

Major Announcements

Customizable Home Tab	2
Web Tabs	5
Studio Enhancements	7
Self-Service Portal Enhancements	12
Multi-Select Picklists	19
Auto-Number Custom Fields	20
Contract Enhancements	22
Product Enhancements	24
Reassigning Multiple Team Members	29

Additional Enhancements

Contact Roles	32
Custom Objects	32
Documents	32
Office Edition	32
Offline PDA Edition	32
Opportunities	32
Organization ID	33
Outlook Edition	33
Picklists	33
Reports	33
Stay-in-Touch Requests	33
Web Links	33



Customizable Home Tab

Available in: **All** Editions

Using salesforce.com's flexible page layout capabilities, you have most likely created customized page layouts that suit your organization. Now, you can be as flexible about what goes on your Home tab. You can also create different Home tab designs for different users.

See Also:

[What is a Custom Home Page Layout? on page 3](#)

[Creating Home Page Components on page 3](#)

[Designing Home Page Layouts on page 4](#)

[Assigning Home Page Layouts to Profiles on page 4](#)

[Changing Your Home Page Dashboard on page 4](#)

IMPLEMENTATION TIPS

- Your home page will still contain the same logo or company message you have now until you customize your Home tab.
- You can now remove the calendar from your users' home pages if they are not using it. Users can still create events from the Open Activities related list on any record detail pages.
- Make sure your users have access to at least one dashboard. A dashboard snapshot will not show up on their home page unless they have access to one.

BEST PRACTICES

- Notify reps of email templates, new fields, and other changes by posting messages in your home page messages section.
- Display messages at the top of the column just below your logo.
- Display links based on profile so users in your sales team can see sales intranet pages and your marketing team can see your marketing intranet pages.
- Display images that motivate your sales force. For example, if your organization sends the sales rep who closes the biggest deal to Vegas, post a picture from a casino.
- Add text below your image component by clicking in the **Insert an image** box.
- Insert up to 20 components on any home page layout.
- Resize your image component in the **Insert an image** box using the corner anchors that display when you click on the image. Larger images can make the column too wide.
- Image components smaller than 20 kilobytes ensure your page loads quickly.
- Create web links using organization, API, and user merge fields.
- Make sure your users' profiles have the Dashboards tab set to Default On. Your users' home pages will not display a dashboard snapshot if the Dashboards tab is not available to them based on their profile settings.
- Create new custom home page layouts by cloning an existing one to retain its basic attributes.

ABOUT CUSTOM HOME PAGE LAYOUTS

What is a Custom Home Page Layout?

Administrators, and users with the "Customize salesforce.com" permission, can design custom home pages that contain components such as links, a company logo, or a dashboard snapshot. A dashboard snapshot is a clipping of the top row of a dashboard's components. Just like other tabs, you can also assign different home pages to different users based on profile.

To start customizing your home page layouts, see:

- [Creating Home Page Components](#) on page 3
- [Designing Home Page Layouts](#) on page 4
- [Assigning Home Page Layouts to Profiles](#) on page 4

Creating Home Page Components

Home page layouts contain standard components, such as recent items and company messages, and any custom components you create. You can create custom components such as a logo or web link. Some standard components are not removable from the home page layouts.

Editing Components

1. Click **Setup | Customize | Home | Home Page Components**.
2. Click **Edit** next to the component you want to edit. If there is no **Edit** link next to a component, it is read only.
3. Make any changes.
4. Click **Save**.

NOTE

When you select Dashboard Snapshot as a component to show on a home page layout, salesforce.com displays the last dashboard the user accessed. Give users instructions on changing the dashboard themselves; see [Changing Your Home Page Dashboard](#) on page 4. Users can view a dashboard snapshot on their home page if they have access to at least one dashboard.

Creating Custom Components

If you are creating custom web link components, define your web links first. See "Setting Web Links" in the online help. If you are creating an image component, upload your image to the Documents tab first. See "Uploading and Replacing Documents" in the online help for information on uploading your files to the Documents tab.

1. Click **Setup | Customize | Home | Home Page Components**.
2. Click **New**.
3. Enter a name for the component. For web links, this name displays for the web links section heading on the home page.
4. Choose the type of component.
5. Click **Next**.
 - For links, select the appropriate web link in the link picklists and click **Add**.
 - For images, click **Insert an image**, choose the document folder, and select the image file.
6. Click **Save**.

TIP

Keep your image size smaller than 20 kilobytes for optimum performance. If your image is too large to fit in the insert window, use an image editor to resize the image. Save your image in gif or jpeg format to reduce file size.

Designing Home Page Layouts

After creating the components you want displayed on your home pages, begin designing your home page layouts.

1. Click **Setup | Customize | Home | Home Page Layouts**.
2. Click **New**.
3. To clone a page layout from an existing one, select the page layout you want to copy.
4. Enter a name for the new page layout.
5. Click **Save**.
6. Select the components you want displayed on the new page layout.
7. Click **Next**.
8. Arrange the selected components in the desired columns. Select the component and use the arrow keys to move it.
9. Optionally, click **Preview** to display the home page layout.
10. Click **Save**. Optionally, click **Save & Assign** to save the page layout and assign it to a profile.

Assigning Home Page Layouts to Profiles

Your home page layouts are only visible to users after you assign them to a user profile.

1. Click **Setup | Customize | Home | Home Page Layouts**.
2. Click **Page Layout Assignment**.
3. Click **Edit Assignment**.
4. Choose the appropriate page layout for each profile.
5. Click **Save**.

TIP

Notify users how to customize their dashboard settings on their home page by clicking **Setup | My Personal information | Change My Display** and choosing the link for **Home**. See [Changing Your Home Page Dashboard](#) on page 4.

See Also:

[Changing Your Home Page Dashboard](#) on page 4

Changing Your Home Page Dashboard

Your administrator can create customized home pages that display customized components such as a dashboard snapshot or your company logo. If your home page contains a dashboard snapshot, you can change the dashboard settings.

Click **Customize Page** in the Dashboard section of your home page if your home page contains a dashboard. Use this page to select a different dashboard to display on your home page.

Web Tabs

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

Salesforce.com Studio now includes web tabs. Web tabs are custom tabs you create within salesforce.com, similar to custom object tabs. Use web tabs to integrate external web resources or applications with salesforce.com. Your users can then connect directly to the designated web application from the custom tab in salesforce.com.

See Also:

[Creating Web Tabs on page 5](#)

IMPLEMENTATION TIPS

- Create web tabs the same way you create custom tabs: enter a tab name, choose from a list of colors and styles, and make it available to the appropriate profiles.
- Use organization, user, and API merge fields in web tabs.

BEST PRACTICES

- Some websites may prevent you from opening them from a salesforce.com tab.
- Create a web tab for Microsoft Outlook or whatever web-based email tool your organization uses.

ABOUT WEB TABS

Creating Web Tabs

Build web tabs so that your users can use your web applications or other websites from salesforce.com.

1. Click **Setup** | **Extend** | **Custom Tabs**.
2. Click **New** in the **Web Tabs** section.
3. Choose a page layout for the new tab. The full page width spans across the sidebar while the column style allows users to view the salesforce.com sidebar.
4. Click **Next**.
5. Choose **URL** for tab type. Choose **sforce Control** if you have previously created an sforce control that you want displayed in the web tab.
6. Enter a label to display on the tab, choose a tab color style, and change the frame height if necessary.
7. Enter a description of the tab, if desired, and click **Next**.
8. Enter the URL or choose the sforce control that you want to display in the tab. Optionally, copy and paste any merge fields for data that you want replaced in the link dynamically. Remember to include the **http://** before your URL. User, organization, and API merge fields are available for web tabs. See the online help for a description of merge fields.
Optionally, click the preview link to display your web tab.
9. For a URL, choose an encoding setting and click **Next**.
10. Add the web tab to the appropriate profiles. In **Tab Visibility**, choose Default On, Default Off, or Tab Hidden to determine whether the custom tab is visible to users with that profile. The administrator can change this setting later.

11. Check **Append tab to users' existing personal customizations** to allow users to show or hide the tab under Personal Setup.
12. Click **Save**.

Studio Enhancements

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

Salesforce.com Studio allows enterprises to create entirely new applications, complete with their own custom tabs, related lists, and reports-- all without requiring any programming, additional servers, software, or maintenance.

With this release, salesforce.com Studio includes a suite of new, advanced custom tab features that give you the power to control custom object security, develop even more custom tabs, search for records in custom objects, and control deployment of your custom tabs. Still, no programming is required for any of these features.

See Also:

[Defining Custom Objects](#) on page 7

[Creating Web Links for Custom Objects](#) on page 8

[Managing Custom Tabs](#) on page 9

[Custom Object Security](#) on page 10

[Custom Object Permissions](#) on page 11

IMPLEMENTATION TIPS

- With the Summer '04 release, all user profiles except Read Only automatically receive Create, Read, Edit and Delete permissions on new custom objects.

BEST PRACTICES

- Control when users have access to new custom objects using the procedure below for [Deploying Custom Tabs](#) on page 10.
- Add a related list for Notes and Attachments to any custom object page layout.
- Control custom object security for any custom tabs with confidential data or read-only data from other systems.

ABOUT STUDIO

Defining Custom Objects

You can define up to 50 custom objects.

1. Click **Setup | Extend | Custom Objects**.
2. Click **New Custom Object**, or click **Edit** to modify an existing custom object.
3. Enter the following:
 - **Label** - a name used to refer to the object in any user interface pages. Specify singular and plural versions.
 - **Gender** - if it is appropriate for your organization's default language, specify the gender of the label. This field appears if the organization-wide default language expects gender. Your personal language preference setting does not affect whether the field appears. For example, if the organization's default language is English and your personal language is French, you are not prompted for gender when creating a custom object.
 - **Starts with a vowel sound** - if it is appropriate for your organization's default language, check if your label should be preceded by "an" instead of "a."

- **Object Name** - a unique name used to refer to the object when using the sforce API. It can contain only alphanumeric characters and must begin with a letter.
 - **Description** - an optional description of the object. A meaningful description will help you remember the differences between your custom objects when you are viewing them in a list.
4. Click **Next**.
 5. Enter the following:
 - **Record Name** - the name used in page layouts, list views, related lists, and search results.
 - **Data Type** - the type of field (text or auto number) for the record name. Records like cases that have IDs instead of names use auto numbers. An auto number is a unique sequential number assigned automatically by salesforce.com. It is always a read only field.
 - **Display Format** - for a **Record Name** of type auto-number, enter a display format.
 - **Starting Number** - for a **Record Name** of type auto-number, enter the number to use when creating your first record for this custom object.
 6. Click **Next**.
 7. Check **Enable Reports** if you want the data in the custom object to be available for reports.
 8. Choose a deployment status. Making the status "In Development" hides the custom object tab, search results, related lists, and report data types from all users except those with the "Customize salesforce.com" permission. Change the deployment status to "Deployed" when you want other users to see these elements.
 9. When creating custom objects, check **Add Notes & Attachments...** if you want users to be able to attach notes and attachments to custom object records.
 10. When creating custom objects, check **Launch New Custom Tab Wizard...** if you want to create a custom tab based on this custom object.
 11. Click **Save**. If you launched the custom tab wizard, see [Creating Custom Object Tabs](#) on page 9.

The data sharing model for all custom objects is controlled by an organization-wide default setting. For more information, see "Setting the Sharing Model" in the online help.

TIP

Records from your custom object appear in search results if they are in a custom tab. See [Creating Custom Tabs](#) on page 9.

Creating Web Links for Custom Objects

Similar to web links on standard tabs, you can add web links to your custom tabs. You begin by creating a web link on your custom object and adding it to the custom object page layout.

To create a web link for a custom object:

1. Click **Setup | Extend | Custom Objects**.
2. Select a custom object from the list.
3. Click **New** in the Web Links related list to create a web link that will appear on the custom tab for that custom object. Follow the procedure in the online help for "Setting Web Links."

Remember to add the web link to the appropriate page layouts for your custom object.

Managing Custom Tabs

A custom tab is a tab you create that your users can access within salesforce.com. You can create up to 24 custom tabs that contain custom object data or any web application.

Extend salesforce.com by:

- [Viewing Custom Tabs](#) on page 9
- [Displaying and Editing Custom Tabs](#) on page 9
- [Creating Custom Tabs](#) on page 9
- [Deploying Custom Tabs](#) on page 10

Viewing Custom Tabs

Click **Setup | Extend | Custom Tabs** to display a list of your organization's custom object tabs and web tabs. Use this page to view, create, edit, or delete custom tabs.

- To view details for a custom tab, click the custom tab name.
- To change the properties of a custom tab, click **Edit**.
- To remove a custom tab, click **Del**.
- To create a new custom tab, click **New**. See [Creating Custom Tabs](#) on page 9.

Displaying and Editing Custom Tabs

To edit, delete, or view details about a custom tab, click **Setup | Extend | Custom Tabs** and click the name of the custom tab.

- To view details about the custom object on which the custom tab is based, click the name of the custom object.
- To change the properties of a custom tab, click **Edit**, make the appropriate changes, and click **Save**.
- To remove a custom tab, click **Delete**.

Creating Custom Tabs

Administrators and users with the "Customize salesforce.com" permission can create two types of custom tabs:

- **Custom Object Tabs** display the data of your custom object in a salesforce.com tab. Custom object tabs look and function just like standard tabs. See [Creating Custom Object Tabs](#) on page 9.
- **Web Tabs** display any external web-based application or web page in a salesforce.com tab. You can design web tabs to look like other standard tabs or span across the sidebar section. See [Creating Web Tabs](#) on page 5.

Creating Custom Object Tabs

You can define a new tab that will display the data stored in your custom object, using the custom page layout.

1. Click **Setup | Extend | Custom Tabs**.
2. Click **New** in the **Custom Object Tabs** section.
3. Select the custom object to display in the custom tab. If you did not already create the custom object, click **create a new custom object now** and follow the instructions in [Defining Custom Objects](#) on page 7.
4. In **Tab Style**, select the color scheme for the custom tab.
5. Enter a description of the tab, if desired, and click **Next**.
6. In **Tab Visibility**, choose Default On, Default Off, or Tab Hidden to determine whether the custom tab is visible to users with that profile. The administrator can change this setting later.

If you choose Default On or Default Off, a link is added to the task bar so the users with the "Create" permission can quickly create a new record. For example, if the custom object displayed in the custom tab is named Expenses, a New Expense link appears.

7. Check **Append tab to users' existing personal customizations** to allow users to show or hide the tab under Personal Setup.
8. Click **Save**.

The label of the new tab is the same as the plural version of the custom object label. See [Defining Custom Objects](#) on page 7.

Deploying Custom Tabs

While developing custom tabs, you may not want users to see and interact with a new tab. Because users may get frustrated with changes in layout or lose data when you delete custom fields, control visibility of the new tab until you are finished.

Use the **Deployment Status** setting to control when users can see and use a custom object and its associated custom tab, related lists, and reports.

- Choose "In Development" as the **Deployment Status** when first creating your custom object to hide it from users while you are designing and testing it. Only users with the "Customize salesforce.com" permission can work with custom objects that are "In Development." See [Defining Custom Objects](#) on page 7.
- Change the **Deployment Status** to "Deployed" when you want to allow all users to use the custom object and any associated custom tab, related lists, and reports.
- After deploying a custom object, change the **Deployment Status** back to "In Development" if you want to make more enhancements to it.

Custom Object Security

Many different security settings work together so you can control access to your custom objects with great flexibility. Set custom object security at the following different levels:

- **Tab** - display the custom tab for the appropriate users based on their user profiles. See "Managing Profiles" in the online help.
- **Records** - set the default sharing model for all your users. This determines the access users have to custom object records that they do not own.
Then, give the appropriate user profiles access to create, read, edit, and delete records in a custom tab. See the online help for information on managing profiles.
- **Fields** - set the level of access users have to fields on your custom object page layout. See the online help for information on setting field-level security.

The following requirements apply to custom objects with no master-detail relationship:

Action	Required Privileges
Create a record	"Create" permission on user profile. The user must have the tab displayed to create a new record from the task bar.
View a record	"Read" permission on user profile and "Public Read Only" or "Public Read/Write" sharing model if not the record owner.

Action	Required Privileges
Edit a record	"Edit" permission on user profile and "Public Read/Write" sharing model if not the record owner.
Delete a record	"Delete" permission on user profile and must be the record owner or owner's boss.

The following requirements apply to custom objects that have a master-detail relationship with a standard or custom object:

Action	Required Privileges
Create a record	"Create" permission on user profile and read/write access to related record.
View a record	"Read" permission on user profile and read access to related record.
Edit a record	"Edit" permission on user profile and read/write access to related record.
Delete a record	"Delete" permission on user profile and read/write access to related record. When a user deletes a record that has related custom object records, all related custom object records are deleted regardless of whether the user has delete permission to the custom object.

Custom Object Permissions

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

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

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

Self-Service Portal Enhancements

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

Salesforce.com has enhanced the functionality of the Self-Service portal:

- Set up your Self-Service portal in minutes using the new **Self-Service Jump Start** options available on both the Cases and Solutions home pages.
- Use our sample style sheets or import your own style sheet to use on all your Self-Service pages.
- Incorporate merge fields and HTML to personalize your Self-Service pages.
- Host your Self-Service portal on your own website or have salesforce.com host it for you.

See Also:

[What is the Self-Service Portal?](#) on page 12

[Self-Service Jump Start](#) on page 13

[Self-Service Setup](#) on page 13

IMPLEMENTATION TIPS

- The "Manage Self-Service" permission on user profiles has been renamed to "Manage Self-Service Portal." It is automatically enabled for any user profile that had it before the Summer '04 release.
- Upload your corporate logo to your Document library before you click **Self-Service Jump Start**.
- Customize the style sheets to reflect your corporate branding before you enable the portal on your website.
- Delete the sample cases and solutions before you enable the portal from your website.

BEST PRACTICES

- Use the **Self-Service Jump Start** to set up a basic portal and invite colleagues to give you feedback.
- Create a splash page from your website that has the following links:
 - Public Knowledge Base
 - Web-to-Case
 - Self-Service Portal

ABOUT SELF-SERVICE

What is the Self-Service Portal?

Self-Service provides an online support channel for your customers - allowing them to resolve their inquiries without contacting a customer service representative.

Setting up your Self-Service portal is simple. Choose from two setup options: [Self-Service Jump Start](#), which will quickly get you up and running, or [Self-Service Setup](#), which allows you more customization.

See the *Self-Service Implementation Guide* for additional information.

NOTE

Contact salesforce.com about activating Self-Service for your organization. You must have the "Manage Self-Service Portal" permission to set up the Self-Service portal. In addition, you need the "Customize salesforce.com" permission to modify the Self-Service page layouts.

Preparation for Self-Service

Before setting up your Self-Service portal:

- **Build your knowledge base** - Review and publish your solutions. Only published solutions can appear in the Self-Service portal. Identify the top five solutions you want to feature on the Self-Service Home Page.
- **Determine the information to show and collect**- Decide which case fields will be available when users view their cases. You should also decide which fields should be required when users submit cases online.
- **Designate the host location** - Choose to have your Self-Service login page hosted on your corporate website or have salesforce.com host your entire portal. The page may be located anywhere within your site.

Self-Service Jump Start

Get your Self-Service portal running quickly using the **Jump Start** button. It automates the setup process by choosing some default settings for you.

Administrators and users with the "Manage Self-Service" permission can launch Self-Service Jump Start in three different ways:

- Click the **Self-Service Jump Start** button on the Cases home page.
- Click the **Self-Service Jump Start** button on Solutions home page.
- Click **Setup | Customize | Self-Service | Self-Service Portal | Jump Start**.
 1. Review the process and click **Continue**.
 2. Choose a style sheet template.
 3. Edit the default settings as needed and click **Save**.
 4. Test your Self-Service portal by:
 - Clicking **Generate** to retrieve a test username and password.
 - Clicking **Access Self-Service Portal** to preview your pages.
 - Optionally, click **Invite** to notify other users how to log in and preview your pages.
 5. Enable your Self-Service portal by copying the link provided in the **Enable Self-Service...** section to an appropriate place on your website.
 6. Click **Done** when finished.
 7. Enable your customers to use your Self-Service portal. See [Enable Self-Service for Your Customers](#) on page 18.

TIP

To make change to your settings, see [Self-Service Setup](#) on page 13.

Self-Service Setup

To configure your Self-Service portal and customize all of the Self-Service options, click **Setup | Customize | Self-Service | Self-Service Portal**. The setup consists of:

- [Enable Self-Service Features and Settings](#) on page 14
- [Generate Login HTML](#) on page 15
- [Customize the Self-Service Style Sheet](#) on page 15
- [Create Your Custom Page Header and Footer Sections](#) on page 16
- [Customize the Login Page](#) on page 16
- [Customize the Home Page](#) on page 16
- [Set the Top Solutions](#) on page 17
- [Enable the Solutions Page](#) on page 17
- [Customize the Log a Case Page](#) on page 17
- [Customize the View Cases Page](#) on page 18
- [Enable Self-Service for Your Customers](#) on page 18

Enable Self-Service Features and Settings

1. Enable Self-Service features and settings by clicking **Self-Service Setup** on the Self-Service Settings page. Set the following options:

Setting	Description
Login Enabled	Allows users to log into the Self-Service portal.
Logout URL	The URL of the web page that will be displayed when users log out of the Self-Service portal, for example, "http://www.acme.com." If a logout URL is not specified, the Logout button does not display to users.
Default Case Origin	The default origin assigned to all cases submitted via the Self-Service portal. Available values are taken from your organization's Case Origin picklist. You can assign different default origins for cases submitted via Self-Service and Web-to-Case.
Case Record Type	The record type to assign to any case submitted via the Self-Service portal.
"From" Email Address	The email address from which all new user and new password emails will be sent, for example, "support@acme.com."
"From" Email Name	The name that will be associated with the "From" Email Address, for example, "Acme Customer Support."
New User Template	The email template used to send a username and initial password to all newly-enabled Self-Service users. Salesforce.com automatically selects a sample template for you. To create your own template or modify the sample, see the online help. This template must be marked as "Available for Use."
New Password Template	The email template used to send a new password to existing Self-Service users when you reset their passwords. Salesforce.com automatically selects a sample template for you. To create your own template or modify the sample, see the online help. This template must be marked as "Available for Use."

Setting	Description
New Comment Template	The email template used to send a notification to Self-Service users when a public comment is added to one of their cases. Salesforce.com automatically selects a sample template for you. To create your own template or modify the sample, see the online help. This template must be marked as "Available for Use."
Notification On	When checked, indicates that the Send Customer Notification option on the case comment is checked by default.
Maximum Page Width	The maximum pixel width of the Self-Service pages from salesforce.com. If hosting the portal yourself, this is the width of the inner HTML frame on your Self-Service login page.
Minimum Page Height	The minimum pixel height of the Self-Service pages from salesforce.com.
Style Sheet URL	The complete, publicly accessible URL of your organization's Self-Service style sheet, for example, "http://www.acme.com/styles/selfservice.css." See Customize the Self-Service Style Sheet on page 15.
Style Sheet Template	Use one of salesforce.com's style sheet templates if you do not have a style sheet URL to use. Click the View link to see template settings.
Case Single Term	Term used on the Self-Service portal instead of "case" (singular form).
Case Plural Term	Term used on the Self-Service portal instead of "cases" (plural form).
Solution Single Term	Term used on the Self-Service portal instead of "solution" (singular form).
Solution Plural Term	Term used on the Self-Service portal instead of "solutions" (plural form).

Click **Save** to save your Self-Service Settings.

Generate Login HTML

1. Click **Generate Login HTML**.
2. Insert the URL or HTML code provided into your website.
3. Click **Finished** to return to the Self-Service Settings page.

Customize the Self-Service Style Sheet

Select a predefined style sheet, or download a sample Self-Service style sheet so you can customize it. This style sheet allows you to incorporate your organization's branding into your Self-Service portal.

1. Click **Setup | Customize | Self-Service | Self-Service Portal**.
2. Click **Self-Service Setup**.
3. Click the **View Style sheet options** link.
4. Find a style sheet you like and click **Download This Style Sheet**.
 - To use a predefined style sheet without customizing it, simply click **Select This Style**.
5. Save the style sheet and give it to your webmaster if it needs more customization.

6. Store the style sheet in a publicly accessible location and enter the URL for your style sheet in the **Style Sheet URL** field.
7. Click **Save**.

Create Your Custom Page Header and Footer Sections

Apply your company's branding to every page in your Self-Service portal by customizing your page headers and footers. Your portal page headers and footers can contain a company logo, your company messaging, or your company's colors.

1. Click **Edit** next to the Page Header listed in the Portal Page Sections.
2. Check **Show Header** to display the header on your portal pages.
3. Check **Show Header Separator** to include a line separating the header from your body pages.
4. If desired, enter a page message. Use the format toolbar to format your page message. See the online help for information on the HTML formatting toolbar and using the HTML formatting buttons.
Optionally, check **Show HTML** to view your page message in HTML code.
5. Click **Save**.
6. Click **Edit** next to the Page Footer listed in the Portal Page Sections.
7. Check **Show Footer** to display the footer on your portal pages.
8. Check **Show Footer Separator** to include a line separating the footer from your body pages.
9. If desired, enter a page message. Use the format toolbar to format your page message. See the online help for information on the HTML formatting toolbar and using the HTML formatting buttons.
Optionally, check **Show HTML** to view your page message in HTML code.
10. Click **Save**.

Customize the Login Page

You can customize the content of the Self-Service Login Page from the Self-Service Portal Pages related list. The Login Page is the first page that users see and prompts them for username and password.

1. To customize this page, click **Edit** next to the Login Page listed.
2. Check **Show Message** to display your message on the login page.
3. Insert a page message. Use the format toolbar to format your page message. See the online help for information on the HTML formatting toolbar and using the HTML formatting buttons.
Optionally, check **Show HTML** to view your page message in HTML code.
4. Click **Save**.

Customize the Home Page

You can customize the content of the Self-Service Home Page from the Self-Service Portal Pages related list. The Home Page is the first page that users see after they log in.

1. To customize this page, click **Edit** on the Home Page line.
2. You can enable the following features:

Feature	Description
Show Top Solutions List	Lists the titles of up to five solutions of your choice on the Home Page.

Feature	Description
Show My Open Cases	Lists the open cases of the Self-Service user who is logged in.
Show Message	The message that will be displayed at the top of the home page. You can enter a message of up to 32,000 characters including any HTML tags.

3. If you enabled the message, enter your message in the text box, using the formatting toolbar to format the size, color, or font. See the online help for information on the HTML formatting toolbar and using the HTML formatting buttons.
Optionally, check **Show HTML** to view your page message in HTML code.
4. Optionally, insert any merge fields for data that you want to replace dynamically.
5. Click **Save**.
6. To see how your Home Page will look, click **Preview** on the Home Page line. If you have customized the Self-Service style sheet, the preview shows your custom styles.

Set the Top Solutions

If you checked **Show Top Solutions List** from the Home page, click **Add** in the Solutions related list of the Self-Service Settings page to search for and select solutions to display on the Home page. You may only select solutions that have been published.

Enable the Solutions Page

You can enable the Self-Service Solutions Page from the Self-Service Portal Pages related list. The Solutions Page allows users to see solutions that have been published and any files attached to those solutions.

1. To enable this page, click **Edit** on the Solutions Page line.
2. Select the **Show Solution Page** checkbox.
3. Check **Show Message** to display a message at the top of the Solutions page.
4. If you enabled the message, enter your message in the text box, using the formatting toolbar to format the size, color, or font. See the online help for information on the HTML formatting toolbar and using the HTML formatting buttons.
Optionally, check **Show HTML** to view your page message in HTML code.
5. Optionally, insert any merge fields for data that you want to replace dynamically.
6. Click **Save**.
7. To see how your Solutions Page will look, click **Preview** on the Solutions Page line. If you have customized the Self-Service style sheet, the preview shows your custom styles.

Customize the Log a Case Page

You can enable and customize the Log a Case Page from the Self-Service Portal Pages related list. The Log a Case Page allows users to submit new cases to your customer support team. New cases submitted from this page will be automatically created in salesforce.com and assigned to the support representative or queue defined by your case assignment rules.

1. To allow users to submit cases from your Self-Service portal, click **Edit** on the Log a Case Page line.
2. Select the **Show Log a Case Page** checkbox.
3. Check **Show Message** to display a message on this page.

4. If you enabled the message, enter your message in the text box, using the formatting toolbar to format the size, color, or font. See the online help for information on the HTML formatting toolbar and using the HTML formatting buttons.
Optionally, check **Show HTML** to view your page message in HTML code.
5. Optionally, insert any merge fields for data that you want to replace dynamically. See the online help for a list of merge fields.
6. Click **Save**.
7. To change the fields that display on the page, click the **Page Layout** link.
8. Click **Save** at any time to finish.
9. To see how your Log a Case Page will look, click **Preview** on the Log a Case Page line. If you have customized the Self-Service style sheet, the preview shows your custom styles.

Customize the View Cases Page

You can enable and customize the View Cases Page from the Self-Service Portal Pages related list. The View Cases Page allows users to view their open and closed cases, to see related solutions and comments, and (optionally) to add comments to their cases.

1. Click **Edit** on the View Cases Page line.
2. Select the **Show View Cases Page** box to allow users to view their open and closed cases.
3. Select **Add Comments to Cases** to allow users to add comments to their cases. When a user adds a comment, an email is automatically sent to the case owner.
4. Select **Add Attachments to Cases** to allow users to upload files to their cases. When a user adds an attachment, an email is automatically sent to the case owner.
5. Check **Show Message** to display a message on this page.
6. If you enabled the message, enter your message in the text box, using the formatting toolbar to format the size, color, or font. See the online help for information on the HTML formatting toolbar and using the HTML formatting buttons.
Optionally, check **Show HTML** to view your page message in HTML code.
7. Optionally, insert any merge fields for data that you want to replace dynamically. See the online help for a list of merge fields.
8. Click **Save**.
9. To change the fields and related lists that display on the page, click the **Page Layout** link. See the online help for more information on changing the page layout.
10. Click **Save** at any time to finish.
11. To see how your View Cases Page will look, click **Preview** on the View Cases Page line. If you have customized the Self-Service style sheet, the preview shows your custom styles.

NOTE

To hide specific cases from users in the Self-Service portal, you can deselect the **Visible in Self-Service Portal** checkbox on the case.

Enable Self-Service for Your Customers

To allow your users to take advantage of the Self-Service portal, you must enable Self-Service access for each user. You can also enable Self-Service super users who can manage all cases for their company on the Self-Service portal. See "Self-Service for Contacts" in the online help.

Multi-Select Picklists

Available in: **All** Editions

Now, users can select up to 100 values at a time from a list of picklist values you define. While standard picklists allow users to select only a single value, multi-select picklists allow users to select more than one value, enabling you to better track and analyze the complexities of your customer relationships.

Administrators can create custom multi-select picklists and assign them to the appropriate page layouts just like any other custom field.

See Also:

[Selecting Picklist Values on page 19](#)

IMPLEMENTATION TIPS

- Multi-select picklists can contain 150 values of 40 characters per value and users can select up to 100 at a time on a record.
- Although your multi-select picklists can contain 150 values, keep the number of values below 50 for ease of use.
- When creating your custom field, enter a large number of lines to display so that users can see all the values.

BEST PRACTICES

- When filtering on a multi-select picklist field, use one of two new filter operators: includes and excludes.
- Convert your existing picklists to multi-select picklists without losing data.
- We recommend selecting fewer than 100 values at a time. Salesforce.com validates when you save a record that it has no more than 100 values selected.

ABOUT MULTI-SELECT PICKLISTS

Selecting Picklist Values

In salesforce.com, you may encounter two different kinds of picklists:

- Standard picklists - Click the down arrow to select a single value.
- Multi-select picklists - Double click on any available value in one scrolling box to add that value to the selected scrolling box on the right. You can choose a single value or multiple values.

To select values within a range, select the first value and click the last value in the range while holding down the Shift key; then, click the arrow to add selections to the selected box.

Auto-Number Custom Fields

Available in: **All** Editions

Add custom sequence numbers to records on standard tabs or custom tabs using the new auto-number custom fields. Salesforce.com automatically assigns a unique sequential number whenever a new record is created. Administrators can create custom auto-number fields and assign them to the appropriate page layouts just like any other custom field.

See Also:

[Creating Custom Auto-Number Fields on page 20](#)

IMPLEMENTATION TIPS

- Because salesforce.com automatically assigns these numbers, they are read only fields.
- Choose your display format carefully. You can change the display format after creating the custom field but existing records will still have the old display format.
- Your custom auto-number fields are included in sidebar search results.
- When searching for auto numbers, you do not need to enter any leading zeros.

BEST PRACTICES

- When creating a custom object, you can make the standard name field an auto-number field. This makes the auto number appear in search results and recent items lists.
- Convert existing text fields to auto-number fields.
- Auto numbers are no longer unique if you convert an auto number field into another data type.
- If you want to apply auto-numbers to existing records, check the **Generate Auto Number for existing records...** option. This numbers all records including archived records, but not converted leads, deleted records, or records in the Recycle Bin.

ABOUT AUTO-NUMBER CUSTOM FIELDS

Creating Custom Auto-Number Fields

Click **Setup** | **Customize**, select the appropriate activity, tab, or users link, and then click the **Fields** link.

Adding Fields - To add a custom field:

1. Click **New** in the Custom Fields section of the page.
2. Choose "Auto Number" as the data type, and click **Next**.
3. Enter a field label, name, and display format, and click **Next**.

The **Display Format** controls such formatting details as the minimum number of leading zeros as well as any prefix or suffix for the number.

- Begin by entering the required minimum: **{0}**. This is a placeholder for the auto-number without any leading zeros.

- Add any prefix to your number before this placeholder and insert any suffix text after the placeholder. Insert any date prefixes or suffixes in the form of **{YY}**, **{YYYY}**, **{MM}**, or **{DD}**, which always represent the create date of the record. Use the examples below when entering your **Display Format**.

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

- Then enter a **Starting Number** that is less than 1 billion.
- Check **Generate Auto Number for existing records...** if you would like to automatically number all current records beginning with the starting number you enter. If unchecked, the next record you enter will be assigned the starting number and your existing records will be blank in this field. For leads, only unconverted leads will be assigned an auto number.

NOTE

An auto-number field can contain up to 10 digits and up to 20 additional characters for your prefix or suffix.

4. In Enterprise and Developer Editions, set the field-level security to determine whether the field should be visible or read-only for specific profiles.
5. Choose the page layouts that should display the field as an editable field. The field is added to the first two-column section on the page layout. For user custom fields, the field is automatically added to the bottom of the User detail page.
6. Click **Save** to finish or **Save & New** to create more custom fields.

Contract Enhancements

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

Summer '04 includes several enhancements for contracts that allow you to customize contracts to handle your internal contract management process.

- **Calculating Contract End Date**
Salesforce.com can automatically calculate **Contract End Date** based on **Contract Start Date** and **Contract Term**. If **Contract End Date** is auto-calculated, it will not display on the Contracts edit page.
- **Searching for contracts**
Enhanced search for contracts allows you to find contracts in both sidebar and advanced searches.
- **Contract name**
In addition to the **Contract Number**, display a unique **Contract Name** to identify your contracts.

See Also:

[Disabling Auto-Calculation of Contract End Dates on page 23](#)
[Contract Search Fields on page 23](#)

IMPLEMENTATION TIPS

- By default, the setting to automatically calculate **Contract End Date** is enabled. This makes **Contract End Date** a read only field. See instructions below to disable it.
- **Contract Name** is available as a standard field but does not automatically show up on any page layouts. Add **Contract Name** to your page layouts and set the appropriate field-level security. If necessary, add the **Contract Name** field to your views and reports.

BEST PRACTICES

- Now you can add the **Contract Name** field to your list of key contracts on the Contracts home page. **Contract Name** displays in addition to **Contract Number** but does not replace it. Administrators of Professional Edition organizations can add the **Contract Name** field to key contracts by adding the field to their contracts page layout. Administrators of Enterprise Edition organizations can add the **Contract Name** field to key contracts using field-level security.
- Also add the **Contract Name** field to your list views. Make the **Contract Name** field visible in your contract page layout and edit your contract list views to display **Contract Name**.
- Find contracts using the Advanced Search feature. Results from advanced search include contract custom fields.
- Standardize on a naming convention for your contracts and use **Contract Name** to provide your users with an easy way to identify them.
- Make **Contract End Date** editable and disable auto-calculation of **Contract End Date** if your contracts do not have specific end dates.

ABOUT CONTRACTS

Disabling Auto-Calculation of Contract End Dates

Your contracts may not have end dates or you may prefer to have users enter them manually. If so, disable auto-calculation of contract end dates:

1. Click **Setup | Customize | Contracts | Settings**.
2. Remove the check in the **Auto-calculate Contract End Date** option.
3. Click **Save**.
4. View your page layout and field-level security settings for **Contract End Date**, **Contract Start Date**, and **Contract Term** to ensure your users can read or edit them as needed. See "Setting Page Layouts and Checking Field Accessibility" in the online help.

To enable auto-calculation, check this option and click **Save**. If salesforce.com auto-calculates **Contract End Date**, it does not display on the Contracts edit page.

NOTE

If **Auto-calculate Contract End Date** is enabled but **Contract Start Date** or **Contract Term** is empty, **Contract End Date** will be blank.

Contract Search Fields

You can search for contract information within any of the fields listed below. The first column lists fields searched in both the sidebar Search and Advanced Search. The second column lists additional fields searched in Advanced Search only.

Contract Fields	
Fields Searched in Both Sidebar Search & Advanced Search	Fields Searched in Advanced Search Only
Billing Name	Billing Address
Contract Name	Description
Contract Number	Special Terms
	All custom fields of type text, text area, email, and phone

Product Enhancements

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

With the new Products tab added for Spring '04, we completely revamped price book functionality, developed robust product search capabilities, and offered product custom fields.

Now, we have extended product flexibility with the following enhancements:

- **Sharing on price books**
Control which users can see price books and which users can add them to opportunities.
- **Deleting products and price books**
Delete a single product or price book and its related price book entries. Also, delete multiple products based on a criteria you specify.
- **Prompting for products on opportunities**
Enable this feature if you would like salesforce.com to prompt users to select products when creating an opportunity.

See Also:

[Sharing Price Books on page 25](#)

[Deleting Products and Price Books on page 25](#)

[Deleting Multiple Products on page 27](#)

[Prompting for Products on Opportunities on page 27](#)

IMPLEMENTATION TIPS

- All product and price book features listed below continue to be available to all Enterprise Edition organizations and Professional Edition organizations for an additional fee.
- Initially, salesforce.com will not prompt for products when creating an opportunity until you enable this option (see [Prompting for Products on Opportunities on page 27](#)). Enabling the prompt removes the **Save** and **Save & New** buttons on an opportunity creation page and replaces them with **Save & Add Product**.
- With the Summer '04 release, your default price book access is set to "Use." If necessary, change your price book access to "View Only" or "No Access." See [Sharing Price Books on page 25](#) for instructions on changing your default price book access.

BEST PRACTICES

- The new **Save & Add Price** button on the product creation page reminds user to add a price to the product immediately after creating it. Alert users of the benefits of this button instead of the **Save** button.
- If you users only use a single price book, giving them access to only one price book allows them to bypass the prompt asking them to choose a price book when creating an opportunity.
- If you enable the opportunity prompt to add products (see [Prompting for Products on Opportunities on page 27](#)), make the opportunity **Amount** field read only so that this field is exclusively driven by the product amounts.
- Avoid deleting products or price books that are associated with opportunities. Instead, deactivate the product or price book.
- If your organization has different sales teams selling different types of products like licenses, services, and maintenance, consider using record types on custom page layouts to make the appropriate products and price books available to the appropriate users. See the online help for more information on record types and setting page layouts.

ABOUT PRODUCTS

Sharing Price Books

Your administrator defines the default access your entire organization has to price books. Administrators and users with the "Manage Price Books" permission can extend sharing of a price book manually to more users. However, you cannot change the sharing model to make it more restrictive than the default.

To extend sharing of a price book:

1. Select **Manage Price Books** from the Products home page.
2. Click the name of the price book you want to share.
3. Click **Sharing**.
4. Click **Add**.
5. From the drop-down list, select the type of group, user, or role to add. Your choices are:

Type	Description
Public Groups	All public groups defined by your administrator.
Users	All users in your organization.
Roles	All roles defined for your organization. This includes all of the users in that role.
Roles and subordinates	This includes all of the users in the role plus all of the users in roles below that role.

6. Choose the specific groups, users, or roles who should have access by adding their names to the New Sharing list.
7. Choose the access level for the record you are sharing and any associated records.
Users must have Use access to a price book in order to add it to an opportunity.
8. Click **Save**.

TIP

If your organization-wide default for price books is "No Access," give your entire organization "View Only" access to your Standard Price Book so that users can see prices on the product detail page.

Deleting Products and Price Books

Deleting products or price books is unique because either may have related price book entries. You can delete a product and its related price book entries or a price book and its price book entries. In either case, price books are not affected when you delete a product within that price book. Likewise, products are not deleted or removed from any other price book when you delete a price book.

Before you begin, review your options for deleting products and price books with related records:

- **Does it have a related price book entry?**

If your product or price book is not associated with any price book entries, you can delete it. Salesforce.com moves it to the Recycle Bin temporarily, and, if needed, you can restore it while it is in the Recycle Bin. If the product or price book has price book entries, all price book entries are deleted and restored with their related product or price book.

- **Is it on an opportunity?**

If your product or price book is used on an opportunity, you have three options:

1. Deactivate it by editing it and deselecting the **Active** field. We recommend deactivating a product or price book that is on an opportunity because it will no longer be available to users but you can activate it again if necessary.
2. Remove the related product or price book from all opportunities. When you try to delete a product or price book that is used on an opportunity, salesforce.com displays a list of the opportunities using it. If you are deleting a price book, go to each opportunity listed and remove the price book from them. If you are deleting a product, remove the product from every opportunity that uses it. Then, delete the price book or product and it will be stored in the Recycle Bin temporarily, during which time, you can recover it and all its related price book entries.
3. Archive the product or price book and each related price book entry. Archived products and price books cannot be recovered because they are not stored in the Recycle Bin. However, they still show up on any opportunities that contained them before they were archived.

TIP

If you lost valuable product information by doing an archive, you can view archived product records in an export.

Deleting Products

To delete a product, click **Delete** from the product detail page. When you delete a product, all related price book entries are also deleted. The product is moved to the Recycle Bin. If you undelete the product from the Recycle Bin, any related price book entries are restored with it.

NOTE

You cannot delete a product that is used on an opportunity. If you try to delete it, salesforce.com displays a list of the opportunities so you can remove the product from those opportunities and try again. If you do not want to remove the product from all opportunities, you can deactivate (recommended) or archive the product instead. See [Deleting Products and Price Books](#) on page 25 for descriptions of these actions.

See Also:

[Deleting Multiple Products on page 27](#)

Deleting Price Books

To delete a price book, click **Delete** from the price book detail page. When you delete a price book, all related price book entries are also deleted. The price book is moved to the Recycle Bin. If you undelete the price book from the Recycle Bin, all related price book entries are also restored.

NOTE

You cannot delete the Standard Price Book or a price book that is on an opportunity. If you try to delete a price book that is used on an opportunity, salesforce.com displays a list of the affected opportunities. If you do not want to remove the price book from those opportunities, you can deactivate (recommended) or archive the price book instead. See [Deleting Products and Price Books](#) on page 25 for descriptions of these actions.

Deleting Multiple Products

Available in: **All** Editions

Administrators, and users with the "Manage Products" permission can delete multiple products.

Before you use this feature, we strongly suggest you run a report to archive your information. When deleting products, all related price book entries are deleted with it. Products on opportunities cannot be deleted, but they can be archived.

To delete multiple products:

1. Click **Setup | Data Management | Mass Delete Records**.
2. Click **Mass Delete Products**.
3. Review the information that will be deleted along with the records.
4. Specify conditions that the selected items must match, for example, "State equals California."
5. When deleting products, check **Archive Products** . . . if you want to include products that are on opportunities. Archived products are not moved to the Recycle Bin. Check this option to:
 - Delete products that are not on opportunities and move them to the Recycle BinAnd
 - Archive products that are on opportunities. These products are not moved to the Recycle Bin and cannot be recovered.Leave this box unchecked to delete only those products that are not on opportunities. Selected products that are on opportunities will remain checked after the deletion to indicate they were not included in the deletion.
6. Choose **Search** to find records that match.
7. Select the box next to the items you want to delete, and click **Delete**. Deleted items are moved to the Recycle Bin.

NOTE

You can only delete up to 250 items at one time.

Prompting for Products on Opportunities

Customize salesforce.com to prompt users to select a product when creating an opportunity. Enabling this option makes it easier for users to add products while creating an opportunity.

Administrators and users with the "Modify All Data" permission can enable this option.

1. Click **Setup | Customize | Opportunities | Settings**.

2. Check **Make products required on opportunities** to have salesforce.com prompt users to select a product when creating an opportunity.
3. Click **Save**.
4. We recommend making the **Amount** field on the opportunity read only to ensure your opportunity amounts are driven from the products on the opportunity. See "Setting Field-Level Security" in the online help.

NOTE

If enabled, salesforce.com replaces the **Save** button with a **Save & Add Product** button the opportunity creation page.

Reassigning Multiple Team Members

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

Now there is a quick way to keep your account teams and sales teams up to date. Use the new mass reassignment options to:

- Add team members to multiple records
- Remove team members from multiple records
- Replace team members on multiple records

See Also:

[Adding Team Members on page 29](#)

[Removing Team Members on page 30](#)

[Replacing Team Members on page 30](#)

IMPLEMENTATION TIPS

- All organizations that have sales teams enabled get the mass reassign options for sales teams.
- All organizations that have account teams enabled get the mass reassign options for account teams.

BEST PRACTICES

- You may see duplicate accounts or opportunities in your search results if your selection criteria includes account or opportunity fields and you are displaying team member name. For example, search results for all accounts in California display a different row on each account in California for each team member on the accounts.
- Use account team or opportunity team member fields when you want to find all records on which a particular person is a member.

ABOUT MASS REASSIGNMENT

What is Mass Reassignment?

If your organization uses account teams or sales teams, you can make changes to a team member on multiple records at a time. Using [salesforce.com](#), you can add, remove, or replace a team member on any record that contains that team member.

Administrators, and users with the "Modify All Data" permission, can transfer team membership on multiple account or opportunity records.

Adding Team Members

To add an account or sales team member to multiple records at a time:

1. Choose **Setup | Data Management | Mass Reassign Account Teams** or **Setup | Data Management | Mass Reassign Opportunity Teams**.
2. Choose the add option and click **Next**.
3. Enter your criteria to find the records you want to change and click **Next**.
4. Select the records you want to change and click **Next**. Use the **select all** and **select none** options if necessary.
5. Choose a team member to add to the selected records.
6. Select a role for the new team member.
7. For account teams, select the appropriate account, case, and opportunity access. For sales teams, select the appropriate opportunity access.

8. Click **Add**.
9. Click **Done** after reviewing the number of records changed.

Removing Team Members

To remove an account or sales team member from multiple records at a time:

1. Choose **Setup | Data Management | Mass Reassign Account Teams** or **Setup | Data Management | Mass Reassign Opportunity Teams**.
2. Choose the remove option and click **Next**.
3. Enter your filter criteria to find the records that contain the team member you want to remove and click **Next**.
4. Select the appropriate records and click **Next**. Use the **select all** and **select none** options if necessary.
5. Choose the existing team member to remove from the selected records.
6. Select a role. The team member is removed only if he or she plays this role. Or, select "Any Role" to removed the team member regardless of what role he or she plays.
7. Check the following options when applicable:
 - **Reassign all open activities...** if you want open activities for the removed team member assigned to the account owner.
 - **Reassign all open opportunities...** if you want open opportunities for the removed team member to be assigned to the account owner.
 - **Reassign all open cases...** if you want open cases for the removed team member to be assigned to the account owner.
 - **Reassign all contacts...** if you want to assign all contact records owned by the removed team member to the account owner.
8. Click **Remove**.
9. Click **Done** after reviewing the number of records changed.

Replacing Team Members

To replace an account or sales team member with a different one on multiple records at a time, or to change the role of a team member:

1. Choose **Setup | Data Management | Mass Reassign Account Teams** or **Setup | Data Management | Mass Reassign Opportunity Teams**.
2. Choose the replace option and click **Next**.
3. Enter your criteria to find the records you want to change and click **Next**.
4. Select the records you want to change and click **Next**. Use the **select all** and **select none** options if necessary.
5. Select the team member currently on the selected records that you want to change.
6. Select the new team member to replace the current one. To simply change the role of a team member, select the existing team member here as well.
7. Choose a role for the team member. Choose **Use Role of Replaced Team Member** to keep the current role.
8. For account teams, select the appropriate account, case, and opportunity access. For sales teams, select the appropriate opportunity access.
9. Check the following options when applicable:
 - **Reassign all open activities...** if you want to assign all open activity records to the replacement team member.

- **Reassign all open opportunities...**if you want to assign all open opportunity records to the replacement team member.
- **Reassign all open cases...**if you want to assign all open cases to the replacement team member.
- **Reassign all contacts...**if you want to assign the contacts associated with the updated records to the replacement team member.

10. Click **Replace**.

11. Click **Done** after reviewing the number of records changed.

ADDITIONAL ENHANCEMENTS

Contact Roles

Contact roles on opportunities help users identify key contributors on a deal. Now, add the contact roles related list to your accounts and contracts page layouts.

Custom Objects

With this release you can create custom objects and associate them with products or solutions. This includes creating custom related lists on the product or solution detail page.

Documents

The Documents tab is now available to all editions. Documents tab settings will not change for users of Professional and Enterprise editions. The Documents tab automatically displays for users of Personal and Team editions. To hide the tab, change your users' profile settings.

Office Edition

- Soon Office Edition will be available in 11 supported languages.
- Salesforce.com automatically refreshes Excel spreadsheet values that are calculated using formulas.

Offline PDA Edition

- This release includes an enhancement that allows you to add, remove, or edit the products or price book associated with an opportunity.
- Another enhancement enables you to add, remove, or edit the schedules for a product on an opportunity.

Opportunities

- Prevent users from deleting opportunities regardless of owner with the new "Delete Opportunities" permission. Automatically, this permission is enabled for all standard profiles. Remove this permission from any profile that should not be able to delete opportunities.
- When cloning an opportunity that has products, you can select a checkbox to copy all the associated products and schedules.
- If you use merge fields to display products on opportunities, two merge field names have changed. However, if your templates contain the old names, both old and new merge field names will work.
 - OPPORTUNITY_LINEITEM_DEFAULTUNITPRICE is now OPPORTUNITY_LINEITEM_LISTPRICE
 - OPPORTUNITY_LINEITEM_UNITPRICE is now OPPORTUNITY_LINEITEM_SALESPRICE

Organization ID

Your organization's unique identifier within salesforce.com is now available to you in the company information page. To view your organization ID, click **Setup | Company Profile | Company Information**.

Outlook Edition

- Available soon in Outlook Edition, users can create a case from an email using Outlook versions 2002 and higher.
- Available soon, access the salesforce.com user interface directly from within Microsoft Outlook versions 2002 and higher.

Picklists

- Convert custom picklist fields to custom text fields without changing the current value in each record.
- Convert custom text fields into picklist fields without changing the current value of that field in your records. When you select the custom field and click **Change Type of this Field**, salesforce.com displays a list of possible picklist values. These are the values your users have entered in that custom text field. You can remove any of these values without affecting the records that contain it. Changes you make to this list of picklist values only applies to records you create in the future.

Reports

- Create custom reports for group events using the new Activities custom report type called Events with Invitees.
- Use the new Events with Invitees standard report in the Activity Reports section on the Reports tab.
- Create custom reports for custom objects by choosing the "Other Reports" option from the "Select the data type" report wizard page.
- When creating charts for your reports, choose the information to display in the y and x axis of the chart. This does not apply to all chart types.

Stay-in-Touch Requests

Salesforce.com automatically prompts users to send a Stay-in-Touch request when they create a new contact. To disable this prompt, users can click **Don't Show Again** on the prompt or change their Stay-in-Touch settings by clicking **Setup | Email | My Stay-in-Touch Settings**.

Web Links

- Web integration links are now called web links.
- URLs to setup pages have changed. Update your web links if they contain any URLs for setup pages.
- Add web links to your custom home page layouts. See [Creating Home Page Components](#) on page 3.

