settings. • LoggedInUser—Each logged-in user sees data according to his or her own access level.
DashboardTableColumn	showTotal	New	Displays the totals for each summarizable column in the dashboard table.

Force.com IDE

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

Summer '10 includes new enhancements to the Force.com IDE. For complete details, visit the Force.com IDE release notes page at http://wiki.developerforce.com/index.php/Force.com_IDE_Release_Notes.

Note: The Force.com IDE for Summer '10 will be released after all instances have been upgraded. Release notes and downloads are not available until that time.

Push Patch Updates

Available in: **Developer** Edition

Starting with the Summer '10, you can develop a new package type called a *patch version*, which enables a developer to change the functionality of existing components in a managed package, while ensuring that subscribers experience no visible changes to the package. Patch versions can only be created for major release packages. Subscribers can receive patch upgrades just like any other package version. However, you can also distribute a patch by using *push upgrades* to automatically upgrade all eligible customers running the same major release.

A *push upgrade* is a method of automatically upgrading your customers to a newer version of your package. You can only push patches for existing installed managed packages.

A package subscriber doesn't need to do anything to receive the push upgrade. The only indication a subscriber receives after a successful push upgrade is that the patch number has changed in the package's `Version Number`. Any upgrades that fail must be resolved by the developer initiating the push.

Push upgrades minimize the potential risk of having multiple subscriber organizations running variations of the same major release. Rather than asking each subscriber to manually install the upgrade, a push guarantees that all subscribers are running the same patch version for a major release by automatically upgrading subscribers.

You can push an upgrade to any number of organizations that have installed your managed package.

About Push Upgrades and Patch Versions

Creating and Uploading Patches

Available in: **Developer** Edition

User Permissions Needed	
To push an upgrade, or create a patch development organization:	"Upload AppExchange Packages"

Note: Patch versions and push upgrades are only available to Salesforce.com ISV partners.

Patch versions are developed and maintained in a patch development organization. For more information on push upgrades and patches, see the Force.com Quick Reference for Developing Packages. You can also read the "Best Practices for Push Upgrades and Patch Versions" in the Salesforce.com online help for more information.

To create a patch version:

1. Click **Setup ➤ Create ➤ Packages**.
2. Click the name of your managed package.
3. In the Development Organization section, click **New**.
4. Select the package version that you want to create a patch for in the Patching Major Release drop-down list. The release type must be Managed - Released for a patch to be created.
5. Enter a `Username` for a login to your patch organization.
6. Enter an `Email Address` associated with your login.
7. Click **Save**.

   Note: If you ever lose your login information, click **Reset** on the package detail page under Patch Development Organizations to reset the login to your patch development organization.

After you receive an email indicating Salesforce.com has created your patch development organization, you can click **Login** to begin developing your patch version.

Development in a patch development organization is restricted. The following is a list of caveats when developing patches in a patch development organization:

- New package components can't be added.
- Existing package components can't be deleted.
- API and dynamic Apex access controls can't change for the package.
- No deprecation of Apex, objects, or fields.
- No new Apex class relationships, such as `extends`, can be added.
- No new Apex access modifiers, such as `virtual` or `global`, can be added.
- No new Web services can be added.

When you finish developing your patch, in your patch development organization:

1. Click **Setup ➤ Create ➤ Packages** and click the name of the package.
2. Click **Upload**. On the Upload Package page, do the following:

   a. Enter a `Version Name`, such as *June 2009*. This field is required for managed and unmanaged packages. The version name is the marketing name for a specific release of a package and allows you to create a more descriptive title for the version.

   b. Notice that the `Version Number` has had its `patchNumber` incremented.

   c. For managed packages, select a `Release Type`:

      - Choose Managed - Released to upload an upgradeable version. After upload, some attributes of Salesforce.com components are locked. For a list of locked attributes, see the Force.com Quick Reference for Developing Packages.
      - Choose Managed - Beta if you want to upload a version of your package to a small sampling of your audience for testing purposes. You'll still be able to change the components and upload additional beta versions. For information on beta versions, see the Force.com Quick Reference for Developing Packages.

        Note: Beta packages can only be installed in Developer Edition or sandbox organizations, and thus can't be pushed to customer organizations.

   d. Change the `Description`, if necessary.

   e. Optionally, enter and confirm a password to share the package privately with anyone who has the password. Don't enter a password if you want to make the package available to anyone on AppExchange and share your package publicly.

   f. Salesforce.com automatically selects the requirements it finds. In addition, select any other required components from the `Package Requirements` and `Object Requirements` sections to notify installers of any requirements for this package.

   g. Click **Upload**.

To distribute your patch, you can either share the upload link, or schedule a push upgrade.

Scheduling Push Upgrades

Available in: **Developer** Edition

User Permissions Needed	
To push an upgrade, or create a patch development organization:	"Upload AppExchange Packages"

Note: Patch versions and push upgrades are only available to Salesforce.com ISV partners.

After you have created a patch version of your package, you can automatically deploy it to customers using a push upgrade.

Tip: Salesforce.com strongly recommends the following sequence for pushing package upgrades:

1. Push the patch to your own organizations so that you can run tests and fix any bugs before upgrading subscribers.
2. When you're ready, push to your customer's organizations. Try sandbox organizations first, if possible.
3. If the patch applies to your most recent release, deprecate the previous version of your package in your main development organization. Replace the version on AppExchange if necessary, and update your Trialforce.
4. Run the push upgrade once again to ensure any remaining subscribers are upgraded.
5. After your patch is successfully distributed to subscriber organizations, reintegrate those changes into your main development organization.

   For more information about combining patches into the main development organization, see "Working with Patch Versions" in the Force.com Quick Reference for Developing Packages.

   Read the "Best Practices for Push Upgrades and Patch Versions" in the Salesforce.com online help for more information.

To schedule a push upgrade:

1. Log into your main development organization.
2. Under **Setup ➤ Create ➤ Packages**, click the name of your managed package with a patch you want to push. On the package detail page, click **Push Upgrades**.
3. Click **Schedule Push Upgrades**.
4. Select a patch version to push from the Patch Version drop-down list. Only packages that have been uploaded from a patch development organization are available in this list.

   Note: Beta versions aren't eligible for push.

5. Enter a **Scheduled Start Date**, indicating when a push upgrade should begin.
6. Optionally, check `Ignore Apex test failures during upgrade`.

   Caution:
   This checkbox should be selected in rare cases when a push upgrade is failing due to an Apex test failure. Only select this option if both you and your subscriber have reviewed the package you want to upgrade and both agree

that upgrading to the new version is safe. For more information on why your install might have failed, see "Resolving Apex Test Failures" in the Salesforce.com online help.

7. In the Select Target Organizations section, select the organizations to receive your push upgrade. If an organization already received a push upgrade for the selected package version, it won't appear in this list. You can select organizations by:

    • Entering a term that filters based on an organization's name or ID. Names can match by partial string, but IDs must match exactly.
    • Choosing between production and sandbox organizations from the Organizations drop-down list.
    • Choosing organizations that have already installed a particular version.
    • Clicking on individual organizations, or the `Select All` and `Deselect All` checkboxes.

    This section lists the following information about the organization (in alphabetical order):

Field	Description
`Current Version`	The current package version an organization has installed.
`Organization ID`	The ID that uniquely identifies the organization to salesforce.com.
`Organization Name`	The name of the organization. Clicking this name shows the upgrade history for the organization.
`Primary Contact`	The name of the contact who installed the package.

8. Click **Schedule**.

While a push upgrade is in progress, you can click **Abort** to stop it.

On the previous push upgrades page, the Push Upgrade History table lists recently scheduled push upgrades for the package.

Integrating Patch Development

If you are developing your packages using the Force.com IDE, you can take advantage of revision control systems in Eclipse to compare and merge different project branches.

The following diagram illustrates the workflow of creating a patch and integrating any work into future versions:
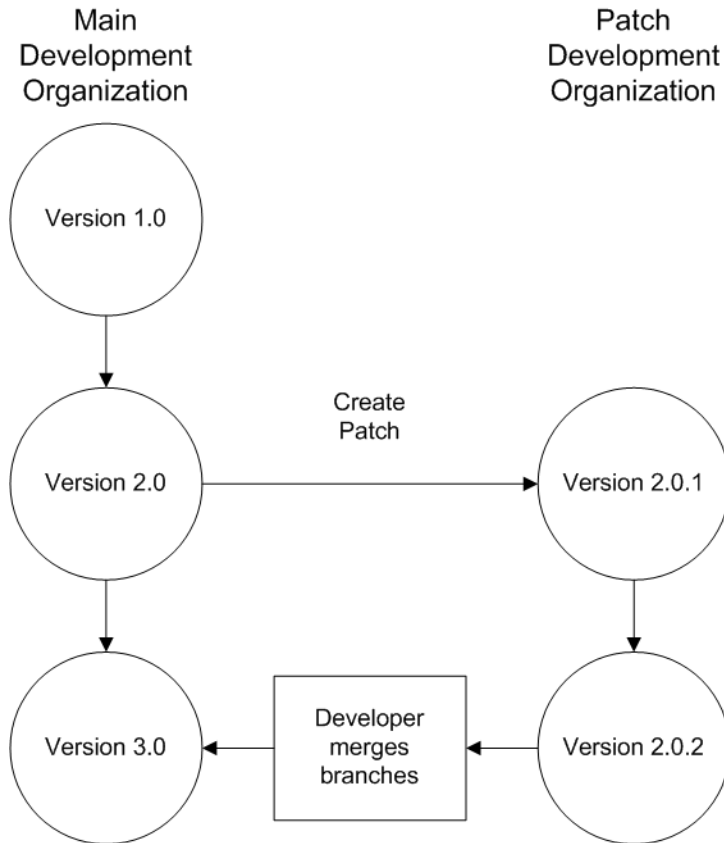
In the diagram above, after version 2.0 is released, the developer creates a patch. The package version number in the patch development organization starts at 2.0.1. As the main development organization moves towards a released version of 3.0, a second patch is created for 2.0.2. Finally, the developer merges the changes between the main development organization and the patch development organization and releases the package as version 3.0.

Salesforce.com recommends using the Subversion plug-in. To install Subversion for the Force.com IDE:

1. Go to `http://subclipse.tigris.org` to get the latest Eclipse Update Site URL compatible with your version of Eclipse.
2. In the Force.com IDE, navigate to **Help ➤ Software Updates**, and select the Available Software tab. Click **Add Site**, and enter the URL from the previous step.
3. Select the new site and click **Finish** to fetch the latest version of the Subclipse plug-in. Select the required Subclipse plug-in from the list returned from the site.
4. Click **Next**, accept the terms, and click **Next** again.
5. Click **Finish** to begin the installation, and then **Install All** when prompted. You will be required to restart Eclipse once the installation completes.

You have now linked your Force.com IDE environment to Subclipse. The next step is to connect your repository to the environment:

1. Open the `SVN Repository Exploring` perspective in the IDE, which will open the SVN Repositories view.
2. Use the **Add SVN Repository** icon on the far right to configure Subclipse to access the local repository. The URL to access your repository locally is `file:///svn_repos`.

The subversion repository tracks changes made to stored projects. Because working with patches involves two different branches—a main development organization and a patch development organization—you need to combine your changes for a future release. To view the different versions of your package:

1. Open the `Project Explorer` perspective.
2. Navigate to a file in your main development project that you want to compare, and use the context menu to select **Compare With... ➤ Branch/Tag...**.
3. In the `Compare to` field, select the patch version of the file.
4. Click `Graphical`, then click **Ok**.

The changes between the main development organization's file and the file stored in the patch development organization are highlighted. You can use this view to merge any differences between the two projects.

For more information on using the Force.com IDE, see the *Platform Developer's Guide*.

Additional Custom Cloud Enhancements

Approval Email Settings

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

With Summer '10, you can set your preferences for receiving approval request emails, including opting not to receive them at all. To set up or edit your Approver Settings, click **Setup ➤ My Personal Information ➤ Personal Information**. Click **Edit** on the User detail page. Note that the `Delegated Approver` field has been relocated to the Approver Settings section of the User detail page.

In the Approver Settings section, you can:

- Optionally, select your `Delegated Approver`.
- Optionally, enter your `Manager`.
- Set your preference for receiving approval request emails. The options are:

  - `Only if I am an approver`
  - `Never`—If you select this option, you will not receive any approval request emails, even if your organization has email approval response enabled. However, if the assignee of an approval step is a queue, selecting Never may not block all approval request emails, depending the queue settings.

Custom Field Enhancements

Enhanced Security for Custom Fields in Portal Profiles

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

Summer '10 introduces enhanced security for custom fields in portal profiles. When you create a custom field, by default the field isn't visible or editable for portal profiles, unless the field is universally required. This ensures that administrators are explicitly granting access to custom fields for their customers and partners. If you want portal users to have access to a custom field, you can always enable access for portal profiles, either when you create the field or anytime after.

Note: This change doesn't affect custom fields created before the Summer '10 release.

Rich Text Area Enhancements

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

With the use of a toolbar, users can format the field content and add images and hyperlinks. The toolbar allows the user to undo, redo, bold, italicize, underline, strike-out, add a hyperlink, upload or link to an image, modify alignment, add a numbered or non-numbered list, indent, and outdent. The maximum field size is 32,000 characters, inclusive of all the formatting and HTML tags. The maximum size for uploaded images is 1MB. Only `gif`, `jpeg` and `png` file types are supported. See Creating Custom Fields and "Using Rich Text Area Fields" in the Salesforce.com online help.

With rich text area custom fields in Summer '10, you can now:

- Convert rich text area fields into long text area fields. Any images in the rich text area are deleted the next time the long text area field is saved. See "Notes on Changing Custom Field Types" in the Salesforce.com online help.
- Publish rich text area fields in Salesforce to Salesforce. See, "Publishing Fields in Salesforce to Salesforce" in the Salesforce.com online help.

Globalization Enhancements

Hebrew—Right-to-Left Language Supported

Available in: **All** Editions

You asked for it! This enhancement is an idea from the IdeaExchange.

In Summer '10, Salesforce.com successfully implemented Hebrew (iw), a language read from right to left.

Hebrew is available upon request as a Salesforce.com end user language. Users can update their personal language settings as follows:

1. Click **Setup ➤ My Personal Information ➤ Personal Information**.
2. Click **Edit**.
3. Select a language from the `Language` picklist.
4. Click **Save**.

My Domain on Sandbox

Available in: **Unlimited**, **Enterprise**, and **Developer** editions.

With Summer '10, My Domain is available for sandbox environments. Using My Domain, your organization can select a custom Salesforce.com domain name that highlights your brand, or a different term that represents your business. Using a

custom domain name provides other important advantages, such as increased security and better support for single sign-on. For more information, see "My Domain Overview" in the Salesforce.com online help.

New User Interface Theme Enabled

Available in: **All** Editions

Starting with Summer '10, new organizations have the new user interface theme enabled by default.

> **Important:** Microsoft® Internet Explorer version 6.0 is not supported for use with the new user interface theme. For more information, see "Supported Browsers" in the Salesforce.com online help.

Packaging Enhancements

Changes to Deleted Components in a Managed Package

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

Summer '10 introduces changes that make it easier to retrieve deleted components from a package. You can now review deleted components from the Package Detail page.

The components that you can review are:

- Apex classes and triggers that don't have `global` access
- Visualforce components with `public` access
- Protected components, including:

  - Custom labels
  - Custom links (for Home page only)
  - Workflow alerts
  - Workflow field updates
  - Workflow outbound messages
  - Workflow tasks

- Data components, such as Documents, Dashboards, and Reports. These are the only types of components that can also be undeleted from the Recycle Bin

You can retrieve these components at any time before uploading a new version of your package. For more information, see "Deleting Components From Managed Packages" in the Salesforce.com online help.

In addition, in previous versions, when a protected component was deleted, it remained in subscriber organizations. Since protected components can't be modified or referenced by the subscriber, these components are now removed from the subscribers' organization during the next package upgrade. This ensures that the developer and subscriber organizations maintain the same behavior. This change may result in executable workflow actions being removed.

Packageable Remote Site Settings

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

You asked for it! This enhancement is an idea from the IdeaExchange.

Remote site settings are now packageable. You can include remote site settings related to Apex callouts in your packages. This lets your application to be able to connect to third-party websites without subscriber intervention.

The installer of the package receives a warning regarding this access the first time the remote site setting is installed. Remote site settings are not upgradeable, and a subscriber can delete a remote site setting at anytime. Deletion of a remote site setting may cause the package to no longer function.

Security Enhancements

Default Certificate Key Size Changed

Available in: **All** Editions

The default value for a certificate's `Key Size` changed from 1024 to 2048. You can still select 1024 bits.

Increased Security When Logged in as Another User

Available in: **All** Editions

As part of salesforce.com's continuing focus on security and trust, an administrator can no longer change the access expiration date for a user when logged in as that user.

New Custom Page URL for SAML Errors

Available in: **All** Editions

You asked for it! This enhancement is an idea from the IdeaExchange.

When configuring SAML, you can now specify the URL of a custom page that users will be directed to if there's an error during SAML login. It must be a publicly accessible page, such as a public site Visualforce page. The URL can be absolute or relative.

Maximum Number of Certificates Now Enforced

Available in: **All** Editions

You can only have 50 certificates in an organization. To view the number of certificates saved in your organization, click **Setup ➤ Security Controls ➤ Certificate and Key Management**, and view the information on the right-hand side at the top of the list of certificates.

Download SAML Metadata

Available in: **All** Editions

As of Summer '10, after you have set up single sign-on using SAML version 2.0, you can download the metadata associated with your setup. If your identity provider supports metadata, they can use this metadata to automatically configure their settings for connecting to Salesforce.com. Click **Setup ➤ Security Controls ➤ Single Sign-On Settings**, then click **Download Metadata**.

Invalid SAML Assertion Used to Populate SAML Assertion Validator

Available in: **All** Editions

As of Summer '10, when you have set up single sign-on using SAML and a user doesn't succeed when they try to log into Salesforce.com using SAML, the invalid SAML assertion automatically populates the SAML Assertion Validator if possible. To view the errors, click **Setup ➤ Security Controls ➤ Single Sign-On Settings**, then click **SAML Assertion Validator**. The SAML assertion validator is only populated with the most recent failed attempt.

New Encryption, Decryption, and Key Generating Methods

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

You asked for it! This enhancement is an idea from the IdeaExchange.

The Apex `Crypto` class has the following new methods:

- `decrypt`—used to decrypt data
- `decryptWithManagedIV`—used to decrypt data with Salesforce.com managing the initialization vector.
- `encrypt`—used to encrypt data.
- `encryptWithManagedIV`—used to encrypt data with Salesforce.com managing the initialization vector.
- `generateAesKey`—used to generate an Advanced Encryption Standard (AES) key.

`Callback URL` Now Takes Protocols Other than HTTPS

Available in: **All** Editions

The `Callback URL` field for remote access applications now uses https or any other protocol, instead of being limited to just https. It cannot use http.

Remote Access Applications and Packaging Changes

Available in: **All** Editions

A remote access application in an unmanaged package can only be used in the organization in which it was created. Only remote access applications in managed packages can be used across organizations.

Data Loader Hard Delete Operation

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

With Summer '10, you can permanently delete records with Data Loader. When you select the **Hard Delete** operation, the deleted records are not stored in the Recycle Bin. Instead, they become immediately eligible for deletion. The administrative permission for this operation, Bulk API Hard Delete, is disabled by default and must be enabled by an administrator. A Salesforce user license is required for hard delete.

User Detail Page UI Enhancements

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

In Summer '10, the Public Group Membership and Queue Membership related lists on the user detail page are optimized for large amounts of data. In both related lists, if the list contains more than five items, it includes a link to show more items and a link to a separate list page. To view these related lists on the user detail page, click **Setup ➤ Manage Users ➤ Users** and select the user.
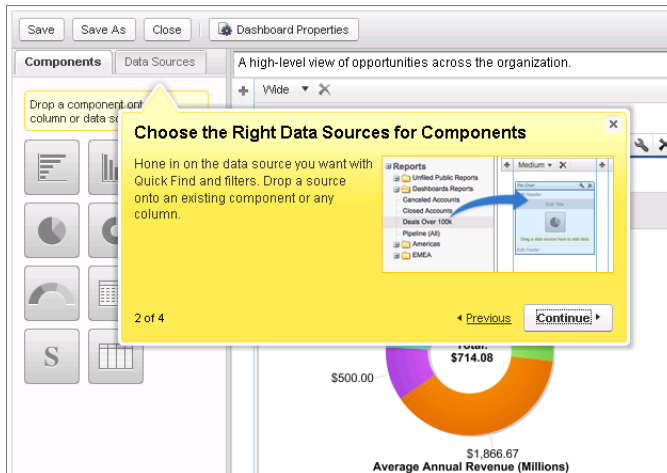
DOCUMENTATION ENHANCEMENTS

New: Guided Tours

Want a quick introduction to the why, where, and how of new features? When you first access certain Summer '10 features, we offer you a quick tour!

Here's an example of the guided tour for the new drag-and-drop dashboard builder:
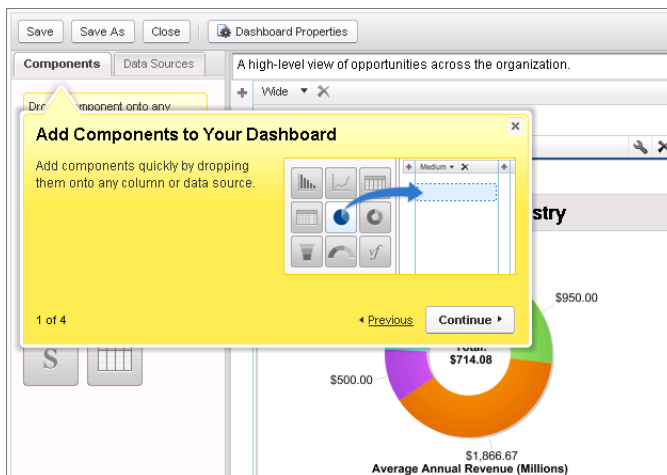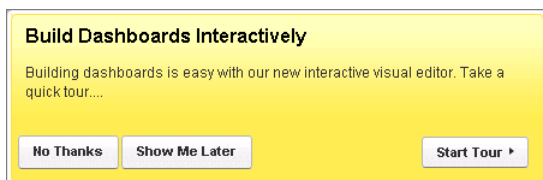
New: Salesforce.com Limits Quick Reference

Want to know how many custom fields you can have per object? Need to find out daily API request limits for your Edition? Want to know how much storage your organization is entitled to? The new *Salesforce.com Limits Quick Reference* contains detailed information on the most commonly referenced Salesforce.com application limits.

You can access the Salesforce.com Limits Quick Reference from the Help & Training window in Salesforce.com.

New: PRM Portal Implementation Guide

We've removed the PRM Portal information from the online help and placed it in a new *PRM Portal Implementation Guide*. Use this guide for information on administering and using the PRM Portal.

Who's using the PRM Portal?

- If you purchased or enabled PRM before February 2008, you are using the PRM Portal, unless you explicitly migrated to the partner portal. For more information about the PRM Portal, see PRM Portal Implementation Guide.
- If you purchased or enabled PRM after February 2008, you are using the partner portal. For information about the partner portal, see "Setting Up Your Partner Portal" in the Salesforce.com online help.

Update: Force.com Cookbook

The *Force.com Cookbook* is a compilation of code samples that show you how to extend your Force.com apps using workflow, approvals, Apex, Visualforce, the API, email, and sites. This edition contains some updated recipes and these new recipes:

- Publishing Documents Into a Salesforce CRM Content Personal Workspace
- Publishing Documents Into a Salesforce CRM Content Public Workspace and Setting Tags
- Publishing Documents in Salesforce CRM Content from a Personal Workspace to a Public Workspace
- Revising a Document Already Published in Salesforce CRM Content
- Downloading Content from Salesforce CRM Content

- Displaying Salesforce CRM Content Documents in a Visualforce Page
- Querying a List of Workspaces in Salesforce CRM Content

Anyone can access the *Force.com Cookbook* online from the Developer Force Documentation page, or Developer Force members can download a PDF at developer.force.com/books/cookbook.

Update: Videos

Like to learn by watching? In Summer '10 we offer some great product demos for new features:

- Salesforce Chatter
- Cloud Scheduler
- New Opportunity Page—Pilot

Additionally, here's a new demo on an existing feature: Watch a demo on creating workflow rules (2:40 minutes).