

# Salesforce Spring '07 Release Notes

Note: Any unreleased services or features referenced in this or other press releases or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make their purchase decisions based upon features that are currently available.



# Table of Contents

|  |    |
|--|----|
| About the Release Notes.....                                       | 5  |
| Summary of Spring '07 Features and Impact on Salesforce Users..... | 5  |
| <b>Salesforce CRM</b> .....  | 8  |
| Case Hierarchies.....  | 8  |
| Additional Salesforce CRM Enhancements.....                        | 10 |
| <b>Apex Platform</b> .....   | 13 |
| Search Enhancements.....   | 13 |
| Time-Based Workflow.....   | 16 |
| Lookup Relationships between Standard Objects.....                 | 24 |
| Outlook Edition 3.0 Limited Release.....                           | 25 |
| Email Relaying.....  | 27 |
| Apex Web Services API 9.0.....                                     | 29 |
| Apex Code Developer Preview.....                                   | 29 |
| Additional Apex Platform Enhancements.....                         | 30 |



## About the Release Notes

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

### What's Included in the Release Notes

For every new major enhancement, the Release Notes provide:

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

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

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

## Summary of Spring '07 Features and Impact on Salesforce Users

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

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

| Feature   | Enabled by Default?                            | Immediate User Impact  |
|---|--|--|
| <a href="#">Case Hierarchies</a>                        | No. An administrator must set up this feature. | None until an administrator exposes the new field and related list.  |
| <a href="#">New Campaign Fields</a>                     | Yes  | Campaign fields available in reports for all users.  |
| <a href="#">Customizable Forecasting Enhancements</a>   | Yes  | Forecast enhancements that make it easier to override forecasts or view key information are available to all forecasting users.  |
| <a href="#">Marketing Enhancements to Team Edition™</a> | Yes  | All Team Edition™ users now have access to leads and the Marketing app. Furthermore, administrators can access Web-to-Lead.  |
| <a href="#">Opportunity Cloning Enhancements</a>        | Yes  | Opportunity cloning behavior now varies depending on whether products are involved.  |
| <a href="#">Report Enhancements</a>                     | Yes  | Exporting reports to CSV (comma separated values) files for European locales and custom contract history reports are available to all users who have access to view and customize reports. |

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

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

# SALESFORCE CRM

## Case Hierarchies

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

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

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

### Implementation Tips

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

### Best Practices

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

## About Case Hierarchies

### Viewing Case Hierarchies

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

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

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



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

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

### Related Cases

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

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

From the Related Cases related list, click:

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

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

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

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

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

## Setting Up Case Hierarchies

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

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

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

## Additional Salesforce CRM Enhancements

### New Campaign Fields

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

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

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

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

### Customizable Forecasting Enhancements

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

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

## Marketing Enhancements to Team Edition™

With Spring '07, Team Edition now includes enhanced marketing functionality that will integrate your marketing and sales processes.

### Leads

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

### Web-to-Lead

With Spring '07, Team Edition organizations can now use Web-to-Lead to gather information from their company's website and automatically generate leads. Web-to-Lead is automatically enabled for all Team Edition organizations with the default lead owner defaulted to the user who originally signed up for Salesforce. For more information, see Capturing Web Leads.

## Opportunity Cloning Enhancements

Spring '07 includes changes to how opportunities are cloned.

Cloning an opportunity varies if products are involved:

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

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

## Report Enhancements

Spring '07 includes the following enhancements to reports:

### Exporting Reports in CSV format

Now, when exporting reports in the CSV (comma separated values) format, the locale settings on your user detail page determine the field separator included in the exported file. For example, if your locale setting is English (United States), where the decimal separator is a '.' (period), then when you export a report in CSV format, the field separator will be a ',' (comma). However, if your locale setting is French (France), where the decimal separator is a ',' (comma), then when you export a report in CSV format, the field separator will be a ';' (semicolon). For more information about locale settings, see "Editing Your Personal Information" in the Salesforce online help.

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

### Contract Field History Report

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

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

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

## Salesforce PRM

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

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

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

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

Here are some tips for working with these new features:

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

# APEX PLATFORM

## Search Enhancements

Available in: **All Editions**

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

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

### Implementation Tips

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

### Best Practices

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



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

## About Search Enhancements

### Search Results Enhancements

#### Customizing Columns

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

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

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

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

To create or edit a search results layout:

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



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

To customize your personal search result columns:

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

### Sorting Search Results

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

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



**Note:**

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

### Filtering Search Results

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

To enable filters by creating search filter layouts:

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

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

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

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

To filter search results:

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



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

### Additional Search Results Enhancements

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

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

## Sidebar Search Enhancements

### Limit to Items I Own

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

### Limit Searches to One Type of Object

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

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



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

## Solution Search Enhancements

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

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

## Time-Based Workflow

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

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

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

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

### Implementation Tips

- If you plan on configuring workflow rules that have time-dependent actions, first specify a default workflow user as follows:

1. Click **Setup** ► **Customize** ► **Workflow & Approvals** ► **Settings**.
2. Select a `Default Workflow User` that you want Salesforce to display with a workflow rule when the user that triggered the rule is not active.

If your organization uses time-dependent actions in workflow rules, you must designate a default workflow user. Salesforce displays this username in the `Created By` field for tasks, the `Sending User` field for email, and the `Last Modified By` field for field updates. Salesforce does not display this username for outbound messages. If a problem occurs with a pending action and the last user to edit the action is no longer active, the default workflow user receives notification email from Salesforce.

3. Click **Save**.
- You cannot use formula fields that calculate time duration in workflow rules. However, you can use formula fields to calculate dates and date/times in time triggers. For example, you cannot use a formula field to calculate "Days Open" in a workflow rule, but you can create a time trigger that uses the `Create Date` field.

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

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

To optionally cancel pending actions:

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

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

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

- Time-dependent actions can automatically be queued again if the record is updated and you set the evaluation criteria to `When a record is created`, or `when a record is edited` and did not previously meet the entry criteria. Using the previous example, if the opportunity status is changed from `Closed Lost` to `Prospecting` and the workflow rule evaluation criteria is set to `When a record is created`, or `when a record is edited` and did not previously meet the entry criteria, Salesforce reevaluates the time triggers are reevaluated and adds the appropriate actions to the workflow queue.
- If the evaluation criteria is set to `Only when a record is created`, the workflow rule evaluates its time triggers only once. If the record that fired the rule changes to no longer meet the evaluation criteria, the pending actions are removed from the queue and the rule is never reapplied to the record.
- You cannot archive a product or price book that has pending actions.
- You cannot convert a lead that has pending actions.
- If a time trigger uses a field that is null, Salesforce ignores the time trigger.

- You can deactivate a workflow rule at any time. If the rule has pending actions in the workflow queue, editing the record that triggered the rule removes the pending actions from the queue. If you do not edit the record, the pending actions are processed even though the rule has been deactivated.
- You cannot add or remove time triggers from an active workflow rule, but you can add actions to existing time triggers.
- Existing workflow rules are not affected by time-dependent actions; Salesforce lists all existing actions in the Immediate Workflow Actions list.

### Best Practices

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

## About Time-Based Workflow

### Managing Workflow Rules

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

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

Workflow automates the following types of actions for your organization:

- **Email Alerts** - Send an email to one or more recipients you specify. For example, automatically send sales management an email alert when a sales representative qualifies a large deal.
- **Workflow Tasks** - Assign a new task to a user, role, or record owner. For example, automatically assign follow-up tasks to a support representative one week after a case is updated.
- **Field Updates** - Update the value of a field on a record. For example, automatically change the Owner field on a contract three days before it expires.
- **Outbound Messages** - Send a secure configurable API message (in XML format) to a designated listener. For example, automatically initiate the reimbursement process for an approved expense report by triggering an outbound API message to an external HR system.

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

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

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

- Click **New Rule** to create a new workflow rule.

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



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

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



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

## Notes on Using Workflow Rules

Consider the following when configuring workflow rules:

- Each workflow rule applies to a single object, such as leads, accounts, or opportunities. For the maximum number of workflow rules allowed on an object, see "App Setup Limits" in the Salesforce online help.
- Workflow rules can only trigger workflow actions that are relevant to the object to which the workflow rule applies. For example, if a workflow rule applies to accounts, it can only trigger field updates that affect fields on account records.
- Workflow rules can be triggered any time a record is saved or created, depending on your rule criteria. However, rules created after saving records are not triggered by those records retroactively.
- Workflow rules on custom objects are automatically deleted if the custom object is deleted.
- Workflow rules trigger automatically and are invisible to the user. Alternatively, approval processes allow users to submit records for approval. For more information on approval processes, see "What Are Approval Processes?" in the Salesforce online help.
- You cannot create email alerts for workflow rules that apply to activities.
- Saving or creating records can trigger more than one rule.
- The following will not trigger workflow rules:
  - Intellisync for salesforce.com
  - Mass replacing picklist values
  - Mass updating address fields
  - Mass updating divisions
  - Changing the territory assignments of accounts and opportunities
- Any changes you make to records while using Offline Edition will be evaluated by workflow rules when you synchronize.



**Tip:** Salesforce processes any rules in the following order:

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

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



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



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

## Creating Workflow Rules

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

To create a new rule:

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

### Select the object for your workflow rule

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



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

4. Click **Next**.

### Configure rule settings and criteria

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

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

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

**Only when a record is created**

Choose this option to ignore updates to existing records.

**Every time a record is created or edited**

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



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

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



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

**Configure workflow actions**

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



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

**Configure immediate actions**

To add an immediate workflow action to a workflow rule:

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

**New Task**

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

**New Alert**

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



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

**New Field Update**

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

**New Outbound Message**

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

**Select Existing Action**

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

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

## Configure time-dependent actions



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

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

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



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

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

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

### **New Task**

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

### **New Alert**

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



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

### **New Field Update**

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

### **New Outbound Message**

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

### **Select Existing Action**

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

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

## Activate the workflow rule

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

## Managing Workflow Actions

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

To manage your workflow actions:

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

## Monitoring the Workflow Queue

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

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

To view pending actions:

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

To optionally cancel pending actions:

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

## Lookup Relationships between Standard Objects

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

Now, you can build custom lookup relationships between standard objects. This includes linking a standard object to itself, such as creating a lookup relationship to link campaigns to other campaigns. Salesforce prevents a single record from linking to itself. However, a record can indirectly relate to itself. For example, the Holiday Promotion campaign can have the Direct Mail campaign selected in the lookup relationship and the Direct Mail campaign can have the Holiday Promotion campaign selected in the lookup relationship.

### Implementation Tips

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

### Best Practices

- Use distinct field labels and names to distinguish custom lookup relationship fields from standard ones.
- You can create self relationships between standard objects as a means of indicating a parent and child relationship.
- A record can be related to its grandparent or one of its grandchildren records. However, Salesforce prevents users from relating a record to itself.
- To create a lookup relationship from users to users, create a hierarchical relationship instead. You cannot create a lookup relationship from the users object to another object.
- If your organization uses person accounts, you can create the following types of lookup relationships:
  - Account to account
  - Account to contact
  - Contact to contact
  - Contact to account

## About Standard-to-Standard Lookup Relationships

### Creating Lookup Relationships

To create a lookup relationship between standard objects:

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



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

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

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

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

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

## Outlook Edition 3.0 Limited Release

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

Outlook Edition is a free plug-in for Microsoft® Outlook® that improves productivity and data quality by allowing users to interact with Salesforce conveniently from Outlook. With Spring '07, customers who want early access to the next version of Outlook Edition can participate in a limited release program for Outlook Edition 3.0. Outlook Edition 3.0 builds on the existing functionality of Outlook Edition 2.0. To learn more about this limited release program, please contact your salesforce.com representative.



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

## Implementation Tips

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

## About Outlook Edition 3.0

### New Enhancements

Outlook Edition 3.0 offers several exciting new enhancements, including:

#### Uploading email attachments to Salesforce

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

#### Associating Outlook events, tasks, and contacts with Salesforce records

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

#### Associating Outlook items to custom objects

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

#### Viewing associated Salesforce records in the toolbar

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

#### Quickly creating new Salesforce records

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

## System Requirements

The system requirements for Outlook Edition 3.0 are as follows:

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

## Email Relaying

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

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

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

## About Email Relaying

### Setting Up Email Relaying

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

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

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

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



**Note:** Contact [salesforce.com](https://salesforce.com) to enable email relaying for your organization.

To enable and configure email relaying:

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

| Setting                   | Description   |
|---------------------------|---|
| Email Host                | The host name of your company's SMTP server. Obtain this information from your email administrator. If Salesforce cannot find a server with the name you enter, an error message appears.   |
| Port                      | The port number of your company's SMTP server. Obtain this information from your email administrator.   |
| TLS Setting               | <p>Specifies whether Salesforce will use TLS for SMTP sessions. Select one of the following options:</p> <ul style="list-style-type: none"> <li>• <b>Preferred:</b> If the remote server offers TLS, Salesforce upgrades the current SMTP session to use TLS. If TLS is unavailable, Salesforce continues the session without TLS.</li> <li>• <b>Required:</b> Salesforce continues the session only if the remote server offers TLS. If TLS is unavailable, Salesforce terminates the session without delivering the email.</li> <li>• <b>Preferred Verify:</b> If the remote server offers TLS, Salesforce upgrades the current SMTP session to use TLS, and verifies the certificate is signed by a valid certificate authority and that the common name presented in the certificate matches the domain or mail exchange of the current connection. If TLS is available but the certificate is not signed or the common name does not match, Salesforce continues the session without TLS. If TLS is unavailable, Salesforce continues the session without TLS.</li> <li>• <b>Required Verify:</b> Salesforce continues the session only if the remote server offers TLS, the certificate is signed by a valid certificate authority, and the common name presented in the certificate matches the domain or mail exchange to which Salesforce is connected. If any of these criteria are not met, Salesforce terminates the session without delivering the email.</li> </ul> |
| Restrict Relay to Domains | Specifies whether to restrict the email relaying functionality to certain domains. If you select this option, enter the names of those domains separated by commas in the text field below. This causes Salesforce to route email to your company's SMTP server only if the email is addressed to one of the listed domains. If you select the checkbox but do  |

| Setting | Description   |
|---------|---|
|         | not list any domains, Salesforce routes all email to your company's SMTP server.  |
| Active  | Enables email relaying for your organization. If you deselect this checkbox, Salesforce keeps the email relaying configuration but does not route email to your company's email server. |

### 3. Click **Save**.



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

## Apex Web Services API 9.0

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

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

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

### SSL Authentication for Delegated Authentication and Outbound Messaging

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

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

## Apex Code Developer Preview

Available in: **Developer** Edition

Salesforce offers extensive customization capabilities for the data model with custom fields, objects, and relationships. Now with Apex Code that customization can be dramatically extended to encompass the business rules that surround the data,

enabling organizations to completely model their unique processes with the power and flexibility of the Apex on-demand platform.

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

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

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

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

- **Advanced testing framework**

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

- **Debug console**

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

For details about Apex Code syntax and code samples, see the *Apex Code Language Reference* at [http://www.salesforce.com/us/developer/docs/apexcode/salesforce\\_apex\\_language\\_reference.pdf](http://www.salesforce.com/us/developer/docs/apexcode/salesforce_apex_language_reference.pdf).



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

## Additional Apex Platform Enhancements

### Apex Mobile Licensing Enhancements

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

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

### Cloning Email Templates

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

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

1. To manage your personal email templates, click **Setup** ► **Email** ► **My Templates**. If you have permission to manage public email templates, click **Setup** ► **Communication Templates** ► **Email Templates**.
2. Click the name of an email template in the list.
3. Click **Save As**.
4. Choose a folder in which to store the template.
5. Check the `Available For Use` checkbox if you would like this template offered to users when sending an email.

6. Enter an `Email Template Name`.
7. Enter a `Description` for the template. Both template name and description are for internal use only.
8. Click **Save**.

### ConnectSAP and ConnectOracle Available for Download

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

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



**Note:** Contact [salesforce.com](https://salesforce.com) to learn more about purchasing and using ConnectSAP and ConnectOracle.

### Data Loader Rebranded

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

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

### Divisions on Custom Objects

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



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

When you create a custom object record:

- If the custom object is enabled for divisions, the record adopts your default division.
- If the custom object is on the detail side of a master-detail relationship with a divisions-enabled custom object, it adopts the division of the master record.
- If the custom object is enabled for divisions and does not have a master-detail relationship, it adopts the global division.

Divisions are available in Professional, Enterprise, and Unlimited Edition. Contact [salesforce.com](https://salesforce.com) to enable divisions for your organization.

### Email Approvals

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

To enable email approval response:

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

### 3. Click **Save**.



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

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

### **Formula Field Compiled Size Increased**

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

### **Long Text Area Custom Fields Increased**

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

### **Outbound Message Queue**

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

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

### **Recent Item Hover Details**

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

### **Sales Anywhere Decommissioned**

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

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

### **Special Date Fields Expanded**

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

- Quarter
- Year
- Fiscal Quarter
- Fiscal Year

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

**User Interface: Classic User Interface Theme No Longer Supported**

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

# Index

## C

- Cases
  - hierarchies [9](#)
  - related cases [9](#)
- Customizing
  - workflow rules [18](#)

## E

- Editing
  - workflow rules [18](#)
- Email
  - relaying [27](#)

## P

- Parent cases
  - viewing [9](#)

## V

- Viewing
  - case hierarchies [9](#)
  - related cases [9](#)

## W

- Workflow
  - immediate actions [18](#)
  - queue [23](#)
  - rules [18](#)
  - time triggers [18](#)
  - time-dependent actions [18](#)

