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# Dashboards

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

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The new Dashboards tab gives your organization a centralized place to view and create visual representations of your custom report data. Consolidate your projected pipeline, outbound communication, and product demand reports into a single dashboard. Then, make this dashboard available to anyone with access to the folder that contains it.

See Also:

[What is a Dashboard? on page 2](#)

[Displaying Dashboards on page 3](#)

[Creating and Editing Dashboard Properties on page 3](#)

[Editing Dashboards on page 4](#)

[Dashboard Properties on page 4](#)

[Adding Dashboard Components on page 5](#)

[Refreshing Dashboard Data on page 6](#)

[Printing Dashboards on page 7](#)

[Deleting Dashboards on page 7](#)

## IMPLEMENTATION TIPS

- All users of Professional, Enterprise, and Developer Editions who have the "Modify All Data" or "Edit Public Reports" permission will automatically get the "Manage Dashboards" permission.
- Give the "Manage Dashboards" permission to any user that will be responsible for creating, editing, or deleting dashboards.
- The Dashboards tab displays automatically for all organizations using Professional, Enterprise, and Developer Editions. If your Dashboards tab is not visible, customize your display to show it.

## BEST PRACTICES

- For best results, create dashboard components out of summary or matrix reports, not standard reports.
- Create special report folders to contain your customized reports that are designed for dashboards.
- A dashboard displays all the data available to the user selected when creating the dashboard. If the dashboard data is confidential, store the dashboard in a dashboard folder that is only shared to its intended audience.

## HOW TO USE DASHBOARDS

### What is a Dashboard?

Dashboards give you a real-time snapshot of corporate metrics and key performance indicators. A dashboard is a group of different charts (or components) that graphically display your custom report data. You can select up to 20 different custom reports to display data graphically as charts in each dashboard. You can position each dashboard component in one of up to three columns.

Administrators and users with the "Manage Dashboards" permission can create, edit, and delete dashboards. Users without "Manage Dashboards" permission can view dashboards stored in folders that they can view.

## Displaying Dashboards

Clicking on the Dashboards tab displays the dashboard you most recently viewed. If this is your first visit to the Dashboards tab, the most recently created dashboard displays. The dashboard data is as current as the **As of** date displayed at the top of the dashboard.

- To view a different dashboard, choose a dashboard from the dashboard list. This drop-down list includes dashboards in all dashboard folders to which you have access.
- Click **Edit** to make any changes to the dashboard.
- Click **Refresh** to update the data in the dashboard.
- Click **Go To Dashboard List** to view a list of your dashboards.
- For certain types of charts, click the dashboard component to view the report details used to create it.

## Creating and Editing Dashboard Properties

Administrators and users with the "Manage Dashboards" permission can create, edit, and delete dashboards.

Before you begin, create the custom reports that include the data you would like to display in dashboards. Custom reports for dashboards are no different than any other custom report you create except you must summarize or group data for best chart results. Be sure to store reports in a public folder. See Customizing Reports in the online help for instructions on creating custom reports.

1. Click the Dashboards tab.
2. Click **Go To Dashboards List**.
3. Click **New Dashboard** to create a new dashboard.  
To modify properties for an existing dashboard, click **Edit** next to the dashboard name and choose **Edit Properties**.
4. Select a folder where you want to store the dashboard.
5. Enter a title and description for the dashboard.
6. Choose a user to apply that user's security settings to the dashboard. If you have the "View All Data" permission, you can choose a different user. If you do not have the "View All Data" permission, you can only choose yourself.

### NOTE

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The user selected in this step determines the dashboard's level of access to data. This bypasses all security settings, giving all users who can view the dashboard access to data they might not be able to see otherwise.

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7. Select the number of columns for this dashboard. Each dashboard can have up to three columns.
8. Choose a text color and size for the dashboard chart titles.
9. Choose a text color and size for the text in the chart.
10. Choose a background option for the gradient color on the charts, and then select the two colors for the gradient. If prefer your background to be all one color or do not want a gradient design, select the same color for both **Starting Color** and **Ending Color**.
11. Click **Save**.
12. Edit the dashboard to organize the dashboard layout and add components to display custom report data. See [Editing Dashboards](#) on page 4.

## Editing Dashboards

Dashboards consist of up to three columns of different dashboard components. Each component is a chart that represents data from one of your custom reports.

If you are creating a dashboard:

1. Click **Add Component** from the top of any column to add a component to that column. See [Adding Dashboard Components](#) on page 5 for instructions on creating new dashboard components.
2. Click any **Column Size** option from the top of the column to change the width of it.
3. Move the new component to another column using the appropriate arrow at the top of the component. These buttons may be disabled depending on the component's current location.
4. Click **Edit** at the top of the new component to change its attributes, if necessary.
5. Click **Edit Properties** to change the attributes of the dashboard. See [Creating and Editing Dashboard Properties](#) on page 3 for more information.
6. Click **Done**. All changes are saved to the dashboard as you make them.

If you are editing a dashboard, you can also:

- **Refresh Dashboard Information** - Click **Refresh** to update the data in the dashboard. See [Refreshing Dashboard Data](#) on page 6 for more information about refreshing your data.
- **Delete Dashboard Components** - Click **Delete** at the top of any dashboard component to delete that component from the dashboard.
- **Editing Dashboard Components** - Click **Edit** at the top of any dashboard component to make changes to it.
- **Display Dashboards** - Click **Go To Dashboard List** to view a list of your dashboards.
- For certain types of charts, click the dashboard component to view the report details used to create it.

## Dashboard Properties

Below is a description of the properties in alphabetical order that are stored for each dashboard.

Field	Description
<b>Background Fade Direction</b>	Indicates how gradient colors are dispersed.
<b>Dashboard Layout Style</b>	Indicates the number of columns in the dashboard.
<b>Description</b>	A description of the dashboard that helps other users locate it.
<b>Ending Color</b>	The color used at the end of the gradient design in the chart background fade.
<b>Folder</b>	A place to store the dashboard
<b>Running User</b>	The user's security settings to apply to the dashboard. Whatever data this user can see will be available to everyone who views the dashboard.
<b>Starting Color</b>	The color used at the beginning of the gradient design.

Field	Description
<b>Text Color</b>	Color of the text on each chart within the dashboard.
<b>Text Size</b>	Size of the text on each chart within the dashboard.
<b>Title</b>	The heading of the page that displays all the components in the dashboard.
<b>Title Color</b>	Color of the titles on each dashboard component.
<b>Title Size</b>	Size of the font for the titles of each dashboard component.

## Adding Dashboard Components

Add up to 20 dashboard components to your dashboards. The components contain the data from your custom reports represented in a chart format.

To add a dashboard component while editing a dashboard:

1. Click **Add Component** from the top of any column.
2. Choose the type of component. See the online help for examples of chart types.
3. Enter a header to display at the top of the dashboard component.
4. Enter a footer to display at the bottom of the dashboard component.
5. Choose a unit of measurement in which to display your chart totals.
6. Make the appropriate chart settings:
  - If you chose chart as your type of component, select a chart type. See the online help for examples of chart types. Enter the chart settings described below:

Chart Setting	Description
<b>Chart Type</b>	Choose a type of chart to display your data.
<b>Title</b>	Enter an identifying name for the chart.
<b>Sort By</b>	Choose a sorting element to determine what element you want displayed first in the horizontal axis of any horizontal chart or the vertical axis of any vertical chart.
<b>Maximum Values Displayed</b>	Enter the maximum number of elements to include in the horizontal axis of a horizontal chart or vertical axis of a vertical chart. For example, if you want to list only your top 5 salespeople, create an opportunity report that lists total opportunity amounts by owner and enter 5 in this field.
<b>Legend Position</b>	Choose where you want the legend displayed with respect to the chart.

- If you chose table as your component type, enter the table settings below:

Table Setting	Description
Sort By	Determine if you want table elements sorted by their labels or values and if you want them in ascending or descending order.
Maximum Values Displayed	Enter the maximum number of elements to include in the table. For example, if you want to list only your top 5 salespeople, create an opportunity report that lists total opportunity amounts by owner and enter 5 in this field.

- If you chose metric as your component type, enter a metric label to describe the value displayed. A metric displays the grand total of a custom report following your label for that value.
- If you chose gauge, define the three colors that you want to represent low, medium, and high from left to right on your gauge. Then, choose the range of values to represent each color. For example, if red is your left-most color representing low on the gauge, you can set the needle to point to the red zone of your gauge if the grand total of your report is between 0 and 1,000,000. In this example, enter 0 as your **Minimum Value** and 1,000,000 as your **Breakpoint #1 Value**. Enter the gauge settings below:

Gauge Setting	Description
Minimum Value	The lowest value on the gauge.
Low Range Color	The color representing the left section of the gauge. This section spans from the <b>Minimum Value</b> to the <b>Breakpoint #1 Value</b> .
Breakpoint #1 Value	The value that separates the left-most color from the middle color on the gauge.
Medium Range Color	The color representing the middle section of the gauge. This section spans from the <b>Breakpoint #1 Value</b> to the <b>Breakpoint #2 Value</b> .
Breakpoint #2 Value	The value that separates the middle color from the right-most color on the gauge.
High Range Color	The color representing the right section of the gauge. This color spans from the <b>Breakpoint #2 Value</b> to the <b>Maximum Value</b> .
Maximum Value	The highest value on the gauge.

7. Choose a custom report to provide the data for the dashboard component.
8. Click **Save**.

## Refreshing Dashboard Data

Each dashboard displays an **As of . . .** field at the top right corner of the dashboard. The data in your dashboard is as current as this date and time. Salesforce.com automatically refreshes your dashboard data several times a day. Click **Refresh** to replenish your dashboard data with the data from the most recent automatic refresh.

## Printing Dashboards

Print dashboards using your browser's print option. Set the paper orientation to print in landscape format so that it is wide enough for all three columns of dashboard components. You may have to resize your columns and remove the browser-imposed headers and footers.

## Deleting Dashboards

Deleting a dashboard deletes all the dashboard components within it. It does not delete the custom reports used by the dashboard components.

To delete a dashboard:

1. Click the Dashboards tab.
2. Click the **Go To Dashboards List** link.
3. Display the folder where the dashboard is stored.
4. Click **Del** next to the name of the dashboard.

To delete a dashboard component:

1. Select the dashboard.
2. Click **Delete** just above the dashboard component you want to delete.

### NOTE

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Deleted dashboards do not get stored in the Recycle Bin.

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# Workflow Automation

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

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In a fast-paced organization, your efficiency depends on your ability to standardize on internal operations. You need to keep each member of your team on top of the latest changes to your information.

Now, set up salesforce.com to automate your internal business processes and liberate your sales force to move quickly on sales operations.

To get started, create workflow rules that trigger workflow tasks or workflow alerts. When your users create or save records, salesforce.com puts your workflow rules into action.

See Also:

[Managing Workflow on page 8](#)

[Managing Workflow Rules on page 9](#)

[Managing Workflow Alerts on page 10](#)

[Managing Workflow Tasks on page 11](#)

## IMPLEMENTATION TIPS

- Users with the "Customize salesforce.com" permission can create workflow rules, workflow tasks, and workflow alerts.
- No need to change your existing email templates to associate them with workflow alerts.
- Check **Notify Assignee** when editing a workflow task to notify users that workflow has assigned a task to them.

## BEST PRACTICES

- Store all your email templates for workflow alerts in a folder designated for workflow alerts.
- Begin each workflow task subject with the same notation to distinguish them from other tasks.
- To save time, create reusable workflow tasks and workflow alerts. Associate your workflow tasks and workflow alerts with more than one rule by clicking on the **Select Tasks** and **Select Alerts** buttons on the rule detail page.
- Use workflow tasks and alerts wisely to avoid "spamming" your users with too many emails.
- We recommend that you test your workflow rules after you set them up but before any records can trigger them. To test workflow rules, set up a rule with an additional criteria entry that other users will not trigger. For example, the additional rule entry can trigger when **Description** contains "test workflow."
- Please note that your lead assignment rules can affect workflow rules. A user creating a lead that gets assigned to a queue through lead assignment rules must have access to that queue to trigger a workflow rule.

## HOW TO USE WORKFLOW

### Managing Workflow

Your sales, support, and marketing teams operate more efficiently with standardized internal procedures and automated business processes. Set up salesforce.com to automatically send email alerts or assign tasks based on your organization's workflow.



Begin by designing workflow rules and associating them with workflow tasks or workflow alerts. When changes to a record meet the conditions in your workflow rule, salesforce.com sends any associated alerts or assigns any associated tasks.

### Basic Concepts

**Workflow Alerts** are emails generated by a workflow rule using an email template. The emails are sent to designated recipients, either salesforce.com users or others, whenever specific business actions trigger a workflow rule. See [Managing Workflow Alerts](#) on page 10 to get started using workflow alerts.

**Workflow Tasks** are like task templates, containing the information a workflow rule uses to assign a task to specified users whenever specific business actions trigger the rule. Workflow tasks provide the **Subject**, **Status**, **Priority**, and **Due Date** for the tasks a rule assigns. See [Managing Workflow Tasks](#) on page 11 to get started using workflow tasks.

**Workflow Rules** use workflow alerts and tasks when their designated conditions are met. See [Managing Workflow Rules](#) on page 9 to get started using workflow rules.

#### NOTE

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Workflow rules can be triggered any time a record is saved or created.

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## Managing Workflow Rules

Workflow rules help keep your business running smoothly by sending emails and assigning tasks based on your business processes. Workflow rules put workflow alerts and workflow tasks into action when their designated criteria are met. Design workflow rules with the business conditions that you want to trigger the associated workflow alerts and tasks. Associate each workflow rule with workflow alerts, workflow tasks, or both.

#### NOTE

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Any changes you make to records while using Offline Edition will be evaluated by workflow rules when you sync. In addition, changes made while using Wireless Edition will be evaluated in real-time by workflow rules. Anything generated by an import, lead conversion, or Intellisync for salesforce.com will not trigger workflow rules.

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## Creating Workflow Rules

Create workflow rules and then associate them with your workflow tasks or workflow alerts. To create your workflow rules:

1. Click **Setup | Customize salesforce.com | Workflow | Workflow Rules**.
2. Click **New Rule**.
3. Choose a type of record and click **Next**. Workflow rules can only be associated with workflow tasks of the same type.
4. Enter a rule name.
5. Enter a description for the rule.
6. Check **Active** to begin firing the rule after you save it.
7. Choose an evaluate option:
  - **Evaluate this rule for new records only** ignores updates to existing records.

- **Evaluate this rule for new and existing records** includes new records and updates to existing records.
8. Select your rule criteria. See [Entering Filter Criteria](#) in the online help for more information on using filter criteria.
  9. Click **Save**. Next, associate the workflow rule with workflow tasks, workflow alerts, or both.
    - Click **Select Tasks** to associate an existing task with this rule.
    - Click **New Task** to create a task and associate it with this rule. The type of record associated with the new task will match the type for the selected rule. See [Creating Workflow Tasks](#) on page 11 for more instructions on creating workflow tasks.
    - Click **Select Alerts** to associate an existing alert with this rule. This option may not be available depending on the **Rule Type**. Activity workflow rules can only be associated with workflow tasks.
    - Click **New Alert** to create an alert and associate it with this rule. See [Creating Workflow Alerts](#) on page 10 for more instruction on creating workflow alerts. This option may not be available depending on the **Rule Type**. Activity workflow rules can only be associated with workflow tasks.
    - Click **Edit** next to any associated workflow task or alert to make changes to it.
    - Click **Remove** next to any associated workflow task or alert to remove its association to the rule. This does not delete the task or alert.

#### NOTE

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If a record triggers a workflow rule, it does not re-trigger that rule each time it is saved even though it continues to meet the rule criteria. However, a record that already triggered a rule, then fell below the threshold, can trigger a second alert if it crosses that threshold again. The only exception to this is when the **Evaluate this rule for new records only** option is selected, which tells the rule to ignore updates to existing records.

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## Managing Workflow Alerts

Workflow alerts are similar to email templates in that they contain the standard text and list of recipients for an email. However, workflow alerts are specifically designed to be associated with a workflow rule. Workflow alerts are emailed to designated recipients whenever specified business conditions trigger the workflow rule.

## Creating Workflow Alerts

Create workflow alerts before creating the workflow rules that use it. To create your workflow alerts:

1. Click **Setup | Customize salesforce.com | Workflow | Workflow Alerts**.
2. Click **New Alert**.
3. Enter a description for this alert.
4. Choose an email template.
5. Select the type of recipient and choose from the list displayed. Select an entry in the list of Available Recipients and click **Add** to add that entry to the list of Selected Recipients.
6. Enter up to 5 additional email addresses.
7. Click **Save**.

# Managing Workflow Tasks

Workflow tasks determine the details of a task that workflow rules assign. You can create workflow tasks and associate them with workflow rules. When the business conditions for that workflow rule are met, the rule assigns tasks to designated users with the selected **Subject**, **Status**, **Priority**, and **Due Date** of the workflow task.

## Creating Workflow Tasks

Create workflow tasks before creating the workflow rules to use it. To create your workflow tasks:

1. Click **Setup | Customize salesforce.com | Workflow | Workflow Tasks**.
2. Click **New Task**.
3. Select a type of record and click **Next**. Remember workflow tasks can only be associated with workflow rules for the same type of record.
4. Select an assignee. An assignee can be in the form of a user, role, record owner, sales team role, or account team role.

### NOTE

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If the assignee of a workflow task is set to owner and the owner of a lead or case record is a queue, the person who triggered the rule is assigned the task.

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5. Enter a subject for the task.
6. Choose a due date, status, and priority. Due dates appear in the time zone of the assignee.
7. Check **Notify Assignee** to send an email notification when the task is assigned.
8. Enter any comments to add to the task.
9. Click **Save**.

### NOTE

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You may notice that all your tasks include **Created By** field. For workflow tasks, this field contains the name of the person who saved the record that triggered the rule to assign the task.

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# Advanced Page Layout Wizard

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Available in: **All** Editions

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With this release, creating and managing page layouts is greatly simplified for administrators with a new, intuitive wizard. This also allows for better organization and usability of salesforce.com pages.

- **Customizable page sections**

Administrators can now create an unlimited number of sections on a page layout and choose whether or not to display each section heading on the detail and edit pages. This will make it easy for companies to organize information in a logical manner.

- **Drag-and-drop layout wizard**

Using a new drag-and-drop interface, administrators can configure the entire layout from one setup page by dragging-and-dropping sections, fields, web integration links, and related lists onto a page layout. Page previews are available for both the detail and edit pages.

See Also:

[Setting Page Layouts on page 13](#)

## IMPLEMENTATION TIPS

- Your existing page layouts have not been changed in any way. Now you simply have an easier wizard for updating the page layouts whenever needed.
- Create custom page sections to organize sets of fields that are specific to certain users. This is especially important in Personal, Team, and Professional Editions where all users have the same page layout for each tab.  
For example, you can create a "Small Business" page section on accounts to hold those custom fields that are specific to your small business team.
- In the scrolling box of available fields in the page layout wizard, remember to click **Next Page** to view all of your fields. The box only displays 20 items at a time. If you have more fields, they will be displayed on separate pages within the box.

## BEST PRACTICES

- Always **Preview** the detail and edit pages before saving your page layout. This allows you to see how the pages will look for your users.
- Remember to click **Save** when you are finished modifying the page layout. If you inadvertently click one of the setup navigation links before clicking **Save**, your changes will not be saved.
- We recommend that you do not delete any of the standard page sections supplied by salesforce.com. These page sections are translated for international users and if you delete the section, all translations will be lost.  
Instead of deleting a section, you can simply remove all the fields from it. The section will not display to your users but it will still be available if you choose to add it back later.

# HOW TO USE PAGE LAYOUTS

## Setting Page Layouts

Administrators, and users with the "Customize salesforce.com" permission, can customize the page layouts for record detail and edit pages and Self-Service portal pages. Page layouts control the layout and organization of fields, web integration links, and related lists. They also help determine which fields are visible, read-only, and required.

To customize your organization's page layouts:

1. Select **Setup | Customize salesforce.com**, select the appropriate activity or tab link, and choose the **Page Layouts** link.
2. In Enterprise and Developer Edition organizations, select a layout name.
3. Click **Edit** to modify the page layout.
4. To arrange fields, web integration links, and related lists on the layout, select one or more items and drag them to the desired location.
  - Use Ctrl+click to select multiple items individually.
  - Use Shift+click to select multiple items as a group.
  - Items that are not in the page layout are displayed in the scrolling box on the right-hand side.
5. To set which fields are required and read-only, select one or more fields and click **Edit Field Properties**.
  - The field properties of some standard fields cannot be changed.
  - Fields marked as read-only are always editable by administrators and users with the "Edit Read Only Fields" permission.
  - If you make a picklist field read-only, all new records will contain the default value for that picklist.
  - If you mark the opportunity **Probability** field as read-only, the **Probability** value will still be updated automatically when a user changes the **Stage** value of an opportunity.
6. To organize the page using sections, click **Edit** next to an existing page section, or click **Create New Section** to create a new page section.
  - Enter a name for the section. Note that names of some standard page sections cannot be changed.
  - Set whether the section should have one or two columns.
  - Set the order in which users will be able to tab through the items in that section.
  - Set whether the section name should be shown on the detail and edit pages.
7. Select the **Overwrite users' personal related list customization** to apply the related lists in the page layout to all users, even if they have already customized their display.
8. Click **Preview** to review the page layout. From the preview in Enterprise and Developer Editions, select a profile to see how the pages will look for users with different profiles.
9. Click **Save** to finish.

# Dynamic Page Layouts and Field-Level Security

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

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Different business situations require you to collect and track different sets of information. For example, your sales team may need to track different information depending on whether an opportunity is an internal deal or a partner deal. Or you may require different lead qualification data based on a prospect's product interest. Or you may be using salesforce.com cases to track product complaints, billing inquiries, or internal IT trouble tickets.

In addition, different types of users may need access to different sets of fields. For example, you may have customer billing fields that salespeople need to view but only the Finance team should be able to modify.

Now you can set up different page layouts and field accessibility depending on the business situation and the user's profile, so your users can collect exactly the information required without having their screens cluttered with irrelevant fields.

- **Record types**

Since the last release of salesforce.com, companies can define different "Record Types" for different business situations (record types can be set up for accounts, contacts, campaigns, leads, opportunities, cases, tasks, and events). For each record type, companies can establish different sets of picklist values for all picklist fields.

- **Page layouts based on record type and profile**

With this release, you can also assign a different page layout to each record type; for example, each record type can now have a different set of displayed fields, different fields identified as "required" or "read only," different arrangements of fields, as well as different related lists and Web integration links. As a result, page layouts need not be based only on profiles but a combination of profile and record type.

- **Field accessibility view**

A new field accessibility view allows you to see at a glance the access to different fields (displayed, required, read only, or hidden) for each combination of profile and record type.

See [Advanced Page Layout Wizard](#) on page 12 for information about customizing page layouts in Personal, Team, and Professional Editions.

See Also:

[Overview of Page Layouts and Field-Level Security](#) on page 15

[Setting Field-Level Security](#) on page 16

[Setting Page Layouts](#) on page 16

[Assigning Page Layouts](#) on page 17

[Checking Field Accessibility](#) on page 18

## IMPLEMENTATION TIPS

- Before setting your page layouts and field-level security, plan which fields you want users to be able to view or edit, which fields you want required for each tab, and how you want the pages to display for users.
- Customizing page layouts and setting field-level security requires only the "Customize salesforce.com" permission.
- You need the "Manage Users" permission to assign page layouts to users based on their profile and record type.
- You need the "Customize salesforce.com" and "Manage Users" permissions modify the access for specific fields via the field accessibility grid.
- Set field-level security to restrict users' access to fields, and use page layouts primarily to organize detail and edit pages. This helps reduce the number of page layouts for you to maintain.
- Use the same page layout for all profiles for a specific record type.

## BEST PRACTICES

- Click **Preview** while editing a page layout to see how the page will look for users with different profiles. This preview includes any extra field security set in field-level security.
- To see why users can or cannot access a field, view the field accessibility - go to **Setup | Customize salesforce.com**, select a tab, click **Fields**, select a field, click **View Field Accessibility**. Hover over any field access setting to view the cause - page layout or field-level security. Then click the setting to modify.

## HOW TO USE PAGE LAYOUTS AND FIELD-LEVEL SECURITY

### Overview of Page Layouts and Field-Level Security

Use page layouts and field-level security to control the layout and organization of salesforce.com detail and edit pages as well as the access that users have to certain fields.

#### Page Layouts

- Control the layout and organization of detail and edit pages
- Control which fields, related lists, and web integration links users see on detail and edit pages
- Determine whether fields are visible, read-only, or required on detail and edit pages
- In Personal, Team, and Professional Editions, control which fields users can access in related lists, list views, reports, Offline Edition, search results, email and mail merge templates, web integration links, and when synchronizing data

#### Field-Level Security

- Available in Enterprise and Developer Editions only
- Restrict users' access to view and edit fields
- Override any less-restrictive field access settings in page layouts  
For example, if a field is required in the page layout and read-only in the field-level security settings, the field-level security overrides the page layout and the field will be read-only for the user.
- Control which fields users can access in related lists, list views, reports, Offline Edition, search results, email and mail merge templates, web integration links, and when synchronizing data

### Managing Page Layouts and Field-Level Security

Setting page layouts and field-level security consists of the basic steps listed below.

#### For Enterprise and Developer Editions

1. Create any custom fields and web integration links; see the online help for more information.
2. Create any custom profiles; see the online help for more information.
3. Create record types for different business scenarios; see the online help for more information.
4. Assign which record types are available to users with different profiles; see the online help for more information.
5. Set the field-level security for each profile to restrict users' access to specific fields; see [Setting Field-Level Security](#) on page 16.
6. Define page layouts to organize your pages; see [Setting Page Layouts](#) on page 16.

7. Assign page layouts to users based on profiles and record types; see [Assigning Page Layouts](#) on page 17.
8. Check the field accessibility grid to verify that all field access settings are correct; see [Checking Field Accessibility](#) on page 18.

## Setting Field-Level Security

Administrators, and users with the "Customize salesforce.com" permission, can define which fields users can access in salesforce.com. Field-level security settings let administrators restrict users' access to view and edit specific fields on detail and edit pages and in related lists, list views, reports, Offline Edition, search results, email and mail merge templates, web integration links, and when synchronizing data.

The fields that users see on detail and edit pages are a combination of page layouts and field-level security settings. The most restrictive field access settings of the two always apply. For example, if a field is required in the page layout and read-only in the field-level security settings, the field-level security overrides the page layout and the field will be read-only for the user.

You can define field-level security from a profile or from a particular field.

1. To set field-level security for all fields on a particular profile:
  - a. Select **Setup | Manage Users | Profiles**.
  - b. Select a profile to change the field access for users with that profile.
  - c. In the Field-Level Security section, click **View** next to the tab you want to modify, and click **Edit**.

Alternatively, set field-level security for a particular field on all profiles:

- a. Select **Setup | Customize salesforce.com**, click a tab or activity link, and click **Fields**.
  - b. Select the field you want to modify.
  - c. Click **Set Field-Level Security**.
2. Specify whether the fields should be visible, hidden, read-only, or editable for users based on their profile.

Note that these field access settings apply throughout salesforce.com. The settings also override any less-restrictive field access settings on the page layouts.

    - Use Ctrl+click to select multiple fields individually.
    - Use Shift+click to select multiple fields as a group.
  3. Click **Save**.

After setting field-level security for users based on their profiles, you can:

- Create page layouts to organize the fields on detail and edit pages; see [Setting Page Layouts](#) on page 16.

## Setting Page Layouts

Administrators, and users with the "Customize salesforce.com" permission, can customize the page layouts for record detail and edit pages and Self-Service portal pages. Page layouts control the layout and organization of fields, web integration links, and related lists. They also help determine which fields are visible, read-only, and required.

To customize your organization's page layouts:

1. Select **Setup | Customize salesforce.com**, select the appropriate activity or tab link, and choose the **Page Layouts** link.
2. In Enterprise and Developer Edition organizations, select a layout name.
3. Click **Edit** to modify the page layout.
4. To arrange fields, web integration links, and related lists on the layout, select one or more items and drag them to the desired location.



- Use Ctrl+click to select multiple items individually.
  - Use Shift+click to select multiple items as a group.
  - Items that are not in the page layout are displayed in the scrolling box on the right-hand side.
5. To set which fields are required and read-only, select one or more fields and click **Edit Field Properties**.
    - The field properties of some standard fields cannot be changed.
    - Fields marked as read-only are always editable by administrators and users with the "Edit Read Only Fields" permission.
    - If you make a picklist field read-only, all new records will contain the default value for that picklist.
    - If you mark the opportunity **Probability** field as read-only, the **Probability** value will still be updated automatically when a user changes the **Stage** value of an opportunity.
  6. To organize the page using sections, click **Edit** next to an existing page section, or click **Create New Section** to create a new page section.
    - Enter a name for the section. Note that names of some standard page sections cannot be changed.
    - Set whether the section should have one or two columns.
    - Set the order in which users will be able to tab through the items in that section.
    - Set whether the section name should be shown on the detail and edit pages.
  7. Select the **Overwrite users' personal related list customization** to apply the related lists in the page layout to all users, even if they have already customized their display.
  8. Click **Preview** to review the page layout. From the preview in Enterprise and Developer Editions, select a profile to see how the pages will look for users with different profiles.
  9. Click **Save** to finish.

After creating page layouts, you can:

- Assign page layouts to users based on profiles and record types; see [Assigning Page Layouts](#) on page 17.

## Assigning Page Layouts

Administrators, and users with the "Manage Users" permission, can assign which page layouts users see. A user's profile determines which page layout he or she sees. In addition, if your organization is using record types for a particular tab, the combination of the user's profile and the record type determine which page layout is displayed.

To assign page layouts:

1. Click **Setup | Customize salesforce.com**, select the appropriate activity or tab link, and choose **Page Layouts** or **Record Types**. Alternatively, select **Setup | Manage Users | Profiles**, and select a profile name.
2. From the page layout or record type list page, click **Layout Assignment**. From the profile, click **View Layout** next to any tab name in the Page Layouts section.
3. Click **Edit Assignment**.
4. Select one or more cells in the layout assignment table. The table shows you the current page layout assignments based on profiles or profile/record type combinations.
  - Use Ctrl+click to select multiple cells individually.
  - Use Shift+click to select multiple cells as a group.

5. From the **Layout to Use** drop-down list, select a page layout to assign to the selected profiles or profile and record type combinations.
6. Click **Save**.

To verify that users have the correct access to fields based on the page layout and field-level security, you can check the field accessibility grid; see [Checking Field Accessibility](#) on page 18.

## Checking Field Accessibility

Several factors help control whether users can view and edit specific fields in salesforce.com. Those factors are:

- **Page layouts** - You can set whether fields are visible, required, editable, or read-only.
- **Field-level security** - You can further restrict users' access to fields by setting whether those fields are visible, editable, or read-only. These settings override any field properties set in the page layout if the field-level security setting is more restrictive.
- **Permissions on profiles** - Some user permissions on profiles override both page layouts and field-level security settings. For example, users with the "Edit Read Only Fields" permission can always edit read-only fields regardless of any other settings. Note that the field accessibility grid does not include any field access restrictions based on permissions.

After setting page layouts, field-level security, and permissions on profiles, you can confirm users' access to specific fields using the field accessibility grid. You must have the "View salesforce.com configuration" permission to view field accessibility, and the "Customize salesforce.com" and "Manage Users" permissions to change field accessibility.

## Checking Field Accessibility for a Particular Field

1. To check field accessibility for a specific field, click **Setup | Customize salesforce.com**, select the appropriate activity or tab link, and choose **Fields**.
2. Select a field and click **View Field Accessibility**.
3. Confirm that the field access is correct for different profiles and record types.
4. Mouse-over any field access setting to see whether the field is required, editable, hidden, or read-only based on the page layout or field-level security.
5. Click any field access setting to change the field's accessibility in the page layout or in field-level security. See [Modifying Field Access Settings](#) on page 18 for more information.

For advanced options to check field accessibility by a specific profile, record type, or field, click **Setup | Security Controls | Field Accessibility**. From this page, you need to choose a particular tab to view and then select whether you want to check access by profiles, record types, or fields.

## Modifying Field Access Settings

From the field accessibility grid, you can click any field access setting to change the field's accessibility in the page layout or in field-level security. The Access Settings page then lets you modify the field access settings.

- In the Field-Level Security section of the page, set whether the field should be visible, hidden, read-only, or editable for users based on their profile.  
We recommend that you use field-level security to control users' access to fields rather than creating multiple page layouts to control field access.
- In the Page Layout section of the page, you can:

- Select the **Remove or change editability** radio button and then change the field access properties for the page layout. These changes will affect all profile and record type combinations that currently use this page layout.
- Alternatively, you can select the **Choose a different page layout** radio button to assign a different page layout to the profile and record type combination.

# Team-Based Account Management

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

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Supporting your multidivisional and multilingual customers requires a multitalented account team that has a united front. Together, your account team members can coordinate management efforts, share and distribute information, and respect the role of each team member.

Account teams are a lot like sales teams on opportunities in that they allow you to assign a group of users to work with an account together. Enabling this feature is simple and, once enabled, users can specify a role and level of access to data for account team members.

See Also:

[What is an Account Team? on page 20](#)

[Setting Up Account Teams on page 20](#)

[Adding Account Team Members on page 21](#)

## IMPLEMENTATION TIPS

- Start by enabling this feature for your organization. Next, add the Account Team related list to the appropriate page layouts.
- Account teams use the same roles as sales teams. So, any changes you make to the sales team roles affect your account team roles.
- When merging two accounts with different account teams, the merged account contains account team members of both accounts.

## BEST PRACTICES

- Although adding account team members is a quick way of giving other users access to your data, assign meaningful roles to members so that other users can see who is working on a deal.

## HOW TO USE ACCOUNT TEAMS

### What is an Account Team?

An account team is a team of users that work together on an account. For example, your account team may include an executive sponsor, dedicated support representative, and project manager.

You can build an account team on each account that you own. When selecting an account team member, choose a role to indicate the role the person plays on the account. Also, depending on your sharing model, you can specify the level of access each account team member will have to the account and any opportunities associated with that account. So, you can give some team members read-only access and others read-write access.

### Setting Up Account Teams

Your users can add account team members to accounts. Account teams are teams of users that share responsibility and work with a client together. Administrators, and users with the "Customize salesforce.com" permission, can enable account teams.

To enable or disable team selling:

1. Click **Setup** | **Customize salesforce.com** | **Accounts** | **Account Teams**.
2. Click the **Enable Account Teams** or **Disable Account Teams** link.

3. Select or deselect the **Account Teams Enabled** check box and click **Save**. Enabling account teams gives your users access to create and use account teams on accounts.
4. If you are enabling account teams, select the account page layouts that should include the new Account Team related list and click **Save**.

### NOTE

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Disabling account teams removes all account teams from all accounts and removes the Account Team related list from all page layouts.

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Every member of an account team has a role that he or she plays for the account, e.g., "Account Manager" or "Project Manager." You can customize the account team roles for your organization:

1. Click **Team Roles** from the Account Team Setup page.
2. Edit the existing entries or add new items.
3. Click **Save**.

If you have changed your team roles and want to update all existing records, you can use the **Replace Team Roles** link on the Account Team Setup page to globally replace the values in all existing records. See Replacing Picklists in the online help for more information.

### NOTE

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Account teams share roles with the sales teams on opportunities. So if you remove an account team role, that role will no longer be listed as an opportunity sales team role.

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## Adding Account Team Members

To build an account team, select an account and add account team members to that account.

To add account team members to an account:

1. View the account.
2. Click **Add** in the Account Team related list.
3. Select users to add as members of the account team.
4. Select the account and opportunity access that each member should have to the account.  
The access level cannot be less restrictive than your organization's default account access level.
5. Select a team role for each member, e.g., "Account Manager."
6. Click **Save**.

To add all account team members to an opportunity, click **Add Account Team** from the Sales Team related list on the opportunity.

### NOTE

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The **Account Access** and **Opportunity Access** options depend on your sharing model. In a Public sharing model, you may only have one option.

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You can run reports based on the account team members for accounts that you own. You can also run reports to get information about the accounts and account teams of which you are a member. See Limiting Report Results in the online help for more information on report criteria for account teams.

# Automated Response Management

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

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If you capture leads or cases online using salesforce.com's Web-to-Lead or Web-to-Case, you know how important it is to respond to each submission quickly. Now, you can personalize these responses using auto-response rules. Auto-response rules allow you to send specific email templates to leads or cases submitted online based on attributes of the incoming lead or case that you choose.

See Also:

[Setting Up Auto-Response Rules on page 22](#)

[Creating Auto-Response Rules on page 22](#)

[Editing Auto-Response Rules on page 23](#)

## IMPLEMENTATION TIPS

- The email template on your Web-to-Lead or Web-to-Case settings page is now your **Default Response Template**. This is the template used when no auto-response rules apply.

## BEST PRACTICES

- Make sure your default templates for Web-to-Lead and Web-to-Case submissions are generic because they may be sent to any case or lead when no response rules apply.
- Create product-specific email templates to use for Web-to-Lead submissions when a lead chooses a product of interest on your Web-to-Lead form.
- Use different email templates for your Web-to-Case submissions if the customer is a Platinum, Gold, or Standard customer.
- Prepare different email templates to use for different types of cases such as "Problem" or "Feature Request."

## HOW TO USE AUTO-RESPONSE RULES

### Setting Up Auto-Response Rules

Web-to-Case and Web-to-Lead response rules determine the email template to use when responding to cases and leads captured online. You can create response rules based on any attribute of the incoming case or lead. The email responses are listed in the Activity History related list of the lead or contact.

### Creating Auto-Response Rules

You can create as many response rules as you like but only one rule for cases and one for leads can be active at a time. Each rule can contain up to 500 entries. Rule entries determine the conditions that must be met and the email template to use when web-generated cases or leads meets those conditions.

- To create a Web-to-Case response rule, click **Setup | Customize salesforce.com | Cases | Auto-Response Rules**.
- To create a Web-to-Lead response rule, click **Setup | Customize salesforce.com | Leads | Auto-Response Rules**.
  1. Click **New**.
  2. Enter the rule name.
  3. Check the active box to make this rule the only one activated.

4. Click **Save**.
5. Create rule entries.

### Creating Response Rule Entries

1. Click **New** from the rule detail page.
2. Enter a number to specify the order this entry should be processed. The rule processes entries in this order and stops processing at the first matching entry and then sends the email. The rule uses the default template you specify on the Web-to-Lead or Web-to-Case Settings page when no response rules apply.
3. Select the criteria for this rule. See Entering Filter Criteria in the online help for instructions on entering filter criteria.
4. Enter an email sender's name.
5. Enter an email address for the sender.
6. Select an email template.
7. Click **Save**.

### Editing Auto-Response Rules

To edit Web-to-Case auto-response rules, click **Setup | Customize salesforce.com | Cases | Auto-Response Rules** and click a rule name.

To edit Web-to-Lead auto-response rules, click **Setup | Customize salesforce.com | Leads | Auto-Response Rules** and click a rule name.

- Click **Edit** to change the rule name.
- Click **New** next to the Rule Entries list to create a new rule entry.
- Click **Reorder** next to the Rule Entries list to change the order they are processed.
- Click **Edit** next to a rule entry to change it.
- Click **Del** next to a rule entry to delete it.

# Report Charting Engine

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Available in: **All** Editions

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Build graphic representations of your custom and standard report data using the report wizard. For all summary and matrix reports, select a chart type from the final step of the report wizard to view report data and a graphical representation of that data all in one place.

See Also:

[Standard Report Wizard on page 24](#)

[Custom Report Wizard on page 24](#)

## IMPLEMENTATION TIPS

- Your current standard and custom reports have not changed.

## BEST PRACTICES

- Charts and graphs are best suited for summary and matrix reports.
- Customize chart settings such as chart type, title, and colors to give your charts more impact.

## HOW TO USE REPORT CHARTS

Whether you are customizing a standard report or building a custom report from scratch, the report wizard now contains a step to select a chart type. You can view your report results just like you did before, but now you can display a chart at the top or bottom of the report results.

## Standard Report Wizard

To build a chart into a standard report, run the report from the Reports tab as usual. Click **Customize** to launch the report wizard. Go to the last page of the report wizard and choose the chart settings you desire. See [Select Chart Type](#) on page 24 for information on the chart options.

## Custom Report Wizard

1. To include a chart in a custom report, click **Create New Custom Report** from the Reports tab.
2. Choose a summary or matrix report for best chart results.
3. Follow the steps in the wizard using the **Next** button.
4. On the last page of the wizard, enter your chart settings to display your report data in chart format. See [Select Chart Type](#) on page 24 for details on the chart options.

## Select Chart Type

Chart Property	Description
<b>Chart Type</b>	Select the type of chart to use when representing the data in your report. See Chart Types in the online help for a description of each chart available.
<b>Size</b>	Select a size for the chart.



<b>Chart Property</b>	<b>Description</b>
<b>Location</b>	Determine where to place the chart in relation to your report.
<b>Title Color</b>	Select the color for the text of your chart title.
<b>Title Size</b>	Select the font size for the text of your chart title.
<b>Chart Title</b>	Enter a name for this chart
<b>Text Color</b>	Select a color for all the text and labels in your chart.
<b>Text Size</b>	Select a font size for all the text and labels in your chart.
<b>Background Fade</b>	Choose a direction for a gradient color background. Also select a beginning and end color for the gradient design. Use white for both if you do not want a background design.
<b>Legend Position</b>	Choose a place to display your chart legend in relation to your chart.
<b>Show Axis Labels</b>	Check this option if you want the chart to display names for each direction of your chart. This only applies to bar and line charts.
<b>Summary Value to Chart</b>	Choose the report value to use when summing data.

# Translation Workbench

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

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This release simplifies global deployments for multilingual organizations with the translation workbench. Use the translation workbench to activate supported languages and designate different translators for different languages. Those translators provide translated terms for your page layouts such as custom field labels, picklist values, and page layout sections.

With this new capability, salesforce.com users can work in the language in which they are most proficient, increasing data quality and productivity. Also, companies no longer need to create separate custom fields for each language, and an executive can now run reports in his or her own language with data from across the company.

See Also:

[Setting Up Translation Workbench on page 26](#)

[Adding and Editing Translated Languages on page 27](#)

[Entering Translated Terms on page 27](#)

[Updating Translated Terms on page 28](#)

## IMPLEMENTATION TIPS

- To enable this feature for your organization at no extra charge, contact salesforce.com.
- Assign the "Manage Translation" permission to any users who will be responsible for adding supported languages and assigning translators for supported languages.
- Make sure all translators have the "View salesforce.com Configuration" permission so that they can access the translation workbench setup area.

## BEST PRACTICES

- Since users have access to all translated terms for active languages, do not make a language active until translators are finished entering all translated values.
- Designate more than one translator for a language so that they can share responsibility and efforts.
- Before translating anything, make sure all your custom field names and picklist values are in the same language. Going forward, this is known as your master language. Then, translate your master picklist values and master custom field names into each language you support.
- Always use the corporate language when creating new custom fields or picklist values.
- For picklist values that you want available to all users, translate all values in to each language you support so that users can work in the language they are most proficient.

## HOW TO USE TRANSLATION WORKBENCH

### Setting Up Translation Workbench

Allow your users to work in the language they are most comfortable. Set up a translation workbench to add translated values for custom field names, picklist values, record types, and page layout sections.

The translation workbench also manages which users are responsible for translating different languages. Your translation workbench can manage translated values for any language salesforce.com supports.

Incorporating translated values is simple and completely invisible to your users. A user who selects French for a primary language can view all translated values in French regardless of the corporate language. Any reports that user runs will provide information in the user's language.

### How it works:

- Add supported languages
- Select translators for each language
- Give the "View salesforce.com Configuration" permission to each translator
- Translators enter translated terms

Maintaining your translated values is simple. When a custom field changes or new picklist values are added, the translation workbench indicates the particular term is out of date and needs translating.

To enable this feature for your organization, contact salesforce.com.

## Adding and Editing Translated Languages

Administrators and users with the "Manage Translation" permission can add languages that you support, activate or deactivate a language, assign translators for that language, and enter translated terms.

To add or edit translated languages and translators:

1. Click **Setup | Translation Workbench | Translation Workbench Setup**.
2. Click **Add** to activate a new language. Click **Edit** to change an existing supported language.
3. If adding a new language, choose a language.
4. Check the **Active** box to activate this language. Deselect this box to make an existing language inactive.

### TIP

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Make a language active only after translators have translated all values. This option makes the translated values available to users who have selected that language.

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5. Select translators for this language. Choose a user from the **Available List** and click **Add** to add the user to the **Selected List**.  
Users can only translate for languages where they are a designated translator. Translators must have the "View salesforce.com Configuration" permission.
6. Click **Save**.

## Entering Translated Terms

Users with the "View salesforce.com Configuration" permission can enter translated terms for the languages that they are designated as translators.

To enter translated values:

1. Click **Setup | Translation Workbench** and choose what you want to translate:
  - **Translate Custom Field Labels** - for custom field titles
  - **Translate Picklist Values** - for standard and custom picklists and any picklists on related lists
  - **Translate Record Types** - for record type names
  - **Translate Layout Sections** - for page layout section titles
2. Select the language and type of record to see a list of terms available for translation. The **Out of Date** column indicates that the element has been updated and the term may need translating.

3. If you are editing picklist values, select the name of the picklist field. For picklist values, check **Include Inactive Values** to show translations for deleted values. If you have more than 100 entries listed, click **Next Page** to view the next 100.
4. Click **Edit**.
5. Enter translated terms.
6. Click **Save**.

## Updating Translated Terms

When your administrator changes a custom field name, picklist value, record type, or page layout section name, the translated value will be marked **Out of Date**. Translators are responsible for keeping the translated terms updated.

For best results, have your translators check their translations frequently and be sure to notify them when changes occur.

To update translated terms, see [Entering Translated Terms](#) on page 27.

# Localized Account, Contact, and Lead Names

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Available in: **All** Editions

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If you work in a multilingual environment, you probably need to keep track of account, contact, and lead names in two languages. A localized name field enables you to store the names of your accounts, contacts, and leads in a local language without changing the standard name in a corporate language.

See Also:

[Adding Translated Names on page 29](#)

## IMPLEMENTATION TIPS

- This feature is available for all editions but not enabled automatically for any organizations. Contact salesforce.com to enable this feature at no extra charge.
- Once the new local fields are enabled, add them to the appropriate page layouts.

## BEST PRACTICES

- Use sidebar searches for local or standard names.

## HOW TO USE LOCALIZED NAMES

### Adding Translated Names

A local name stores a translated value for a corresponding account, contact, or lead field. For example, you can store the name of an account in the default language of your organization as well as the account's or user's language. The following fields can have corresponding local names:

Standard Field	Local Name Field
Account Name	Account Name (Local)
Contact: First Name	Contact: First Name (Local)
Contact: Last Name	Contact: Last Name (Local)
Lead: Company	Lead: Company Name (Local)
Lead: First Name	Lead: First Name (Local)
Lead: Last Name	Lead: Last Name (Local)

Local names do not affect the user's language settings. Depending on your page layout settings, they can both be displayed on the detail or edit page. To enable the ability to use local names, your administrator must first contact salesforce.com and then add the corresponding local name fields to your page layout settings.

# Redesigned Setup Area

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Available in: **All** Editions

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With the Winter '04 release, salesforce.com introduces an all-new application setup area to make it easier than ever for you to harness the power of salesforce.com. The new look and navigation options in setup will make it more efficient for administrators to customize and manage their salesforce.com deployments. End users will also find it easier to locate the personal setup areas they commonly need to access.

Key features are:

- **New organization architecture** - All administrative functions in setup have been organized and grouped based on a new logical structure.
- **Navigation tree** - A new tree-based navigation makes it easy for users to explore options at a glance without having to click on every page.
- **Task-based descriptions** - Setup functions now have easy-to-understand, task-based explanations, making it easy for users to locate what they need (for example, set your quota, change your language, etc.).
- **Getting started options** - Some setup overview pages now include Getting Started sections with links to tutorials and tip sheets to help you learn more about specific features.

See Also:

[Personal Setup on page 30](#)

[Administration Setup on page 31](#)

[Order Center on page 33](#)

## IMPLEMENTATION TIPS

- Your existing personal and organization preferences have not been changed in any way. The only difference is a new, easier-to-use setup interface.

## BEST PRACTICES

- Whenever you are modifying your personal or organization setup, always remember to click the **Save** button to submit your changes. If you choose another option from the Setup navigation tree without clicking **Save**, your changes will be lost.
- Click any of the tasks from the setup overview pages to jump directly to the appropriate setup page.
- Use the tutorials and tip sheets in the red Getting Started sections to help you and your users learn more about specific salesforce.com features.

## HOW TO USE SETUP

The setup navigation tree consists of three major areas - **Personal Setup**, **Administration Setup**, and **Order Center**. Each section contains the options listed below. Some options may not be available to you based on your Edition or your user permissions.

### Personal Setup

The Personal Setup page, accessed by clicking **Setup | Personal Setup**, contains setup and customization options to help you personalize salesforce.com for your personal use.

## My Personal Information

Expand the **My Personal Information** folder under **Personal Setup** to access the following options:

- **Personal Information** - Edit your user information, create quotas, view login history, and more.
- **Change My Password** - Change your salesforce.com password.
- **My Groups** - Add, update, or delete your personal groups.
- **Change My Display** - Customize your display of salesforce.com tabs and related lists.
- **Grant Login Access** - Allow salesforce.com Customer Support representatives to log in to your account.
- **Record Type Selection** - Set your preferences for automatic selection of default record types.

## Email

Expand the **Email** folder under **Personal Setup** to access the following options:

- **My Email Settings** - Set your outbound email settings.
- **My Templates** to create and edit your own email templates.
- **My Stay-in-Touch Settings** - Set your preferences for emails requesting contact information updates.
- **Outlook Edition** - Download the salesforce.com Outlook integration plug-in.

## Mobile Users

Expand the **Mobile Users** folder under **Personal Setup** to access the following options:

- **Sync to Outlook/Palm** - Synchronize your data with Outlook or Palm™.
- **Offline Edition** - Download the Offline Edition client.
- **Wireless Edition** - Set up your Wireless Edition access and download related files.

## Import

Expand the **Import** folder under **Personal Setup** to access the following options:

- **Import My Contacts** - Import your personal accounts and contacts.

# Administration Setup

The Administration Setup page, accessed by clicking **Setup | Administration Setup**, contains setup and customization options to help you set up your salesforce.com organization.

## Manage Users

Expand the **Manage Users** folder under **Administration Setup** to access the following options:

- **Users** - Create, edit, and deactivate users.
- **Roles** - Define your organization's role hierarchy.
- **Profiles** - Set user profiles to control users' permissions, login access, and field-level security.
- **Public Groups** - Add, update, or delete public groups.
- **Login History** - View when your users are logging in.
- **Training History** - View which users have taken online training.

## Customize salesforce.com

Expand the **Customize salesforce.com** folder under **Administration Setup** to access options for customizing each of the salesforce.com tabs. You can also access options to customize workflow, products, activities, users, leads management, and customer support management.

## Company Profile

Expand the **Company Profile** folder under **Administration Setup** to access the following options:

- **Company Information** - Update your company's information.
- **Manage Currencies** - Set up multiple currencies.

## Security Controls

Expand the **Security Controls** folder under **Administration Setup** to access the following options:

- **Sharing Rules** - Define how your users share data.
- **Field Accessibility** - View the access that users have to specific fields based on profile and record types.
- **Password Policies** - Define password policies for security.
- **Expire All Passwords** - Expire passwords for all users in the organization.
- **Session Settings** - Lock users' sessions to an IP address or change session timeout settings.
- **Setup Audit Trail** - View which users have recently changed your organization's setup.
- **API Audit Trail** - View how often your organization is using the sforce API.

## Communication Templates

Expand the **Communication Templates** folder under **Administration Setup** to access the following options:

- **Letterheads** - Create branded letterheads for HTML emails.
- **Email Templates** - Create email templates to standardize communication.
- **Mail Merge Templates** - Upload templates for mail merge documents.

## Translation Workbench

Expand the **Translation Workbench** folder under **Administration Setup** to access options to translate custom field names, picklist values, record types, and page layout section names for your international users.

## Data Management

Expand the **Data Management** folder under **Administration Setup** to access the following options:

- **Import Accounts/Contacts and Import Leads** - Import your organization's contacts, accounts, and leads.
- **Data Export** - Export your organization's data.
- **Storage Usage** - View how much disk space your organization is using.
- **Mass Transfer Records** - Transfer multiple records at one time.
- **Mass Delete Records** - Delete multiple records at one time.

## Sforce Application Server

Expand the **Sforce Application Server** folder under **Administration Setup** to access options for sforce API developers.

- **Sforce Custom Objects** - In Enterprise and Developer Edition organizations, create custom data and custom fields to store information unique to your organization.



- **Sforce WSDL Generator** - In Enterprise and Developer Edition organizations, administrators can download the Web Services Description Language (WSDL) file to integrate and extend salesforce.com using the sforce API. See <http://www.sforce.com> for more information.

## Order Center

The Order Center page, accessed by clicking **Setup | Order Center**, contains options to help you manage your salesforce.com organization.

- **Subscription Summary** - Order more licenses and products, change your billing information and view your organization's orders and invoices.

# Stay-in-Touch Relationship Builder

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Available in: **All** Editions

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Keep in touch with your contacts and cultivate your relations with them using the Stay-in-Touch email option. Use the Stay-in-Touch option on any contact to send a formatted email to your contacts requesting that they update their contact information and return it to you. You can accept or reject the updated information in one click.

See Also:

[Sending Stay-in-Touch Requests on page 34](#)

[Editing Stay-in-Touch Settings on page 34](#)

[Requesting Contact Information Updates on page 35](#)

[Merging Updated Contact Information on page 35](#)

[Mass Stay-in-Touch Update on page 35](#)

## IMPLEMENTATION TIPS

- Users can send Stay-in-Touch requests if they have the "Send Email" permission to send emails.
- Users can send mass Stay-in-Touch requests if they have the "Mass Email" permission to send mass emails.
- Users can send single Stay-in-Touch requests regardless of the contact's **Email Opt Out** setting. Users are restricted from sending mass Stay-in-Touch requests to contacts that have the **Email Opt Out** box checked.
- For mass Stay-in-Touch requests, use the default "My Stale Contacts" list view to get a list of all the contacts you own that you haven't create or sent a Stay-in-Touch request to in the last 90 days.

## BEST PRACTICES

- Use Stay-in-Touch requests to build relationships with contacts you have not contacted in 3 months.

## HOW TO USE STAY-IN-TOUCH

### Sending Stay-in-Touch Requests

A quick and easy way to retrieve updated contact information from your contacts is to use the **Stay-in-Touch** option on any contact. Use **Stay-in-Touch** for contacts you own and those that are associated with accounts that you own.

#### How it works:

- Select a contact and click **Stay-in-Touch**.
- Review the email to the contact and click **Send**.
- The contact receives an email, clicks the link, and updates contact information.
- You receive an email with the updated information. Then click to update, review, and accept or reject the updated information to the contact record.

### Editing Stay-in-Touch Settings

Before sending contact update emails, set your preferences for these outbound messages.

1. Click **Setup | Email | My Stay-in-Touch Settings**.

2. Select an automatic BCC option indicating if you would like to be copied on the outgoing email.
3. Enter a subject for the email.
4. Enter a note if you would like to standardize the content of your message.
5. Enter a signature with your contact information. Include any merge fields in your subject, body, note, or signature using the available merge fields at the top. Just copy and paste the merge field into the appropriate space.
6. Click **Save**.

## Requesting Contact Information Updates

To request updated information from a contact:

1. Find the contact that you want to update.
2. Click **Stay-in-Touch**.
3. Review the email and click **Send**.

To make all your outgoing messages consistent, set up your outgoing Stay-in-Touch settings from Personal Setup. See [Editing Stay-in-Touch Settings](#) on page 34 for more information.

### NOTE

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To send Stay-in-Touch requests, users need the "Send Email" permission to send emails. Users can send Stay-in-Touch requests regardless of the contact's **Email Opt Out** setting.

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## Merging Updated Contact Information

When one of your contacts updates the request and returns the updated information, you will receive an email with a link. You can view the updated information and click **Update Now** to merge the updated information with the information you have in your contact. To merge the new information with your data:

1. Click **Update Now** from the email you receive.
2. Review the updated information, noted with the previous values.
3. Click **Accept Changes** to update your data. Click **Reject Changes** to keep your current information on this contact.

### NOTE

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These updates do not trigger workflow rules.

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## Mass Stay-in-Touch Update

If you have the "Mass Email" permission, you can request updated contact information from more than one contact at a time. See [Sending Stay-in-Touch Requests](#) on page 34 for information on the process of requesting and merging updated contact information.

To send a mass Stay-in-Touch email:

1. Click the Contacts tab.
2. Click **Mass Stay-in-Touch** from the Contact Tools section.
3. Select a view or create a view of contacts you want to solicit for updated information. See [Creating Custom List Views](#) in the online help for instructions on creating a new view.
4. Click **Go**.
5. Review the list of recipients and click **Next**.
6. Review the information to be sent and click **Send**.

Contacts can update their information and return updated information to you. You will receive updates in email and can merge updated information as you receive it. See [Merging Updated Contact Information](#) on page 35 for information on processing these replies.

#### NOTE

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Users can only send mass Stay-in-Touch requests to contacts that do not have the **Email Opt Out** box checked.

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# Enhanced Web Integration Links

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Available in: **All** Editions

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Web integration links are a simple and effective way to integrate salesforce.com with other web-based or web-enabled applications by passing text strings and parameters. In this release, web integration links have been enhanced in two main areas:

- **Window controls**  
You now have greater control over the browser windows that are opened when clicking web integration links. Properties such as position, size, borders, title, and scroll can be set to better manage the user experience.
- **Browser frames**  
You have the option to make web integration links open up within your existing salesforce.com browser window — with the salesforce.com “header” and “sidebar” forming the outer frame — giving users a more seamless experience between salesforce.com and other integrated applications.

See Also:

[Defining Web Integration Links on page 37](#)

## IMPLEMENTATION TIPS

- Administrators, and users with the "Customize salesforce.com" permission, can create web integration links.
- Use merge fields to include salesforce.com data as tokens within the web integration link. For example, you could include an account name in a URL that searches Yahoo: `http://search.yahoo.com/bin/search?p={!Account_Name}`.
- Your existing web integration links have not been modified in any way. If desired, you can edit your existing links to take advantage of the new features for web integration links.

## BEST PRACTICES

- Set the web integration link to open in a popup window if the link contains content that users need to view outside of the salesforce.com window.
- Set the web integration link to open within the salesforce.com main window if the content is specific to salesforce.com and you don't want users to be taken to another window while working.
- Use the "open in salesforce.com window with sidebar" option to open the content within salesforce.com while keeping the list of most recently used items accessible to users. This helps users return quickly to what they were working on.
- When opening web integration links to non-secure websites (that is, websites that start with "http://" rather than "https://", users may be prompted to "display non-secure items." This is standard browser behavior and not a problem with the web integration link itself.

## HOW TO USE WEB INTEGRATION LINKS

### Defining Web Integration Links

To add web integration links:

1. Select **Setup** | **Customize salesforce.com**, select the appropriate tab or users link, and choose **Web Integration Links**.

2. Choose **New** to add a link.
3. Enter the **Link Label** as it should appear to your users on record detail pages, and select the **Link Encoding**.  
The default encoding is UTF-8. Change this default if the URL to which you are passing information requires data in a different format.
4. Click **Next**.
5. Enter the **Link URL** as it would appear in a web browser.  
To pass specific salesforce.com data in the URL, substitute merge fields for the data elements in the URL.
6. Click **Next**.
7. Select how you want the link to open.  
It can open in its own popup window or within the main salesforce.com window with or without the standard salesforce.com sidebar.
8. Click **Next**.
9. For links that you have chosen to open in a popup window, set the window properties. If you leave the window properties blank, the web integration link will use the default settings of the user's browser. The properties are:

Window Property	Description
<b>Width (in pixels)</b>	The width of the popup.
<b>Height (in pixels)</b>	The height of the popup.
<b>Window Position</b>	The location on the screen where the popup should open.
<b>Show Address Bar</b>	Show the browser's address bar which contains the URL.
<b>Show Scrollbars</b>	Show browser scrollbars for the popup.
<b>Show Toolbars</b>	Show the browser toolbars. Toolbars normally contain navigation buttons like Back, Forward, and Print.
<b>Show Menu Bar</b>	Show the browser menus. The menus typically contain option like <b>File</b> and <b>Edit</b> .
<b>Show Status Bar</b>	Show the status bar at the bottom of the browser.
<b>Resizable</b>	Allow users to resize the popup window.

10. Click **Next** to confirm the web integration link.
11. Click **Save**.
12. Edit the page layout for the appropriate tab to display the new link.  
If you add a web integration link for users, it is automatically added to the Useful Links section of the User detail page.

#### NOTE

The **Link URL** can be up to 3000 bytes. When data is substituted for the tokens in the URL, the link may exceed 3000 bytes. Your browser may enforce additional limits for the maximum URL length.

# SFORCE 2.0 MAJOR ENHANCEMENTS

Salesforce.com's Winter '04 release includes several enhancements to sforce, salesforce.com's online application platform. The industry-leading sforce platform makes it easier than ever for companies to customize, integrate, and extend salesforce.com to match their own unique business requirements. Open, secure, and reliable, sforce allows business users to customize their CRM and developers to easily integrate and extend salesforce.com by leveraging familiar tools and languages. This makes sforce a welcome solution for any company serious about custom-tailored CRM.

Learn more at [www.sforce.com](http://www.sforce.com).

## sforce Web Services Enterprise API

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

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Salesforce.com is built on the sforce Web services application platform. In this release, a new SOAP/WSDL-based API is introduced — with strong typing and an improved object model. For example, when adding a field to an object in salesforce.com, a new WSDL is automatically generated on the salesforce.com server to reflect this new field. This makes the new sforce Enterprise Web Services API very easy to use in all modern development tool environments.

In addition, the query, insert and updated methods are enhanced and optimized for bulk operations.

Please note that all existing APIs — including the older XML-RPC API and the existing SOAP API — will continue to be supported. However, all future advances and enhancements will focus on the new sforce Enterprise Web Services API.

In this release, we have also increased the number of salesforce.com elements exposed through the new sforce Enterprise Web Services API.

Learn more at [www.sforce.com](http://www.sforce.com).

## sforce Object Query Language

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

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With this release, salesforce.com introduces a new sforce Object Query Language (sforce OQL) to simplify querying of objects through the Web services API. This will significantly speed up development times for developers coding sforce applications in Java or Microsoft environments. The language supports an SQL-like syntax with standard "Select... From... Where" syntax. A full range of operators, including AND and OR, are supported in the "Where" clause. Advanced SQL features such as joins, ordering, and grouping are not supported in the sforce OQL language.

Learn more at [www.sforce.com](http://www.sforce.com).

# sforce Custom Objects

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

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Today, administrators can create custom fields on standard salesforce.com records, including accounts, contacts, campaigns, leads, opportunities, cases, and activities. With this release, you can now create your own custom data — called “sforce custom objects.” For example, if you need to track order data, you can create a new sforce custom object labeled “Orders.” You can then add custom fields to these new sforce custom objects.

Data related to sforce custom objects can be collected and displayed in a Web page developed using standard tools such as BEA WebLogic, Borland JBuilder, or Microsoft Visual Studio. A Web services interface is automatically created for all sforce custom objects, making them available via our sforce Enterprise Web Services API for back-office integration. All data in sforce custom objects is backed up and secured in exactly the same way as all other salesforce.com data, ensuring that your sensitive information is protected. In this release, more advanced features, such as reporting, automatic user interface generation, field-level security, sharing model, referential integrity, and text search will not be included for sforce custom objects.

Learn more at [www.sforce.com](http://www.sforce.com).

See Also:

*[Defining sforce Custom Objects on page 40](#)*

*[Creating Custom Fields for sforce Custom Objects on page 41](#)*

## IMPLEMENTATION TIPS

- In the salesforce.com user interface, you can define up to 50 sforce custom objects, create up to 250 custom fields for each sforce custom object, and delete sforce custom objects.
- Use the sforce API to create individual records and populate them with your organization’s data.
- You must be an administrator, or have the "Customize salesforce.com" permission, to create, edit, and delete sforce custom objects.

## HOW TO USE SFORCE CUSTOM OBJECTS

### Defining sforce Custom Objects

To define an sforce custom object in Enterprise and Developer Edition organizations:

1. Click **Setup | Sforce Application Server | Sforce Custom Objects**.
2. Choose the **New Custom Object** button.
3. Fill in the information for the sforce custom object.
  - **Name** - a unique name that will be used to refer to the object when using the sforce API. It can contain only alphanumeric characters and must begin with a letter.
  - **Label** - a name that will be used to refer to the object in any user interface pages.
  - **Description** - an optional description of the object.
4. Click **Save**.



## NOTE

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In the salesforce.com user interface, you define only the metadata for the sforce custom object. You must use the sforce API to create individual records and populate them with your organization's data.

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## Creating Custom Fields for sforce Custom Objects

In Enterprise and Developer Edition organizations, you can create up to 250 custom fields for each sforce custom object you define.

To create a custom field for an sforce custom object:

1. Click **Setup | Sforce Application Server | Sforce Custom Objects**.
2. Select an sforce custom object from the list.
3. Click **New** in the Custom Fields related list to create a custom field for the sforce custom object.

From the Custom Fields related list, you can also edit and delete existing custom fields.

# ADDITIONAL ENHANCEMENTS

## Cases

- Keep Self-Service users updated on new public comments added to their cases. When creating a new comment on a case, check the **Send Customer Notification** option to send the customer an email notification about the new comment. On the Self-Service Settings page, you can check the **Default Setting** option to make the notification option checked by default. You can also select an email template to use when notifying customers about new comments on their cases.

## Competitors

- Define a standard list of your competitors for users to select when adding competitor names to opportunities. Go to **Setup | Customize salesforce.com | Opportunities | Competitors** and click **New** to define new competitors.
- Create reports of the competitors on your opportunities. Choose **Opportunities with Competitors** when creating a custom report and include the competitor's strengths and weaknesses.

## Custom Fields and Picklist Values

- Create new custom fields using a new data type: **Date/Time**. Custom fields can now store a date and time stamp using this new data type.
- When creating custom fields, set the **Name** in addition to the **Label** of the custom field. Use the label for page layouts and email and mail merge templates. Use the name for integration purposes such as web integration links and when referencing the custom field in the API.
- Add custom fields on the Users page to track your own custom information on your users. Personal and Team Editions can add up to five user fields, and other editions can add up to ten user fields.
- If your organization uses record types, you can now add multiple picklist values to a field at one time. Previously the user interface required you to add new values one at a time.
- All standard and custom fields now include a page that shows the details for the field. From this page, you can add or replace picklist values, edit the field (if it is a custom field), and in Enterprise and Developer Editions, set field-level security and check who can access the field. To view a field detail page, click **Setup | Customize salesforce.com**, select a tab link, click **Fields**, and select the name of the field.

## Documents

- Save space in your documents library by storing a link to the document on your network instead of uploading the document itself.
- Let your users know that a document is confidential by checking the **Internal Use Only** flag when uploading or document or link to a document in your document library.
- Keep track of all the documents stored in your document library by running the **Documents** report. This new standard report lists the folder, document name, file type, file size, author, and description.

- To email a document to a contact, view the document, and click **Email Document**. Then fill in the details of the email, and click **Send**. The document is sent as an attachment to the email and is logged in the Activity History for the contact. Documents that reference URLs rather than physical files cannot be emailed.
- New complimentary document storage stores files in your document library. When you have exceeded your complimentary document storage space, you can use your general storage for documents. The storage space is:

salesforce.com Edition	Document Storage Limit
Professional	50MB complimentary document storage
Enterprise	250MB complimentary document storage

## Email and Mail Merge Templates

- You are no longer required to store email templates in the Unfiled Public Email Templates folder to use them as system emails. Use the new email template selector that allows you to choose an email template from any visible email template folder. Use this new selector when:
  - Creating assignment and escalation rules
  - Setting up Web-to-Case
  - Setting up Web-to-Lead
  - Customizing support settings
  - Setting up Self-Service portal
  - Selecting email templates to send to a person
  - Storing items in folders
- Upload and send mail merge documents using a new engine. Salesforce.com no longer imposes the following restrictions:
  - **Password protected documents** - You can now upload password protected documents. However, users will be unable to use it without the password. Make sure you give the password to the users that need it.
  - **VBA code** - Salesforce.com does not prevent you from uploading mail merge documents with VBA code but depending on the code, they may not work as you assume.
  - **Blank merge field** - Merge fields can be blank but will not be replaced with any values.

### Implementation Tips

- The first time you run mail merge, salesforce.com attempts to install components on your machine. If you do not have permissions to install programs on your machine, log in as the administrator of your machine before installing these components or contact your IT department for assistance.

## Merge Fields

- Use new merge fields in your case email templates that show the account or contact associated with a case:
  - Case Account `{!Case_Account}`
  - Case Contact `{!Case_Contact}`
- All case merge fields are now available for use in mail merge documents and templates.

- Products and schedules fields are now available for use in mail merge documents and templates, allowing you to create detailed, customized quotes for your customers.
  - To download a sample mail merge document using product and schedule fields, click **Setup | Communication Templates | Mail Merge Templates**, and then select the link to download the sample templates.
  - The available product and schedule merge fields are:

### Product Fields on Opportunities

Salesforce.com Field Name	Merge Field Name
Product merge fields can only be used in mail merge templates. They are available only in organizations that have enabled products.	
Date	Opportunity_LineItem_Date
Default Unit Price (as defined in price book)	Opportunity_LineItem_DefaultUnitPrice
Line Description	Opportunity_LineItem_Description
Line Item End (Place this merge field after the product merge fields in your template. Include Line Item Start and Line Item End once in your mail merge template to list all the products on an opportunity).	Opportunity_LineItem_End
Line Item Start (Place this merge field where you want to begin listing product merge fields in your template.)	Opportunity_LineItem_Start
Product Code	Opportunity_LineItem_ProductCode
Product Description (as defined in price book)	Opportunity_LineItem_ProductDescription
Product Name	Opportunity_LineItem_ProductName
Quantity	Opportunity_LineItem_Quantity
Total Price	Opportunity_LineItem_TotalPrice
Unit Price	Opportunity_LineItem_UnitPrice

## Opportunities

- The opportunity Stage History related list now shows the name of the person who changed the record and the time and date of that change.

- Add product descriptions to the products on your opportunities. The new **Description** field is available from the Products related list.
- When transferring opportunities, check the new **Keep Sales Team** box to transfer all sales team members on the opportunity to the new owner.

## Org Charts

- Create organization charts of your contacts and accounts using the **Reports To** field on a contact. If each contact in an account contains another contact in the **Reports To** field, click **View Org Chart** to display an interactive chart of the contact hierarchy.

## Products

- On an opportunity with products, the new **Edit All** button lets you quickly edit all of the product items at once.
- The Setup navigation tree now includes a **Products** folder under **Customize salesforce.com**. Go here to set up your company's price books, products, and schedules.

## Reports

- When exporting a report to Excel, choose an encoding setting so that your exported data is in the correct format.
- View trends in your data by using dates to group reports. In the custom report wizard on the "Select Grouping" step, you can choose to group your data by a specific time period, such as weeks, months, years.
- Opportunity reports now allow you to include the **Account Created Date** and **Account Last Modified Date** fields.
- New reports include:
  - **Documents** report
  - **Account Teams** report
  - **Opportunity Competitors** report (available from the custom report wizard only)

## Role Hierarchy

- View your role hierarchy with more flexibility using the expanding and collapsing control options.

## Search

- Use wildcards when searching in *lookup* windows. To improve search results, append an '\*' wildcard to your search string. For example, searching for *bob jo\** finds items with *bob jones* and *bob johnson*.
- You can no longer search for leads and contacts using the **Salutation** field.

# Session Timeout

- Activate a session timeout limit that prompts users to log out or continue using salesforce.com after a designated period of inactivity. You can set timeout limits from thirty minutes to two hours. When users do not respond to this prompt, they will be required to log in again. Go to **Setup | Security Controls | Session Settings** to enable or disable session timeout.

# Setup Audit Trail

Salesforce.com adds to your administrative capabilities with a new audit trail that documents every action performed under setup, including who made the change and when it was made. Having this history allows you to trace setup changes and quickly identify/address policy violations. The setup audit trail is available in Team, Professional, Enterprise, and Developer Editions.

## How To Use The Setup Audit Trail

To view the setup audit trail history, click **Setup | Security Controls | Setup Audit Trail**. In Team Edition, click **Setup | Company Profile | Setup Audit Trail**.

To download your organization's full setup history for the past 180 days, click the **Download** link. You must be an administrator or have the "View salesforce.com configuration" permission to access the setup audit trail history.

The setup audit trail history shows you the 20 most recent setup changes made to your organization. It lists the date of the change, who made it, and what the change was.

The setup audit trail history tracks the following types of changes:

- Company information changes
- Weekly data export requests
- Multiple currency setup changes
- User, role, and profile changes
- Public groups, organization-wide sharing, and sharing rule changes
- Password policy changes
- Mass delete, mass transfer, and import wizard use
- Company message changes
- Page layout changes
- Field-level security changes
- Changes to lead settings, lead assignment rules, and lead queues
- Changes to support settings, business hours, case assignment and escalation rules, and case queues

# Sharing

- Sharing rules are now automatically reevaluated whenever you make modifications to groups and roles. Modifications might include adding or removing individual users from a group or role, changing which role a particular role reports to, or adding or removing a group from within another group. However, if these modifications affect too many users at once, you are warned that the sharing rules will not be automatically reevaluated, and you must manually recalculate them.

- When viewing the sharing details for an individual account, there is now a new page that lets you view which associated records an individual user owns or has sharing access to. This is helpful when trying to figure out why a particular user has access to the account in question. To view this new page, view the account, click **Sharing**, select the **Associated record owner or sharing** link in the Reason column.
- Managing your personal and public groups is now even easier with the improved setup navigation. To access personal groups, click **Setup | My Personal Information | My Groups**. To manage public groups, click **Setup | Manage Users | Public Groups**.

## Users and Permissions

- Add custom fields on the Users page to track your own custom information on your users. Personal and Team Editions can add up to five user fields, and other editions can add up to ten user fields.
- Add web integration links on the Users page. For example, you can link salesforce.com to internal employee databases or HR systems
- Control users ability to create new accounts with the new "Create Accounts" permission by adding or removing it from any profile. Any profiles that currently have the "Edit Accounts" permission will automatically contain the "Create Accounts" permission, including custom profiles.
- Apply the "Delete Accounts" permission to the appropriate profiles. All profiles that currently have "Edit Accounts" will also include the "Delete Accounts" permission.  
To add the "Delete Accounts" permission to a profile, it must also have the "Edit Accounts" permission.  
If you remove the "Delete Accounts" permission from any profile, those users are unable to delete any accounts, including the ones they own, or merge accounts since that involves a deletion.

## Weekly Export

- If your organization uses the weekly export data backup service, you can now create your backup export every six days, instead of every seven. This allows you to more easily keep a regular backup schedule.

