



Salesforce.com: Salesforce Spring '08

Salesforce Spring '08 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.

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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, 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 '08 Features and Impact on Salesforce Users

Spring '08 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 '08 features and whether they will have an immediate impact on users:

Feature	Automatically visible to all users. No setup required.	Not automatically visible. Feature is enabled but requires some setup.	Contact salesforce.com to enable this feature.
General Availability of Salesforce Ideas			
Partner Portal			
Scheduling Dashboards to Refresh			
Account Team and Sales Team Member Enhancements	 Users must now click a Display Access button to display the team member's entire sharing access.		
Spell Checker for Activities			
Home Page Hover Links for Events			

Feature	Automatically visible to all users. No setup required.	Not automatically visible. Feature is enabled but requires some setup.	Contact salesforce.com to enable this feature.
Default Email Notifications on Tasks	 If administrators previously enabled the Send Notification Email checkbox on task page layouts, the new option Make this the default setting will display when users select or deselect the Send Notification Email checkbox as they create and edit tasks.		
Redesigned Calendar View Headers	 At the top of calendar views, users will see a new layout of their familiar icons and links.		
Campaign Enhancements	 On the opportunity detail page, users can now see the campaign which generated the opportunity for opportunities created directly from contacts that participated in a campaign.		
Person Accounts for the Customer Portal	 Users with the "Edit Self-Service Users" permission can click an Enable Customer Portal User button on person accounts to enable them for your Customer Portal.		
Forecasting Enhancements			

Feature	Automatically visible to all users. No setup required.	Not automatically visible. Feature is enabled but requires some setup.	Contact salesforce.com to enable this feature.
Lead Conversion with Validation Rules and Triggers			 Existing customers must contact salesforce.com to enable this feature. For customers that sign up a new organization after Spring '08, this feature is automatically enabled.
Opportunity Roll-Up Summary Fields on Accounts			
21 Digit Summaries on Reports	 Summary fields on existing reports now display up to 21 digits for greater accuracy.		
Comprehensive Record Reporting via Custom Report Types (Outer Joins)			
Salesforce Content Enhancements			
Salesforce to Salesforce Enhancements			
Visualforce Enhancements			
Apex Enhancements			
Force.com Web Services API 12.0		 When you access the Spring '08 API, changing an account or opportunity owner does not revoke sharing access to any pre-existing account or sales team members. In previous API versions, such changes removed sharing access for each respective account team or sales team.	

Feature	Automatically visible to all users. No setup required.	Not automatically visible. Feature is enabled but requires some setup.	Contact salesforce.com to enable this feature.
Apex Generally Available in Enterprise Edition and New Apex Sandbox			
Metadata API			
Force.com Toolkit for Eclipse			
Apex Email Services Enhancements and General Availability	 Email services created prior to Spring '08 will no longer work because of changes to the implementation of the InboundEmail handlers in the Inbound Email Object.		
Hierarchy Visibility Override—Controlling Sharing Access Using Hierarchies			
Mobile Custom Views			
Salesforce Mobile Support for Person Accounts	 Mobile users in organizations that have enabled person accounts can immediately access them from their wireless devices unless the administrator has set up a data filter in the mobile configurations that excludes person accounts.		
Salesforce Mobile Enhanced Data Filtering			
AppExchange Package Upload and Install Enhancements	 Users can now upload packages with dependencies. During upload, Salesforce lists the dependencies on the Show Dependency page. During install,		

Feature	Automatically visible to all users. No setup required.	Not automatically visible. Feature is enabled but requires some setup.	Contact salesforce.com to enable this feature.
	Salesforce verifies all requirements are met.		
Custom Button Enhancements			
Custom List View Enhancements			
Deleted Custom Fields Automatic Cleanup	 Any fields that you deleted after the Summer '07 release will be permanently deleted 45 days after the Spring '08 release. If you do not want them to be permanently deleted, undelete them within 45 days. This change affects all Salesforce Editions.		
Dynamic Approval Routing			
Email Deliverability Testing			
Force.com Connect Offline Enhancements			
Formula and Validation Rule Enhancements			
Inline Editing Supported for the Console	 If you have enabled inline editing, the ability to use it on the console is automatic.		
Search Enhancements for Accented Characters	 This enhancement only applies to new records, or existing records that are saved after the Spring '08 release goes live for your instance.		

Feature	Automatically visible to all users. No setup required.	Not automatically visible. Feature is enabled but requires some setup.	Contact salesforce.com to enable this feature.
Security Enhancements	 Although this security feature is automatically enabled and requires no setup, it does not affect your users' ability to export report data or user list view data, nor does it alter the user experience.		
Setup Menu Restructuring	 Users with access to the Setup options under the Build, Develop, Exchange , and Integrate folders immediately see the new names for these folders.		
Special Date Values Supported for All English Locale Types			
Email-to-Case Workflow			
Workflow Rule Criteria for Converted Leads			

SALESFORCE APPLICATIONS

General Availability of Salesforce Ideas

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

With Spring '08, Salesforce Ideas is generally available in Professional, Enterprise, Unlimited, and Developer Editions. It is also available to users with these license types:

- Customer Portal
- Partner Portal
- Salesforce Platform
- Salesforce Platform One
- Content Only
- Ideas Only

To customers who participated in the limited release of Salesforce Ideas, Spring '08 introduces the following new capabilities:

- The My Inbox page lists the ideas you have participated in—either by posting an idea or commenting on an idea—that have received new comments since you last viewed the idea.
- The Top All-Time subtab lists the most-voted-for ideas of all time. This is in contrast to the Popular Ideas subtab, which lists "hot" ideas that are currently gaining popularity.
- The Comments subtab lists the ideas with the most recently added comments.
- The detail page of an idea includes a list of the last 100 users who voted for the idea.
- The data objects Idea, IdeaComment, and Vote are now accessible in the API. For more information, see the *Force.com Web Services API Developer's Guide* for API version 12.0, available with Spring '08 at www.salesforce.com/apidoc.

Implementation Tips

- To enable Salesforce Ideas for your organization:
 1. Click **Setup** ► **Customize** ► **Ideas** ► **Settings**.
 2. Click **Edit**.
 3. Select the `Enable Ideas` checkbox.
 4. Click **Save**.

Enabling Salesforce Ideas immediately makes the Ideas app display in the AppExchange app menu. By default, the Ideas app includes the following tabs: Home, Contacts, Accounts, Ideas, Reports, and Dashboards. To access the page where you can customize the tabs in an app, click **Setup** ► **Create** ► **Apps**, then click **Edit** next to the appropriate app name.

- We recommend configuring the half-life of ideas to two days:
 1. Click **Setup** ► **Customize** ► **Ideas** ► **Settings**.
 2. Enter 2 in the `Half-life (in Days)` field. The half-life setting controls how quickly older ideas are demoted on the Popular Ideas subtab.
 3. Click **Save**.

- Create categories that are relevant to your organization by clicking **Setup > Customize > Ideas > Fields** then editing the available picklist values in the `Category` field.
- As appropriate, modify user profiles to set the visibility of the Ideas standard app and the Ideas tab. For more information, see "Managing Profiles" in the Salesforce online help.
- If you plan to host a Salesforce Ideas community on your organization's Customer Portal or Partner Portal, refer to the following:
 - "Setting Up Your Customer Portal" in the Salesforce online help
 - [Salesforce Customer Portal Implementation Guide](#)
 - "About Partner Relationship Management" in the Salesforce online help

Best Practices

- Distribute the following PDF tip sheet to your users to familiarize them with the capabilities of Salesforce Ideas: [Tips & Hints for Salesforce Ideas](#)

Setting Up and Using Salesforce Ideas

About Ideas

User Permissions Needed	
To view the Ideas tab:	"Read" on ideas
To view and vote for ideas:	"Read" on ideas
To create ideas and add comments to ideas:	"Create" on ideas
To edit ideas and edit comments on ideas:	"Edit" on ideas

Salesforce Ideas is a community of users who post, vote for, and comment on ideas. Consider it an online suggestion box that includes discussions and popularity rankings for any subject.



Tip: Salesforce.com offers its own Salesforce Ideas community for Salesforce users to submit product feedback and suggest new features. To visit, go to <http://ideas.salesforce.com>.

Ideas Terminology

The following terminology is used for Salesforce Ideas:

Category

Administrators can define categories so ideas can be organized into logical groups for easier browsing. A `View Category` drop-down list displays on the Ideas tab, and a `Category` picklist is available when creating an idea. For example, if your Salesforce Ideas community has the focus "Improvements to our clothing line," then you might set up categories such as "Shirts," "Jackets," and "Slacks." Each organization has one common set of categories for all of its communities.

Comment

Comments are plain text responses to posted ideas that enable discussions about the ideas. On the Ideas tab, the Comments subtab lists the comments that have most recently been submitted. On the detail page of an idea, comments are sorted in chronological order from oldest to newest.

Community

A community is an implementation of Salesforce Ideas, with its own focus, ideas, and registered users. Enterprise and Unlimited Edition organizations can have two communities: one for Salesforce users located internally within Salesforce, and a second for portal users located on an appropriately configured Customer Portal or Partner Portal. Professional Edition organizations can have only one internal community. For more information, see "Managing Salesforce Ideas Communities" in the Salesforce online help.

Half-life

The half-life setting determines how quickly old ideas drop in ranking on the Popular Ideas subtab, to make room for ideas with more recent votes. A shorter half-life moves older ideas down the page faster than a longer half-life. This setting affects all communities in your organization. For information on customizing the half-life, see "Customizing Salesforce Ideas Settings" in the Salesforce online help.

Idea

Ideas are suggestions written in plain text. For example, if the focus of a particular Salesforce Ideas community is "Ideas for car features," an appropriate idea for that community might have the title "Insulated cup holders that keep your beverage hot or cold." Or, if the focus of a particular Salesforce Ideas community is "Ideas for our company's employee benefits," an appropriate idea for that community might have the title "On-site day care." Currently, ideas do not support markup, such as HTML or images.

Inbox

Your inbox tracks the ideas you have participated in—either by posting an idea or adding a comment to an idea—that have received new comments since you last viewed the idea. For more information, see "Using Your Ideas Inbox" in the Salesforce online help.

Point

A point is a unit of measurement that represents the popularity of an idea. Each vote for an idea is worth ten points. An idea's total number of points displays next to its **Vote** button.

Popular

On the Popular Ideas subtab, ideas are sorted by an internal calculation that reflects the age of an idea's votes. Regardless of an idea's static total number of points, ideas with newer votes display higher on the page than ideas with older votes. This allows you to browse ideas that have most recently gained popularity, with less precedence given to long-established ideas that were voted on in the past. For more information on how ideas move down the page, see "Point" in the Salesforce online help and "Half-life" in the Salesforce online help.

Portal

If your organization has a Customer Portal or Partner Portal, you can add the Ideas tab to either or both portals so that portal users can participate in their own Salesforce Ideas community. Ideas can be posted either internally for Salesforce users or externally for portal users who have access to a Customer Portal or Partner Portal. This distinction is exclusive; you can only publish an idea to one or the other. From within Salesforce, you can switch views between internally posted ideas and ideas published to a portal: Click the **Internal** and **Portal** links below the colored header bar on the Ideas tab.

For more information about the Customer Portal, see "Setting Up Your Customer Portal" in the Salesforce online help. For more information about the Partner Portal, see "About Partner Relationship Management" in the Salesforce online help.

Top All-Time

On the Top All-Time subtab, ideas are sorted from most number of points to fewest. This allows you to see the most popular ideas in the history of your Salesforce Ideas community.

Vote

If you agree with or like an idea, click the **Vote** button to vote for it. Each vote adds ten points to an idea. You cannot vote for the same idea more than once. Note that when you post an idea, your vote is

automatically added when you save the new idea. For more information on points, see "Point" in the Salesforce online help.

Customizing Salesforce Ideas Settings

User Permissions Needed	
To customize Salesforce Ideas settings:	"Customize Application"

To manage organization-wide settings for Salesforce Ideas:

1. Click **Setup** ► **Customize** ► **Ideas** ► **Settings**.
2. Click **Edit**.
3. Use the `Enable Ideas` checkbox to enable or disable Salesforce Ideas for your organization.

Enabling Salesforce Ideas immediately makes the Ideas app display in the AppExchange app menu. By default, the Ideas app includes the following tabs: Home, Contacts, Accounts, Ideas, Reports, and Dashboards. To access the page where you can customize the tabs in an app, click **Setup** ► **Create** ► **Apps**, then click **Edit** next to the appropriate app name. Disabling Salesforce Ideas removes the Ideas app as well as any instances of the Ideas tab included in other apps.

4. In the `Half-Life (in Days)` field, enter a number of days.

The half-life setting determines how quickly old ideas drop in ranking on the Popular Ideas subtab, to make room for ideas with more recent votes. A shorter half-life moves older ideas down the page faster than a longer half-life.

5. Click **Save**.

Customizing Salesforce Ideas Categories

User Permissions Needed	
To customize Salesforce Ideas categories:	"Customize Application"

Administrators can define categories so ideas can be organized into logical groups for easier browsing. A `View Category` drop-down list displays on the Ideas tab, and a `Category` picklist is available when creating an idea.

Categories are configured in a picklist field on the ideas object. For general information on changing picklist fields, see "Updating Picklists" in the Salesforce online help.

To customize your organization's idea categories:

1. Click **Setup** ► **Customize** ► **Ideas** ► **Fields**.
2. Click **Edit** next to the `Category` field.
3. On the picklist edit page, perform the following tasks as appropriate:
 - To add new values, click **New**.
 - To rename an existing value or set it as the default value, click **Edit**.
 - To remove an existing value, click **Del**.
 - To change the sequence of values in the picklist, click **Reorder**.
 - To replace all occurrences of an existing value (including blank values) with an alternate value, click **Replace**.

Setting Up Idea Reports

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

As an administrator, you can create custom report types so users can run and create custom reports about ideas, idea comments, and votes. Custom report types are the only way to make idea reports available for your users—Salesforce does not provide sample idea reports or a standard report folder for ideas.

To create a folder of idea reports for your users:

1. Create a custom report type for idea objects. For details, see "Setting Up Custom Report Types" in the Salesforce online help.
2. Create a new public folder for idea reports. This step requires the "Manage Public Reports" permission. For details, see "Creating and Editing Folders" in the Salesforce online help.
3. Using your custom report type, create one or more new custom reports for ideas. Assign the reports to the new idea reports folder you created. For details, see "Creating a Custom Report" in the Salesforce online help.

After completing these steps, a folder of idea reports will be available to your users on the Reports home page.

Posting Ideas

User Permissions Needed	
To view the Ideas tab:	"Read" on ideas
To view and vote for ideas:	"Read" on ideas
To create ideas and add comments to ideas:	"Create" on ideas
To edit ideas and edit comments on ideas:	"Edit" on ideas



Note: To avoid entering a duplicate idea, first use the search box in the sidebar to search for existing ideas that match your idea. For more information, see "Searching for Ideas" in the Salesforce online help. If no existing ideas match your idea, then proceed with the following procedure.

Posting a new idea is quick and easy:

1. On the Ideas tab, click **Post Idea**. Alternatively, select **Idea** from the `Create New` drop-down list in the sidebar.
2. Enter a title for your idea no longer than 255 characters.
3. In the description area, enter the details of your idea. Note that you must enter plain text—HTML or other markup is not allowed.
4. Choose a category for your idea.
5. If your organization has a second Salesforce Ideas community for portal users who have access to a Customer Portal or Partner Portal, choose the appropriate option for the `Published In` field.

Ideas can be posted either internally for Salesforce users or externally for portal users who have access to a Customer Portal or Partner Portal. This distinction is exclusive; you can only publish an idea to one or the other. From within Salesforce, you can switch views between internally posted ideas and ideas published to a portal: Click the **Internal** and **Portal** links below the colored header bar on the Ideas tab. The `Published In` field is only available in the internal Salesforce application.

6. Click **Post**.

Your new idea displays at the top of the Recent Ideas subtab, and your vote is automatically applied to the idea. Each vote is always worth 10 points.



Tip: Use the following writing tips to make your idea easier for others to read and understand:

- Use complete sentences.
- Be as concise and direct as possible.
- Check your spelling and punctuation.

Editing Ideas

If you have the "edit" permission on ideas, you can edit the details of an existing idea:

1. On the Ideas tab, click the title of an idea.
2. Click **Edit**.
3. Modify the title, description and other details of the idea as appropriate.
4. Click **Apply** to save your work.

Editing an idea's details does not include editing the comments on an idea. For information on how to edit the comments on an idea, see "Commenting on Ideas" in the Salesforce online help.

Viewing Ideas

User Permissions Needed	
To view the Ideas tab:	"Read" on ideas
To view and vote for ideas:	"Read" on ideas
To create ideas and add comments to ideas:	"Create" on ideas
To edit ideas and edit comments on ideas:	"Edit" on ideas

The following sections describe how to view ideas:

- Accessing the Ideas Tab in Salesforce
- Accessing the Ideas Tab in a Portal
- Browsing Popular Ideas
- Browsing Recent Ideas
- Viewing the Details of an Idea

Accessing the Ideas Tab in Salesforce

In Salesforce, the Ideas tab is available by default in the Ideas app. To switch to the Ideas app, select **Ideas** from the AppExchange app menu in the top right corner of every Salesforce page.

Note that your administrator may have customized your profile to also display the Ideas tab in other apps. Also, your administrator may have renamed the Ideas tab to an alternate tab name.

For information on how to personalize your available tabs to meet your needs, see "Customizing Your Display" in the Salesforce online help.



Tip: Ideas can be posted either internally for Salesforce users or externally for portal users who have access to a Customer Portal or Partner Portal. This distinction is exclusive; you can only publish an idea to one or the other. From within Salesforce, you can switch views between internally posted ideas and ideas published to a portal: Click the **Internal** and **Portal** links below the colored header bar on the Ideas tab.

Accessing the Ideas Tab in a Portal

If your organization has portal users who have access to a Customer Portal or Partner Portal, your portal's administrator can display the Ideas tab on either type of portal. The ideas that display in a portal are either created through a portal or are created internally in Salesforce and published for display in a portal.

Browsing Popular Ideas

On the Popular Ideas subtab, ideas are sorted by an internal calculation that reflects the age of an idea's votes. Regardless of an idea's static total number of points, ideas with newer votes display higher on the page than ideas with older votes. This allows you to browse ideas that have most recently gained popularity, with less precedence given to long-established ideas that were voted on in the past.

Browsing Recent Ideas

The Recent Ideas subtab lists the ideas that have most recently been submitted. Newer ideas display above older ideas.

Browsing Top Ideas of All Time

The Top All-Time subtab lists the ideas with the most votes. The difference between the Top All-Time subtab and the Popular Ideas subtab is that the Top All-Time subtab displays the top ideas of all time by number of votes, whereas the Popular Ideas subtab uses an algorithm to display the ideas that have received the most recent votes.

Browsing Ideas by Category

Administrators can define categories so ideas can be organized into logical groups for easier browsing. A `View Category` drop-down list displays on the Ideas tab, and a `Category` picklist is available when creating an idea.

To browse ideas by category, select a category from the `View Category` drop-down list. Alternatively, click the category link at the bottom of the idea description, next to the alias of the user who posted the idea.

Viewing the Details of an Idea

Click the title of an idea to open the detail page of that idea. The detail page of an idea includes the following sections:

- The details of the idea, including its full text and number of points (each vote is worth ten points)
- All comments that have been submitted for the idea
- An area for adding a new comment
- A list of the last 100 users who have voted for the idea, sorted left to right from most recent vote to oldest vote



Tip: Go to your inbox to view new comments on ideas that you have posted or commented on. For more information, see "Using Your Ideas Inbox" in the Salesforce online help.

Voting for Ideas

User Permissions Needed	
To view the Ideas tab:	"Read" on ideas
To view and vote for ideas:	"Read" on ideas
To create ideas and add comments to ideas:	"Create" on ideas
To edit ideas and edit comments on ideas:	"Edit" on ideas

Voting Overview

If you agree with or like an idea, click the **Vote** button to vote for it. Each vote adds ten points to an idea. You cannot vote for the same idea more than once. Note that when you post an idea, your vote is automatically added when you save the new idea.

A point is a unit of measurement that represents the popularity of an idea. Each vote for an idea is worth ten points. An idea's total number of points displays next to its **Vote** button.

Adding Your Vote to an Idea

To add your vote to an idea:

1. On the Ideas tab, locate an idea you want to vote for.
2. Click the **Vote** button next to the idea. Ten points are added to the idea, and the button name changes to "Voted" so that you cannot vote for the same idea again. In addition, your user alias displays at the bottom of the idea's detail page to track that your vote was made.



Note: When you post a new idea, Salesforce automatically adds your vote to the idea.

Commenting on Ideas

User Permissions Needed	
To view the Ideas tab:	"Read" on ideas
To view and vote for ideas:	"Read" on ideas
To create ideas and add comments to ideas:	"Create" on ideas
To edit ideas and edit comments on ideas:	"Edit" on ideas

Comments are plain text responses to posted ideas that enable discussions about the ideas. On the Ideas tab, the Comments subtab lists the comments that have most recently been submitted. On the detail page of an idea, comments are sorted in chronological order from oldest to newest.

Adding Comments to Ideas

Add comments to ideas to share your thoughts and opinions with other community members:

1. On the Ideas tab, locate an idea on which you want to add a comment.

2. Click either the title of the idea or the **Comments** link below the idea description.
3. On the detail page for the idea, type your comments into the text entry area in the Add Your Comment section. You can enter up to 4,000 characters. Note that comments must be entered in plain text—HTML or other kinds of markup are not allowed.
4. Click **Post** to submit your comment.

Your newly added comment displays in the Comments related list on the idea detail page.

Editing Comments on Ideas

To edit a comment that you have submitted on an idea:

1. On the detail page of the idea, click **Edit** next to your comment.
2. Modify your comment as desired.
3. Click **Apply** to save your work.

Deleting Comments on Ideas

Deleting comments on ideas requires the "delete" permission on ideas.

1. On the detail page of the idea, click **Del** next to your comment.
2. Click **OK**.

Viewing Recently Posted Comments

To view the comments that have most recently been posted in your Salesforce Ideas community, click the Comments subtab. Click the text of a comment to view the detail page of the appropriate idea.

On the Comments subtab:

- Comments are listed in chronological order from newest to oldest.
- The title of the idea on which the comment was posted displays above the comment.
- The alias of the user who posted the comment displays next to the comment text.
- The total number of comments on the idea displays in brackets below the comment text. For example, `Comments [20]` indicates that the idea has twenty comments.

Using Your Ideas Inbox

User Permissions Needed	
To view the Ideas tab:	"Read" on ideas
To view and vote for ideas:	"Read" on ideas
To create ideas and add comments to ideas:	"Create" on ideas
To edit ideas and edit comments on ideas:	"Edit" on ideas

Your inbox tracks the ideas you have participated in—either by posting an idea or adding a comment to an idea—that have received new comments since you last viewed the idea. To use your inbox:

1. On the Ideas tab, click the **My Inbox** link.



Tip: The Inbox link displays the number of ideas in your inbox in parentheses. For example, **My Inbox (5)** indicates that five ideas you have participated in have received new comments since you last viewed the idea. **My Inbox (0)** indicates that no ideas you have participated in have received new comments since you last viewed the idea.

2. Optionally, choose a value from the `View Category` drop-down list to change the category displayed.
3. Click the title of an idea to view the idea's details.
4. Click **Previous Page** and **Next Page** as appropriate to view the different pages of your inbox.
5. To leave your inbox, click the Ideas tab.

Searching for Ideas

User Permissions Needed	
To view the Ideas tab:	"Read" on ideas
To view and vote for ideas:	"Read" on ideas
To create ideas and add comments to ideas:	"Create" on ideas
To edit ideas and edit comments on ideas:	"Edit" on ideas

You can search for ideas using either sidebar search or advanced search. For an overview of these search methods, see "About Search" in the Salesforce online help. For tips on performing searches, see "Search Tips" in the Salesforce online help.



Note: Sidebar search includes only the titles of ideas. However, advanced search also includes idea descriptions and the comments that have been posted on ideas.

For general information on understanding search results, see "Viewing Search Results" in the Salesforce online help.

Deleting Ideas

User Permissions Needed	
To delete ideas and comments:	"Delete" on ideas

To delete an idea:

1. Click the name of an idea to open the detail page.
2. Click the **Delete** button.
3. Click **OK**.

The idea and its comments are moved to the Recycle Bin. Note that undeleting an idea from the Recycle Bin also restores the idea's comments and votes.

Partner Portal

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

With Spring '08, Salesforce customers can leverage the power of the Partner Portal to extend the benefits of a CRM system to their indirect sales channels through a simple and easy-to-use portal. Partner Portal allows companies to track a consolidated sales forecast and manage pipeline dashboards across internal sales groups and external partner sales groups. With Partner Portal, it is easy to collaborate with strategic partners through co-marketing and joint selling programs.

The new capabilities delivered with the Salesforce partner portal include:

Support for S-Controls, Web Tabs, and Custom Links

Provide your partner users with a rich interactive user experience by leveraging s-controls, web-tabs and custom links in the Partner Portal.

Tasks on Partner Portal Home page

Provides partner users with a consolidated list of all their tasks on the Partner Portal home page. Partner users no longer need to click into every lead, opportunity, or custom object to see the tasks they need to complete—they can see them the moment they log in.

Self-Service Password Reset

Reduce the administrative burden on your channel managers or partner operations by allowing partners to reset their own passwords.

Printer Friendly View

Partner users can print a record in a printer friendly format, allowing them to take the details with them when they aren't connected.

About the Partner Portal

About the Partner Portal

Partner relationship management (PRM) allows companies that sell through indirect sales channels to maximize the return on their channel investments and increase channel revenues. With partner relationship management, organizations can manage, track, and forecast their channel business alongside their direct sales business. It also helps partners sell more effectively, close more business, and achieve greater profits.

Empowering your partners with your Salesforce data can help you sell more without spending more. However, you want to control the information your partners can access, and you want your partners to work within an application that uses your company's branding. You can accomplish this by granting your partners access to a Salesforce partner portal.

A portal allows partner users to log in to Salesforce through a separate website than your non-partner users. Partner users can only see the data that you have made available to them. Furthermore, partner users can only manipulate data if you give them the appropriate user permissions.

The following Salesforce features are key to partner relationship management:

Partner accounts

Partner accounts are accounts that a channel manager uses to manage partner organizations, partner users, and activities.

Partner users

Partner users are Salesforce users with limited capabilities. They are associated with a particular partner account, have limited access to your organization's data, and log in via a partner portal.

There are three license types available for partner users: Bronze (Basic) Partner, Silver (Standard) Partner, and Gold (Strategic) Partner. The license type controls the amount of additional organization storage per license as well as which features the partner user can access on the portal.

	Bronze Partner License Type	Silver Partner License Type	Gold Partner License Type
Storage per license	None	2 MB	5 MB
Documents	Yes	Yes	Yes
My Account Profile	Yes	Yes	Yes

	Bronze Partner License Type	Silver Partner License Type	Gold Partner License Type
Leads	No	Yes	Yes
Custom Objects	No	No	Yes
Approvals	No	Yes	Yes
Accounts	No	No	Yes
Opportunities	No	No	Yes

Your organization may also have users with a Partner license which is no longer available from salesforce.com. The Partner license has all of the functionality of the Strategic Partner License Type, but includes 20 MB of storage per user. For more information on storage limits, see "Monitoring Resources" in the Salesforce online help. For more information on user license types, see "Viewing User License Types" in the Salesforce online help.

Channel managers

Channel managers are the internal users that manage your partners.

Partner portals

Partner portals allow partner users to log in to Salesforce through a web portal rather than through salesforce.com. You can customize the web portal to show your branding, and you can configure it to meet your functional and security needs. You can also have multiple portals to meet your different requirements for working with partners.

Setting Up Your Partner Portal

User Permissions Needed	
To set up a Partner Portal:	"Customize Application"

To set up your Partner Portal:

1. Enable the Partner Portal.
2. Create one or more portals.

For each portal:

- a. Configure the settings and communication templates.
- b. Customize the fonts and colors.
- c. Customize the available tabs and tab order.

3. Create partner profiles.

For each partner profile:

- a. Customize page layouts. For more information, see "Setting Page Layouts" in the Salesforce online help.
- b. Customize list views. For more information, see "Creating Custom List Views" in the Salesforce online help.

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

- c. Customize search layouts. For more information, see "Customizing Search Layouts" in the Salesforce online help.

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

4. Assign partner profiles to Partner Portals.
5. Enable login on each Partner Portal.
6. Create partner users.

Enabling the Partner Portal

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

To enable the Partner Portal:

1. Click **Setup** ► **Customize** ► **Partners** ► **Settings**.
2. Click **Edit**.
3. Select the `Enable Partner Portal` checkbox.
4. Click **Save**.

After you enable the Partner Portal for your organization, you can then create one or more Partner Portals to satisfy the various business needs of your customers. To create Partner Portals, see [Creating Partner Portals](#).

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

The Partner User profile.

You can assign Partner Portal users to profiles cloned from this profile. Each cloned profile must deselect the `API Only User` administrative permission. If that option is selected, the users with the profile will not be able to log in to the Partner Portal.

The Enable As Partner button on account records.

Allows you to create a partner account. See [Creating Partner Accounts](#) for more information on creating partner accounts.

The Enable Partner Portal User and View Partner Portal User buttons on contact records.

Allows you to create a new partner user or view existing partner users. See [Creating Partner Users](#) for more information on creating partner accounts.

The "All Partner Portal Users" and "All Internal Users" groups along with the "Roles and Internal Subordinates" sharing rule category.

The "All Partner Portal Users" group automatically contains all Partner Portal users in your organization; the "All Internal Users" group automatically contains all Salesforce users in your organization; the "Roles and Internal Subordinates" sharing rule category allows you to create sharing rules in which you can choose specific Salesforce users in your organization by role plus all of the users in roles below that role, excluding any Partner Portal and PRM portal roles. You can use these groups and sharing rule category to easily create sharing rules that grant all of your Partner Portal or Salesforce users access to specific data.



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

Creating Partner Portals

User Permissions Needed	
To create Partner Portals:	"Customize Application"

After you have enabled the Salesforce Partner Portal, you can create Partner Portals to satisfy the various business needs of your customers.

To create a Partner Portal:

1. Click **Setup** ► **Customize** ► **Partners** ► **Settings**.
2. Click **New**.
3. Set the following options:

Setting	Description
Name	Name of the Partner Portal as displayed on the portal's detail and edit pages, as well as the Partner Portal Setup page. The name of the Partner Portal is not displayed on portal pages, but it does display in the browser title bar.
Description	A description of the Partner Portal as displayed on the portal's detail and edit pages. The description of the Partner Portal is not displayed in the portal.
Login Enabled	<p>Allows users to log in to the Partner Portal.</p> <p>We recommend that you do not select this checkbox until you have completed configured your portal.</p> <p> Note: When you enable the Partner Portal, the default portal will be set as Login Enabled.</p>
Administrator	<p>Click the lookup icon () to choose a default administrator for your Partner Portal. All email notifications regarding users who self-register for your Partner Portal will be sent to this Salesforce user.</p> <p>Notifications include information about registration errors and any other issues self-registering customers may experience, such as inadvertently entering duplicate email addresses, creating duplicate contact records, and exceeding your organization's user license limit.</p> <p>When choosing an administrator for your Partner Portal, you can only select users that have the "Manage Partners" user permission. Furthermore, you cannot deactivate a user selected as a portal administrator. For more information, see "Deactivating Users" in the Salesforce online help.</p>

Portal Default Settings	
Setting	Description
Logout URL	The URL of the Web page that displays when users log out of the Partner Portal, for example, "http://www.acme.com." If a logout URL is not specified, portal users return to the login page when they log out.
Show Action Confirmation	<p>Allows users to view confirmation messages after they complete an action in the Partner Portal. For example, after a user creates a lead in your Partner Portal, he or she views the message: "Lead has been created" if this setting has been enabled.</p> <p>Confirmation messages may help users clearly understand actions they have completed in your Partner Portal.</p>

Email Notification Settings	
Setting	Description
From Email Address	The email address from which all Partner Portal communication templates are sent, for example, "support@acme.com." Salesforce sends the emails automatically, but they appear to portal users as if they were sent from this email address. If a portal user responds to a communication template, the response is sent to this address.
From Email Name	The name associated with the "From" Email Address, for example, "Acme Partner Support."
New User Template	The email template used to send a username and initial password to all newly-enabled Partner Portal users. By default, a sample template is automatically selected for you. To create your own template or modify the sample, see "Managing Email Templates" in the Salesforce online help. This template must be marked as Available for Use.
New Password Template	The email template used to send a new password to existing Partner Portal users when you reset their passwords.
Lost Password Template	The email template used to send a new password to existing Partner Portal users when they reset their own passwords by clicking Forgot your password? on the login page of the Partner Portal.
Change Owner to Portal User Template	The email template used to send a notification to Partner Portal users when they become the new owner of a record in the portal.

Look and Feel	
Setting	Description
Header	<p>A text or HTML file that allows you to incorporate your organization's branding into the header of your Partner Portal. Click the lookup icon () to choose a file that has been uploaded to a publicly accessible folder on the Documents tab.</p> <p>The files you include in the <code>Header</code> and <code>Footer</code> lookup fields can have a combined size of up to 10 KB.</p> <p>We recommend that you do not add a header <i>and</i> a logo to your portal because they may not display properly together.</p> <p>You can position the logout link anywhere on the header by using the HTML tag: "<code>Logout</code>".</p>
Footer	<p>A text or HTML file that allows you to incorporate your organization's branding into the footer of your Partner Portal. Click the lookup icon () to choose a file that has been uploaded to a publicly accessible folder on the Documents tab.</p> <p>The files you include in the <code>Header</code> and <code>Footer</code> lookup fields can have a combined size of up to 10 KB.</p>
Logo	<p>An image file that allows you to incorporate your organization's branding into the top left header of your Partner Portal. Click the lookup icon () to choose a file that has been uploaded to a publicly accessible folder on the Documents tab and marked as an <code>Externally Available Image</code>.</p> <p>The file you include in the <code>Logo</code> lookup field can be up to 20 KB.</p> <p>We recommend that you do not add a header <i>and</i> a logo to your portal because they may not display properly together.</p>
Login Message	<p>A text or HTML file that allows you to incorporate your organization's branding into the header of the login page, forgot password page, and change password page of your Partner Portal. Click the lookup icon () to choose a file that has been uploaded to a publicly accessible folder on the Documents tab.</p> <p>The file you include in the <code>Login Message</code> lookup field can be up to 2 KB.</p>

4. Click **Save**.



Note: Contact salesforce.com for information about the number of Partner Portals you can activate for your organization.

Partner Portal Configuration

User Permissions Needed	
To configure a Partner Portal:	"Customize Application"

Once you have created a Partner Portal, you can customize it to meet your business needs. By customizing your Partner Portal, you can satisfy the needs of your various channels. For example, you can create a "Gold Partner Portal" that includes more functionality than a "Silver Partner Portal."

To customize your Partner Portal

1. Click **Setup** ► **Customize** ► **Partners** ► **Settings**.
2. Click the name of the portal you wish to customize.
3. Configure the portal settings and communication templates.
4. Configure the fonts and colors used on the portal.
5. Configure the available tabs for the portal.
6. Assign partner profiles to the portal.

Scheduling Dashboards to Refresh

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

With Spring '08, you no longer have to wonder when a dashboard refresh has finished. Now, you can specify when a dashboard should refresh, and upon completion, Salesforce will send you an email notification that includes the refreshed dashboard. You can also send the notification to particular users and groups so they too can view the refreshed dashboard in an email.

Implementation Tips

- Add the "Schedule Dashboards" permission to the profiles of users who should be allowed to schedule dashboard refreshes for your organization. By default, the "Schedule Dashboards" permission is enabled in the System Administrator profile.
- Your organization is limited to no more than 200 scheduled dashboard refreshes. Unlimited Edition users can schedule up to two dashboard refreshes an hour per day, whereas Enterprise Edition users can schedule up to one dashboard refresh an hour per day.
- Dashboard components that include s-controls may not display in dashboard refresh notifications. Users must log in to Salesforce to view s-control data displayed in real-time.
- Dashboards refresh in the time zone of the user who schedules the refresh. For example, if the `Time Zone` field on your user record is set to Pacific Standard Time, and you schedule a dashboard to refresh every day at 2:00 PM, then the dashboard will refresh every day at 2:00 PM Pacific Standard Time.
- If you schedule a dashboard to refresh on a specific day of every month, the dashboard will only refresh on months that have that specific day. For example, if you schedule a dashboard to refresh on the 31st day of every month, then the dashboard will only refresh on months that have 31 days. If you want a dashboard to refresh on the last day of every month, choose last from the `On day of every month` drop-down list.
- To send a dashboard refresh notification to other users, the dashboard must be in a public folder with access granted to others. This is because other users cannot access dashboards in your personal folders.

- The dashboard refresh runs within an hour of the time you select in the `Preferred Start Time` drop-down list. For example, if you select 2:00 PM as your preferred start time, the dashboard may refresh any time in between 2:00 PM or 2:59 PM, depending on how many other dashboards are scheduled to refresh at that time.
- Dashboard refresh notifications may not display properly in Outlook 2007.

Best Practices

- Inform users that after they receive dashboard refresh notifications in their email clients, they can view the notifications when the email clients are not connected to the Internet.
- Instruct users to click any dashboard component in a dashboard notification to view the report the dashboard component represents. Users must log in to Salesforce to view the report the dashboard component represents.
- Click **Delete** on scheduled dashboard refreshes you no longer use so that you do not reach the 200 scheduled dashboard refresh limit for your organization.

About Scheduling a Dashboard Refresh

Scheduling a Dashboard Refresh

User Permissions Needed	
To schedule and email a dashboard refresh:	“Schedule Dashboards”

You can schedule an existing dashboard to refresh daily, weekly, or monthly so that you can work in Salesforce without having to wait for the most recent data to refresh. Furthermore, after a refresh completes you can send an email notification to yourself and other users that includes the dashboard in HTML format. In email applications that do not support HTML, the notification displays text that includes a link to the dashboard in Salesforce. Users can view the dashboard after they log in.

To schedule a dashboard refresh:

1. On the Dashboards tab, select a dashboard from the `View Dashboard` drop-down list.
2. Click **Refresh** and choose **Schedule Refresh...** from the drop-down button.

The user in the `Running User` field 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. For more information, see "Creating and Editing Dashboard Properties" in the Salesforce online help.

3. Select a notification setting to send an email when the dashboard refresh finishes:
 - Click `Me` to send an email that includes the refreshed dashboard to the email address specified on your Salesforce user record.
 - Click `Others...` to send an email that includes the refreshed dashboard to additional users. You can only send dashboard refresh notifications to email addresses included on Salesforce user records.
4. Schedule the dashboard refresh:
 - In the `Frequency` field, select the frequency at which the dashboard refreshes. When you click the `Daily`, `Weekly`, or `Monthly` fields, more options display that allow you to refine frequency criteria.
 - In the `Start` and `End` fields, specify the dates during which you wish to schedule dashboard refreshes.
 - In the `Preferred Start Time` drop-down list, click the **Find available options...** link to choose a preferred start time for the dashboard refresh.

Your preferred start time may not be available if other users have already selected that time to refresh a dashboard.

5. Click **Save** to schedule the dashboard refresh.

To delete a scheduled dashboard refresh:

1. Select the dashboard that has a scheduled refresh you want to delete from the `View Dashboard` drop-down list on the Dashboards tab.
2. Click **Refresh** and choose **Schedule Refresh...** from the drop-down button
3. Click **Delete**.

The scheduled refresh is permanently deleted and *not* sent to the Recycle Bin.



Tip: Optionally, users with the "Schedule Dashboards" and "View Setup and Configuration" permissions can view all the dashboards scheduled to refresh for your organization in the scheduled jobs queue. To view the scheduled jobs queue, click **Setup** > **Monitoring** > **Scheduled Jobs**.

You can perform the following actions in the scheduled jobs queue next to a specific dashboard refresh:

- Click **Edit** to update the notification and frequency settings of all instances of the scheduled dashboard refresh.
- Click **Del** to permanently delete all instances of the scheduled dashboard refresh.

Tips on Scheduling a Dashboard Refresh

Consider the following when scheduling a dashboard refresh:

- Your organization is limited to no more than 200 scheduled dashboard refreshes. Unlimited Edition users can schedule up to two dashboard refreshes an hour per day, whereas Enterprise Edition users can schedule up to one dashboard refresh an hour per day.
- Dashboards refresh in the time zone of the user who schedules the refresh. For example, if the `Time Zone` field on your user record is set to Pacific Standard Time, and you schedule a dashboard to refresh every day at 2:00 PM, then the dashboard will refresh every day at 2:00 PM Pacific Standard Time.
- If you schedule a dashboard to refresh on a specific day of every month, the dashboard will only refresh on months that have that specific day. For example, if you schedule a dashboard to refresh on the 31st day of every month, then the dashboard will only refresh on months that have 31 days. If you want a dashboard to refresh on the last day of every month, choose `last` from the `On day of every month` drop-down list.
- The dashboard refresh runs within an hour of the time you select in the `Preferred Start Time` drop-down list. For example, if you select 2:00 PM as your preferred start time, the dashboard may refresh any time in between 2:00 PM or 2:59 PM, depending on how many other dashboards are scheduled to refresh at that time.

Tips on Dashboard Refresh Notifications

Consider the following when scheduling dashboard refresh notifications:

- Dashboard refresh notifications may not display properly in Outlook 2007.
- In HTML-formatted dashboard refresh notifications, users can click the name of the dashboard to log in to Salesforce and view the dashboard directly.
- To send a dashboard refresh notification to other users, the dashboard must be in a public folder with access granted to others. This is because other users cannot access dashboards in your personal folders. To add a dashboard to a public folder, see "Creating and Editing Dashboard Properties" in the Salesforce online help.
- Users can click any dashboard component in a dashboard refresh notification to view the report the dashboard component represents. Users must log in to Salesforce to view the report the dashboard component represents.
- Dashboard components that include s-controls may not display in dashboard refresh notifications. Users must log in to Salesforce to view s-control data displayed in real-time.
- After users receive dashboard refresh notifications in their email clients, they view the notifications when the email clients are not connected to the Internet.

Additional Salesforce Application Enhancements

Account Team and Sales Team Member Enhancements

The Account Team and Sales Team related lists previously displayed the sharing access specified for each team member when added to the team as granted by the account team or sales team. That sharing access is no longer displayed by default. Instead, you can click a **Display Access** button to display the team member's entire sharing access, regardless of how it is acquired. For example, a sharing rule may give a team member greater access than you specified when adding the team member. This enhancement is available in Enterprise, Unlimited, and Developer Editions.

Activities Enhancements

Spring '08 includes enhancements to tasks and events for all Salesforce Editions:

Spell Checker for Activities

In Spring '08, users can spell-check events and tasks while creating or editing them. This functionality is the same as the existing spell checker for emails, cases, and solutions: Click the **Check Spelling** button at the top of the page to run the spell checker in a popup window.

This functionality must be enabled by an administrator by clicking **Setup** ► **Customize** ► **Activities** ► **Activity Settings** and selecting the `Enable Spell Checker on Tasks and Events` checkbox.

Home Page Hover Links for Events

On the home page, users can mouse-over calendar events to view the details of the event in an overlay. Administrators can control whether this functionality is available for their organizations by clicking **Setup** ► **Customize** ► **User Interface** and selecting or deselecting the `Enable Home Page Hover Links for Events` checkbox.

Default Email Notifications on Tasks

When a user creates or edits a task, he or she can now set a personal default for whether or not a notification email is sent to a task's assignee. This option displays when the user selects or deselects the `Send Notification Email` checkbox. To save the current state of the checkbox as the personal default, select `Make this the default setting`.

Administrators can show or hide the `Send Notification Email` checkbox by editing the page layouts for tasks. Administrators can also set an organization-wide default that controls whether the `Send Notification Email` checkbox is selected by default. However, a user's personal preference for defaulting the state of the checkbox takes precedence over the organization-wide setting.

Redesigned Calendar View Headers

The headers across the top of daily, weekly, and monthly calendar views have been redesigned for easier navigation and more efficient use of space. All previously available icons and links still display, but in new positions on the page.

Campaign, Case, and Lead Sharing Defaults Renamed

The organization-wide default sharing settings called Public Read/Write/Transfer are now called Public Full Access yet still provide the same access level as before: all users can view, edit, transfer, delete, and report on all records.

Campaign Enhancements

Previously, only opportunities that were created from leads automatically showed their associated campaigns. Now with Spring '08, when an opportunity is created directly from a contact, the opportunity is associated with the campaign most recently added to the contact regardless of the campaign start and end dates. If campaign sharing is enabled, the user sees the most recent campaign to which he or she has access.

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

Person Accounts for the Customer Portal

Now, users with the "Edit Self-Service Users" permission can give person accounts access to your Customer Portal. To enable a person account:

1. Click **Enable Customer Portal User** from the detail page of a person account.
2. Verify the general information and locale settings for the person account.
3. Select a portal user license for the user.
4. Click `Generate new password and notify user immediately` to email a Customer Portal username and password to the customer.
5. Click **Save**.

Consider the following when enabling the Customer Portal for person accounts:

- You cannot delete a person account enabled to use a Customer Portal.
- You cannot import person accounts to be automatically enabled to use a Customer Portal. For more information on importing person accounts, see "Import My Person Accounts" in the Salesforce online help.
- Person account users cannot self-register for a Customer Portal. When person account users self-register for a Customer Portal, they receive an email notification that instructs them to contact the portal administrator. For more information, see "Enabling Customer Portal Login and Settings" in the Salesforce online help.
- You cannot merge person accounts enabled to use a Customer Portal.

Person Accounts are available in the Customer Portal with Enterprise and Unlimited Editions.

Forecasting Enhancements

Spring '08 includes forecasting enhancements for Professional, Enterprise, Unlimited, and Developer Editions:

Customizable Forecast Category Values

Now, you can rename opportunity forecast categories to match your business processes. For example, you can rename the default forecast category name from "Best Case" to "Upside." Your forecast category names display in reports, opportunity detail and edit pages, opportunity searches, and opportunity list views. You can then group or filter your pipeline reports by that term, trigger workflow rules by it, and have the new value appear in email templates.

As with other custom and standard fields, you can access the merge field for `Forecast Category` in email templates, validation rules, and other places that allow merge fields. The `Forecast Category` merge field value is now available as `ForecastCategoryName`. As an example, you may want to generate a workflow alert where the email references the `Opportunity Name`, `Owner`, `Amount`, and `Forecast Category` fields. The merge fields may be used as such to create the subject line:

```
Auto-Alert: {{{ID:Opportunity.ForecastCategoryName}}
{{{ID:Opportunity.Amount}}} - {{{ID:Opportunity.Name}}} (Owner:
{{{ID:Opportunity.OwnerFullName}}})
```

The resulting email subject line is "Auto-Alert: Upside \$12.00 – Fugacious (Owner: Bob Jones)."

Creating custom forecast categories also allows you to customize the translation of your forecast categories. If your organization uses translation workbench, you can customize the translated values of each of the forecast category values your organization uses. For more information, see "Entering Translated Terms" in the Salesforce online help.

Additions to the Setup Audit Trail

The following forecast actions are now added to the setup audit trail:

- Enabling forecast sharing
- Disabling forecast sharing
- Allowing a forecast manager to share his forecast
- Disallowing a forecast manager from sharing his forecast
- Enabling a user for forecasting
- Changing forecast revenue settings
- Changing forecast quantity settings
- Changing forecast period settings
- Changing forecast date settings
- Changing forecast type settings

Forecast Totals on Forecast Detail Pages

The forecast detail page now includes the total for the forecast items.

New Option for Forecast Summary Default View

The **Default Product Family** drop-down list now includes the `--All--` option. To change this option, click **Setup** > **Customize** > **Forecasts** > **Settings**. For more information, see "Defining Customizable Forecast Settings" in the Salesforce online help.

Lead Conversion with Validation Rules and Triggers

By default, customers who sign up for a new organization after the launch of the Spring '08 release (in February 2008) are enabled with new lead conversion functionality that respects validation rules and Apex triggers.

The functionality is controlled by the `Enforce Validation and Triggers from Lead Convert` checkbox on the Lead Settings page at **Setup** > **Customize** > **Leads** > **Settings**. When selected, it enables the following operations when you convert leads:

- Enforcement of universally required custom fields.
- Enforcement of validation rules.
- Workflow actions on leads such as field updates, automatic task assignments, and transfers.
- Execution of Apex before triggers that fire before the insertion of accounts, contacts, or opportunities. In addition, execution of Apex before triggers that fire before the update of accounts or contacts.

Optionally, administrators of newly-signed-up organizations can deselect the checkbox to opt out of the new lead conversion functionality and use the lead conversion functionality offered prior to the Spring '08 release.

Existing organizations who signed up prior to the Spring '08 release will not see a change in lead conversion behavior or the new checkbox. Such organizations can contact salesforce.com to request the new lead conversion functionality.

This lead conversion enhancement is available in Group, Professional, Enterprise, Unlimited, and Developer Editions.

Opportunity Roll-Up Summary Fields on Accounts

The custom field type introduced in the Summer '07 release, roll-up summary field, has been extended to include support for the standard relationship between accounts and opportunities. This provides easier access to aggregated opportunity information directly from an account record without running a report. For information on roll-up summary field behavior, see "About Roll-Up Summary Fields" in the Salesforce online help. Roll-up summary fields are available in all Editions.



Note: Roll-up summary fields cannot calculate the values of other roll-up summary fields except for account to opportunity roll-up summary fields, which allow you to calculate the values of opportunity roll-up summary fields.

Report Enhancements

21-Digit Summaries

Now, summary fields on tabular, summary, and matrix reports can display up to 21 digits for greater accuracy. Summary fields of 21 digits will display precisely, but more than 21 digits may not be precise. This is available in all Salesforce Editions.

Comprehensive Record Reporting via Custom Report Types (Outer Joins)

Now, you can define custom report types so that users can run reports that display results from an object with or without its related objects. For example, you can build a custom report type so that users can run reports on cases with or without solutions. Such a report allows users to see which cases were closed with solutions, and which were not.

To choose the object relationships that display on reports created from custom report types:

1. Click **Setup** ► **Develop** ► **Report Types** to display the All Custom Report Types page.
2. Select the name of a custom report type.
3. Click **Edit** on the Object Relationships section.
4. If you want users to run reports on object A with object B, then select the `Each "A" record must have at least one related "B" record` field. For example, choose this field if you want users to run reports on accounts that have contacts. If you want users to run reports on object A with or without object B, then select the `"A" records may or may not have related "B" records` field. For example, choose this field if you want users to run reports on accounts that may or may not have contacts. Note that these field names automatically update to include the letter that represents each object on the Edit Custom Report Type page.

Note the following about selecting a may-or-may-not association:

- If you select that object A may or may not have object B, then all subsequent objects automatically include the may-or-may-not association on the custom report type. For example, if accounts are the primary object and contacts are the secondary object, and you choose that accounts may or may not have contacts, then any tertiary and quaternary objects included on the custom report type default to may-or-may-not associations.
- Blank fields display on report results for object B when object A does not have object B. For example, if a user runs a report on accounts with or without contacts, then contact fields display as blank for accounts without contacts.
- On reports where object A may or may not have object B, you cannot use the OR condition to filter across multiple objects on the Select Criteria page of the report wizard. For example, if you enter filter criteria `Account Name starts with M OR Contact First Name starts with M`, an error message displays informing you that your filter criteria is incorrect. For more information, see "Entering Filter Criteria" in the Salesforce online help.
- The `Rows to Display` drop-down list on the Select Criteria page of the report wizard only applies to objects on reports created from custom report types where object A is with object B. Furthermore, existing reports may not run or disregard the `Rows to Display` drop-down list if they were created from custom report types where object associations changed from object A with object B to object A with or without object B. For more information, see "Limit Report Results" in the Salesforce online help.

5. Click **Save**.

Custom report types are available in Professional, Enterprise, Unlimited, and Developer Editions.

Salesforce Content Enhancements

Spring '08 includes Salesforce Content enhancements for Professional, Enterprise, and Unlimited Editions:

Featured Content

"Featuring" content enables authors and administrators to highlight specific content as particularly valuable to users. For example, a Competitive Intelligence Team that publishes many competitive articles about "Acme Corp" can mark the most important articles as "featured." When users search for content related to Acme Corp, the featured content displays at the top of search results and it is highlighted to visually distinguish it from other content in the search-result set. Featured content is also listed on the workspace overview and workspace detail pages for quick access.

Multiple Content Types

Content types are the containers for custom fields; they determine which fields are available during the publishing process and how the fields display on the content details page. You can create multiple content types and assign a content field to any or all content types. For example, if sales and marketing users need to record different information about their content, you can create Sales and Marketing content types. If you create a `Related Campaign` lookup field and add it to the Marketing content type only, users who select the Sales content type during the upload process will not have the option to choose a campaign. After creating multiple content types, you can choose to restrict the content types that are available in a particular workspace. Users can filter their search results by content type to locate relevant content easily.

Workspace Tagging Rules

In Salesforce Content, tags are descriptive labels that help classify and organize content. Contributors can assign tags to their files or Web links, thus enabling all workspace members to browse for content by tag. To encourage contributors to tag consistently, administrators now have the option of applying a tagging rule to a workspace. Three tagging rules are available: open, guided, and restricted. The open tagging rule allows contributors to assign any tag to their content. The guided tagging rule provides a list of suggested tags but also allows contributors to enter their own tags. The restricted tagging rule does not allow contributors to enter their own tags; in a restricted-tagging workspace, contributors can only choose from the list of suggested tags.

Managing Salesforce Content Storage

You can now click **Setup > Data Management > Storage Usage** to view your current usage for all storage types, including Salesforce Content. Salesforce Content storage is allocated on a license count basis, with each license contributing 500 MB to the organization's total allotment. Administrators receive a warning email when their organization reaches 80% of its total Salesforce Content storage allowance. Additional storage can be purchased in 1 GB blocks.

Search Enhancements

Finding the information you need in Salesforce Content is easier than ever. Display options on the Content tab allow you to customize search results and then sort data by clicking the column headers. "Smart bars" on the Content and Workspaces tabs provide a graphical representation for the relative number of downloads, ratings, subscribers, and comments.

Moving and Deleting Content

Spring '08 offers greater flexibility in managing content. In addition to sharing content among workspaces, you can now move content from one home workspace to another. You can also permanently delete files from Salesforce Content. Like other deleted Salesforce records, deleted content is moved to your Recycle Bin.

Salesforce to Salesforce Enhancements

As an administrator, you can build custom report types so users can run and create custom reports about connections. For more information on custom report types, see "What is a Custom Report Type?" in the Salesforce online help.

FORCE.COM PLATFORM

Visualforce Enhancements

Available in **Developer** Edition as part of the Visualforce developer preview program

The Spring '08 release includes several new features that improve the capabilities of Visualforce. These include:

- [Custom Components](#)
- [The <apex:pageBlockList> Component](#)
- [The <apex:actionFunction> Component](#)
- [The <apex:flash> Component](#)
- [Controller Class Security](#)
- [Additional Visualforce Enhancements](#)

Custom Components

In the Spring '08 release, developers can now build custom components to augment the library of standard, prebuilt component tags, such as <apex:relatedList> and <apex:dataTable>.

A custom component encapsulates a common design pattern that can be reused in one or more Visualforce pages. For example, suppose you want to create a photo album using Visualforce pages. Each photo in the album has its own border color, and a text caption that displays beneath it. Rather than repeating the Visualforce markup required for displaying every photo in the album, you can define a custom component named `singlePhoto` that has attributes for image, border color, and caption, and then uses those attributes to display the image on the page. Once defined, every Visualforce page in your organization can leverage the `singlePhoto` custom component in the same way as a page can leverage standard components such as <apex:dataTable> or <apex:relatedList>.

Unlike page templates, which also enable developers to reuse markup, custom components provide more power and flexibility because:

- Custom components allow developers to define attributes that can be passed in to each component. The value of an attribute can then change the way the markup is displayed on the final page, and the controller-based logic that executes for that instance of the component. This behavior differs from that templates, which do not have a way of passing information from the page that uses a template to the template's definition itself.
- Custom component descriptions are displayed in the application's component reference dialog alongside standard component descriptions. Template descriptions, on the other hand, can only be referenced through the Setup area of Salesforce because they are defined as pages.

All markup for a custom component is defined within an <apex:component> tag. This tag must be the top-level tag in a custom component definition. For example:

```
<apex:component>
  <b>
    <apex:outputText value="This is my custom component."/>
  </b>
</apex:component>
```

The body of an `<apex:component>` tag is the markup that is added to a standard Visualforce page whenever the component is included. For example, the following Visualforce page uses the component defined above (in this example, the component above was saved with the name `myComponent`):

```
<apex:page standardController="Account">
  This is my <i>page</i>. <br/>
  <c:myComponent>
</apex:page>
```

It results in the following output:

```
This is my page.
This is my custom component.
```

Apart from standard Visualforce markup, the body of an `<apex:component>` tag can also specify the attributes that can be passed in to the custom component when it is used in a Visualforce page.

Attributes are defined with the `<apex:attribute>` tag. For example, the following custom component definition specifies two required attributes named `value` and `borderColor`. The values for these attributes are referenced in the custom component definition with `{! }` syntax:

```
<apex:component>
  <!-- Attribute Definitions -->
  <apex:attribute name="myValue" description="This is the value for the component."
    type="String" required="true"/>
  <apex:attribute name="borderColor" description="This is color for the border."
    type="String" required="true"/>

  <!-- Custom Component Definition -->
  <h1 style="border:{!borderColor}"/>
    <apex:outputText value="{!myValue}"/>
  </h1>
</apex:component>
```

To reference this component in a Visualforce page, you can use the following markup:

```
<c:myComponent myValue="My value" borderColor="red" />
```

Similar to standard Visualforce pages, custom components can be associated with a controller written in Apex. You can use the controller to perform additional logic before returning the component's markup to the associated page. However, unlike page controllers, component controllers cannot directly access the Force.com database by executing SOQL or SOSL queries or DML operations. Instead, component controllers can only access data that is passed into the custom component with attributes. Any database operations that are required by a custom component must be executed by the controller or controller extensions associated with the Visualforce page on which the custom component appears.

To define a custom component:

1. In Salesforce click **Setup** ► **Develop** ► **Components**.
2. Click **New**.
3. In the **Label** text box, enter the text that should be used to identify the custom component in Setup tools.
4. In the **Name** text box, enter the text that should identify this custom component in Visualforce markup. This name must only contain alphanumeric characters, start with a letter, and be unique from all other components in your organization.
5. In the **Description** text box, enter a text description of the custom component. This description appears in the component reference with other standard component descriptions as soon as you click **Save**.
6. In the **Body** text box, enter Visualforce markup for the custom component definition. A single component can hold up to 1 MB of text, or approximately 1,000,000 characters.

7. Click **Save** to save your changes and view the custom component's detail screen, or click **Quick Save** to save your changes and continue editing your component. Your Visualforce markup must be valid before you can save your component.

The `<apex:pageBlockList>` Component

An `<apex:pageBlockList>` component displays a list of data, similar to the way a list of data is displayed in a standard Salesforce page. The `<apex:pageBlockList>` component must be a child of either an `<apex:pageBlock>` or `<apex:pageBlockSection>`.

Like an `<apex:dataTable>` component, an `<apex:pageBlockList>` is defined by iterating over a set of data, displaying information about one item of data per row. The body of the `<apex:pageBlockList>` component tag contains one or more `<apex:column>` components that specify what information should be displayed for each item of data.

Unlike the `<apex:dataTable>` component, the default styling for `<apex:pageBlockList>` matches standard Salesforce styles. Any additional styles specified with `<apex:pageBlockList>` attributes override the standard Salesforce styling.

Note that if you specify an sObject field as the `value` attribute of an `<apex:column>` in an `<apex:pageBlockList>` component, the associated label for that field is used as the column header by default. To override this behavior, use the `headerValue` attribute on the column, or the column's `header facet`.

The following markup shows an example of a Visualforce page that uses `<apex:pageBlockList>`:

```
<!-- Page: -->
<apex:page standardController="Account">
  <apex:pageBlock title="My Content">
    <apex:pageBlockList value="{!account.Contacts}" var="item">
      <apex:column value="{!item.name}"/>
    </apex:pageBlockList>
  </apex:pageBlock>
</apex:page>
```

The `<apex:actionFunction>` Component

An `<apex:actionFunction>` component provides support for invoking controller action methods directly from JavaScript code using an AJAX request. Unlike the `<apex:actionSupport>` component, which only provides support for invoking controller action methods from other Visualforce components, `<apex:actionFunction>` defines a new JavaScript function which can then be called from within a block of JavaScript code. An `<apex:actionFunction>` component must be a child of an `<apex:form>` component.

The following markup shows an example of a Visualforce page that uses `<apex:actionFunction>`:

```
<!-- Page: -->
<apex:page controller="exampleCon">
  <apex:form>
    <apex:actionFunction name="sayHello" action="{!sayHello}" rerender="out" status="myStatus"/>
  </apex:form>
  <apex:outputPanel id="out">
    <apex:outputText value="Hello ">
      <apex:actionStatus startText="requesting..." id="myStatus">
        <apex:facet name="stop">{!username}</apex:facet>
      </apex:actionStatus>
    </apex:outputPanel>
    <script>window.setTimeout(sayHello,2000)</script>
  </apex:page>
```

The following Apex class is the controller for the page above:

```
/** Controller */
public class exampleCon {
  String uname;
```

```

public String getUsername() {
    return uname;
}

public PageReference sayHello() {
    uname = UserInfo.getName();
    return null;
}
}

```

The <apex:flash> Component

An <apex:flash> component allows you to display a Flash movie from within a Visualforce page.

Controller Class Security

With Spring '08 you can now specify whether a user can execute methods in a custom controller or controller extension class based on the user's profile.



Note: If a user has the "Author Apex" permission enabled in his or her profile, the user has access to all Apex classes in the associated organization, regardless of the security setting for individual classes.

Permission for an Apex class is checked at the top level only. For example, if class A calls class B, and a user profile has access only to class A but not class B, the user can still successfully execute the code in class A. Likewise, if a Visualforce page uses a custom component with an associated controller, security is only checked for the controller associated with the page. The controller associated with the custom component executes regardless of permissions.

To set Apex class security from the class list page:

1. Click **Setup** ► **Develop** ► **Apex Classes**.
2. Next to the name of the class that you want to restrict, click **Security**.
3. Select the profiles that you want to enable from the Available Profiles list and click **Add**.
4. Select the profiles that you want to disable from the Enabled Profiles list and click **Remove**.
5. Click **Save**.

To set Apex class security from the profile detail page:

1. Click **Setup** ► **Manage Users** ► **Profiles**.
2. Click the name of the profile you want to modify.
3. In the Enabled Apex Class Access related list, click **Edit**.
4. Select the Apex classes that you want to enable from the Available Apex Classes list and click **Add**.
5. Select the Apex classes that you want to disable from the Enabled Apex Classes list and click **Remove**.
6. Click **Save**.

Additional Visualforce Enhancements

The following enhancements have also been added to Visualforce with Spring '08:

Links on output fields

The <apex:outputField> component now displays the values of lookup, URL, and email fields as links rather than plain text.

Help links in page blocks

The <apex:pageBlock> component now supports an online help link with the following new attributes:

- `helpUrl`—The URL of a Web page that provides help for the page block. When this value is specified, a help link appears in the upper right corner of the page block. The user can click this link to get to the provided help.
- `helpTitle`—The text that displays when a user hovers the mouse over the help link for the page block. This attribute only has an effect if a value for `helpUrl` is also specified.

Custom help for fields

If the Salesforce page header is displayed, the `<apex:inputField>` and `<apex:outputField>` components now display custom help if it is defined for the field in Setup. Additionally, the `<apex:pageBlockSectionItem>` component now includes a `helptext` attribute that allows you to mimic custom field help behavior on non-Salesforce fields. Custom help does not display if the `showHeader` attribute is set to `false` on the `<apex:page>` tag.

Note that if you do not want to display the custom help associated with a Salesforce field, use `<apex:inputField>` and `<apex:outputField>` in the body of an `<apex:pageBlockSectionItem>` component, and do not specify a value for the `helptext` attribute. No help is displayed on fields within that component unless a value is specified for `helptext`.

Custom header, footer, and body text on table columns

The `<apex:column>` component now supports custom header, footer, and body text with the following new attributes and facets:

- `footerValue`—The text that should be displayed in the column footer. If you specify a value for this attribute, you cannot use the column's `footer` facet.
- `headerValue`—The text that should be displayed in the column header. If you specify a value for this attribute, you cannot use the column's `header` facet. Note also that specifying a value for this attribute overrides the default header label that appears if you use an `<apex:inputField>` or `<apex:outputField>` component in the column body.
- `value`—The text that should be displayed in every cell of the column, other than its header and footer cells. If you specify a value for this attribute, you cannot add any content between the column's opening and closing tags.
- `footer facet`—The components that appear in the footer cell for the column. Note that the order in which a `footer facet` appears in the body of an `<apex:column>` component does not matter, because any facet with `name="footer"` will control the appearance of the final cell in the column. If you use a `footer facet`, you cannot specify a value for the column's `footerValue` attribute.
- `header facet`—The components that appear in the header cell for the column. Note that the order in which a `header facet` appears in the body of an `<apex:column>` component does not matter, because any facet with `name="header"` will control the appearance of the first cell in the column. If you use a `header facet`, you cannot specify a value for the column's `headerValue` attribute. Note also that specifying a value for this facet overrides the default header label that appears if you use an `<apex:inputField>` or `<apex:outputField>` in the column body.

Custom columns on related lists

An `<apex:relatedList>` component in a Visualforce page now displays all columns that are specified in the related list layout in Setup. In previous releases, only the `Name` field was displayed, regardless of the columns specified in the related list layout.

Renamed `<alias>` component

The `<apex:alias>` component is now named `<apex:variable>`.

A Visualforce page that was defined with one or more `<apex:alias>` components will continue to display properly in this release, but when the page definition is opened for editing the platform will automatically convert all instances of `<apex:alias>` to `<apex:variable>`. New page definitions must use `<apex:variable>` to compile properly.

Renamed `StandardController` class method

The `getSubject` method on the `ApexStandardController` class is now named `getRecord` to match the Force.com API. Existing controllers that use `getSubject` will continue to function properly during this release, but may not compile in future releases.

Refer to the [Visualforce Developer's Guide](#) for complete information about Visualforce.

Apex Enhancements

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

Apex includes the following enhancements in Spring '08:

Apex in AppExchange Packages

With Spring '08 comes the ability to include your Apex scripts in a package that you can then upload to the AppExchange. Note that when you upload an AppExchange package that contains Apex, the same testing guidelines apply as if you were deploying your code. That is:

- 75% of your Apex scripts are covered by unit tests, and all of those test complete successfully.

Note that when deploying to a production organization, every unit test in your organization namespace is executed.

- Every trigger has some test coverage.
- All classes and triggers compile successfully.

In addition, salesforce.com recommends that any AppExchange package that contains Apex be a managed package. Managed packages receive a unique namespace. This namespace is automatically prepended to your script class names, methods, variables, and so on, which helps prevent duplicate names in the installer's organization.

Available in Enterprise Edition

Apex is now generally available in Enterprise Edition.

Business Accounts and Person Accounts

If your organization has enabled person accounts, you have two different kinds of accounts: business accounts and person accounts. If your script creates a new account using `name`, a business account is created. If the script uses `lastName`, a person account is created.

Debug Logging

You can specify greater granularity when you generate a debug log. Instead of a single debug log level, there is a log category for specifying the type of information to be logged, such as `Workflow` or `Apex` scripts, as well as a log level, for specifying the amount of information to be logged for an Apex script.

Decimal to Double Conversion

Prior to Spring '08, it was possible to implicitly convert a `Decimal` value to a `Double` value. As of Spring '08, implicit `Decimal` to `Double` conversion is no longer allowed for argument types of methods. However, code compiled in releases prior to Spring '08 still allow this conversion. In addition, implicit `Decimal` to `Double` conversion is still enabled for assignment of values.

Deprecated Keywords `commit`, `rollback`, and `package`

As of Spring '08, the `commit` and `rollback` keywords are no longer supported. You must rewrite your Apex scripts to use the database `savepoint` and `rollback` methods instead.

In addition, packages are no longer allowed. All packages must be rewritten as classes for Spring '08.

Enhanced User Interface

The Salesforce user interface for editing Apex scripts has been enhanced to include line numbers and color coding to distinguish different elements, such as comments, keywords, literal strings, and so on.

New Arguments, Methods

The `sObject clone` method now allows you to specify whether you want a shallow copy or a deep copy of the object.

The following math functions have been added:

- Long `abs(decimal)`
- Double `acos(Double)`
- Double `asin(Double)`
- Double `atan(Double)`
- Double `atan2(Double, Double)`
- Double `cbrt(Double)`
- Double `cosh(Double)`
- Double `cos(Double)`
- Double `rint(Double)`
- Double `round(decimal)`
- Double `sin(Double)`
- Double `sinh(Double)`
- Double `signum(Double)`
- Double `tan(Double)`
- Double `tanh(Double)`

Show Dependencies

As part of managing your Apex classes and triggers, you can now review the dependencies for that script, that is, the objects and other items that are referenced in the script and must exist for the script to be valid. This includes such things as standard and custom fields, standard and custom objects, and organization-wide settings such as multicurrency or territory management. To review dependencies, click **Show Dependencies** when viewing the detail page for a class or trigger. This information can be very useful before deploying your code or adding it to an AppExchange package.

Support for Salesforce Object Search Language (SOSL) Queries

You can now use SOSL queries in Apex classes and anonymous blocks. Similar to SOQL query syntax, a SOSL query must be placed in brackets (`[]`) to return values, and can reference Apex script variables and expressions if they are preceded by a colon (`:`). SOSL statements evaluate to a list of lists of `sObjects`, where each list contains the search results for a particular `sObject` type. The result lists are always returned in the same order as they were specified in the SOSL query.

Note that the syntax of the `FIND` clause in Apex differs from the syntax of the `FIND` clause in the Force.com Web Services API:

- In Apex, the value of the `FIND` clause is demarcated with single quotes. For example:

```
FIND 'map*' IN ALL FIELDS RETURNING Account (id, name), Contact,
Opportunity, Lead
```

- In the Force.com API, the value of the `FIND` clause is demarcated with braces. For example:

```
FIND {map*} IN ALL FIELDS RETURNING Account (id, name), Contact,
Opportunity, Lead
```

A new system method, `Test.setFixedSearchResults`, enables you to specify a set of fixed search results when executing a SOSL query in a test method. If fixed search results are not specified with `Test.setFixedSearchResults`, SOSL queries in test methods do not return any records.

Classes and anonymously executed Apex scripts can execute up to 20 SOSL queries. A single SOSL query return up to 200 records.

transient Keyword

The `transient` keyword was added for use with Visualforce pages. It enables you to specify a method for a field that will not be included in the view state of a page.

In addition, several entries are automatically marked as transient, such as `Savepoints` and `PageReferences`.

XMLStreamWriter Class

Methods in the new `XMLStreamWriter` class enable you to write to an XML document from Apex.

Refer to the [Apex Developer's Guide](#) for complete information about Apex.

Force.com Web Services API 12.0

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

The Force.com Web Services API and related toolkits have been improved for Spring '08:

- In previous versions of the Force.com Web Services API, changing an account owner removed sharing access for each account team member. In addition, changing an opportunity owner removed each sales team member and their sharing access to the record. In version 12.0 of the Force.com Web Services API, changing an account or opportunity owner does not revoke sharing access to any pre-existing account or sales team members.
- Status codes are now documented. See [Force.com Web Services API Developer's Guide](#) for a list of status codes, the probable cause of the error that generated the status code, and suggested solutions.
- Sessions will only expire if the session has been inactive for a predetermined time. The period of activity before session expiration can be configured at **Setup > Security Controls**. Your session will stay valid as long as you continue to use your session.

For complete details about Force.com Web Services API 12.0 enhancements, visit the detailed "What's New in Web Services API Spring '08" on the Apex Developer Network at wiki.apexdevnet.com/index.php/Apex_Wiki.

Force.com Developer Tools

Spring '08 includes the following tools and enhancements designed specifically for developers building applications on the Force.com platform.

Apex Generally Available in Enterprise Edition and New Apex Sandbox

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

Starting in patch release 150.5 (January 2008), Apex is now generally available in Enterprise Edition. In addition, all Enterprise and Unlimited Edition organizations now include a small configuration-only sandbox for testing Apex code. To avoid confusion, the Quick Copy sandbox name has changed to Configuration Only. The following sandbox types are now available:

- Apex - Copies up to 10 MB, configuration only.
- Full Copy - Copies your entire production organization and all of its data.

- Configuration Only - Copies up to 500 MB, configuration only. This was previously called a Quick Copy sandbox.

To see your sandbox list, click **Setup** ► **Data Management** ► **Sandbox**. For more information, see "Managing Your Apex Sandboxes" in the Salesforce online help.

Metadata API

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

Use the metadata API to manage setup and customization information for your organizations:

- Work with setup configuration as XML metadata files
- Migrate configuration changes between organizations
- Create your own tools for managing organization and application metadata

You can modify metadata in *test* organizations on Developer Edition or Sandbox, and then deploy tested changes to *production* organizations on Enterprise Edition or Unlimited Editions. You can also create scripts to populate a new organization with your custom objects, custom fields, Apex classes, Apex triggers, Visualforce pages, and other components.

Two kinds of metadata calls are available for use:

- Asynchronous metadata API calls `create()`, `update()`, and `delete()` which act upon the metadata objects in a manner similar to the way synchronous API calls act upon objects. Use these calls with the utility call `checkstatus()`.
- Declarative or file-based metadata API calls `deploy()` and `retrieve()`, which act upon packages. Packages contain a `.zip` file that holds components in a set of folders, and a manifest file named `package.xml`.



Note: An object must be visible in the organization for the API metadata to act on it. Apex classes, Apex triggers, and Visualforce pages may be visible in Enterprise Edition with Power Pack.

In addition to the components previously available in the Developer Preview, you can now work with custom buttons, links, and email templates and letterhead.

For complete details about Force.com Web Services Metadata API 12.0, visit the detailed "What's New in Web Services API Spring '08" on the Apex Developer Network at wiki.apexdevnet.com/index.php/Apex_Wiki.

The documentation will be available in a new location when version 12.0 is released:

www.salesforce.com/us/developer/docs/api_meta/index.htm.

Force.com Toolkit for Eclipse

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

Spring '08 includes the general availability of the Force.com Toolkit for Eclipse. While the previously released Apex Toolkit for Eclipse allowed you to edit classes, triggers, and s-controls in Eclipse, the new Force.com Toolkit for Eclipse allows you to create, update, and delete many more components exposed in the API. The Force.com Toolkit for Eclipse contains the following enhancements:

- A customized Force.com perspective in Eclipse.
- XML insight in the code editor.
- Support for new component types provided through the API. in the Winter '08 release, including custom objects, fields, record types, tabs, applications, profiles and more.

For complete details about the Force.com Toolkit for Eclipse, visit the Force.com Toolkit for Eclipse main page at wiki.apexdevnet.com/index.php/Force.com_Toolkit_for_Eclipse.

Apex Email Services Enhancements and General Availability

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

With Spring '08, Apex email services are now generally available with Enterprise, Unlimited, and Developer Editions. In addition, Apex email services have been enhanced since the Winter '08 developer preview release. The implementation of the `InboundEmail` handlers in the Inbound Email Object has changed as well.

Implementation Tips

- Before creating Apex email services, create Apex classes that implement the `Messaging.InboundEmailHandler` interface.
- To create Apex classes for processing email, you must have the "Author Apex" permission.
- Salesforce limits the total number of messages that all email services combined can process daily. Messages that exceed this limit are bounced, discarded, or queued for processing the next day, depending on how you configure the failure response settings for each email service. Salesforce calculates the limit by multiplying the number of user licenses by 1,000.
- Each email service has one or more Salesforce-generated email addresses to which users can send messages for processing. An email service only processes messages it receives at one of its addresses.
- Salesforce calculates the limit by multiplying the number of user licenses by 1,000.
- If you configure an email service and its email service address to only accept messages from authorized senders, note that the email service only processes messages from senders who are authorized to use both the email service and its address.

Best Practices

- Request that your users keep the email service addresses confidential.

About Apex Email Services

What are Email Services?

User Permissions Needed	
To configure Apex email services and email service addresses:	"Modify All Data"
To create Apex classes:	"Author Apex"

Email services are automated processes that use Apex classes to process the contents, headers, and attachments of inbound email. For example, you can create an email service that automatically creates contact records based on contact information in messages.

Each email service has one or more Salesforce-generated email addresses to which users can send messages for processing. An email service only processes messages it receives at one of its addresses.

To use email services, click **Setup** ► **Develop** ► **Email Services**.

- Click **New Email Service** to define a new email service.
- Select an existing email service to view its configuration, activate or deactivate it, and view or specify addresses for that email service.

- Click **Edit** to make changes to an existing email service.
- Click **Del** to delete an email service.



Note: You cannot delete an active email service.

When defining email services, note the following:

- Salesforce limits the total number of messages that all email services combined can process daily. Messages that exceed this limit are bounced, discarded, or queued for processing the next day, depending on how you configure the failure response settings for each email service. Salesforce calculates the limit by multiplying the number of user licenses by 1,000.
- Email service addresses that you create in your sandbox cannot be copied to your production organization.

Defining Email Services

User Permissions Needed	
To configure Apex email services and email service addresses:	"Modify All Data"
To create Apex classes:	"Author Apex"

To define an email service:

1. Click **Setup** ► **Develop** ► **Email Services**.
2. Click **New Email Service**, or click **Edit** to change an existing email service.
3. Specify the name of the email service.
4. Choose the Apex class you want this email service to use to process messages. The Apex class you choose must implement the `Messaging.InboundEmailHandler` interface. For example:

```
global class CreateTaskEmailExample implements Messaging.InboundEmailHandler {
}
```

For information on the `InboundEmail` object, see "Using the InboundEmail Object" in the Salesforce online help

5. Choose the types of attachments you want the email service to accept. The options are:

None

The email service accepts the message but discards any attachment.

Text Attachments Only

The email service only accepts the following types of attachments:

- Attachments with a Multipurpose Internet Mail Extension (MIME) type of `text`.
- Attachments with a MIME type of `application/octet-stream` and a filename that ends with either a `.vcf` or `.vcs` extension. These are saved as `text/x-vcard` and `text/calendar` MIME types, respectively.

Messages with attachments other than these types are accepted, but the attachments are discarded.

Binary Attachments Only

The email service only accepts binary attachments, such as image, audio, application, and video files.

Messages with attachments that are not binary are accepted, but the attachments are discarded.

All

The email service accepts any type of attachment.



Note: An email service can only process attachments if you configure the email service to accept attachments and use an Apex class that processes the types of attachments the email service accepts.

6. Optionally, select the `Authenticate Senders` checkbox to configure the email service to verify the legitimacy of the sending server before processing a message. The email service uses the following authentication protocols to verify the sender's legitimacy:

- SPF
- SenderId
- DomainKeys
- DKIM

If the sending server passes at least one of these protocols and does not fail any, the email service accepts the email. If the server fails a protocol or does not support any of the protocols, the email service performs the action specified in the `Unauthenticated Sender Action` failure response setting.



Tip: Before selecting the `Authenticate Senders` checkbox, ensure that the senders that you expect to use the email service support at least one of the authentication protocols listed above. For information on these authentication protocols, see the following websites:

- <http://www.openspf.org>
- <http://www.microsoft.com/mscorp/safety/technologies/senderid/default.mspx>
- <http://www.dkim.org>

7. Optionally, configure this email service only to accept messages from certain senders by listing their email addresses and domains in the `Accept Email From` textbox. Separate multiple entries with commas. For example: `george@mycompany.com, yahoo.com, gmail.com`. If the `Accept Email From` textbox has a value and the email service receives a message from an unlisted email address or domain, the email service performs the action specified in the `Unauthorized Sender Action` failure response setting.

Leave this field blank if you want the email service to receive email from any email address.



Note: You can also authorize email addresses and domains at the email service address-level. See "Defining Email Service Addresses" in the Salesforce online help.

If both the email service and email service address are configured to only accept messages from certain senders, the email service only processes messages from senders that are listed in the `Accept Email From` textboxes on both the email service and the email service address.

8. Select the `Active` checkbox if you want the email service to be activated when you click `Save`.
9. Configure the failure response settings, which determine how the email service responds if an attempt to access this email service fails for the following reasons:

Over Email Rate Limit Action

Determines what the email service does with messages if the total number of messages processed by all email services combined has reached the daily limit for your organization. Salesforce calculates the limit by multiplying the number of user licenses by 1,000.

Deactivated Email Address Action

Determines what the email service does with messages received at an email address that is inactive.

Deactivated Email Service Action

Determines what the email service does with messages it receives when the email service itself is inactive.

Unauthenticated Sender Action

Determines what the email service does with messages that fail or do not support any of the authentication protocols if the `Authenticate Senders` checkbox is selected.

Unauthorized Sender Action

Determines what the email service does with messages received from senders who are not listed in the `Accept From Email` textbox on either the email service or email service address.

The failure response options are:

Bounce Message

The email service returns the message to the sender with a notification that explains why the message was rejected.

Discard Message

The email service deletes the message without notifying the sender.

Queue Message (Over Email Rate Limit Action Only)

The email service queues the message for processing in the next 24 hours. If the message is not processed within 24 hours, the email service returns the message to the sender with a notification that explains why the message was rejected.

10. Click `Save` to save your changes, or `Save` and `New Email Address` to create email addresses for this email service, as described in "Defining Email Service Addresses" in the Salesforce online help.

Defining Email Service Addresses

User Permissions Needed	
To configure Apex email services and email service addresses:	"Modify All Data"
To create Apex classes:	"Author Apex"

To define an email service address:

1. Click **Setup** ► **Develop** ► **Email Services**.
2. Choose the email service for which you want to define an address.
3. Click **New Email Address**, or click **Edit** to change the configuration for an existing email service address.
4. In the `Email Address` field, enter the local-part of the email service address. Salesforce generates a unique domain-part for each email service address to ensure that no two email service addresses are identical. The generated domain-part appears to the right of the `Email Address` field.



Tip: For the local-part of a Salesforce email address, all alphanumeric characters are valid, plus the following special characters: `!#$%&'*/=?^_+~`{|}~`. For the domain-part of a Salesforce email address, only alphanumeric characters are valid, as well as hyphen (-). The dot character (.) is also valid in both the local-part and domain-part as long as it is not the first or last character.

Salesforce email addresses are case-insensitive.

5. Select the `Active` checkbox if you want the email service address to be activated when you click `Save`.
6. Choose the `Context User`. The email service assumes the permissions of the context user when processing the messages this address receives. For example, if the email service is configured to modify contact records upon receiving updated contact information, the email service only modifies a record if the context user has permission to edit the record.



Important: Choose a context user that has permission to execute the Apex class that the email service is configured to use.

- Optionally, configure this email service address to only accept messages from certain senders by listing their email addresses and domains in the `Accept Email From` textbox. Separate multiple entries with commas. For example: `george@mycompany.com, yahoo.com, gmail.com`. If the `Accept Email From` textbox has a value and the email service receives a message from an unlisted email address or domain, the email service performs the action specified in the `Unauthorized Sender Action failure` response setting.

Leave this field blank if you want the email service to receive email from any email address.



Note:

If both the email service and email service address are configured to only accept messages from certain senders, the email service only processes messages from senders that are listed in the `Accept Email From` textboxes on both the email service and the email service address.

- Click `Save` to save your changes, or `Save and New` to define another inbound email address for this email service.

Using the InboundEmail Object

For every email the Apex email service domain receives, Salesforce creates a separate `InboundEmail` object that contains the contents and attachments of that email. You can use Apex classes that implement the `Messaging.InboundEmailHandler` interface to handle an inbound email message. Using the `handleInboundEmail` method in that class, you can access an `InboundEmail` object to retrieve the contents, headers, and attachments of inbound email messages, as well as perform many functions.



Note: For information on the Apex email service, see "What are Email Services?" in the Salesforce online help.

Example

The following is an example of how you can look up a contact based on the inbound email address and create a new task.

```
global class CreateTaskEmailExample implements Messaging.InboundEmailHandler {
    global Messaging.InboundEmailResult handleInboundEmail(Messaging.InboundEmail email,
                                                            Messaging.InboundEnvelope env) {
        // Create an inboundEmailResult object for returning the result of the Apex Email Service
        Messaging.InboundEmailResult result = new Messaging.InboundEmailResult();

        String myPlainText= '';
        // Add the email plain text into the local variable
        myPlainText = email.plainTextBody;

        // New Task object to be created
        Task[] newTask = new Task[0];

        // Try to lookup any contacts based on the email from address
        // If there is more than 1 contact with the same email address,
        // an exception will be thrown and the catch statement will be called.
        try {
            Contact vCon = [Select Id, Name, Email
                            From Contact
                            Where Email = :email.fromAddress
                            Limit 1];
```

```

// Add a new Task to the contact record we just found above.
newTask.add(new Task(Description = myPlainText,
    Priority = 'Normal',
    Status = 'Inbound Email',
    Subject = email.subject,
    IsReminderSet = true,
    ReminderDateTime = System.now()+1,
    WhoId = vCon.Id));

// Insert the new Task
insert newTask;

System.debug('New Task Object: ' + newTask );

}
// If an exception occurs when the query accesses
// the contact record, a QueryException is called.
// The exception is written to the Apex debug log.
catch (QueryException e) {
    System.debug('Query Issue: ' + e);
}

// Set the result to true. No need to send an email back to the user
// with an error message

    result.success = true;

// Return the result for the Apex Email Service
return result;

}
}

```

InboundEmail Object

An InboundEmail object has the following fields.

Name	Type	Description
binaryAttachments	InboundEmail.BinaryAttachment[]	A list of binary attachments received with the email, if any Examples of binary attachments include image, audio, application, and video files.
ccAddresses	String[]	A list of carbon copy (CC) addresses, if any
fromAddress	String	The email address that appears in the From field
fromName	String	The name that appears in the From field, if any
headers	InboundEmail.Header[]	A list of the RFC 2822 headers in the email, including: <ul style="list-style-type: none"> • Recieved from • Custom headers • Message-ID • Date
htmlBody	String	The HTML version of the email, if specified by the sender
plainTextBody	String	The plain text version of the email, if specified by the sender

Name	Type	Description
replyTo	String	The email address that appears in the reply-to header If there is no reply-to header, this field is identical to the <code>fromAddress</code> field.
subject	String	The subject line of the email, if any
textAttachments	InboundEmail.TextAttachment	A list of text attachments received with the email, if any The text attachments can be any of the following: <ul style="list-style-type: none"> Attachments with a Multipurpose Internet Mail Extension (MIME) type of <code>text</code> Attachments with a MIME type of <code>application/octet-stream</code> and a filename that ends with either a <code>.vcf</code> or <code>.vcs</code> extension. These are saved as <code>text/x-vcard</code> and <code>text/calendar</code> MIME types, respectively.
toAddresses	String[]	The email address that appears in the To field

InboundEmail.Header Object

An InboundEmail object stores RFC 2822 email header information in an InboundEmail.Header object with the following fields.

Name	Type	Description
name	String	The name of the header parameter, such as "Date" or "Message-ID"
value	String	The value of the header

InboundEmail.BinaryAttachment Object

An InboundEmail object stores binary attachments in an InboundEmail.BinaryAttachment object.

Examples of binary attachments include image, audio, application, and video files.

An InboundEmail.BinaryAttachment object has the following fields.

Name	Type	Description
body	Blob	The body of the attachment
fileName	String	The name of the attached file
contentType	String	The primary and sub MIME-type

InboundEmail.TextAttachment Object

An InboundEmail object stores text attachments in an InboundEmail.TextAttachment object.

The text attachments can be any of the following:

- Attachments with a Multipurpose Internet Mail Extension (MIME) type of `text`

- Attachments with a MIME type of `application/octet-stream` and a filename that ends with either a `.vcf` or `.vcs` extension. These are saved as `text/x-vcard` and `text/calendar` MIME types, respectively.

An `InboundEmail.TextAttachment` object has the following fields.

Name	Type	Description
<code>body</code>	String	The body of the attachment
<code>charset</code>	String	The original character set of the body field. The body is re-encoded as UTF-8 as input to the Apex method.
<code>fileName</code>	String	The name of the attached file
<code>mimeTypeSubType</code>	String	The primary and sub MIME-type

InboundEmailResult Object

The `InboundEmailResult` object is used to return the result of the email service. If this object is null, the result is assumed to be successful. The `InboundEmailResult` object has the following fields.

Name	Type	Description
<code>success</code>	Boolean	A value that indicates whether the email was successfully processed. If false, Salesforce rejects the inbound email and sends a reply email to the original sender containing the message specified in the <code>Message</code> field.
<code>message</code>	String	A message that Salesforce returns in the body of a reply email if the <code>Success</code> field is false. For example, this message could inform the sender that the request could not be processed and provide an explanation. If the <code>InboundEmailResult</code> object is null or the <code>Success</code> field is true, no message is returned to the sender.

InboundEnvelope Object

The `InboundEnvelope` object stores the envelope information associated with the inbound email, and has the following fields:

Name	Type	Description
<code>toAddress</code>	String	The name that appears in the To field of the envelope, if any
<code>fromAddress</code>	String	The name that appears in the From field of the envelope, if any

Hierarchy Visibility Override—Controlling Sharing Access Using Hierarchies

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

A new sharing setting called `Grant Access Using Hierarchies` allows you to disable the default sharing access granted by your role and territory hierarchies. This option can be changed for custom objects that do not have their organization-wide default sharing setting set to `Controlled by Parent`.

Implementation Tips

- Regardless of your organization's sharing settings, users can gain access to records they do not own through other means such as user permissions like "View All Data," sharing rules, or manual sharing of individual records.
- The `Grant Access Using Hierarchies` option is always selected on standard objects and is not editable.
- If you disable the `Grant Access Using Hierarchies` option, sharing with a role or territory and subordinates only shares with the users directly associated with the role or territory selected. Users in roles or territories above them in the hierarchies will not gain access.
- If your organization disables the `Grant Access Using Hierarchies` option, activities associated with a custom object are still visible to users above the activity's assignee in the role hierarchy.
- Select the `Grant Access Using Hierarchies` sharing setting on all custom objects you plan to display in your Salesforce Customer Portal. This includes custom objects that are on the detail side of a master-detail relationship with any custom object displayed in your Salesforce Customer Portal. If your organization already uses the Salesforce Customer Portal, the `Grant Access Using Hierarchies` sharing setting is not changeable.
- Before enabling the Partner Portal, make sure the `Grant Access Using Hierarchies` sharing setting is selected on all objects. If your organization uses the Partner Portal, this option is not changeable for any object.
- The `Grant Access Using Hierarchies` option affects which users gain access to data when something is shared with public groups, personal groups, queues, roles, or territories. For example, the **View All Users** option displays group members and people above them in the hierarchies when a record is shared with them using a sharing rule or manual sharing and the `Grant Access Using Hierarchies` option is selected. When the `Grant Access Using Hierarchies` option is not selected, some users in these groups no longer have access. The following list covers the access reasons that depend on the `Grant Access Using Hierarchies` option.

These reasons always gain access:

- Group Member
- Queue Member
- Role Member
- Member of Subordinate Role
- Territory Member
- Member of Subordinate Territory

These reasons only gain access when using hierarchies:

- Manager of Group Member
- Manager of Queue Member
- Manager of Role
- Manager of Territory
- User Role Manager of Territory

Best Practices

- When you deselect `Grant Access Using Hierarchies`, notify users of the changes in report results that they can expect due to losing visibility of their subordinates' data. For example, selecting `My team's...` in the `View` drop-down list returns records owned by the user; it will not include records owned by their subordinates. To be included in this type of report view, records from subordinates must be explicitly shared with that user by some other means such as a sharing rule or a manual share. So, if no records are shared with you manually, the `My...` and `My team's...` options in the `View` drop-down list return the same results. However, choosing the `Activities with...` any custom object report type when creating a custom report returns activities assigned to you as well as your subordinates in the role hierarchy.

About Controlling Sharing Access Using Hierarchies

Controlling Access Using Hierarchies

User Permissions Needed
To change the <code>Grant Access Using Hierarchies</code> option: "Manage Users" AND "Customize Application"

Beyond setting the organization-wide sharing defaults for each object, your organization can specify whether users have access to the data owned by or shared with their subordinates in the hierarchy. For example, hierarchies like the role hierarchy or territory hierarchy automatically grant record access to users above the record owner in the hierarchy. The `Grant Access Using Hierarchies` option in the organization-wide defaults determines the access users have to records that they do not own, including records they do not have sharing access to but someone below them in the hierarchy does. By default, the `Grant Access Using Hierarchies` option is enabled for all objects, and it can only be changed for custom objects.

To control sharing access using hierarchies for any custom object, click **Setup** > **Security Controls** > **Sharing Settings** and **Edit** in the `Organization Wide Defaults` section. Deselect `Grant Access Using Hierarchies` if you want to prevent users from gaining automatic access to data owned by or shared with their subordinates in the hierarchies.

Mobile Custom Views

Available in: Unlimited Edition
Available for an additional cost in: Professional and Enterprise Editions

Spring '08 offers an exciting new feature for the management of mobile users. Now administrators can create mobile-friendly versions of custom views that are pushed to the mobile client application. In `Salesforce Mobile`, users can select standard views or the administrator-defined custom views.

Implementation Tips

- Mobile views are set up by the administrator per mobile configuration. The views are available to all users assigned to the configuration, and administrators cannot restrict visibility to certain groups of users within the configuration. Each mobilized object in a mobile configuration can have up to ten custom views. For more information about mobile configurations, see "Managing Mobile Configurations" in the `Salesforce` online help.

- Mobile views cannot be filtered by All Records or My Records. The views apply to all records stored locally on the device, regardless of ownership; however, ownership filters can be applied using the additional fields in the search criteria.
- Mobile views do not support advanced filtering options.
- Mobile views are limited to a two-column display.
- Mobile views can be sorted in ascending or descending order by up to two fields.
- BlackBerry users can create custom views on their wireless devices, but they cannot edit or delete views created by the mobile administrator. Windows Mobile users cannot create custom views from their wireless devices.
- You cannot exclude a field from a mobile page layout if it has been used in a mobile custom view.
- Organizations using the legacy Sendia mobile console cannot import their existing mobile views from the old console to the Salesforce Mobile Administration Console. Customers migrating from the old console must recreate the views in Salesforce.

About Mobile Custom Views

Managing Mobile Custom Views

User Permissions Needed	
To view mobile devices and users:	"View Setup and Configuration"
To manage mobile custom views:	"Manage Mobile Configurations"

To manage the custom views for a mobile configuration, click **Setup** ► **Mobile Administration** ► **Mobile Configurations**, and then click the name of the mobile configuration. In the Mobile Views related list:

- To see a list of all your custom views, choose All Options in the Select an object drop-down list. You can also use the Select an object drop-down list to filter the views by object type.
- To create a new mobile view, select the object type from the Select an object drop-down list, and then click **New Mobile View**. See "Creating Mobile List Views" in the Salesforce online help.
- To make changes to a mobile custom view, click **Edit** next to a view name.
- To delete a mobile custom view, click **Del** next to a view name.
- To view details about a mobile custom view, click its name.

Creating Mobile Custom Views

User Permissions Needed	
To view mobile devices and users:	"View Setup and Configuration"
To manage mobile custom views:	"Manage Mobile Configurations"

For each mobile configuration, you can define up to ten mobile custom views per object that are pushed to the devices of users assigned to the configuration. To create a mobile custom view:

1. Click **Setup** ► **Mobile Administration** ► **Mobile Configurations**, and then click the name of a mobile configuration. To learn how to set up a mobile configuration, see "Creating Mobile Configurations" in the Salesforce online help.
2. Scroll down to the Mobile Views related list.

3. Choose an object type from the Select an object drop-down list, and then click **New Mobile View**. Only objects included in the mobile configuration's data set appear in the drop-down list.
4. Enter the view name.

Because display space on mobile devices is limited, the maximum length of a mobile view name is 30 characters.

5. In the Specify Filter Criteria section, enter conditions that the selected items must match, for example, `Amount is greater than $100,000`.
 - a. Choose a field from the first drop-down list.
 - b. Choose an operator. For descriptions of each operator, see "Filter Operators" in the Salesforce online help.
 - c. In the third field, enter the value to match.

For tips on entering filter values, see "Tips for Entering Filter Criteria" in the Salesforce online help. You can also use special date values in your filter criteria.

- d. Select **Match All** if items in the mobile view should match all the criteria you entered. Select **Match Any** if items in the mobile view should match any of the criteria you entered.



Note: Mobile custom views do not support advanced filtering options.

6. In the Select Fields to Display section, select the fields to use as display columns.

The default fields are automatically selected. You can choose up to two different columns of data fields to display in your mobile custom view.

7. In the Define Sort Order section, set a primary and secondary sort order for the view.
 - a. Select a field in the Order By drop-down list. You can sort by fields that have been excluded from the object's mobile page layout.
 - b. Set the sort order to Ascending or Descending.
8. Click **Save**.

Additional Force.com Platform Enhancements

AppExchange Package Upload and Install Enhancements

Previously, if a package had dependencies, the developer was prevented from uploading the package because there was no guarantee that the permission or preference would be enabled in the installer's organization. With Spring '08, Salesforce automatically detects package dependencies and lists them on the new Show Dependency page as part of the upload wizard.

You can also select additional requirements based on the contents of your package and the components your installers should have enabled. This allows packages that reference permissions or preferences like Business-to-Consumer or Salesforce-to-Salesforce to be uploaded. Dependency and requirement checks are performed during installation.

In the install wizard, Salesforce verifies these dependencies to ensure the installer has the required permissions or preferences enabled. If the installer's organization does not meet all requirements, Salesforce prevents them from installing the package.

In addition, once a package is installed with a dependency, the permission or preference can not be disabled while the package is installed in the organization. The package must be uninstalled before the permission or preference can be disabled.

For more information on dependencies, see Understanding Dependencies.

The AppExchange package enhancements are available in Group, Professional, Enterprise, Unlimited, and Developer Editions.

Custom Button Enhancements

Spring '08 includes these custom button enhancements for all Salesforce Editions:

Mass Action Buttons for Tag and Search Results

Custom list buttons are now available in search result layouts, which determine the data included in search layouts for tagging results. To add a custom button to a search layout, first create the custom button and give it a `List Button Display Type`. Next, add it your search result layout. In addition, you can use existing custom list buttons that you have already added to list views and related lists.

Custom List Buttons Include Checkbox Option

Previously, custom list buttons automatically added a column of checkboxes to your list. Now, you can choose to hide these checkboxes by deselecting the `Display Checkboxes` (for `Multi-Record Selection`) option when you choose the `List Button Display Type` for a custom button. For example, you may want to hide the checkboxes if your custom list button does not require the user to select records such as one that quickly navigates the user to another page or adds a new record.

Custom List View Enhancements

With Spring '08, the user interface for creating and editing custom list views has been improved for enhanced usability.

Deleted Custom Fields Automatic Cleanup

In Summer '07, Salesforce began storing your deleted custom fields and their data until your organization permanently deleted them. This provided you the ability to undelete your fields along with their data. However, these deleted fields still count against the maximum number of custom fields allowed in your organization until they are permanently deleted. Now, Salesforce automatically deletes them permanently after 45 days.



Important: Any fields that you deleted after the Summer '07 release will be permanently deleted 45 days after the Spring '08 release. If you do not want them to be permanently deleted, undelete them within 45 days. This change affects all Salesforce Editions.

Dynamic Approval Routing

Previously, you could configure approval processes with steps that assigned approval requests only to a specific user or queue, or to the user in the custom field selected for the entire approval process. With Spring '08, you can configure approval steps to use a new `Related User` option that assigns requests to a user specified in any user lookup field on the submitted record. Additionally, you can quickly populate user lookup fields through the user interface or a programming language like Apex. Because the user specified in the user lookup field can differ for each record entering the approval step, the `Related User` option gives you the power to dynamically assign approval requests.

Use dynamic approval routing to automate even the most complex matrix-based approvals. Matrix-based approvals require that the approval authority be based on a matrix of one or more criteria. For example, in the context of a job requisition process, an approver may be selected based on both the geographic region and the cost center of the job requisition record. With Apex, you can implement both data-driven and algorithmic routing rules.

Make your approval processes more dynamic to cover more business scenarios with fewer process definitions and enhance productivity and efficiency. For more information, see "Creating Approval Steps" in the Salesforce online help. Approval processes are available in Enterprise, Unlimited, and Developer Editions.

Email Deliverability Testing

With Spring '08, you can simultaneously send test messages from all of the IP addresses Salesforce uses for sending email. This lets you ensure that your organization is not blocking any of these IP addresses, and that your users can receive all email sent from Salesforce. To send the test messages, click **Setup** > **Security Controls** > **Test Email Deliverability**. This enhancement is available in all Salesforce Editions.

Force.com Connect Offline Enhancements

Force.com Connect Offline lets users work on their key deals anywhere, anytime. With Spring '08, Connect Offline includes the following enhancements:

- The look and feel of Connect Offline has been completely revamped to provide a more uniform experience.
- Connect Offline now enforces validation rules and supports dependent picklists.



Important: Because validation rules that enforce data requirements are enforced at sync time, you must correct invalid data before it can be transferred to Salesforce.

- The Connect Offline login screen now features a **Remember Password** checkbox users can select to avoid having to enter their password every time they to log in.

To use these new enhancements, install the new version of Connect Offline as described in "Installing Connect Offline" in the Salesforce online help. You do not need to uninstall the older version.

Formula and Validation Rule Enhancements

Spring '08 includes these formula enhancements for all Salesforce Editions:

Increased Formula Size Limits 300%

Formulas were once limited to 1300 characters but can now contain up to 3900 characters, regardless of where you use them. The character limit includes spaces and return characters. For information on where you can use formulas, see "About Formulas" in the Salesforce online help.

Functions Added - ISNUMBER, REGEX, and VLOOKUP

Use the following functions in your formulas:

- **ISNUMBER:** Determines if a text value is a number and returns TRUE if it is. Otherwise, it returns FALSE.

This validation rule ensures a custom text field called `Bank Account Number` is a number of 10 digits and is not blank.

```
OR(LEN(Bank_Account_Number__c) <> 10,
NOT(ISNUMBER(Bank_Account_Number__c)))
```

- **REGEX:** Compares a text field to a regular expression and returns TRUE if there is a match. Otherwise, it returns FALSE. A regular expression is a string used to describe a format of a string according to certain syntax rules.

This example ensures that a custom field called `SSN` matches a regular expression representing a valid social security number format of the form 999-99-9999.

```
NOT (
  OR (
    LEN (SSN__c) = 0,
    REGEX ( SSN__c , "[0-9]{3}-[0-9]{2}-[0-9]{4}" )
  )
)
```

- **VLOOKUP:** Returns a value by looking up a related value on a custom object similar to the VLOOKUP() Excel function.

This example checks that a billing postal code is valid by looking up the first five characters of the value in a custom object called `Zip_Code__c` that contains a record for every valid zip code in the US.

If the zip code is not found in the Zip_Code__c object or the billing state does not match the corresponding State_Code__c in the Zip_Code__c object, an error is displayed.

```

AND (
  LEN(BillingPostalCode) > 0,
  OR(BillingCountry = "USA",
     BillingCountry = "US"),
  VLOOKUP (
    $ObjectType.Zip_Code__c.Fields.State_Code__c,
    $ObjectType.Zip_Code__c.Fields.Name,
    LEFT(BillingPostalCode,5))

<> BillingState
)

```

The following table describes where these new functions are available:

Area	ISNUMBER	VLOOKUP	REGEX
Formula Fields	No	No	No
Report Summary Formulas	No	No	No
Validation Rules	Yes	Yes	Yes
Default Values	Yes	No	Yes
Workflow Rule	Yes	No	Yes
Workflow Field Update	Yes	No	Yes
Approval Process	Yes	No	Yes
Approval Step	Yes	No	Yes
Escalation Rule	Yes	No	Yes
Assignment Rule	Yes	No	Yes
S-Control	Yes	No	Yes
Custom Button or Link	Yes	No	Yes
Visualforce Pages	No	No	No

Inline Editing Supported for the Console

In Winter '08, Salesforce introduced inline editing, which allows users to quickly change field values on a record's detail page. In Spring '08, inline editing support has been expanded to the console.

Salesforce Mobile Enhancements

Spring '08 includes Salesforce Mobile enhancements for Unlimited Edition. (Salesforce Mobile is also available for an additional cost in Professional and Enterprise Editions.)

Salesforce Mobile Support for Person Accounts

Spring '08 extends support for person accounts to the mobile solution. If person accounts are enabled in your organization, administrators can create mobile configurations that include or exclude person accounts, and users are able to work with person accounts in the mobile client application. The following table

summarizes how person accounts in Salesforce Mobile differ from business accounts or have unique considerations:

Salesforce Functionality	Person Account Behavior
Mobile Configurations	<p>Mobile configurations that include the account object automatically deliver person accounts and business accounts to users' mobile devices. For more information about mobile configurations, see "Managing Mobile Configurations" in the Salesforce online help.</p> <p>Person accounts can be excluded from the configuration's data set using the criteria "Is Person Account equals False." To mobilize only person accounts, use the criteria "Is Person Account equals True." If a mobile configuration includes accounts but not contacts, users assigned to that configuration will see a Contacts tab in the mobile client application, and the tab will contain person accounts.</p>
Salesforce Mobile	<p>In some cases, Salesforce Mobile handles person accounts differently than Salesforce.</p> <p>In the BlackBerry client application:</p> <ul style="list-style-type: none"> • Person accounts have a Contacts related list. • In search results, person accounts display under accounts and contacts. • When logging calls and emails, the Name field is not automatically populated with the person account; however, users can manually select the person account. <p>In the Windows Mobile client application:</p> <ul style="list-style-type: none"> • Person accounts have a Contacts related list. • The person accounts detail page inherits a contacts page layout. • When logging calls and emails, the Name field is not automatically populated with the person account. Users cannot manually select the person account.

Salesforce Mobile Enhanced Data Filtering

Spring '08 introduces enhanced record ownership filters for mobile configurations. Previously, administrators were limited to only one of the available filter options. To accommodate organizations with more complex mobile requirements, you can now add the same object data set a maximum of four times on the same hierarchy level and define a different ownership filter for each node. For example, a sales manager might want to synchronize his opportunities, opportunities owned by his subordinates, and opportunities for which he is a sales team member. In this case, you would add an opportunity data set and select `User's Team's Records`, then add a second opportunity data set at the same level in the

hierarchy and select `User's Sales Team's Records`. Note that objects with only one ownership filter option, such as `Case Comment`, cannot be added multiple times at the same level of the hierarchy.

For more information about filtering data in mobile configurations, see "Defining Data Sets" in the Salesforce online help.

Search Enhancements for Accented Characters

With Spring '08, searches return records that contain accented characters even if the search term does not contain accented characters. For example, searches now return records containing the name José when either `Jose` or `José` is entered as the search term. In prior releases, searches did not return records containing the name José when `Jose` was entered as the search term. This enhancement is available in all Salesforce Editions.



Note: This enhancement only applies to new records, or existing records that are saved after the Spring '08 release goes live for your instance.

Security Enhancements

With Spring '08, Salesforce has added an additional layer of security to prevent unauthorized exports of report data and user list view data, such as from malware or a phishing attack. This security feature takes advantage of browser cookies and proprietary salesforce.com code to help block such unauthorized access to your organization's data. This feature does not affect your users' ability to export report data or user list view data, nor does it alter the user experience. This enhancement is available in all Salesforce Editions.

Setup Menu Restructuring

In Spring '08, some areas of the Setup menu have been reorganized to improve user navigation and ease-of-use. The changes are:

Previous Setup Option	New Setup Option
Build folder	Create folder
Build ► Code	Develop ► Apex Classes
Build ► Pages	Develop ► Pages
Build ► S-Controls	Develop ► S-Controls
Customize ► Workflow & Approvals	Create ► Workflow & Approvals
Exchange folder	Removed
Exchange ► Installed Apps	View Installed Packages folder
Exchange ► Shared Apps	Create ► Packages
Integrate folder	Develop folder

This enhancement is available in all Salesforce Editions.

Special Date Values Supported for All English Locale Types

In previous releases, if your company's locale was English (United States), you could use special date values (such as "yesterday," "today," and "Monday") when entering dates. With Spring '08, you can use special date values if your company uses any type of English locale, such as English (Australia) and English (South Africa).

Workflow Enhancements

Email-to-Case Workflow

Now, organizations that have Email-to-Case enabled can create workflow rules for email messages so that emails automatically update fields on the cases with which they are associated. For example, you can create a workflow rule so that an email marked as `Is Incoming` automatically changes its case's `Status` from `Closed` to `New`.

To create such a workflow rule:

1. Click **Setup** > **Create** > **Workflow & Approvals** > **Workflow Rules** to access the workflow rules list page.
2. On the workflow rules list page, click **New Rule**.
3. Select `Email Message` in the `Select object` drop-down list.
4. Click **Next**.
5. Enter a rule name. Optionally, enter a description for the rule.
6. Select the evaluation criteria.
7. Choose `criteria are met`.
8. Enter the following criteria: `Email Message: Is Incoming equals True AND Case: Status equals Closed`.
9. Click **Add Workflow Action** and choose **New Field Update**.
10. Enter a name for your workflow field update. Optionally, enter a description for the workflow field update.
11. Select `Case` in the `Target Object` drop-down list.
12. Choose `Status` in the `Field to Update` drop-down list.
13. Select `New` in the `A specific value` field to specify the new field value.
14. Click **Save**.

Note the following when creating workflow rules for email messages that automatically update the fields on their associated cases:

- For more information about creating workflow rules, see "Creating Workflow Rules" in the Salesforce online help.
- Email-to-Case must be enabled to create workflow rules for email messages to update the fields on their associated cases.
- To insert case merge fields in the formula of a workflow rule, click **Insert Field** on the Rule Criteria section and choose `Email Message > Parent Case`.
- Note what is and is not triggered on cases when email messages update case fields:

Triggered	Not Triggered
Workflow rules	Assignment rules
Validation rules	Auto-response rules
Roll-up summary fields	
Escalation rules	
Apex triggers	

This enhancement is available in Enterprise, Unlimited, and Developer Editions.

Workflow Rule Criteria for Converted Leads

With Spring '08, the criteria Lead: Converted is now available in workflow rules. For more information on lead conversion enhancements in Spring' 08, see [Lead Conversion with Validation Rules and Triggers](#) on page 30.