



Salesforce.com: Winter '11

Salesforce.com Winter '11 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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Summary of Winter '11 Features and Impact on Salesforce.com Users

Winter '11 has features that immediately impact all users after the release. You might want to communicate these changes to your users beforehand so they are prepared. Other features require direct action by an administrator before users can benefit from the new functionality.

The following table summarizes the Winter '11 features and their impact on users. Review the feature details for the applicable Salesforce.com Editions.

Chatter the Collaboration Cloud Enhancements

Chatter

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Chatter Search	✓			
Files Tab	✓			
Chatter Central: Chatter Tab	✓			
Using Chatter Filters	✓			
View Your People Recommendations	✓			
View Your Group Recommendations	✓			
Add Chatter Topics to Posts and Comments	✓			
Viewing a Single Update	✓			
View Chatter Feeds		✓		
Share Chatter Files on Records to Chatter Feeds	✓			
Share Private Files to Chatter Feeds	✓			
Perform Actions on the Group Files List on a Chatter Group	✓			
Groups List on Profiles	✓			
Group Member Count	✓			
Perform Actions on the Files Owned List on a Chatter Profile	✓			

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Chatter Groups Enhancements				
Chatter Email Digests	✓			
Additional Chatter Enhancements				
Events and Tasks in Chatter	✓			
Events, Tasks, Reports, and Dashboards Added to Feed Tracking		✓		
What To Do Next	✓			

Sales Cloud Enhancements

Sales Productivity

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Salesforce for Outlook—Generally Available			✓	
Event and Task Subject Limits Increased	✓			
Attachments on Activities			✓	
Link to File Detail Page for Chatter Feed Attachments on Notes and Attachments	✓			
“View” is Now “Preview” for Chatter Feed Attachments on Notes and Attachments	✓			

Quote Templates

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Quote Templates—Generally Available			✓	

Partner Relationship Management

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Caching for Salesforce to Salesforce	✓			

Service Cloud Enhancements

Call Center

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Computer-Telephony Integration (CTI) 3.0: Service Cloud Console Integration			✓	

Case Management

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup. Available to Enterprise and Unlimited Editions with the Service Cloud.	Contact salesforce.com to enable this feature.
Service Cloud Console			✓	
Web-to-Case Limit Increased	✓			
Daily Limit for On-Demand Email-to-Case Updated		✓		

Customer Portal

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Portal Usage Analytics		✓		
Customizable My Profile Page		✓		
High Volume Customer Portal User License—Generally Available				✓
Security Sharing Sets			✓	
Users Field Removed from Customer Portal Settings		✓		

Entitlement Management

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required. Available to Enterprise and Unlimited Editions with the Service Cloud.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Service Contract Fields Available in Custom Report Types		✓		
Dynamic Milestones for Entitlement Processes		✓		
Updated Status Icons for Entitlements, Service Contracts, and Contract Line Items		✓		

Salesforce Knowledge

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Chatter Feeds on Articles		✓		

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
New Visualforce Components for Improving Custom Article-Type Templates		✓		
New Apex Option for Automatically Filling Article Fields		✓		
Improved PDF Generation on Case Emails		✓		
New API Object for Article Views			✓	
New API Object for Article Votes			✓	
Weekly Export Includes Salesforce Knowledge Articles				✓
New Fields on Custom Report Types		✓		

Force.com Cloud Apps Enhancements

Analytics

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Real-Time Report Builder—Generally Available		✓		
Dashboard User Switching		✓		
Reports and Dashboards Chatter	✓			
Chatter Analytics		✓		
API Access for Reports and Dashboards		✓		
Click-to-Detail for Dashboard Components		✓		
Metric Inline Editing		✓		
Improved Chart Validation on Reports	✓			

Globalization

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Language Translation for Force.com				✓
Arabic and British English Support				✓

Apex and Visualforce

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Force.com Apex Code Enhancements			✓	
Improved System Log Console	✓			
Visualforce Enhancements		✓		

Customization

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
API Name Shown for Custom Fields	✓			
Rich Text Area Field Enhancements	✓			
Changes to rounding in number fields	✓			

Search

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Global Search	✓			

Sites

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Sites Self-Registration			✓	
Customizable My Profile Page		✓		
Sites URL Redirects		✓		

Security

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Identity Providers and Service Providers			✓	
Configure Start, Login, and Logout Pages Using Single Sign-On			✓	
Federation ID Only Displays To Users With Adequate Permission	✓			
Session Time Out Clarification	✓			
Remote Access Application Logo URL Size Defined	✓			
OAuth Version 2.0 Supported			✓	
Enforce Password History Now Can Remember Up To 10 Passwords		✓		

User Interface and Other Force.com Platform Enhancements

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available requires some setup.	Contact salesforce.com to enable this feature.
User Interface Setting Name Change		✓		
New User Interface Header	✓			
Browser Support Updates	✓			
Custom Settings Data Limits Change	✓			

Web Services API and Developer Tools

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Force.com Flex Framework—Generally Available			✓	
Web Services API Enhancements			✓	
Force.com Development as a Service			✓	
API Access Privileges on Unmanaged Packages			✓	

Workflow and Approvals

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Visual Process Manager—Pilot				✓

CHATTER THE COLLABORATION CLOUD

Chatter Search

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

With Winter '11, you can search for Chatter feeds, files, groups, and people in [Global Search](#).

Implementation Tips

- Enabling and disabling Chatter in your organization automatically enables and disables Global Search.
- Enable Chatter by clicking **Your Name** ► **Setup** ► **Customize** ► **Chatter** ► **Settings**, then clicking **Edit** and selecting **Enable**.
- Global Search is not supported in partner portal or Customer Portal.
- Only users with supported browsers can use Global Search. See “Supported Browsers” in the Salesforce.com online help.

Searching for Chatter

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

To find Chatter feeds, files, groups, and people:

1. Enter your search terms in the header search box.

You can also search for topics by entering # followed by the topic (such as #SalesReport). In the search results, click **Chatter Feed Results** to see all posts and comments that refer to that topic.

2. Click **Search**.
3. From the search results, click an item to open it or click **Edit**, if available.

Chatter files, groups, and people appear on the [records search results](#) page. Click **Chatter Feed Results** at the top of the page to view [Chatter feed search results](#) that include your search terms.

To find all posts and comments on a specific topic:

1. Locate a comment or feed that contains a topic link you're interested in.
2. Click the topic link to view all related posts and comments.

Chatter Feed Search Results

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

The Chatter feed Search Results page displays Chatter users' posts and comments that include your search terms.



Note: Feed-tracked changes on records and fields aren't included in search results. For example, if you've enabled feed tracking on the **Billing Address** field for the Acme account and modified the Acme billing address, search results for Acme include ***Acme — Suzanne Powell** Looking for volunteers to help with the Acme account* but don't include ***Acme — Suzanne Powell** changed Billing Street to 10 Main Road.*

- To view the detail pages for Chatter files, groups, and people, click the respective name in the update.
- To view a single feed update, click the timestamp below the update, for example, **Yesterday at 12:57 AM**.
- To download or preview files, click **Download** or **Preview** next to the file. Preview lets you see the file without downloading it.
- To refine your search, click the search box and select **Search Options....**

Search options aren't available to Chatter Only users.

To view [search results for records](#), such as accounts, contacts, and Chatter files, groups, and people, click **Record Results** at the top of the page.

Files Tab

You can easily upload, store, find, and follow Salesforce.com files in the cloud using the Files tab. This includes files you own or have access to from Chatter and Salesforce CRM Content. All file types, up to 100 MB, are supported, including everything from Microsoft® PowerPoint presentations and Excel spreadsheets, to Adobe® PDFs, image files, audio files, and video files. All files you own or have access to from the **All Files, My Files, Files in My Groups**, or **Files in My Workspaces** list views are available to attach to posts on Chatter feeds. Files are automatically included in **All Files, My Files, Files in My Groups**, or **Files in My Workspaces** when:

- You upload a file to My Files. The file is private and not shared with anyone, but you can view it, perform actions, and attach it to Chatter feeds.
- You or someone else attaches a file to a Chatter feed on the Home tab, Chatter tab, a profile, a group, or a record. This includes files attached to all public groups, whether you're a member or not, and private groups you're a member of, but not private groups you're not a member of.
- You upload a file to a Salesforce CRM Content workspace.
- Someone else uploads a file to a workspace you're a member of.
- You or someone else creates a content pack or uploads a Web link in Salesforce CRM Content. You only see content packs and Web links you have access to.

Implementation Tips

The Files tab is included with Chatter, which is enabled by default after Winter '11.

Best Practices

- Get started by viewing the Files tab lists to see files you own or have access to. If you don't see any files, click **Upload a File** to upload one to **My Files**.
- Preview, download, and find files to follow. When you follow a file, you see updates to the file in your Chatter feed on the Home tab.
- Search for files using specific list views and by typing terms in the Files tab search box, or the search box at the top of the page.
- Click on the name of a file to see the file detail page.

Files Tab Overview

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







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

You can easily upload, store, find, and follow Salesforce.com files in the cloud using the Files tab. This includes files you own or have access to from Chatter and Salesforce CRM Content. All file types, up to 100 MB, are supported, including everything from Microsoft® PowerPoint presentations and Excel spreadsheets, to Adobe® PDFs, image files, audio files, and video files. All files you own or have access to from the **All Files, My Files, Files in My Groups, or Files in My Workspaces** list views are available to attach to posts on Chatter feeds. Files are automatically added to one or more of the list views on the Files tab when:

- You upload a file to My Files. The file is private and not shared with anyone, but you can view it, perform actions, and attach it to Chatter feeds.
- You or someone else attaches a file to a Chatter feed on the Home tab, Chatter tab, a profile, a group, or a record. This includes files attached to all public groups, whether you're a member or not, and private groups you're a member of, but not private groups you're not a member of.
- You upload a file to a Salesforce CRM Content workspace.
- Someone else uploads a file to a workspace you're a member of.
- You or someone else creates a content pack or uploads a Web link in Salesforce CRM Content. You only see content packs and Web links you have access to.

On the Files tab:

- See all the files you own or have access to and click on specific list views on the sidebar to see a certain group of files:
 - **All Files** shows all of the files you own or have access to.
 - **My Files** shows all of the files you own.
 - **Files in My Groups** shows all files you or other people attached to groups you're a member of.
 - **Files in My Workspaces** shows all files you and other people uploaded to workspaces you're a member of and all files you uploaded to your personal workspace.
- [Search for files](#) using specific list views and by typing terms in the Files tab search box, or the search box at the top of the page. The titles, descriptions, and contents of the files are searched. The search results are filtered based on the terms entered.
- Click **Upload a File** to [upload a private file](#) to **My Files**. You own files you upload.

- Click  **Follow** to [receive updates about a file](#) in the Chatter feed. Click  in the Following column next to the file you're following to stop receiving updates about the file.
- Click a file name to view the [file detail page](#). You can view detail pages for all files, but you'll only see updates in the Chatter feed for files you follow.
- Click the **Download**  icon or **Preview**  icon next to a file. [Preview](#) lets you see the file without downloading it.
- Click a file owner's name to see his or her profile.

To learn who can perform which actions on a file, see the [File actions table](#).





Note:

- For more information about Chatter files and Salesforce CRM Content files, see “What is the difference between a Chatter file and a Salesforce CRM Content file?” in the Salesforce.com online help
- Not all files can be previewed, such as copy-protected PDFs, unknown file types, and any file larger than 25 MB. For files that can't be previewed, the **Preview** option isn't available on feeds or list views, and files appear as generic file type icons in the feed. Some Microsoft Office 2007 features don't display correctly in previews.

Uploading Files

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

Upload a file to **My Files** on the Files tab where you can store, preview, download, follow, and search for the file. Files are uploaded as private, not shared with anyone, and you are the file owner. Only file owners and users with the “View All Data” permission can see private files. Private files are indicated by the word “Private” and a lock  icon on the file's detail page, and by a lock  icon on file lists. You can search for your private files in Chatter and on the Files tab. You can also share private files by attaching them to a Chatter feed on the Home tab, Chatter tab, a profile, a group, or a record. When you share a private file, it's no longer private. All file types, up to 100 MB, are supported, including everything from Microsoft® PowerPoint® presentations and Excel spreadsheets, to Adobe® PDFs, image files, audio files, and video files.

To upload a file to My Files:

1. Click **Upload a File**.
2. Click **Browse** and select a file from your computer. The file name populates automatically when you select a file.
3. Optionally, change the file name or add a description.
4. Click **Upload to My Files**. The file detail page displays.

Files are also automatically included in **All Files, My Files, Files in My Groups, or Files in My Workspaces** by:

- Attaching a file to a Chatter feed on the Home tab, Chatter tab, a profile, a group, or a record.
- Uploading files to Salesforce CRM Content personal and shared workspaces.
- Creating content packs or uploading Web links in Salesforce CRM Content.

The Files tab doesn't include:

- Documents from the Documents tab
- Links attached to a Chatter feed
- Attachments, notes, and Google docs from the Notes and Attachments related list

**Note:**

- The maximum file size you can upload is 100 MB.
- You automatically follow files you upload to **My Files**, attach to a Chatter feed, or upload to a Salesforce CRM Content workspace.
- Files without a file extension or with an unrecognized file extension are listed as “unknown” in the Type column.
- To learn who can perform which actions on a file, see the [File actions table](#).

Searching for Files

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


Clicking on the Files tab displays Chatter and Salesforce CRM Content files you own and have access to. The twenty-five most recently modified files are listed by default. You can see a certain group of files by clicking a specific list view on the sidebar:

- **All Files**—All files you own or have access to from Chatter and Salesforce CRM Content, including:
 - Files you uploaded to **My Files**. These files are private and not shared with anyone, but you can view them, perform actions, and attach them to Chatter feeds.
 - Files you attached to a Chatter feed on the Home tab, Chatter tab, a profile, a group, or a record.
 - Files you uploaded to Salesforce CRM Content workspaces you're a member of and your personal workspace.
 - Files attached by other people to a Chatter feed on the Home tab, Chatter tab, a profile, a group, or a record. This includes files attached to all public groups, whether you're a member or not, and private groups you're a member of, but not private groups you're not a member of.
 - Files uploaded by other people to Salesforce CRM Content workspaces you're a member of.

For example, if another Chatter user in your organization shares a file with a group you're a member of, that file shows up in your All Files list.

- **My Files**—All files that you own from Chatter and Salesforce CRM Content, including:
 - Files you uploaded to **My Files**. These files are private and not shared with anyone, but you can view them, perform actions, and attach them to Chatter feeds.
 - Files you attached to a Chatter feed on the Home tab, Chatter tab, a profile, a group, or a record.
 - Files you uploaded to Salesforce CRM Content workspaces you're a member of and your personal workspace.
- **Files in My Groups**—All files you and other people attached to groups you're a member of. The first five groups you're a member of are listed. If you're a member of more than five groups, click **More** to see a complete list.
- **Files in My Workspaces**—All files you and other people uploaded to workspaces you're a member of and all files you uploaded to your personal workspace. The first five workspaces you're a member of, including your personal workspace, are listed. If you're a member of more than five workspaces, click **More** to see a complete list.

To search for files using the Files tab search:

1. Optionally, click a list view on the sidebar to restrict your search to a specific set of files.
2. Enter your search terms in the box on the Files tab. The titles, descriptions, and contents of the files are searched.
3. Click **Search** to see a filtered list of all relevant files based on your search terms. Or click  to clear your search terms.

You can also search for feeds, files, groups, and people by [entering search terms in the search box](#) on the top of the page.

The Files tab doesn't include:

- Documents from the Documents tab
- Links attached to a Chatter feed
- Attachments, notes, and Google docs from the Notes and Attachments related list

The following file types and sizes are supported for file search. Files that exceed the maximum size aren't searched.

File Type	File Extensions	Maximum Size
HTML	.htm, .html, .xhtml	5 MB
PDF	.pdf	25 MB
PPT	.ppt, .pptx, .pptm	25 MB
RTF	.rtf	5 MB
Text	.c, .cpp, .css, .csv, .ini, .java, .log, .sql, .txt	5 MB
Word	.doc, .docx, .docm	25 MB
XML	.xml	5 MB
XLS	.xls, .xlsx, .xlsm	5 MB

Viewing the File Detail Page

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



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




Open a file detail page by clicking a file name on the Files tab, on a Chatter feed, or on a group or profile files list. On the file detail page, you can see details about Chatter files and Salesforce CRM Content files, but you can only perform actions on Chatter files. To perform actions on files that originated in Salesforce CRM Content, click **Go to Content Detail Page**.

From a file detail page, you can:

- Preview the file without downloading it. If the file has multiple pages, click on the enhanced document player or use the arrow keys on your keyboard to see each page, zoom in or out, or change the preview width and screen size. Files owners and anyone with access to the file can preview it.



Note: Not all files can be previewed, such as copy-protected PDFs, unknown file types, and any file larger than 25 MB. For files that can't be previewed, the **Preview** option isn't available on feeds or list views, and files appear as generic file type icons in the feed. Some Microsoft Office 2007 features don't display correctly in previews.

- See if your file is private. You'll see the word “Private” and a lock icon next to the file name if you haven't shared the file with anyone. When you [upload a file](#) to **My Files**, it is private. When you attach a private file to a Chatter feed, it is no longer private.
- Click  **Download** to open or save the file. File owners and anyone with access to the file can download it.
- Click **Upload New Version** to [update the file with a newer version](#). Only file owners can upload a new version of their file.
- Click **Delete** to [delete the file](#). File owners and users with the “Modify All Data” permission can delete files.
- See who the file is owned by and when it was last modified.
- Click  **Follow** to [follow the file](#) or click  to stop following the file.
- See who's following the file.
- Click **Go to Content Detail Page** to see the content detail page of a file that originated in Salesforce CRM Content. Any actions performed on files that originated in Salesforce CRM Content must be done on the file's content detail page instead of the file detail page.

This table describes the actions that can be performed by users with the “View All Data” or “Modify All Data” permission, and owners of files:

Actions	User with “View All Data” Permission	User with “Modify All Data” Permission	Owner
View/Preview	Yes	Yes	Yes
Download	Yes	Yes	Yes
Upload New Version			Yes
Attach		Yes	Yes
Delete		Yes	Yes

Uploading a New Version of a File

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

Upload a new version of a file that you previously uploaded to My Files or attached to a Chatter feed so the latest version is available on the Files tab and in Chatter. You may want to upload a new version of a file if the contents of the previous version have changed or if you want to change the title or description of a file. When you upload a new version, a notification is posted to your Chatter feed on the Home tab and the Chatter tab, and anyone following the previous file will also get a notification in their Chatter feed. Uploading a new version replaces all previous versions in Chatter.

To upload a new version:

1. Click **Upload New Version** on the [file detail page](#).
2. Click **Browse** and select a file from your computer. The file name populates automatically when you select a file.
3. Optionally, change the file name and description.
4. Click **Upload New Version**.

The detail page view now shows your updated file and all previous versions are updated.





Note:

- Only file owners can upload new versions. To learn who can perform which actions on a file, see the [File actions table](#).
- If the file is from Salesforce CRM Content, you can't upload a new version from the file detail page. You can click **Go to Content Detail Page** and upload a new version there.

Following Files

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

Follow files so you can see updates in your Chatter feed on the Home tab and Chatter tab, including when a new file version is uploaded. If you stop following a file, the file remains in your Files tab list, you just won't see updates in your feed anymore.

Click  **Follow** to start seeing updates, or click  to stop seeing updates:

- On the file's detail page
- Next to the file on the **All Files, My Files, Files in My Groups, or Files in My Workspaces** lists on the Files tab
- Next to the file on the Group Files list on a group
- Next to the file on the Files Owned list on a profile



Note:

- You automatically follow files you upload to **My Files**, attach to a Chatter feed, or upload to a Salesforce CRM Content workspace.
- If you follow a file in Chatter that you have previously subscribed to in Salesforce CRM Content, you can unsubscribe from the file in Salesforce CRM Content because you'll now be receiving updates about it in your Chatter feed.

Deleting a File from the File Detail Page

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

Click **Delete** on a [file's detail page](#) to delete the file and remove it from all locations where it's been shared. To restore the deleted file, click on the **Recycle Bin** link on the Home tab. Select the file and click **Undelete**.



Note: Only file owners and users with the “Modify All Data” permission can delete files. To learn who can perform which actions on a file, see the [File actions table](#).

For more information about deleting files from other places in Chatter, see “Removing and Deleting Files and Links from a Chatter Feed” in the Salesforce.com online help.

Understanding Files in Salesforce.com

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

There are several different ways you can use files in Salesforce.com depending on what you want to do and what part of the app you're in. For example:

- Upload a file to My Files and store it there privately until you're ready to share it. Share the file by attaching it to a Chatter feed on the Home tab, Chatter tab, a profile, a group, or a record.
- Create, clone, or modify a presentation in Salesforce CRM Content, and then save it so only you can see it or publish it so other users in your organization can see it.
- Add a custom logo to meeting requests by uploading your logo to the Documents tab.
- Store pertinent information on a lead's detail page by attaching a note or image to the lead's Notes and Attachments related list.

For more information about Chatter files and Salesforce CRM Content files, see “What is the difference between a Chatter file and a Salesforce CRM Content file?” in the Salesforce.com online help

See the following definitions to determine how you want to use files:

Files Tab

You can easily upload, store, find, and follow Salesforce.com files in the cloud using the Files tab. This includes files you own or have access to from Chatter and Salesforce CRM Content. All file types, up to 100 MB, are supported, including everything from Microsoft® PowerPoint presentations and Excel spreadsheets, to Adobe® PDFs, image files, audio files, and video files. All files you own or have access to from the **All Files, My Files, Files in My Groups, or Files in My Workspaces** list views are available to attach to posts on Chatter feeds.

The Files tab requires no administration and can be used right away. Files are automatically included in **All Files, My Files, Files in My Groups, or Files in My Workspaces** when you or other people share or upload files in Chatter or Salesforce CRM Content. Files can be shared with a Chatter group or all Chatter users in your organization. If you want to share a private file (that you uploaded to My Files) with certain people to get their feedback, you can create a private group, add group members, and then share the file with the group. The group members can preview, download, and collaborate on the file by sharing comments in the group's feed. You can incorporate their feedback into the file on your computer and then upload a new version for the group to see. For more information, see [Files Tab Overview](#) on page 13.

Salesforce CRM Content

Salesforce CRM Content is where you publish, share, and deliver corporate files.

With Salesforce CRM Content you can organize, share, search, and manage content within your organization and across key areas of the Salesforce.com application. Content can include all file types, from traditional business documents such as Microsoft® PowerPoint presentations to audio files, video files, Web pages, and Google® docs.

Salesforce CRM Content requires set up by your administrator and includes workspaces, content packs, and content deliveries. Users can contribute, search, tag, provide feedback, share, and subscribe to files. Files are stored in fully searchable file repositories known as workspaces. Administrators can create multiple workspaces based on any classification, such as department name, job function, or team, then configure user permissions within the workspace to balance content access with security. Authors assign descriptive labels called tags to help classify and organize content across workspaces. You can view a list of all content that belongs to a particular tag or filter search results based on a tag or tags. One example

of how you can use Salesforce CRM Content is to create and deliver content packs. You may want to create a content pack with a product list, price quote, and contract to send to a particular customer. Using email or instant messaging, you can distribute the content pack to colleagues in your organization or leads and contacts outside your organization. The recipient of a *content delivery* can click a single URL to open a preview player with which he or she can preview and download the content. You can then view tracking information to see how often the content pack was viewed and which documents were downloaded. For more information, see “Salesforce CRM Content Overview” in the Salesforce.com online help.

Documents Tab

The Documents tab is where you store Web resources, such as, logos, DOT files, and other Visualforce materials.

A document library is a place to store files without attaching them to accounts, contacts, opportunities, or other records. Each document in the document library resides in a folder. The folder's attributes determine the accessibility of the folder and the documents within it.

For more information, see “Document Library Overview” in the Salesforce.com online help.

Notes and Attachments

The notes and attachments related list is where you attach and store files related to a specific account, contact, opportunity, or other record. When you attach a file to a Chatter feed on a record, it's automatically added to the record's notes and attachments related list as a Feed Attachment. You can also add files directly to the notes and attachments related list.

You can create, view, and edit notes and add attachments from the Notes and Attachments related list on selected detail pages such as accounts, contacts, leads, opportunities, and products. You can also add attachments from the Attachments related list on selected detail pages such as cases, solutions, and campaigns.

If Chatter is enabled for your organization, files posted to a feed on a record are added to the record's Notes and Attachments related list as feed attachments. You can preview (if available), download, and delete feed attachments from the Notes and Attachments related list, but you can't edit them. You can view feed attachment details by clicking on the title of the file.

For more information, see “Viewing and Editing Google Docs, Notes, and Attachments” in the Salesforce.com online help.

Chatter Central: Chatter Tab

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

The Chatter tab shows updates for all the records and people you're following as well as for the groups you've joined. From the Chatter tab you can:

- [Filter your feed](#)
- [View Your People Recommendations](#)
- [View Your Group Recommendations](#)

Implementation Tips

Enabling Chatter in your organization automatically inserts the Chatter tab next to the Home tab in most apps.

Using Chatter Filters



You asked for it! This enhancement is from an [idea](#) on the IdeaExchange.

Feed filters display a subset of updates in your Chatter feed on the Chatter tab.

All Chatter

Displays all Chatter feed updates, including posts, status updates, group updates, and record updates.

To: Me

Displays posts others make to your Chatter feed.

People

Displays only updates for people you follow. Because you follow yourself, your own updates also display in the People filter.

Groups

Displays only updates for groups you are a member of.

Records (for example, Accounts or Opportunities)

Displays only updates for records you are following, including custom object records. You'll only see a filter if you're following at least one of that type of record. For example, if you're not following any contacts, then no Contact filter will display.

View Your People Recommendations

Chatter recommends people in your organization that you might want to follow based on similar interests. For example, Chatter recommends people who:

- Follow the same people as you. This means you have connections in common.
- Are in your management hierarchy, such as your manager, people who report to your manager, and people who report to you.

Salesforce.com uses the `Manager` field on the personal information page to determine these recommendations. If this field is blank, Chatter won't recommend people based on your management hierarchy. Only your Salesforce.com administrator can edit the `Manager` field.
- Are popular, which means they have many followers.
- Are new to Chatter.

View your recommendations on the right side of the Chatter and People tabs. To see an expanded list of your recommendations, click **More**. If no recommendations appear, then you're already following all the recommended people.

When viewing your recommendations, you can:

- Click **Follow** to follow a person.
- Click "x" to dismiss a recommendation so it doesn't appear again. You can always go to the People tab and find that person if you want to follow them later.
- Click the link below the person's name to see the connections you have in common.
- Click the person's name to view his or her profile.



Note: If your organization has fewer than 16 people, you automatically follow everybody, so no people are recommended.

View Your Group Recommendations

Chatter recommends groups that you might want to join based on:

- The popularity of the group determined by the number of members.
- The number of people you're following in the group. Chatter recommends groups with the most members that you're following.
- If the group is new (created in the last month).

View your recommendations on the right side of the Chatter and Groups tabs. To see an expanded list of your recommendations, click **More**.

Chatter only recommends public groups. Private groups aren't included in recommendations. If no recommendations appear, then you're already a member of all the recommended groups.

When viewing your recommendations, you can:

- Click **Join** to become a group member.
- Click “x” to dismiss a recommendation so it doesn't appear again. You can always go to the Groups tab and find that group if you want to join it later.
- Click the group's name to view more information about the group, including recent posts.

Chatter Feeds Enhancements

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

Events, Tasks, Reports, and Dashboards Added to Feed Tracking

In Winter '11, you can enable feed tracking on events, tasks, reports, and dashboards. Now your users can track the progress of important tasks and get notified of calendar and meeting updates directly in their feeds. They can also be notified about changes to reports and dashboards.

Unlike other records, you don't auto-follow events, tasks, or dashboards in Chatter after you create them.



Note: Feed tracking for events doesn't include requested meetings. Once a requested meeting is confirmed and becomes an event, then it can be included in feeds.

To set up feed tracking:

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

For more information on feed tracking in Chatter, see “Customizing Chatter Feed Tracking” in the Salesforce.com online help.

View Chatter Feeds on Articles

If Salesforce Knowledge article types are enabled for Chatter feed tracking, knowledge base users can follow a published article and see updates in their Home tab feed when the article is removed from publication, republished, or archived. New in Winter

'11, enabling an article type for feed tracking also creates a Chatter feed in published articles. The feed allows readers to get a sense of the article's history, contribute comments, and see comments from other readers.

Share Chatter Files on Records to Chatter Feeds

You can now share a Chatter file on a record by attaching it to a Chatter feed on the Home tab, Chatter tab, a profile, a group, or a record. On a feed, click **File** and **Select a file from Salesforce**. Search for your file from the Select a File to Attach list, click **Attach**, and then click **Share**.



Note:

- You only see files on records that you have access to.
- Files attached to a Chatter feed on a record are automatically added to the record's Notes and Attachments related list and are called Feed Attachments. Feed Attachments are included in search results and available to attach to other Chatter feeds. Files attached directly to a record's Notes and Attachments related list are called Attachments. Attachments aren't included in search results and aren't available to attach to Chatter feeds. If you don't see the Notes and Attachments related list on your page layout, contact your administrator.

Share Private Files to Chatter Feeds

With Winter '11, you can upload a file to **My Files** so you can store, preview, download, search for, and share the file. When you upload a file to **My Files**, it's added as private, not shared with anyone, and you are the file owner. Private files are indicated by the word “Private” and a lock icon on the file's detail page, and by a lock icon on file lists. You can search for your private files in Chatter and on the Files tab, and share them by attaching them to a feed on the Home tab, Chatter tab, a profile, a group, or a record. On a feed, click **File** and **Select a file from Salesforce**. Search for your file from the Select a File to Attach list, click **Attach**, and then click **Share**. When you share a private file, it's no longer private.

Add Chatter Topics to Posts and Comments

In Winter '11, when you post an update in Chatter, you can associate your update with all other posts and comments on the same topic by adding a topic link. A topic link is a way to tag and categorize your update so other people can find it more easily. Topic links are similar to hashtags used in other social networking sites.

For example, if you post an update that you're working on a sales presentation for your customer Universal Paper, you might want to add the topic link #UniversalPaper in your update. If your coworkers use the same topic link in their updates, anyone can click the topic link to view all related comments and posts. Topic links become more valuable as more people use them.

To create a topic link in an update:

1. Enter # followed by any word. Spaces, tabs, and new lines automatically end a topic link, as well as the special characters noted below.

Topic links aren't case-sensitive, so #UniversalPaper is the same as #universalpaper.

2. Post your update.

The word you entered after “#” becomes a link that others can click on to view all posts and comments that use the same topic link.

Once you post an update, the only way to delete a topic link is to delete the entire post or comment. Chatter administrators can't restrict which topic links are used.

The following characters can't be included in a topic link. For example, if you enter “#Sales.Report” in your update, only “#Sales” becomes a topic link.

- . (period)
- , (comma)
- ; (semi-colon)

- : (colon)
- () (left and right parenthesis)
- & (ampersand)
- ! (exclamation point)
- "" (beginning and ending quotes)
- ' (apostrophe)
- / \ (back and forward slashes)
- | (pipe)
- # (hash)
- @ (at sign)
- % (per cent)
- + (plus)
- = (equals)
- \$ (dollar)
- ^ (caret)
- ~ (tilde)
- [] (left and right square bracket)
- { } (open and close curly brace)
- < > (left and right angle bracket)
- * (asterisk)

Viewing a Single Update

You can view a single Chatter update in a feed for a user, record or group.

- In a Chatter feed, click the timestamp displayed below the update, for example, **Yesterday at 12:57 AM**.
- In a Chatter email notification, click the link in the body of the email to view only the related update.
- To view the full feed, above the update, click **All Updates**.

Chatter Groups Enhancements

Group Recommendations

The right side of the Groups tab lists the groups that Chatter recommends you join based on:





- The popularity of the group determined by the number of members.
- The number of people you're following in the group. Chatter recommends groups with the most members that you're following.
- If the group is new (created in the last month).

For more information, refer to “Viewing Your Chatter Group Recommendations” in the [Chatter Central: Chatter Tab](#) section of these release notes.

Perform Actions on the Group Files List on a Chatter Group

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

To see a list of all the files posted to a group or to search for a specific file, click **Show All**. The twenty-five most recently modified files are listed by default. On the Files Shared with list you can:

- Search for files that have been posted to the group. The list includes files that you and other people have attached to the Chatter feed on the group. The list doesn't include:
 - Documents from the Documents tab
 - Links attached to a Chatter feed
 - Attachments, notes, and Google docs from the Notes and Attachments related list
- Click  **Follow** to [receive updates about a file](#) in the Chatter feed. Click  in the Following column next to the file you're following to stop receiving updates about the file.
- Click a file name to view the [file detail page](#). You can view detail pages for all files, but you'll only see updates in the Chatter feed for files you follow.
- Click the **Download**  icon or **Preview**  icon next to a file. [Preview](#) lets you see the file without downloading it.
- Click a file owner's name to see his or her profile.




Note:

- Not all files can be previewed, such as copy-protected PDFs, unknown file types, and any file larger than 25 MB. For files that can't be previewed, the **Preview** option isn't available on feeds or list views, and files appear as generic file type icons in the feed. Some Microsoft Office 2007 features don't display correctly in previews.
- Files without a file extension or with an unrecognized file extension are listed as "unknown" in the Type column.

Groups List on Profiles

The Groups list on your profile shows you the Chatter groups you're a member of. If you're not a member of any groups, click **Join or create groups** to view the Groups tab and join some groups. You can also view the Groups list on other people's profiles to see their group memberships.

Click **Show All** to view the full list in alphabetical order.

- Use the **Next** and **Previous** links to see more of the list.
- Click  to leave a group you're a member of.
- On another person's groups list, click **Join** to join a public group.
- On another person's groups list, click **Ask Owner** next to a private group to view the group owner's profile. You can then ask the owner to add you to the group.
- Click **Done** to close the window.

Group Member Count

The new Members column on the Groups tab allows you to view the number of members in each group, and to sort the list by member count. Additionally, the `MemberCount` field is available on the CollaborationGroup API object; see [Web Services API Enhancements](#).

Group Email Digests

In Winter '11, you can receive Chatter email digests from your groups. Group digests include updates about a particular group, and are configurable on a group-by-group basis. See [Chatter Email Digests](#) on page 26.





Chatter Profiles Enhancements

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

Perform Actions on the Files Owned List on a Chatter Profile

The Files Owned list on a profile shows the five files the profile owner attached most recently to a Chatter feed on the Home tab, Chatter tab, a profile, a group, or a record. It also includes files the profile owner has uploaded most recently to Salesforce CRM Content workspaces. You can preview or download files directly from this list.

To see a list of all the files the profile owner has attached and uploaded, or to search for a specific file, click **Show All**. The twenty-five most recently modified files are listed by default. On the Files Owned by list you can:

- Search for files the profile owner has attached and uploaded in Chatter and Salesforce CRM Content. The list doesn't include:
 - Documents from the Documents tab
 - Links attached to a Chatter feed
 - Attachments, notes, and Google docs from the Notes and Attachments related list
- Click  **Follow** to [receive updates about a file](#) in the Chatter feed. Click  in the Following column next to the file you're following to stop receiving updates about the file.
- Click a file name to view the [file detail page](#). You can view detail pages for all files, but you'll only see updates in the Chatter feed for files you follow.
- Click the **Download**  icon or **Preview**  icon next to a file. [Preview](#) lets you see the file without downloading it.
- Click a file owner's name to see his or her profile.



Note:

- Only files you have access to are listed. For example, if the profile owner posted a file to a private group or workspace you're not a member of, you won't see that file in the list.
- Not all files can be previewed, such as copy-protected PDFs, unknown file types, and any file larger than 25 MB. For files that can't be previewed, the **Preview** option isn't available on feeds or list views, and files appear as generic file type icons in the feed. Some Microsoft Office 2007 features don't display correctly in previews.
- Files without a file extension or with an unrecognized file extension are listed as "unknown" in the Type column.

Groups List

See [Groups List on Profiles](#).

Chatter Email Digests

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

In Winter '11, you can receive Chatter user email digests, as well as digests from your groups.

User digests include updates from your Chatter feed, such as updates about the people, files, and records you follow and your groups. Group digests include updates about a particular group, and are configureable on a group-by-group basis.

When configuring your user and group digests, specify whether you want to receive each digest daily or weekly. Daily digests include the 25 latest posts from the previous day while weekly digests include the 50 latest posts from the week. Both include the three latest comments on each post. Alternatively, when configuring group digests, you can choose to receive an email every time someone posts to the group.

To configure your email digests:

1. Click **Your Name** ► **My Settings** at the top of any page, then click **Email Settings**. You can also click **Your Name** ► **Setup** ► **My Chatter Settings** ► **Chatter Email Settings**.
2. Select **Receive Chatter Emails** to receive Chatter email.



Caution: Deselecting this option prevents you from receiving all Chatter email notifications.

3. Use the checkboxes and radio buttons to indicate the types of Chatter email you want to receive. You can configure different digest settings for each group.
4. Click **Save**.




Additional Chatter Enhancements

Events and Tasks in Chatter

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

In Winter '11, you can now follow individual tasks and events. Follow a task you've assigned to someone else to track its progress, or follow an event to get notified of scheduling changes.

When you follow an activity, your Chatter feed on the Home tab includes field changes and activity feed updates.

- To follow an activity, click  **Follow**. To stop following, click  **Following** .
- The Followers list shows you who is following the activity. To view a full list, click **Show All**.

When following tasks or events in Chatter, consider that:

- You can't follow recurring events and tasks in Chatter, nor individual instances of recurring events and tasks. Changes to an individual event or task in a recurring series or to the series itself won't show up in your Chatter feed.
- Unlike other records, you don't auto-follow events or tasks in Chatter after you create them.
- Feed tracking for events doesn't include requested meetings. Once a requested meeting is confirmed and becomes an event, then it can be included in feeds.

Packaging Applications that Use Chatter

Available in **Developer** Edition

The objects, field settings, and field settings history of Chatter are packageable. However, an object's field is only tracked if the object itself is tracked. For example, you can create a new custom field on the Account standard object, but the field will only be tracked if you have enabled feed tracking on Accounts.

When developing applications that use Chatter, it's important to be aware that some organizations may not have Chatter enabled. By default, when you upload Chatter applications, the package is only available to organizations that have Chatter enabled. You can change this behavior and allow organizations to install the package even if they don't have Chatter. Note the following:

- You must use a managed package. Unmanaged packages that include Chatter functionality can only be installed in organizations that have Chatter enabled.
- All DML, SOSL, and SOQL exceptions will throw a runtime exception if the subscriber organization does not have Chatter enabled. You must catch and handle any Apex exceptions that are thrown as a result of the missing Chatter feature. These exceptions are of the type `REQUIRED_FEATURE_MISSING` for SOSL and SOQL calls. For DML calls, you must check for the specific `REQUIRED_FEATURE_MISSING` status code on a DML Exception. The following code sample illustrates one way to handle this type of exception.
- When you upload the package, deselect the Chatter required checkbox (this is automatically selected if you have an Apex reference to Chatter).



Note: If the Chatter required checkbox can't be deselected, then some component in the package has a special requirement for Chatter. This may happen, for example, if you package a custom report type that relies on Chatter. If the Chatter required checkbox can't be disabled, then the package can only be installed in organizations that have Chatter enabled.

The following example tries to post to feeds and get a user's feed. If Chatter is not enabled in the organization, the code catches the `REQUIRED_FEATURE_MISSING` exception. Note that this is an incomplete code example and does not run.

```
public void addFeedPost(String post, Id objId) {
    FeedPost fpost = new FeedPost();
    // Get the parent ID of the feed, such as an Opportunity ID
    // or a custom object ID.
    fpost.ParentId = objId;
    fpost.Body = post;
    try{
        insert fpost;
    } catch (System.DmlException e) {
        for (Integer i = 0; i < e.getNumDml(); i++) {
            // Chatter not enabled in the organization
            // do not insert record
            System.assertEquals(StatusCode.REQUIRED_FEATURE_MISSING, e.getDmlType(i));
            System.Debug('Chatter not enabled in this organization:' + e.getDMLMessage());
        }
    }
}

public List<NewsFeed> getMyFeed() {
    List<NewsFeed> myfeed;
    try{
        myfeed = [SELECT Id, Type, CreatedById, CreatedBy.FirstName, CreatedBy.LastName,
                    CreatedDate, ParentId, Parent.Name, FeedPostId, FeedPost.Body,
                    FeedPost.Title, FeedPost.CreatedById, FeedPost.LinkUrl,
                    (SELECT Id, FieldName, OldValue, NewValue
                     FROM FeedTrackedChanges ORDER BY Id DESC),
                    (SELECT Id, CommentBody, CreatedDate, CreatedById,
                     CreatedBy.FirstName, CreatedBy.LastName
                     FROM FeedComments ORDER BY CreatedDate DESC, ID DESC LIMIT 10)
                FROM NewsFeed
                ORDER BY CreatedDate DESC, ID DESC
                LIMIT 20];
    } catch (System.RequiredFeatureMissingException e){
        // The above has returned an empty NewsFeed
        // Chatter is not enabled in this organization
        myfeed = new List<NewsFeed>{};
        System.Debug('Chatter not enabled in organization:' + e.getMessage());
    }
}
```

```
    }  
    return myfeed;  
}
```

Visualforce Components for Chatter

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

Visualforce now supports the following Chatter components:

- `<chatter:feed>`: Displays the Chatter feed for a record.
- `<chatter:feedWithFollowers>`: An integrated UI component that displays the Chatter feed for a record, its list of followers, and optionally, a header bar that allows users to show or hide the Chatter feed and subscribe to it.
- `<chatter:follow>`: Renders a button for a user to follow or unfollow a Chatter record.
- `<chatter:followers>`: Displays the list of Chatter followers for a record.

In addition, the `<apex:detail>` component has a new `showChatter` attribute that specifies whether to display the Chatter feed, followers list, and header bar for the record.



Note: Chatter components don't render for organizations that aren't Chatter enabled. Chatter components don't render for Visualforce pages using Force.com sites.

What To Do Next

In Winter '11, we're introducing a new way to help you get started using Chatter. The What To Do Next checklist provides suggested tasks based on where you are in Chatter. Click a task and you are taken to the right place and given further instruction. As you complete the tasks, they are crossed off the list. Additionally, if you want to skip a task, you can click the **x** next to it and it is removed from the list. Once you complete all tasks, the list disappears.

SALES CLOUD

Salesforce for Outlook—Generally Available

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

With Winter '11, Salesforce for Outlook is generally available! Salesforce for Outlook is a Microsoft® Outlook® integration application that lets you log emails in Salesforce.com and sync contacts and events between Outlook and Salesforce.com.

With Salesforce for Outlook, you can:

- Sync data automatically in the background
- Add email to Salesforce.com in a single click
- Manage administration settings in the cloud

Get started with Salesforce for Outlook in a few simple steps.

Administrators of Professional, Enterprise, Unlimited, or Developer Editions

1. [Create a configuration](#) and [assign users](#) to it.
2. [Define settings](#) and [add data sets](#).
3. [Activate](#) the configuration and have users [install](#).

Administrators of Contact Manager or Group Editions

1. Review the [default configuration](#) for your organization.
2. Have users [install](#).

Users

1. [Review your configuration](#).
2. [Install and set up](#) Salesforce for Outlook.



You asked for it! Salesforce for Outlook addresses the following ideas on the IdeaExchange: [add sync for multi-day events](#), [add “email added” indicators](#), [enhance filtering of synced contacts](#), [prevent duplicate contacts](#), [move administration settings to the cloud](#), [search contact roles when adding emails](#), [allow syncing all events](#), [provide simple contact sync](#), and provide support for [Windows 7 64-bit](#) and [Outlook 2010](#).

Salesforce for Outlook vs. Connect for Outlook

If you're upgrading from our previous Outlook integration application, Connect for Outlook, note these key differences.

	Connect for Outlook	Salesforce for Outlook
What syncs?	Only the contacts, tasks, and events that you manually mark for sync.	All data from the contact and calendar folders that you select. Tasks don't sync.
How does it sync?	You manually click Sync . You may be configured to automatically sync.	You do nothing. Your data syncs automatically in the background.
How are contacts and emails associated with Salesforce.com?	In Outlook, you manually specify related records for each item you're syncing.	Records are associated automatically in the cloud. Items we're not sure how to associate go to your My Unresolved Items page in Salesforce.com, where you can easily select related records.
How are emails associated with Salesforce.com?	In Outlook, you manually specify related records for each email you're adding.	Emails are automatically associated to related records based on your Email to Salesforce settings.
Where are administration settings managed?	In Outlook by the user.	In Salesforce.com by the administrator. Administrators can grant permission to users to customize their settings.
Do recurring events and event attendees sync?	Recurring events sync as individual events. Event attendees don't sync.	Recurring events and event attendees don't sync.

Implementation Tips

- You can define Salesforce for Outlook configurations for sets of users in Salesforce.com based on job function. For example, you may have separate configurations for Sales Managers, Sales Engineers, and Account Executives.
- Mark a configuration **Active** when you're ready to use it.
- Set up a data set for every object that is configured to sync.
- Use field mappings to link Salesforce.com fields with Outlook fields.

Best Practices

- Salesforce for Outlook uses Outlook folders to limit which records sync with Salesforce.com. Before you complete the Salesforce for Outlook setup wizard, make sure the folders you want to sync contain the right records. If you're syncing both ways or syncing Outlook to Salesforce.com, moving a record out of a synced Outlook folder deletes that record in Salesforce.com. If you're syncing both ways or syncing Salesforce.com to Outlook, removing a record from Salesforce.com deletes that record in Outlook.
- Salesforce for Outlook uses data sets to limit which contacts sync from Salesforce.com to Outlook. Work with your administrator to set up the data set that works best for you.
- Enter a company name when you create a contact in Outlook. This helps us automatically assign that contact to its related Salesforce.com account so you don't have to manually assign it in Salesforce.com.

Limitations

- Events aren't automatically associated with related Salesforce.com records when they sync from Outlook. Users must manually assign an event to related records using My Unresolved Items.
- The following items don't sync: events with locations longer than 80 characters, recurring events, all-day events beginning on the first day you're configured to sync, and event attendees. Multiday events sync as single events in either direction.
- Rich-text formatting from Outlook doesn't sync. If an Outlook event with rich-text formatting syncs both ways, it syncs back to Outlook as plain text, overwriting any formatting in the original version.

- The Windows time zone must match the time zone set in the user's Salesforce.com profile. For supported time zones, see “Salesforce for Outlook System Requirements” in the Salesforce.com online help.
- When selecting sync folders in the setup wizard, follow these guidelines: You can use your default folders or click **Change Folder** and select or create a folder that's within your default folders or the main Mailbox folder.
- You must define a data set for any object that has a sync direction. Otherwise, the object won't sync, and the user's configuration won't display a filter for that object.
- You can't map picklist values in Salesforce for Outlook configurations.
- Advanced filters aren't available in Salesforce for Outlook configurations. This means you can't combine filters, as in `filter 1 OR (filter 2 AND filter 3)`.
- Add Email limitations:
 - Email attachments aren't added to Salesforce.com.
 - If you configure Email to Salesforce to associate emails to matching opportunities, Salesforce.com searches the **To** and **CC** fields for the email addresses of your contacts. If contacts are found, Salesforce.com saves the email to the Activity History related list on all open opportunities for which the contact is assigned a contact role.
- Salesforce for Outlook isn't fully 508-compliant.
- Salesforce for Outlook doesn't currently support single sign-on (SSO).
- If you rename tabs in Salesforce.com, such as changing **Contacts** to **Candidates**, those new names aren't reflected in Outlook or the scopes and filters of data sets.
- A shortcut to Salesforce for Outlook remains in the Start menu of Microsoft Vista users who upgrade and then remove Salesforce for Outlook. The shortcut is removed when they restart their system.
- Microsoft Vista and Windows 7 users who want to use the `.msi` installer must run the command prompt as an administrator and then launch the installer from the command line, such as from the command `msiexec /i SalesforceForOutlook.msi`.



Note: For details on what has changed since the Summer '10 pilot, see [What's New with Salesforce for Outlook?](#) For answers to frequently asked questions, see “Salesforce for Outlook FAQ” in the Salesforce.com online help.

Administering Salesforce for Outlook

Salesforce for Outlook System Requirements

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

System Requirements

- Microsoft® Outlook® 2007 or 2010 (32-bit only; 64-bit isn't supported). If you're using Outlook 2010, Outlook 2010 .NET programmability support is also required.
- Microsoft Windows® 7 (32-or 64-bit), XP (32-bit only), or Vista™ (32-bit only)
- Adobe® Acrobat® Reader® 7.0 or later



Note: IMAP and Pop3 email servers are not supported.

Salesforce for Outlook is supported on systems that connect to the internet through a proxy server. We support automatic proxy detection, manual proxy, and NTLM proxy authentication.

.msi Installer Requirements

You may have to install the following additional tools if you use the `.msi` installer. They're installed automatically when you use the standard `.exe` installer.

- Microsoft .NET Framework 2.0 Service Pack 2
- Office 2007 Primary Interop Assemblies
- Visual Studio® 2005 Tools for Office Second Edition Runtime

Microsoft Vista and Windows 7 users who want to use the `.msi` installer must run the command prompt as an administrator and then launch the installer from the command line, such as from the command `msiexec /i SalesforceForOutlook.msi`.

Time Zone Requirements

The Windows time zone must match the time zone set in the user's Salesforce.com profile. Salesforce for Outlook supports all Salesforce.com time zones except custom time zones and the following.

- America/Panama
- America/Puerto_Rico
- Asia/Manila
- Atlantic/Bermuda
- Australia/Lord_Howe
- Pacific/Chatham
- Pacific/Enderbury
- Pacific/Kiritimati
- Pacific/Niue
- Pacific/Norfolk
- Pacific/Pago_Pago

Salesforce for Outlook Supported Languages

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

Salesforce for Outlook supports these languages.

- Chinese (Simplified)
- Chinese (Traditional)
- Czech
- Danish
- Dutch

- English
- German
- Finnish
- French
- Hebrew
- Hungarian
- Italian
- Japanese
- Korean
- Polish
- Portuguese (Brazil)
- Romanian
- Russian
- Spanish
- Spanish (Mexico)
- Swedish
- Thai
- Turkish
- Ukrainian
- Vietnamese

The Salesforce for Outlook installer doesn't support:

- Hebrew
- Portuguese (Brazil)
- Romanian
- Spanish (Mexico)
- Thai
- Vietnamese

Salesforce for Outlook Configurations Overview

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

User Permissions Needed	
To view configurations:	“View Setup and Configuration”
To create, edit, or delete configurations:	“Manage Email Client Configurations”

A Salesforce for Outlook configuration is a set of parameters that determine the data that Salesforce for Outlook users can sync between Microsoft® Outlook® and Salesforce.com. You can create multiple configurations to simultaneously suit the needs of different types of users. For example, a sales team might want to sync everything, while a manager might only want to sync events. Users may be able to edit some of their own settings.

Default configurations are automatically assigned to users of **Contact Manager** and **Group** Editions.

To manage your configurations, click **Your Name** ► **Setup** ► **Desktop Administration** ► **Outlook Configurations**.

- To create a configuration, click **New Outlook Configuration**.
- To change a configuration, click **Edit**.
- To delete a configuration, click **Del**.
- To view details about a configuration, click its name.
- To activate a configuration, click **Edit** next to the configuration, select **Active**, and click **Save**.
- To deactivate a configuration, click **Edit** next to the configuration, deselect **Active**, and click **Save**. If the configuration's users are listed on another active configuration through a profile, that configuration is used the next time they open Outlook. Otherwise, they're unable to use Salesforce for Outlook.

Creating Salesforce for Outlook Configurations

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

User Permissions Needed	
To view configurations:	"View Setup and Configuration"
To create, edit, or delete configurations:	"Manage Email Client Configurations"

1. Click **Your Name** ► **Setup** ► **Desktop Administration** ► **Outlook Configurations**.
2. Click **New Outlook Configuration**.
3. Enter a name for the configuration.
4. Enter a description of the configuration.
5. Depending on the configuration, define some or all of these settings.
 - [Assigned users and profiles](#)
 - [Add email](#)
 - [Sync direction](#)
 - [Conflict behavior](#)
 - [Field mappings](#)
 - [Matching criteria](#)
 - [Whether users can modify](#)
 - [Advanced settings](#)
6. Save the configuration.
7. [Define data sets](#).
8. Select **Active** to activate the configuration.

When users log in to Salesforce.com from the Salesforce for Outlook setup wizard, these settings take effect immediately. If you deactivate a configuration and the assigned users are listed on another active configuration through a profile, that configuration is used the next time they open Outlook. Otherwise, they're unable to use Salesforce for Outlook.

Assigning Users to Salesforce for Outlook Configurations

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

User Permissions Needed	
To view configurations:	“View Setup and Configuration”
To create, edit, or delete configurations:	“Manage Email Client Configurations”

After you define basic information for a Salesforce for Outlook configuration, you select the Salesforce for Outlook users that the configuration's settings will apply to.

1. Click **Your Name** ► **Setup** ► **Desktop Administration** ► **Outlook Configurations**.
2. Click **Edit**.
3. In the Assign Users and Profiles section, select either **Profiles** or **Users** in the **Search** drop-down list.
4. If you don't see the member you want to add, enter keywords in the search box and click **Find**.
5. Select members from the Available Members box, and click **Add** to add them to the group. If all available users are assigned to this configuration, the Users list is empty and you can only assign profiles.
6. To remove members, select those members and click **Remove**. If removed users are assigned to another active configuration through a profile, that other configuration is used the next time they open Outlook. Otherwise, they're unable to use Salesforce for Outlook.
7. Click **Save**. All changes take effect the next time data syncs for the users in this configuration. If you assign a user who is already assigned to a different configuration, that user is removed from the other configuration and assigned to this one. If an assigned user is also part of a profile assigned to another active configuration, the configuration that lists the user directly is used.

Defining Data Settings for Salesforce for Outlook

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

User Permissions Needed	
To view configurations:	“View Setup and Configuration”
To create, edit, or delete configurations:	“Manage Email Client Configurations”

Data settings control the sync behavior and email functionality of Salesforce for Outlook. You can define the following settings using the Data Settings fields in a Salesforce for Outlook configuration.

- [Add email](#)
- [Sync direction](#)
- [Conflict behavior](#)

- [Field mappings](#)
- [Matching criteria](#)
- [Whether users can modify](#)

Enabling Add Email in Salesforce for Outlook

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

User Permissions Needed	
To view configurations:	“View Setup and Configuration”
To create, edit, or delete configurations:	“Manage Email Client Configurations”
To enable Add Email	“Customize Application”

Enabling Add Email for your Salesforce for Outlook users adds **Add Email** and **Send and Add** buttons to Outlook that let users add emails to Salesforce.com in a single click.

Emails are saved in Salesforce.com and assigned to other records based on each user's My Email to Salesforce settings. Emails that can't be associated with other records are assigned to the user as open tasks.

To enable Add Email:

1. Click **Your Name** ► **Setup** ► **Desktop Administration** ► **Outlook Configurations**.
2. Click **Edit**.
3. Select **Add Email**.
4. Click **Save**.
5. If you don't already have Email to Salesforce, click **Enable** in the popup message to enable both features.

Defining Sync Directions for Salesforce for Outlook

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

User Permissions Needed	
To view configurations:	“View Setup and Configuration”
To create, edit, or delete configurations:	“Manage Email Client Configurations”

Sync direction indicates the direction data flows when Salesforce for Outlook syncs data.

1. Click **Your Name** ► **Setup** ► **Desktop Administration** ► **Outlook Configurations**.
2. Create or edit a configuration, and select one of these sync directions under Data Settings for each object being synced.

- **Don't sync**—Outlook and Salesforce.com records aren't synced, and you can't select an Outlook folder to sync within the setup wizard.
 - **Salesforce.com to Outlook**—When data first syncs, a record in Salesforce.com creates or updates a record in Outlook. During future syncs, changes made to Salesforce.com records appear in Outlook, regardless of whether the Outlook version of the record has changed. In addition, deleting a synced record in Salesforce.com deletes its Outlook counterpart. Outlook changes are never sent to Salesforce.com. The required conflict behavior setting for this option is **Salesforce.com always wins**.
 - **Outlook to salesforce.com**—During its first sync, a record in Outlook creates or updates a record in Salesforce.com. During future syncs, changes made to Outlook records appear in Salesforce.com, regardless of whether the Salesforce.com version has changed. In addition, deleting a synced record in Outlook deletes its Salesforce.com counterpart. Salesforce.com changes are never sent to Outlook. The required conflict behavior setting for this option is **Outlook always wins**. This option isn't available for contacts.
 - **Sync both ways**—When records sync, changes to Outlook records are reflected in Salesforce.com, and vice versa. If records conflict, the conflict behavior setting determines which record wins.
3. Click **Save**. All changes take effect the next time data syncs for the users in this configuration.
 4. Define a data set for each object that has a sync direction.

Defining Conflict Behavior for Salesforce for Outlook

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

User Permissions Needed	
To view configurations:	"View Setup and Configuration"
To create, edit, or delete configurations:	"Manage Email Client Configurations"

Conflict behavior settings determine what happens when Salesforce for Outlook encounters a conflict when syncing data both ways. A conflict occurs when the same record is updated in both Salesforce.com and Outlook or when a record is updated on one side and deleted in the other.

1. Click **Your Name** ► **Setup** ► **Desktop Administration** ► **Outlook Configurations**.
2. Edit a configuration, and select a conflict behavior under Data Settings for each object being synced. Possible options are:
 - **Salesforce.com always wins**
 - **Outlook always wins**
3. Click **Save**. All changes take effect the next time data syncs for the users in this configuration.

Mapping Fields for Salesforce for Outlook

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

User Permissions Needed	
To view configurations:	"View Setup and Configuration"
To create, edit, or delete configurations:	"Manage Email Client Configurations"

Field mappings define which Salesforce.com and Outlook fields correspond when records sync with Salesforce for Outlook. Salesforce.com comes with a set of default mappings. You may be able to change some of them.

To map fields:

1. Click **Your Name** ► **Setup** ► **Desktop Administration** ► **Outlook Configurations**
2. Under Data Settings, click **Edit Field Mappings** to display the list of available fields.
3. Choose a field from the **Salesforce.com Field** picklist. This list displays the names of all Salesforce.com fields that haven't yet been mapped.



Caution: If you map a custom field that is universally required, make sure it has a default value to avoid errors. Also, note that mapping custom fields that require validation by Salesforce.com may cause sync errors. For example, if you map a custom Salesforce.com field that requires a unique value, you'll get a uniqueness error when you sync if you enter a non-unique value in the Outlook field.

4. Choose a field from the **Outlook Field** picklist next to the selected Salesforce.com field. This list displays the names of all standard Outlook fields that haven't yet been mapped and that match the data type of the corresponding Salesforce.com field.
5. To map a Salesforce.com field to a custom Outlook field, select **Custom Field...** from the end of the corresponding Outlook Field picklist. Enter the field's name and click **OK**.

The custom field must already exist in Outlook. Letters are not case-sensitive, and these characters aren't allowed: [,] , _ , #. The first sync validates that the custom Outlook field exists and then maps it to the Salesforce.com field. Custom Outlook fields use a string data type. Note that we only allow custom fields for Salesforce.com text fields and non-restricted picklists.

6. To remove a field mapping, click the delete icon to the right of the mapping. To redo the mapping, just add a new mapping to the bottom of the list. To view your mappings, click **View** under Field Mapping on the detail page.
7. Click **Save**. All changes take effect the next time data syncs for the users in this configuration.



Note: You can map custom Salesforce.com fields to standard or custom Outlook fields. You can't map picklist values.

Defining Matching Criteria for Salesforce for Outlook

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

User Permissions Needed	
To view configurations:	"View Setup and Configuration"
To create, edit, or delete configurations:	"Manage Email Client Configurations"

If Salesforce for Outlook finds multiple matching contacts when a contact first syncs from Outlook, we pick a Salesforce.com contact based on the matching criteria you define here.

1. Click **Your Name** ► **Setup** ► **Desktop Administration** ► **Outlook Configurations**.
2. Edit a configuration, and select one of these matching criteria options under Data Settings for contacts.
 - **Most recent activity**—Choose the Salesforce.com contact that shows the most recent activity (such as a phone call or email), as shown in the contact's Activity History related list. This is the default matching option.
 - **Last updated**—Choose the Salesforce.com contact that was most recently modified.
 - **Oldest**—Choose the Salesforce.com contact that has the earliest creation date.
3. Click **Save**. All changes take effect the next time data syncs for the users in this configuration.

If we don't find a matching contact in Salesforce.com, we create a new contact that syncs with the Outlook contact. We then either automatically assign the synced contact to a Salesforce.com account, leave it unassigned, or place it in the user's My Unresolved Items page to be manually assigned.

Letting Users Modify Salesforce for Outlook Settings

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

User Permissions Needed	
To view configurations:	"View Setup and Configuration"
To create, edit, or delete configurations:	"Manage Email Client Configurations"

1. Click **Your Name** ► **Setup** ► **Desktop Administration** ► **Outlook Configurations**.
2. Edit a configuration, and select any of the following checkboxes under Data Settings for each object being synced. You can allow users to modify:
 - **Whether object is synced**
 - **Sync direction**
 - **Conflict behavior**
 - **Field mappings**

3. Click **Save**. All changes take effect the next time data syncs for the users in this configuration.

You can overwrite users' modifications any time by selecting **Overwrite configuration changes made by users** in a configuration. After you save the updated configuration, the new settings replace the existing settings for users of the configuration the next time their data syncs.

Defining Advanced Settings for Salesforce for Outlook

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

User Permissions Needed	
To view configurations:	"View Setup and Configuration"
To create, edit, or delete configurations:	"Manage Email Client Configurations"

Use advanced settings in a Salesforce for Outlook configuration to customize the default behavior of Salesforce for Outlook, such as setting the maximum size of the sync log. Click **Edit** to change the value of an advanced setting or **Remove** to remove it from the configuration.

1. Click **Your Name** ► **Setup** ► **Desktop Administration** ► **Outlook Configurations**.
2. Click **Edit**.
3. Click **Add Advanced Setting** in the Advanced Settings section of an Outlook configuration.
4. Choose one of these settings and enter a value.

Advanced Setting	Description
HTTPTimeout	Number of seconds Salesforce for Outlook waits while trying to establish an HTTP connection with Salesforce.com. Value must be between 15 and 360 seconds, and the default is 30.
MaxLogFileSize	Maximum file size of the sync log you'll maintain. Value must be between 1 and 128 MB, and the default is 1.
MaxRetries	Number of times Salesforce for Outlook tries to connect to Salesforce.com. Value must be between 0 and 10, and the default is 3.

5. Click **OK**.
6. Click **Save**. All changes take effect the next time data syncs for the users in this configuration.

Default Salesforce for Outlook Configuration

Available in: **Contact Manager** and **Group** Editions

Because Salesforce for Outlook configurations are only available in Professional, Enterprise, Unlimited, and Developer Editions, users of Contact Manager and Group Editions are automatically assigned a default configuration so they can use Salesforce for Outlook. The default configuration has these settings.

- Email—Add Email is enabled if Email to Salesforce is turned on.
- Contacts
 - Sync Direction—Sync both ways
 - Conflict Behavior—Outlook always wins
 - Filters—Contacts: User's Records AND Contacts on Accounts: User's Records
 - Field Mapping—Default settings
 - Matching Criteria—Most recent activity
- Events
 - Sync Direction—Outlook to salesforce.com
 - Conflict Behavior—Outlook always wins
 - Filters—User's Records AND Date greater or equal TODAY
 - Field Mapping—Default settings

Defining Data Sets for Salesforce for Outlook

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

User Permissions Needed	
To view configurations:	“View Setup and Configuration”
To create, edit, or delete configurations:	“Manage Email Client Configurations”
To create, edit, or delete data sets:	Sync Direction can't be Don't sync

Data sets are subsets of the Salesforce.com records that Salesforce for Outlook users can sync. They consist of filters that limit which records will sync. Each configuration must have a data set in order for users to sync with Outlook.

The Outlook Configuration detail page shows a summary of the configuration's current filters.

1. Click **Your Name** ► **Setup** ► **Desktop Administration** ► **Outlook Configurations**.
2. Click the name of an Outlook configuration.
3. In the Data Sets related list, click **Edit**.
4. Specify filters.

5. To see how many items will sync, you can check the data set size.
6. Click **Save**.

Entering Contact Filters for Salesforce for Outlook

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

User Permissions Needed	
To view configurations:	"View Setup and Configuration"
To create, edit, or delete configurations:	"Manage Email Client Configurations"
To filter contacts by opportunity teams:	"Opportunity Team Selling"
To filter contacts by account teams:	"Account Teams"
To create, edit, or delete data sets:	Sync Direction can't be Don't sync

Data sets are subsets of the Salesforce.com records that Salesforce for Outlook users can sync. They consist of filters that limit which records will sync. For example, you may want to let certain users sync all contacts, but let other users sync only contacts related to their sales teams. In addition, you can filter by the fields in the records, such as letting users sync only contacts related to specific accounts and opportunities.

The Outlook Configuration detail page shows a summary of the configuration's current filters.

1. [Define a data set](#) for a configuration.
2. Under Filter By Record Ownership, specify whether users can sync all contacts or only selected ones.
3. If you click **Selected Contacts**, you can further limit which contacts users can sync using these checkboxes.
 - Contacts
 - User's Records—Syncs all contacts the user owns
 - User's Team's Records—Syncs all contacts owned by the user and the user's subordinates in the role hierarchy
 - Contacts on Opportunities
 - User's Records—Syncs contacts related to the user's opportunities
 - User's Team's Records—Syncs contacts related to opportunities owned by the user and the user's subordinates in the role hierarchy
 - User's Sales Teams' Records—Syncs contacts related to opportunities the user is a sales team member of but not opportunities the user owns
 - Contacts on Accounts
 - User's Records—Syncs contacts related to the user's accounts
 - User's Team's Records—Syncs contacts related to accounts owned by the user and the user's subordinates in the role hierarchy
 - User's Account Teams' Records—Syncs contacts related to accounts the user is a team member of but not accounts the user owns

4. Under **Filter By Additional Objects and Fields**, add any field-level filters you need.
 - a. Select an object and a field within that object.
 - b. Select the correct filter operator.
 - c. Enter a value for the selected field.
5. Click **Add Row** to add a new filter or **Remove Row** to delete the last one in the list.
6. You can use the **Get Record Count** button to check how many records will sync for a sample Salesforce for Outlook user based on the configuration's filters.



Note: If you remove access to certain objects by deselecting the `Selected Contacts` checkboxes, filters for those objects will be marked with a warning icon indicating that they're no longer valid. All marked filters are removed when you save.

Tips on Entering Salesforce for Outlook Contact Filters

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

Contact filters control the number of records that Salesforce for Outlook users can sync between Outlook and Salesforce.com. Note the following when using contact filters.

- The criteria you specify are AND based, so if you specify more than one criterion, the result includes only records that match all of the criteria.
- If entering a date, use the format allowed by your `Locale` setting. You can also use special date values like `TODAY`, `NEXT WEEK`, `NEXT YEAR`, `LAST <number> DAYS`, and so on.
- When searching for numbers or other data that includes commas, place quotation marks around the data. For example: `Amount equals "10,000"` returns records that have an amount of \$10,000.
- When you use the “less than,” “greater than,” “less or equal,” or “greater or equal” operators on fields that have numeric values, records with blank or “null” values are returned as if their value is zero (0).
- To limit results to records that are blank or contain “null” values for a particular field, choose the field and the “equals” or “not equal to” operators, leaving the third field blank. For example, `Amount equals` returns records with blank amount fields. You can search for blank values or other specified values at the same time. For example, `Amount equals 1,,2` returns records where the `Amount` is blank or contains the value “1” or “2”. For example, if you create a workflow a filter for accounts with the criteria `Annual Revenue less than 100000`, account records match if their `Annual Revenue` is blank.
- To search for phone numbers, you might need to include the exact phone number formatting; for example, `Phone starts with (561)`.
- To create a filter that includes more than one value, enter your search terms, separated by commas, in the corresponding field. You can enter up to 80 characters, including commas and spaces. For example, to search for accounts in California, New York, or Washington, use `State contains CA, NY, WA`.
- When you filter on standard long text area fields, such as `Description`, only the first 1000 characters of the field are searched.
- You can use the **Get Record Count** button to check how many records will sync for a sample Salesforce for Outlook user based on the configuration's filters.
- If you need to reference user information in your contact filters, you can add the following merge fields to them.

Merge Field	Description
<code>\$User.ID</code>	References the ID of the current user. This merge field can be applied to fields that contain a user lookup. The valid operators for this merge field are Equals and Not Equal To. When creating mobile view filters that reference an owner field, you can only use the <code>\$User.ID</code> merge field.
<code>\$User.Username</code>	References the username of the current user. This merge field can be applied to any text or lookup field, except picklists. The valid operators for this merge field are Equals, Not Equal To, Greater Than or Equal, Less Than or Equal, Contains, Does Not Contain, and Starts With.
<code>\$User.Firstname</code>	References the first name of the current user. This merge field can be applied to any text or lookup field, except picklists. The valid operators for this merge field are Equals, Not Equal To, Greater Than or Equal, Less Than or Equal, Contains, Does Not Contain, and Starts With.
<code>\$User.Lastname</code>	References the last name of the current user. This merge field can be applied to any text or lookup field, except picklists. The valid operators for this merge field are Equals, Not Equal To, Greater Than or Equal, Less Than or Equal, Contains, Does Not Contain, and Starts With.
<code>\$User.Fullname</code>	References the first and last name of the current user. This merge field can be applied to any text or lookup field, except picklists. The valid operators for this merge field are Equals, Not Equal To, Greater Than or Equal, Less Than or Equal, Contains, Does Not Contain, and Starts With.

Entering Event Filters for Salesforce for Outlook

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

User Permissions Needed	
To view configurations:	“View Setup and Configuration”
To create, edit, or delete configurations:	“Manage Email Client Configurations”
To create, edit, or delete data sets:	Sync Direction can't be Don't sync

Data sets are subsets of the Salesforce.com records that Salesforce for Outlook users can sync. They consist of filters that limit which records will sync. For example, most users may sync only current and future events, while some users may need to also

sync past events. Salesforce for Outlook syncs events based on their end dates rather than their start dates. For example, if you're syncing current and future events only, a two-day event that started yesterday still syncs.

The Data Sets section of the Outlook Configuration detail page shows a summary of the configuration's current event filters.

1. [Define a data set](#) for a configuration.
2. Under Events, enter one of these filters in the `Greater or equal to` field.
 - `TODAY`—Syncs only events that end on or after today. The start time is 12:00 a.m.. This option is displayed by default.
 - `LAST MONTH`—Syncs only events that ended on or after the first day of last month.
 - `LAST N DAYS`—Syncs only events that ended on or after a specified number of days ago, such as `LAST 10 DAYS`.
3. You can use the **Get Record Count** button to check how many records will sync for a sample Salesforce for Outlook user based on the configuration's filters.
4. Save the data set.



Note: The following items don't sync: events with locations longer than 80 characters, recurring events, all-day events beginning on the first day you're configured to sync, and event attendees. Multiday events sync as single events in either direction. Multi-day events do sync.

Sample Salesforce for Outlook Data Sets

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

Because Salesforce for Outlook users with the same role usually have similar data requirements, many administrators create Outlook configurations based on the positions in their organization. Below are sample data sets for common Salesforce.com groups. Your Outlook users have unique needs, but you can use these examples as a reference to help you get started with Outlook configurations.

Sales Manager

Sales managers usually need to see records they own and the records of the users who report to them. They also need to see the latest contact information for anyone associated with large deals in the pipeline and any upcoming meetings that might be related to these deals.

Sample Outlook Configuration for Sales Managers:

```
Contacts
Contacts: User's Records, User's Team's Records
Contacts on Opportunities: User's Team's Records
Contacts on Accounts: User's Team's Records

Events
Events: User's Records
Date greater or equal TODAY
```

Sales Engineer

Sales Engineers often only need the contacts owned by them and the other members of their sales teams. They may also want a record of the past month's meetings and a schedule of all future meetings.

Sample Outlook Configuration for Sales Engineers:

```

Contacts
Contacts: User's Records
Contacts on Opportunities: User's Sales Teams' Records

Events
Events: User's Records
Date greater or equal LAST MONTH

```

Account Executive

Account executives need to see contacts related to their accounts and opportunities. The opportunities are filtered so only contacts related to open opportunities with a probability over 40% sync. They'd also like to sync all future meetings and all meetings from the last two months.

Sample Outlook Configuration for Account Executives:

```

Contacts
Contacts on Opportunities: User's Records
(Probability (%) greater than 40) AND (Stage not equal to Closed Won,Closed Lost)
Contacts on Accounts: User's Records

Events
Events: User's Records
Date greater or equal LAST 60 DAYS

```

Checking the Size of Salesforce for Outlook Data Sets

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

User Permissions Needed	
To view Outlook data sets:	"View Setup and Configuration"
To test Outlook data sets:	"Manage Email Client Configurations"

You can use the **Get Record Count** button to check how many records will sync for a sample Salesforce for Outlook user based on the configuration's filters. If the numbers are too high or low, you can adjust the filters and check the size again. The maximum record count is 5000 per object.

1. Define a data set for a configuration.
2. Under Data Set Size, click the lookup icon next to the **User** field.
3. Select a user. To test maximum size, choose a user who owns a lot of records, even one who may not be currently assigned to the configuration.
4. Click **Get Record Count**. The number of records that would sync between Outlook and Salesforce.com for that user appear.
5. Adjust the filters or selected user and retest the data set as needed. Nothing is saved until you click **Save**.

Using Salesforce for Outlook

Installing Salesforce for Outlook

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

User Permissions Needed	
To install Salesforce for Outlook:	Assigned to an active configuration AND Valid data set for each object being synced
To change sync folders:	Your Outlook profile set as the default in your Mail Settings

1. Close Outlook.
2. In Salesforce.com, click **Your Name** ► **Setup** ► **Desktop Integration** ► **Salesforce for Outlook**.
3. If you want to see the email and sync settings your administrator has defined for you before you install, click **View My Configuration**.
4. Click **Download**. Then click **Save**, open the saved file, and complete the installation wizard. If needed, you can [use the .msi](#) on page 33 version of the installer.
5. Open Outlook. The setup wizard opens, and the Salesforce for Outlook icon (🔗) appears in your system tray. To resume a cancelled installation, right-click this icon and click **Settings**.
6. In the **Connect to** field, keep the default `https://www.salesforce.com` or enter the URL for another Salesforce.com site.

If your organization uses a custom domain name for its Salesforce.com URL, you should still use `www` and not the domain name for this login.

7. Enter your Salesforce.com username and password, and click **Login**. This creates a connection between Outlook and Salesforce.com. You won't have to log in again until prompted.



Note: If your organization restricts IP addresses, logins from untrusted IPs are blocked until they're activated. Salesforce.com automatically sends you an activation email that you can use to log in. The email contains a security token that you must add to the end of your password. For example, if your password is `mypassword`, and your security token is `XXXXXXXXXX`, you must enter `mypasswordXXXXXXXXXX` to log in.

8. Click **Next**, and choose the folders you want to sync. You can use your default folders or click **Change Folder** and select or create a folder that's within your default folders or the main Mailbox folder.



Important: All data in these folders will sync with Salesforce.com. If you're syncing from Salesforce.com to Outlook or syncing both ways and delete a record in Salesforce.com, that record is automatically deleted in Outlook. Click the **configuration** link to see more details about how you're configured to sync.

9. Click **Next**, and then click **Done**. A welcome message appears at the system tray icon (📧), which is now active. If you're configured to sync Outlook items, all data in your selected folders syncs automatically. The icon spins to let you know when data is syncing.

During active use, all updates sync automatically every ten minutes. If we detect no keyboard or mouse activity for 30 minutes, we change the sync frequency to 30 minutes. After two hours of inactivity, we sync hourly, and after four hours, we sync every four hours.

Managing Your Salesforce for Outlook Configuration

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

User Permissions Needed	
To access your configuration	Assigned to an active configuration

Your version of Salesforce for Outlook has been configured with certain functions, like syncing contacts or events or adding emails to Salesforce.com. These settings are saved in a Salesforce for Outlook configuration in Salesforce.com.

1. Access your configuration in any of these ways.
 - Click **Your Name** ➤ **Setup** ➤ **Desktop Integration** ➤ **Salesforce for Outlook** in Salesforce.com. Then click **View My Configuration**.
 - Right-click the system tray icon (📧) on your desktop, and select **Salesforce.com** ➤ **Outlook Configuration**.
 - Right-click the system tray icon (📧), and select **Settings....** Then click **Next** and click **configuration** in the second step of the wizard.
2. Depending on your permissions, you may be able to:
 - [Edit your email settings](#)
 - [Edit your sync settings](#)
 - [Edit your sync direction](#)
 - [Edit your conflict settings](#)
 - [View your matching criteria](#)
 - [Edit your field mappings](#)
3. Click **Save**. All changes take effect the next time your data syncs. Return to your original settings any time by clicking **Revert to default** at the top of your modified configuration. Your administrator may change your settings as needed.

Editing Your Salesforce for Outlook Email Settings

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

User Permissions Needed	
To access your configuration	Assigned to an active configuration
To edit email settings	"Add Email"

The Email Settings section of your Salesforce for Outlook configuration shows you whether you're allowed to add emails to Salesforce.com from Outlook. Emails that you add using Salesforce for Outlook are saved in Salesforce.com and assigned to other records based on your My Email to Salesforce settings. Emails that can't be associated with other records are assigned to you as open tasks.

1. Access your configuration in any of these ways.

- Click **Your Name** ► **Setup** ► **Desktop Integration** ► **Salesforce for Outlook** in Salesforce.com. Then click **View My Configuration**.
- Right-click the system tray icon (📧) on your desktop, and select **Salesforce.com** ► **Outlook Configuration**.
- Right-click the system tray icon (📧), and select **Settings....** Then click **Next** and click **configuration** in the second step of the wizard.

If **Add Email** is selected, you'll see **Add Email** and **Send and Add** buttons in Outlook.

2. Click **Email to Salesforce Settings**.

3. In **My Acceptable Email Addresses**, enter any email addresses you will use to send email. Separate multiple email addresses with commas.

4. Configure Email to Salesforce to add emails as activities to matching opportunities, leads, contacts, or all three.

If you configure Email to Salesforce to associate emails to matching leads or contacts, Salesforce.com searches the **To** and **CC** fields for the email addresses of your leads or contacts. If any leads or contacts are found, Salesforce.com saves the email to the Activity History related list on the appropriate record.

If you selected leads or contacts, choose how Email to Salesforce should process emails containing lead or contact information that matches duplicate records. Email to Salesforce can add the email activity to all matching records, to the oldest duplicate record, or to the record that has greatest number of activities.

5. Select the option to create a task if no matching records are found. If this option isn't selected and Salesforce.com can't identify the sender's email address, the email won't be saved in Salesforce.com.
6. Select the option to receive a confirmation email.
7. Click **Save**.

Editing Your Salesforce for Outlook Sync Settings

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

User Permissions Needed	
To access your configuration	Assigned to an active configuration
To disable sync:	“Whether object is synced”

The Sync Settings section of your Salesforce for Outlook configuration tells you which objects you're allowed to sync and the direction data syncs. To view or edit these settings:

1. Access your configuration in any of these ways.
 - Click **Your Name** ► **Setup** ► **Desktop Integration** ► **Salesforce for Outlook** in Salesforce.com. Then click **View My Configuration**.
 - Right-click the system tray icon (🔌) on your desktop, and select **Salesforce.com** ► **Outlook Configuration**.
 - Right-click the system tray icon (🔌), and select **Settings....** Then click **Next** and click **configuration** in the second step of the wizard.
2. Hover over filter icons (🔍) to see which kinds of records sync.
3. Deselect a checkbox to stop an item from syncing. All fields related to that item are disabled on the page.
4. Click **Save**. All changes take effect the next time your data syncs. Return to your original settings any time by clicking **Revert to default** at the top of your modified configuration. Your administrator may change your settings as needed.

Editing Your Salesforce for Outlook Sync Direction

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

User Permissions Needed	
To access your configuration	Assigned to an active configuration
To change sync direction	“Sync direction”

Sync direction indicates the direction data flows when Salesforce for Outlook syncs data.

1. Access your configuration in any of these ways.
 - Click **Your Name** ► **Setup** ► **Desktop Integration** ► **Salesforce for Outlook** in Salesforce.com. Then click **View My Configuration**.
 - Right-click the system tray icon (🔌) on your desktop, and select **Salesforce.com** ► **Outlook Configuration**.

- Right-click the system tray icon (🔌), and select **Settings....** Then click **Next** and click **configuration** in the second step of the wizard.
2. Select one of these options under Sync Direction for a particular object.
 - **Outlook to salesforce.com**—During its first sync, a record in Outlook creates or updates a record in Salesforce.com. During future syncs, changes made to Outlook records appear in Salesforce.com, regardless of whether the Salesforce.com version has changed. In addition, deleting a synced record in Outlook deletes its Salesforce.com counterpart. Salesforce.com changes are never sent to Outlook. The required conflict behavior setting for this option is **Outlook always wins**. This option isn't available for contacts.
 - **Salesforce.com to Outlook**—When data first syncs, a record in Salesforce.com creates or updates a record in Outlook. During future syncs, changes made to Salesforce.com records appear in Outlook, regardless of whether the Outlook version of the record has changed. In addition, deleting a synced record in Salesforce.com deletes its Outlook counterpart. Outlook changes are never sent to Salesforce.com. The required conflict behavior setting for this option is **Salesforce.com always wins**.
 - **Sync both ways**—When records sync, changes to Outlook records are reflected in Salesforce.com, and vice versa. If records conflict, the conflict behavior setting determines which record wins.
 3. Click **Save**. All changes take effect the next time your data syncs. Return to your original settings any time by clicking **Revert to default** at the top of your modified configuration. Your administrator may change your settings as needed.

Editing Your Salesforce for Outlook Conflict Settings

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

User Permissions Needed	
To access your configuration	Assigned to an active configuration
To change conflict behavior	"Conflict behavior"

Conflict behavior settings determine what happens when Salesforce for Outlook encounters a conflict when syncing data both ways. A conflict occurs when the same record is updated in both Salesforce.com and Outlook or when a record is updated on one side and deleted in the other.

1. Access your configuration in any of these ways.
 - Click **Your Name** ► **Setup** ► **Desktop Integration** ► **Salesforce for Outlook** in Salesforce.com. Then click **View My Configuration**.
 - Right-click the system tray icon (🔌) on your desktop, and select **Salesforce.com** ► **Outlook Configuration**.
 - Right-click the system tray icon (🔌), and select **Settings....** Then click **Next** and click **configuration** in the second step of the wizard.
2. Under Conflict Behavior for each object you're syncing, select one of these options.
 - **Salesforce.com always wins**
 - **Outlook always wins**

3. Click **Save**. All changes take effect the next time your data syncs. Return to your original settings any time by clicking **Revert to default** at the top of your modified configuration. Your administrator may change your settings as needed.

Viewing Your Salesforce for Outlook Matching Criteria

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

User Permissions Needed	
To access your configuration	Assigned to an active configuration
To view your configuration	Assigned to a configuration

If Salesforce for Outlook finds multiple matching contacts when a contact first syncs from Outlook, we pick a Salesforce.com contact based on the matching criteria defined by your administrator.

Access your configuration in any of these ways.

- Click **Your Name** ► **Setup** ► **Desktop Integration** ► **Salesforce for Outlook** in Salesforce.com. Then click **View My Configuration**.
- Right-click the system tray icon (📧) on your desktop, and select **Salesforce.com** ► **Outlook Configuration**.
- Right-click the system tray icon (📧), and select **Settings....** Then click **Next** and click **configuration** in the second step of the wizard.

Then review the matching preference assigned to you. Options are:

- **Most recent activity**—Choose the Salesforce.com contact that shows the most recent activity (such as a phone call or email), as shown in the contact's Activity History related list. This is the default matching option.
- **Last updated**—Choose the Salesforce.com contact that was most recently modified.
- **Oldest**—Choose the Salesforce.com contact that has the earliest creation date.

Editing Your Salesforce for Outlook Field Mappings

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

User Permissions Needed	
To access your configuration	Assigned to an active configuration
To change field mappings	"Field mappings"

Field mappings define which Salesforce.com and Outlook fields correspond when records sync with Salesforce for Outlook.

1. Access your configuration in any of these ways.

- Click **Your Name** ► **Setup** ► **Desktop Integration** ► **Salesforce for Outlook** in Salesforce.com. Then click **View My Configuration**.
- Right-click the system tray icon (🔌) on your desktop, and select **Salesforce.com** ► **Outlook Configuration**.
- Right-click the system tray icon (🔌), and select **Settings....** Then click **Next** and click **configuration** in the second step of the wizard.

2. Click **Edit Field Mappings**.

3. Choose a field from the **Salesforce.com Field** picklist. This list displays the names of all Salesforce.com fields that haven't yet been mapped.



Caution: If you map a custom field that is universally required, make sure it has a default value to avoid errors. Also, note that mapping custom fields that require validation by Salesforce.com may cause sync errors. For example, if you map a custom Salesforce.com field that requires a unique value, you'll get a uniqueness error when you sync if you enter a non-unique value in the Outlook field.

4. Choose a field from the **Outlook Field** picklist next to the selected Salesforce.com field. This list displays the names of all standard Outlook fields that haven't yet been mapped and that match the data type of the corresponding Salesforce.com field.
5. To map a Salesforce.com field to a custom Outlook field, select **Custom Field...** from the end of the corresponding **Outlook Field** picklist. Enter the field's name and click **OK**.

The custom field must already exist in Outlook. Letters are not case-sensitive, and these characters aren't allowed: [,] , _ , #. The first sync validates that the custom Outlook field exists and then maps it to the Salesforce.com field. Custom Outlook fields use a string data type. Note that we only allow custom fields for Salesforce.com text fields and non-restricted picklists.

6. Click **Save**. All changes take effect the next time your data syncs. Return to your original settings any time by clicking **Revert to default** at the top of your modified configuration. Your administrator may change your settings as needed.

To remove a field mapping, click the delete icon to the right of the mapping. To redo the mapping, just add a new mapping to the bottom of the list. You can map custom Salesforce.com fields to standard or custom Outlook fields. You can't map picklist values.

Using the Salesforce for Outlook System Tray Application

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

After you install Salesforce for Outlook, a new application icon (🔌) appears in your Microsoft® Windows system tray. You can use this application to:

- [Sync Outlook and Salesforce.com items](#)
- [View your sync log](#)
- [Resolve your unresolved synced items](#)
- [Manage your Salesforce for Outlook configuration](#)
- [Change your login information](#)
- [Hide alerts](#)
- [View errors](#)
- [Change your sync folders](#)

- Access the Salesforce for Outlook online help

Accessing the System Tray Application

- If you don't see the icon, just restart the application by double-clicking the Salesforce for Outlook shortcut on your desktop or the application in your computer's Programs directory (**Start > All Programs > salesforce.com > Salesforce for Outlook**).
- If the icon is disabled (🔇), you may need to start Outlook.
- If you're using Microsoft Windows 7, you may need to click the arrow next to the notification area and drag the Salesforce for Outlook icon to the system tray.

Viewing the Salesforce for Outlook Sync Log

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

The sync log records troubleshooting information for Salesforce for Outlook, including the number of records that had errors and the number of records that were created, updated, or deleted during sync.

To view this log, right-click the system tray icon (🔊) and click **Sync > View Sync Log**.

Changing Your Salesforce for Outlook Sync Folders

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

User Permissions Needed	
To change sync folders:	Assigned to an active configuration AND Your Outlook profile set as the default in your Mail Settings
To disable sync:	“Whether object is synced”

Salesforce for Outlook uses Outlook folders to limit which records sync with Salesforce.com. Before you complete the Salesforce for Outlook setup wizard, make sure the folders you want to sync contain the right records. If you're syncing both ways or syncing Outlook to Salesforce.com, moving a record out of a synced Outlook folder deletes that record in Salesforce.com. If you're syncing both ways or syncing Salesforce.com to Outlook, removing a record from Salesforce.com deletes that record in Outlook.

To change your sync folders after your initial setup:

1. Right-click the system tray icon (🔊) on your desktop and select **Settings...**
2. Click **Next**, and choose the folders you want to sync. You can use your default folders or click **Change Folder** and select or create a folder that's within your default folders or the main Mailbox folder.
3. Click **Next**, and then click **Done**. Salesforce for Outlook starts syncing with the new folders immediately.

Changing Your Salesforce for Outlook Login Information

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

User Permissions Needed	
To log in to Salesforce for Outlook	Assigned to an active configuration

If your Salesforce.com username or password changes, you'll need to update your login information in Salesforce for Outlook.

1. Right-click the system tray icon (🔔) on your desktop and select **Settings...**
2. Enter your correct Salesforce.com username and password, and click **Login**. This creates a connection between Outlook and Salesforce.com. You won't have to log in again until prompted.
3. Click **Next**, click **Next** again, and then click **Done**.



Note: If your organization restricts IP addresses, logins from untrusted IPs are blocked until they're activated. Salesforce.com automatically sends you an activation email that you can use to log in. The email contains a security token that you must add to the end of your password. For example, if your password is mypassword, and your security token is XXXXXXXXXXXX, you must enter mypasswordXXXXXXXXXXXX to log in.

Hiding Salesforce for Outlook Alerts

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

Salesforce for Outlook automatically displays system tray alerts about issues like sync errors and unresolved synced records.

To hide these alerts, right-click the system tray icon (🔔) and click **Hide Alerts**. Click **Hide Alerts** again to show them.

Viewing Salesforce for Outlook Errors

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

Whenever Salesforce for Outlook has problems syncing your data, the system tray icon changes to an error icon (❗), and the status text at the top of the system tray shortcut menu displays the number of errors.

To view these errors, double-click the system tray icon or click the text in the shortcut menu to open the Salesforce for Outlook Error dialog box. If an error relates to a specific Outlook record, you can click the record's link to edit that record in Outlook.

Adding Email with Salesforce for Outlook

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

User Permissions Needed	
To add Outlook emails to Salesforce.com:	“Email to Salesforce.com”
	AND
	“Add Email”

To save an existing email in Salesforce.com, select a sent or received email and click **Add Email**.

To save a new email in Salesforce.com:

1. Open an email folder in Outlook and click **New**.
2. Add the recipients.
3. Write the email and click **Send and Add**.

Emails are saved in Salesforce.com based on your Email to Salesforce settings as follows.

- The email is sent to the recipients and saved in Salesforce.com. The text `Sent to salesforce.com` appears at the top of the email, and you receive a confirmation email in Outlook.
- If you configure Email to Salesforce to associate emails to matching leads or contacts, Salesforce.com searches the **To** and **CC** fields for the email addresses of your leads or contacts. If any leads or contacts are found, Salesforce.com saves the email to the Activity History related list on the appropriate record.
- If you configure Email to Salesforce to associate emails to matching opportunities, Salesforce.com searches the **To** and **CC** fields for the email addresses of your contacts. If contacts are found, Salesforce.com saves the email to the Activity History related list on all open opportunities for which the contact is assigned a contact role.
- If Email to Salesforce matches an email address to multiple lead or contact records in Salesforce.com, you can choose to associate the email with all matching records, the oldest record, or the record with the most activity.
- Email attachments aren't added to Salesforce.com.
- With Salesforce for Outlook, you add emails using the **Add Email** and **Send and Add** toolbar buttons instead of the **BCC** field.

Syncing with Salesforce for Outlook

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

User Permissions Needed	
To sync data	Sync enabled for contacts or events

Salesforce for Outlook offers a seamless sync experience, where data syncs automatically without interrupting your work. Here are some guidelines to keep in mind as you sync data with Salesforce for Outlook.

- Salesforce for Outlook uses Outlook folders to limit which records sync with Salesforce.com. Before you complete the Salesforce for Outlook setup wizard, make sure the folders you want to sync contain the right records. If you're syncing both ways or syncing Outlook to Salesforce.com, moving a record out of a synced Outlook folder deletes that record in Salesforce.com. If you're syncing both ways or syncing Salesforce.com to Outlook, removing a record from Salesforce.com deletes that record in Outlook.
- Your data syncs automatically after you set up Salesforce for Outlook.
- During active use, all updates sync automatically every ten minutes. If we detect no keyboard or mouse activity for 30 minutes, we change the sync frequency to 30 minutes. After two hours of inactivity, we sync hourly, and after four hours, we sync every four hours.
- You can force a sync at any time by right-clicking the system tray icon (🔌) and clicking **Sync ➤ Sync Now**.
- Your Outlook configuration defines which items are set to sync, which direction the data flows between Outlook and Salesforce.com, and what happens when data conflicts.
- Outlook and Salesforce.com must be configured to sync before you can see the **Sync ➤ Sync Now** menu item.
- If data is undeleted in Salesforce.com or becomes available due to a change in sharing permissions, it will show up in Outlook within 24 hours or when you manually sync from the system tray.

Syncing Events with Salesforce for Outlook

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

User Permissions Needed	
To sync events from Outlook to Salesforce.com:	"Read" and "Edit" on events, and event sync direction set to Outlook to salesforce.com
To sync events from Salesforce.com to Outlook:	"Read" and "Edit" on events, and event sync direction set to Salesforce.com to Outlook
To sync events both ways:	"Read" and Edit" on events, and event sync direction set to Sync both ways
To sync multiday events:	"Enable Multiday Events" on activities

You can easily keep your Outlook and Salesforce.com events in sync using Salesforce for Outlook. Once an event is in Salesforce.com, you can assign it to related records, like contacts, accounts, opportunities, and so on. Syncing events also lets you maintain an accurate view of your availability when you create events and request meetings from your Salesforce.com calendar.

Which Events Sync

Your Outlook configuration defines which items are set to sync, which direction the data flows between Outlook and Salesforce.com, and what happens when data conflicts. The event filters in your configuration determine which events sync. The possible filters are:

- **TODAY**—Syncs only events that end on or after today.
- **LAST MONTH**—Syncs only events that ended on or after the first day of last month.
- **LAST N DAYS**—Syncs only events that ended on or after a specified number of days ago, such as **LAST 10 DAYS**.

Event updates stop syncing once the event falls outside of the range you're configured to sync.

The following items don't sync: events with locations longer than 80 characters, recurring events, all-day events beginning on the first day you're configured to sync, and event attendees. Multiday events sync as single events in either direction. Salesforce for Outlook syncs events based on their end dates rather than their start dates. For example, if you're syncing current and future events only, a two-day event that started yesterday still syncs.

How We Match Events

When events first sync, we either link them with existing events that have the same subject and time or create new events if nothing matches.

How You Assign Events to Salesforce.com records

After an event is added to Salesforce.com, you can assign it to other records using the **My Unresolved Items** page or the **Related To** and **Name** fields on the event record. The event is added to the associated record's **Activity History** or **Open Activities** related list. You can't save changes if your events have a required custom field or an activity custom field becomes required after items are added to your unresolved events list.

Who Sees Synced Events in Salesforce.com

Events that aren't marked as private are visible Salesforce.com to you, those above you in your role hierarchy, and anyone who has access to the records they're associated with. You can also grant access to view your calendar to other users, personal and public groups, roles, or roles and subordinates.

Syncing Contacts with Salesforce for Outlook

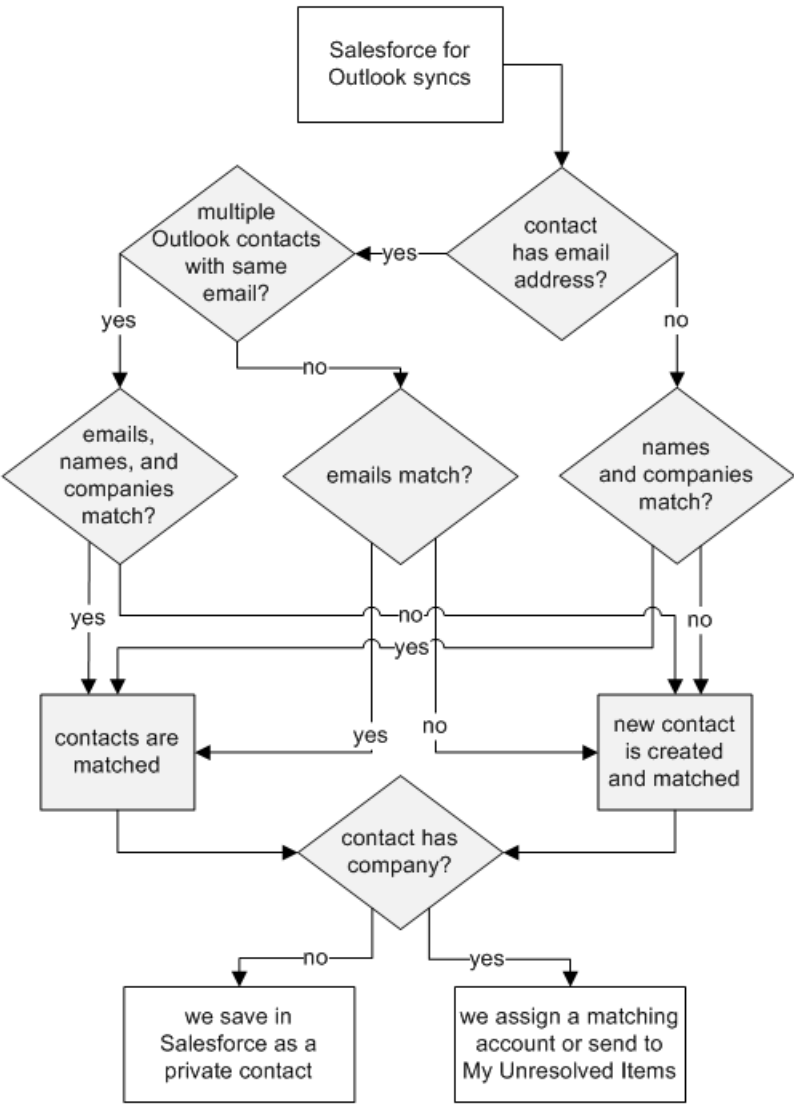
Available in: **Contact Manager, Group, Professional, Enterprise, Unlimited, and Developer** Editions

User Permissions Needed	
To sync contacts from Salesforce.com to Outlook:	“Read” on contacts AND Contact sync direction set to Salesforce.com to Outlook
To sync contacts both ways:	“Read” and “Edit” on contacts, and “Read” on accounts AND Contact sync direction set to Sync both ways

You can easily keep your important Outlook and Salesforce.com contacts in sync using Salesforce for Outlook. When contacts initially sync, Salesforce for Outlook checks to see whether a contact with the same email address exists in both Outlook and Salesforce.com. If a matching email address exists, the two contacts are synced. If it doesn't exist, Salesforce for Outlook checks to see whether a contact with the same first name, last name, and company name exists. If it doesn't exist, a new contact is created and the two are synced.

Your Outlook configuration defines which items are set to sync, which direction the data flows between Outlook and Salesforce.com, and what happens when data conflicts. The supported sync directions are `Salesforce.com to Outlook` and `Sync both ways`. You can't currently sync contacts from Outlook to `salesforce.com`. Salesforce for Outlook isn't case-sensitive when matching contacts.

This diagram shows how contacts sync.



How contacts sync when the sync direction is `Salesforce.com` to Outlook:

If	Then
A contact already exists in Outlook	The Salesforce.com contact replaces the Outlook contact and the two are synced.
A contact doesn't exist or has been deleted in Outlook	The contact is automatically created in Outlook and the two are synced.
Multiple matching contacts exist in Outlook	We select one of them.
A contact is updated	The Salesforce.com contact always overwrites the Outlook contact, regardless of which one was updated.

If	Then
A Salesforce.com contact is deleted	The Outlook counterpart is also deleted. If the Outlook contact is deleted and the Salesforce.com contact is updated, the contact is recreated in Outlook.

How contacts sync when the sync direction is `Sync both ways`:

If	Then
A contact exists on one side only	The contact is automatically created on the other side and the two are synced.
A matching contact exists	One contact record replaces the other one, and the records are synced. If your Outlook configuration specifies that Outlook contacts win, the Outlook version replaces the Salesforce.com version, and vice versa if Salesforce.com is set to win. Any change to either record is automatically reflected in the other. If records conflict, the conflict behavior setting determines which record wins.
Multiple matching Salesforce.com contacts exist	As long as there's only one version of the Outlook contact and that contact has an email address, we sync the Outlook contact with a Salesforce.com contact based on your matching preference, such as the contact that was most recently updated.
A contact is updated	Both contacts are updated with the latest changes. If records conflict, the conflict behavior setting determines which record wins.
A Salesforce.com contact is deleted and the Outlook contact is updated	The Outlook counterpart is deleted if Salesforce.com is set to win, and the contact is recreated in Salesforce.com if Outlook is set to win.
An Outlook contact is deleted and the Salesforce.com contact is updated	The Salesforce.com counterpart is deleted if Outlook is set to win, and the contact is recreated in Outlook if Salesforce.com is set to win.



Note: If person accounts have been implemented in your organization, Salesforce for Outlook can sync person accounts between your Accounts tab in Salesforce.com and your contacts folder in Outlook. You can create new person accounts in Salesforce.com and view, edit, and delete synced person accounts in Outlook or Salesforce.com. Contacts synced from Outlook to Salesforce.com may be matched to person accounts.

A deleted person account will be recreated as a contact in Salesforce.com if:

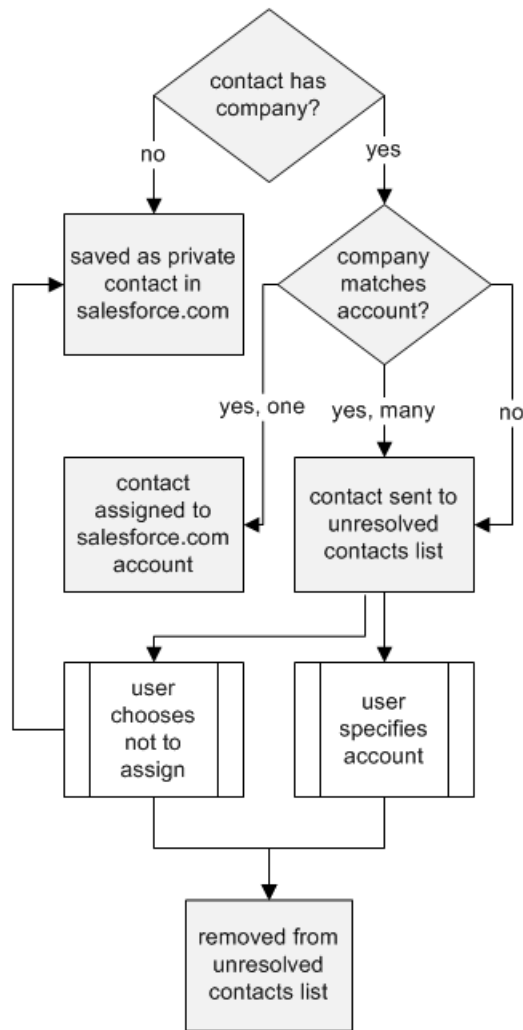
- You update the related Outlook contact before the next sync, and
- Your configuration is set to sync both ways with Outlook winning.

Automatic Account Assignments for Synced Contacts

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

User Permissions Needed	
To assign accounts:	“Read” on accounts and “Edit” on contacts
To create new accounts:	“Create” on accounts and “Edit” on contacts
	AND
	“Show Quick Create”

After syncing contacts from Outlook, Salesforce for Outlook tries to automatically assign them to accounts, as shown in this diagram.



This table describes the account assignment process.

If	Then
A contact's company matches a single Salesforce.com account	The contact is assigned to that account.
A contact's company matches many Salesforce.com accounts or none	The contact is sent to My Unresolved Items in Salesforce.com, which you can access from the Contact home page or the Salesforce for Outlook system tray application. You can use this list to manually assign contacts to existing accounts, create new accounts, or confirm that contacts are private.
A contact doesn't have a company name	The contact is treated as a private contact and is not sent to My Unresolved Items.
A contact's company changes in Outlook	If a matching account is found in Salesforce.com, the contact is assigned to that account. Otherwise, the contact is sent to My Unresolved Items to be resolved.

If	Then
An unresolved contact is deleted in Outlook	The contact is removed from My Unresolved Items the next time you open the list.
An unresolved contact is changed in Outlook	The contact record is updated in My Unresolved Items. If the contact's company changes, Salesforce.com checks to see if that information matches any existing accounts and assigns it to an account if it finds a match.

My Unresolved Items Overview

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

My Unresolved Items is a list of contacts and events that have synced from Outlook but haven't been assigned to Salesforce.com records. Use this list to assign items to Salesforce.com records or confirm that you want to leave items unassigned.

You can access this list in any of these ways:

- Right-click the Salesforce for Outlook system tray icon and click **Salesforce.com ► My Unresolved Items...**
- Click the popup message that appears at the system tray icon (🔔) when items are added to My Unresolved Items.
- Click **unresolved contacts list** in the banner on your Contacts home page if you have unresolved contacts.
- Click **unresolved events list** in the banner on your Salesforce.com calendar if you have unresolved events.

Resolving Your Synced Outlook Contacts

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

User Permissions Needed	
To view or edit unresolved contacts:	“Edit” on contacts and “Read” on accounts AND Sync enabled for contacts
To create new accounts:	“Edit” on contacts and “Create” on accounts AND “Show Quick Create”

When contacts sync from Outlook with Salesforce for Outlook, some are automatically assigned to accounts based on their company. The rest are added to My Unresolved Items, where you can either assign contacts to Salesforce.com accounts or confirm that you want to leave them unassigned.

1. Access your unresolved contacts in any of these ways.
 - Right-click the Salesforce for Outlook system tray icon and click **Salesforce.com ► My Unresolved Items....** If you sync both contacts and events, click the **Contacts** tab.
 - Click the popup message that appears at the system tray icon (🔔) when items are added to My Unresolved Items.
 - Click **unresolved contacts list** in the banner on your Contacts home page if you have unresolved contacts.
2. Resolve each contact in any of these ways.
 - Assign an account.
 - Select an account under **Choose Suggested Account** in the drop-down list. We suggest accounts only if we detect possible matches based on the contact's company. Suggested accounts always show the **Account Name** field and the first three additional fields defined in your account search layout. If your organization has contact lookup filters that prevent certain accounts from being assigned to contacts, those accounts won't appear as suggested accounts and can't be assigned to contacts.
 - Select **Search Salesforce.com...** In the lookup, either click **New**, enter account information, and click **Save**, or enter search criteria, click **Go!**, and click the right account.
 - Leave unassigned—Select **Don't Assign New Account** from the drop-down list if you want to confirm that a contact with no account should remain unassigned. Unassigned contacts aren't related to Salesforce.com records and are visible to you and your administrator only.
 - Choose an account if there's a conflict—If the Outlook and Salesforce.com contacts' companies are different, click **Don't Assign New Account** in the drop-down list to overwrite one with the other. The Salesforce.com account overwrites the Outlook company if Salesforce.com is set to win, and Outlook overwrites the Salesforce.com account if Outlook is set to win.
 - Cancel a selection—Select **None Selected** from the drop-down list.
3. Click **Save** to save your changes. All modified items are removed from the list. Remaining items continue to sync, and you can return any time to resolve them. Clicking **Cancel** cancels all changes on the page. Every contact assigned to an account now appears on the **Contacts related** list for that account.



Note: You can also resolve a contact from the contact record by marking it private or by assigning it to an account. Your unresolved contacts list works like a standard list view. Click **Edit** or **Create New View** to define filters and customize columns.

Resolving Your Synced Outlook Events

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

User Permissions Needed	
To view or edit unresolved events:	“Edit” on events and “Read” on the objects you assign to events AND Sync enabled for events
To create new Salesforce.com records:	“Edit” on events AND “Show Quick Create” and “Create” on those objects
To see recently used data in the related records fields:	“Lookup Auto-Completion”

When events sync from Outlook with Salesforce for Outlook, they appear in your Salesforce.com calendar and on the My Unresolved Items page. Use this page to either assign events to related Salesforce.com records or confirm that you want to leave them unassigned.

- You can access your unresolved events in any of these ways:
 - Right-click the Salesforce for Outlook system tray icon and click **Salesforce.com ► My Unresolved Items....** If you sync both contacts and events, click the Events tab.
 - Click the popup message that appears at the system tray icon (🔔) when items are added to My Unresolved Items.
 - Click **unresolved events list** in the banner on your Salesforce.com calendar if you have unresolved events.
- Depending on how you want to resolve an event, choose either of these actions.
 - Assign to related records—Enter a related record in one or both fields. If you need to, first select the correct record type from the drop-down list. If you assign a lead, you can't assign additional records. Clear an entry to cancel an assignment.
 - Leave unassigned—Click **Don't Assign**. Unassigned events, such as internal meetings or personal appointments, aren't linked to any other records and are visible to you only.
- Click **Save** to save your changes. All modified items are removed from the list. Remaining items continue to sync, and you can return any time to resolve them. Clicking **Cancel** cancels all changes on the page. The event is added to the associated record's Activity History or Open Activities related list. You can't save changes if your events have a required custom field or an activity custom field becomes required after items are added to your unresolved events list.



Note: You can also resolve an event from the event record by marking it private or by assigning it to other Salesforce.com records using the **Related To** and **Name** fields. Assigned and private events are automatically removed from your unresolved events list. Click ► next to the subject to see an event's description.

Quote Templates—Generally Available

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

Quote templates is generally available in the Winter '11 release. We've included new features you asked for, including repeating headers and footers, field alignment, and rich text. We've made it easier to add graphics to your templates, and you can now preview your templates as you're creating them. You can also control which templates are available for use by activating or deactivating them.

Implementation Tip

If you used quote templates during the Summer '10 beta release, you'll notice a change in how template logos and signature blocks work. The first time you create a template in the Winter '11 release, if you add any content to the header or footer, the logo and signature block you previously used won't be displayed. If the new template's header *and* footer have no content, the original logo and signature block will appear.

Using Headers and Footers on Quote Templates

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

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

Use headers and footers to show standard, repeating information on your quote template, such as your company logo, your company address, the date the quote was created, or the quote number. Headers and footers can span the width of the template or be divided into two equal columns.


A header or footer is essentially a section: you can add fields to it and show or hide its title. You can't remove a header or footer or add more sections to it.



Note:

In some cases, a field may not appear on the quote templates palette or on a PDF created from a template.

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



- 1. If you need to change the number of columns in your header or footer, click  and select the number (one or two) that you want.



Tip: To display an image that spans the width of a page, use a one-column header or footer. For terms and conditions text, use a one-column footer.

- 2. Select an object and drag the fields you want into the header or footer. Press CTRL+click to select multiple fields and SHIFT+click to select a range.

If you want to use an image, such as your company logo, or include extended information, such as terms and conditions, use a Text/Image Field.

- 3. If you need to change field alignment within a column, click  and select left or right alignment.
- 4. If you want to hide field labels, click  and select the Hide checkbox.
- 5. Select **Hide Title** if you don't want the title to appear on the template or PDF.
- 6. Click **OK**.

Adding Rich Text to Quote Templates

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

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

Use the quote templates text/image field to add text you can format, such as your organization's address or terms and conditions. You can also insert images, like your company logo. You can use text/image fields in the body of your template, and also in the header and footer.

Rich Text Restrictions

Text formatting is not available in the Text/Image Field for Unicode languages such as Arabic and Japanese.

The maximum number of characters you can use in the quote templates Text/Image Field is 32,000, which includes the hidden HTML characters used to format text.

- 1. Drag a Text/Image Field into place in the header, the footer, or any section in the body.
- 2. Type or paste your text into the field, then format it however you like.
- 3. Click **OK**.



Tip: Use a text/image field to create a signature block.

Adding Images to Quote Templates

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

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

Use the quote templates text/image field to insert images, like your company logo. You can use text/image fields in the body of your template, and also in the header and footer.

You can store images for uploading in either your own file system or in Salesforce CRM Content.

If you store images on the Documents tab or the Static Resources page, you'll get a Web address you can use to insert the image.



Note: If you need to insert an image from a *public* Web address outside the Salesforce.com application (such as your company's website), contact Salesforce.com and ask to have the public URL whitelisted for your organization.


Image Size Considerations

If you insert an image that's too large, it will be cropped when users create quote PDFs from the template. To prevent cropping, click **Save and Preview** after you insert an image, then resize the image if you need to.


Inserting an Uploaded Image

1. If you want to use an image stored in Salesforce CRM Content, locate the image and download it to your local file directory.
2. Drag a **Text/Image Field** into place in the header, the footer, or any section in the body.
3. Select **Hide Title** if you don't want the title to appear on the template or PDF.
4. Click the image icon, then click **Browse...** and locate the image in your file directory.
5. Click **Open** and the image appears in the field. You can resize it by dragging the sizing handles, which show the image's height and width in pixels.
6. Click **OK**.
7. Click **Save and Preview** to see how the image will look in PDFs created from the template.

Inserting an Image from a Salesforce.com Web Address

1. If you need to, upload the image to the Documents tab or define a static resource.
2. Drag a **Text/Image Field** into place in the header, the footer, or any section in the body.
3. Select **Hide Title** if you don't want the title to appear on the template or PDF. Click **OK**.
4. On the Documents tab or the Static Resources page, open the image's detail page, click **View File**, and copy its URL.
5. Return to the quote template editor and click  in the title bar of the text/image field.
6. Click the image icon, then click the **Web Address** tab.

- 7. Paste the URL into the **URL** field, then click **Insert**. The image appears in the field. You can resize it by dragging the sizing handles, which show the image's height and width in pixels.
- 8. Click **OK**.
- 9. Click **Save and Preview** to see how the image will look in PDFs created from the template.


 **Important:** If the image is removed from the Documents tab or Static Resources page, where it is stored, the template displays a message that the image is not available. Restore the image, then open the template, delete the error message image, and repaste the URL.

Previewing Quote Templates


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

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

Preview your quote templates to make sure the quote PDFs users create will look the way you want them to.

 **Note:** Preview shows templates in system administrator profile view. The preview and the template show any rich text and images you've added. Other data is simulated.

- 1. Open the template you want to preview. Edit the template if you need to.
- 2. Click **Save and Preview**.

 **Important:** **Save and Preview** saves changes to your template, so after you preview, you can't undo them.

- 3. In the Template Preview overlay, verify that the content and layout are correct.
- 4. Click **Close**.

Additional Sales Cloud Enhancements

Activity Enhancements

Event and Task Subject Limits Increased



You asked for it! This enhancement is from an [idea](#) on the IdeaExchange.

Available in: **All** Editions

The character limit for the `subject` field on the Event and Task objects increased from 80 to 255.

Attachments on Activities



You asked for it! This enhancement is from an [idea](#) on the IdeaExchange.

Available in: **All** Editions

You can now add attachments to events and tasks. After you add the Attachments related list to the Activity page layout, your organization can attach files using the task and event edit pages. Activity attachments can't be private and don't sync to Outlook.

Notes and Attachments Enhancements

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

Link to File Detail Page for Chatter Feed Attachments on Notes and Attachments

A file attached to a Chatter feed on a record is added to the record's Notes and Attachments related list as a Feed Attachment. You can now click on the title of the Feed Attachment to see its detail page. From a file detail page you can see file details and perform actions on the file depending on your level of access. For more information about the file detail page, see [Viewing the File Detail Page](#) on page 16.

“View” is Now “Preview” for Chatter Feed Attachments on Notes and Attachments

Feed Attachments now have “Preview” listed as an action instead of “View”. Clicking **Preview** next to a Feed Attachment on a Notes and Attachments related list displays a preview of that file. Not all files can be previewed, such as copy-protected PDFs, unknown file types, and any file larger than 25 MB. For files that can't be previewed, the **Preview** option isn't available on feeds or list views, and files appear as generic file type icons in the feed. Some Microsoft Office 2007 features don't display correctly in previews. For more information on file previews see, “Downloading and Previewing a File in a Chatter Feed” in the Salesforce.com online help.



Note: On some objects, the Notes and Attachments related list is titled Attachments because the object does not offer notes. Also, the same related list may be titled Google Docs, Notes, and Attachments or Google Docs and

Attachments depending on the setting in your organization. References to the Notes and Attachments related list include all versions of the related list, regardless of title.

Salesforce to Salesforce Enhancements

Available in: All Editions

Caching for Salesforce to Salesforce

In Winter '11, we implemented a caching system to support larger transaction volumes and reduce the number of API calls that count against your organization's limits. To provide these improvements, we now cache the following events:

- Selection of the `Auto-Accept` checkbox
- Changes to field mappings
- Changes to picklist value mappings
- Adding currencies

Salesforce.com refreshes the cache every 15 minutes. As a result, changes to cached events may take up to 15 minutes to show up in your partner connection.

SERVICE CLOUD

Service Cloud Console

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with the Service Cloud

With Winter '11, you can dramatically speed up support, sales, and telemarketing functions with the Service Cloud console. The Service Cloud console is designed for users in fast-paced environments who need to find, update, and create records quickly. It improves on the Console tab by letting you:

- Work with fewer clicks and less scrolling
- Limit switching between pages
- Easily spot important fields on records
- See records and their related items as tabs on one screen so that you never lose context or navigate too far from a record
- Jot notes on each record in an interaction log
- Access a SoftPhone for Salesforce CRM Call Center in a footer instead of a sidebar

Implementation Tips

- Only users assigned to the Service Cloud User feature license can use the Service Cloud console. See “Viewing Feature Licenses” in the Salesforce.com online help.
- The Service Cloud console respects all of the security and sharing settings in your Salesforce.com organization.
- You can review an out-of-the box Service Cloud console by selecting Sample Console from the Force.com app menu. Administrators can customize the Sample Console and give users access to it at **Your Name > Setup > Create > Apps**.
- Users see the new user interface theme on all pages in the Service Cloud console even if the theme isn't enabled for your organization (the new user interface isn't applied to any pages outside of the Service Cloud console unless it's enabled)
- The number of Service Cloud console apps you can create is based on your custom app limits. See “Salesforce.com Editions and Limits” in the Salesforce.com online help.
- The interaction log only displays on items that have an Activity History related list, such as accounts and contacts. The interaction log isn't available for items like reports, dashboards, Salesforce CRM Content, the Article Management tab, or Visualforce pages that display as primary tabs.
- You must refresh your browser to see any setup changes to the Service Cloud console.
- You can't add the Service Cloud console to partner portals or customer portals.
- Advanced administrators and developers can use the Service Cloud Console Integration Toolkit to implement custom functionality for the Service Cloud console. For example, you can use the Service Cloud Console Integration Toolkit to display Visualforce pages or third-party content as tabs in the Service Cloud console. The Service Cloud Console Integration Toolkit is an API that uses browsers as clients to display pages in the console. For more information, see the *Service Cloud Console Integration Toolkit Developer's Guide* on the [Developer Force Documentation page](#).

Best Practices

- So that users can easily recognize the correct console, we recommend naming Service Cloud console apps after their function. For example, Customer Service Desk.

- When setting up the Service Cloud console, pick the center of your business process as a primary tab and related items as subtabs. For example, you can set account as a primary tabs and cases and contacts as subtabs.
- Call Center users can [use the interaction log](#) to write notes in call logs while using the Service Cloud console. A call log is an activity record that automatically generates when you use the SoftPhone; it tracks the phone number, caller, date, time, and duration of the call. You can view call logs in the Activity History related list of any record associated with the call.

Limitations

- The Service Cloud console is only available in Internet Explorer 7 or 8 and Firefox 3.5 and above.
- Visualforce pages might not display correctly in the Service Cloud console unless they're updated to show in it.
- Google AdWords might not display correctly in the Service Cloud console.
- All Salesforce CRM Content items display as primary tabs in the Service Cloud console.
- Call center users can only use a SoftPhone in the Service Cloud console if they're using a CTI adapter built with version 3.0 of the [CTI Toolkit](#).
- URLs to Service Cloud console pages may not work when pasted into browsers or selected from bookmarks.
- The Service Cloud console doesn't meet accessibility requirements.
- The Service Cloud console isn't available for AppExchange.
- If you refresh the Change Case Status page in the Service Cloud console, an `Unable to Access Page` error displays.
- If you leave the Service Cloud console and return to it, any subtabs that were displayed may not automatically reload. Also, if you leave the Service Cloud console by selecting an app from the Force.com app menu, your browser's **Back** and **Forward** buttons may not work as expected.

Helpful Service Cloud Console Terminology

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with the Service Cloud

The following terms are used when describing Service Cloud console features and functionality.

Navigation Tab

A tab with a drop-down button. Select an object to view its home page without leaving the Service Cloud console.

Primary Tab

A tab that displays the main item to work on, such as an account. The selection you make from the navigation tab or search results displays as a primary tab.

Subtab

A tab that displays content related to the item on a primary tab. For example, a primary tab showing an account might have subtabs for cases and contacts.

Highlights Panel

A customizable table of up to four columns and two rows that appears at the top of every primary tab. It lets you view key information about records at a glance.

Interaction Log

An area where you can jot notes about the main record you're working on without clicking a button, viewing a new tab, or scrolling to the Notes & Attachments related list. Interaction logs are archived on the Activity History related list for easy review and retrieval. Administrators can customize interaction logs to include task fields.

Setting Up a Service Cloud Console

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with the Service Cloud

User Permissions Needed	
To set up a Service Cloud console:	“Customize Application”

To set up the Service Cloud console:

1. [Customize highlights panels for all objects.](#)
2. [Create an app for your Service Cloud console and assign it to user profiles.](#)
3. Set up interaction logs and assign them to user profiles.
4. Set up call center with version 3.0 of the CTI Toolkit. Call center users can only use a SoftPhone in the Service Cloud console if they're using a CTI adapter built with version 3.0 of the [CTI Toolkit](#).
5. Assign users the Service Cloud User feature license:
 - a. Click **Your Name** ► **Setup** ► **Manage Users** ► **Users**.
 - b. Click **Edit** next to a user's name.
 - c. Select **Service Cloud User**.
 - d. Click **Save**.

Tips on Setting Up a Service Cloud Console

- The new user interface theme automatically displays for all pages in the Service Cloud console. It's not applied to any pages outside of the Service Cloud console unless you enable it.
- You can review an out-of-the box Service Cloud console by selecting Sample Console from the Force.com app menu. Administrators can customize the Sample Console and give users access to it at **Your Name** ► **Setup** ► **Create** ► **Apps**.
- You must refresh your browser to see any setup changes to the Service Cloud console.
- Advanced administrators and developers can use the Service Cloud Console Integration Toolkit to implement custom functionality for the Service Cloud console. For example, you can use the Service Cloud Console Integration Toolkit to display Visualforce pages or third-party content as tabs in the Service Cloud console. The Service Cloud Console Integration Toolkit is an API that uses browsers as clients to display pages in the console. For more information, see the *Service Cloud Console Integration Toolkit Developer's Guide* on the [Developer Force Documentation](#) page.

Customizing Highlights Panels

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with the Service Cloud

User Permissions Needed	
To customize page layouts:	“Customize Application”
To view page layouts:	“View Setup”

View key information at a glance—the highlights panel is a table of up to four columns at the top of every primary tab in the Service Cloud console. Each column has one or two fields that you can customize to suit your business needs.

Highlights Panel Fields and Format

The Highlights panel displays standard and custom fields, and columns. The following formatting rules apply:

- Standard and custom fields
 - Fields must also be on the detail page layout
 - Fields can appear once per highlights panel
- Columns—minimum one, maximum four. Column widths resize automatically.
- Fields per column—one or two, in top or bottom positions.


When users see the highlights panel:

- Top fields appear in bold and in a larger font than bottom fields.
- Blank fields appear as follows:
 - Top fields—appear blank (except when top fields are blank because users don't have permission to view them).
 - Bottom fields—the top field expands to fill the column
 - Both fields—the column appears blank
- Users see only the fields that they have permission to view.


If users can't see:

- Top fields—the bottom field replaces the top field and expands to fill the column
- Bottom fields—the top field expands to fill the column
- Any fields in a column—the column is removed

Editing the Highlights Panel

Hover over the highlights panel on any page layout and click  (or double-click the highlights panel) to edit.

- To add or change fields, click the appropriate column and select fields from the Top Field and Bottom Field lists:
 - Fields must also be on the detail page layout. If fields you want to add aren't listed, add them to the detail page layout.

- Rich text area (RTA) and custom long-text area fields are not supported in the highlights panel, even if they are included in the detail page layout.
- Fields can appear once per highlights panel. Fields already in use appear grey in the field-selection lists.
- To remove fields, click the appropriate column and select **-None-** from the field-selection lists.
- To add columns, click **Add Column**.
- To remove columns, hover over the column and click .
- To save highlights panel changes, click **OK** in the Highlights Panel Properties dialog box. When you've finished editing the page layout, click **Save**. Don't navigate away from the page layout before clicking **Save** or you'll lose your changes.

Creating a Service Cloud Console App

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with the Service Cloud

User Permissions Needed	
To view apps:	"View Setup and Configuration"
To manage apps:	"Customize Application"

You create the Service Cloud console as a custom app that users select from the Force.com app menu. The number of Service Cloud console apps you can create is based on your custom app limits.

1. Click **Your Name** ► **Setup** ► **Create** ► **Apps**.
2. Click **New**.
3. Select **Service Cloud console** and click **Next**.
4. Specify a label for the app. The label can have a maximum of 40 characters, including spaces. This label is the app's name in the Force.com app menu.
5. Optionally, enter a description of the app.
6. Click **Next**.
7. Select the items to include in the navigation tab. For example, if you want users to choose accounts from the navigation tab, move **Accounts** from **Available Navigation Tab Items** to **Selected Navigation Tab Items**.
 - Click the left and right arrow buttons to add or remove items.
 - Click the up and down arrow buttons to define the order in which items display on the navigation tab when it's clicked.



Note: You can't add forecasts, ideas, answers, connections, portals, console, home, or buttons for customizing your organization to the navigation tab. You can add Google AdWords to the navigation tab, but it might not display correctly in the Service Cloud console.

8. Click **Next**.
9. Choose how items display in the Service Cloud console when they're not selected from a primary tab or subtabs. For example, when users select cases from list views, search results, or screen pops, you can choose whether cases display as primary tabs or as subtabs on parent records.

Next to an object, click:

- As a `primary tab` to display the object's records as primary tabs.
- As a `subtab` of to display the object's records as subtabs. From the drop-down list, choose the parent record where the subtabs will appear. For example, if you want cases to appear as subtabs on contacts, select `Contact Name (Contact)` in the `Cases` row. If parent records don't apply, subtabs appear as primary tabs. For example, if you make campaigns a subtab of leads but a lead doesn't belong to a campaign, that campaign appears as a primary tab.

10. Click `Next`.

11. Assign the Service Cloud console to user profiles:

- Check the `Visible` box to choose the user profiles for which the app will be available.
- Check the `Default` box to set the app as that profile's default app. This means that new users who have the profile will see this app when they log in for the first time. Profiles with limits are excluded from this list.

12. Click `Save`.



Tip: You must refresh your browser to see any setup changes to the Service Cloud console.

Setting Up Interaction Logs

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with the Service Cloud

User Permissions Needed	
To set up interaction logs:	"Customize Application"

The Service Cloud console lets users write notes on records that appear on primary tabs. A set of notes is called an *interaction log*.

Creating Interaction Logs

You can create multiple interaction logs and customize them to display specific task fields for different users to update.

- Click ***Your Name*** ► **Setup** ► **Create** ► **Interaction Log Layouts**.
- Click **New**.
- Name the interaction log.
- Select task fields to add to the interaction log and click **Add**.
 - * indicates required fields.
 - You can only add editable task fields to interaction logs.
 - The `Enter your notes here...` field is automatically added to all interaction logs; you can't remove it.
- If you want this interaction log to be the default for all users, select `Set as default layout`.
You can't delete a default interaction log; you must first mark another interaction log as the default for your organization.
- Click **Save**.



Tip: You can create custom fields for tasks and add them to interaction logs. For example, you can create a `Caller Disposition` picklist with values of `Angry`, `Neutral`, and `Satisfied`.

Assigning Interaction Logs

After you set up or customize interaction logs, you can assign them to different user profiles.

1. Click **Your Name** ► **Setup** ► **Create** ► **Interaction Log Layouts**.
2. Click **Log Layout Assignment**.
3. Choose an interaction log to assign to each user profile.
4. Click **Save**.



Note: You can't assign interaction logs to portal user profiles because the Service Cloud console isn't available to portal users.

Using the Service Cloud Console

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with the Service Cloud

Unlike standard Salesforce.com pages, all items you click in the Service Cloud console display as tabs. Tabs let you quickly:

- Find, update, and create records
- Review and update records from lists
- Display all the information you need on one screen without losing context

When you select a Service Cloud console from the Force.com app menu, the navigation tab appears. Use the navigation tab to select an object and view its home page. Click any record in the home page to open the record as a primary tab. Primary tabs display the main work item, such as an account. Related items on a primary tab are subtabs. In the example below, the `Acme, Inc.` account is the primary tab and the `Carole White` contact is its subtab.

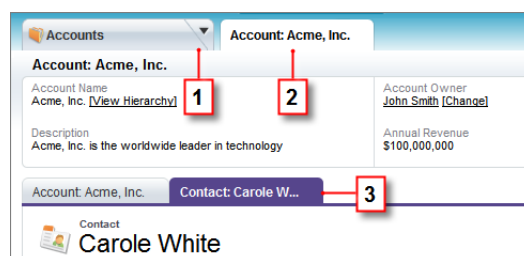


Figure 1: Service Cloud Console Tabs

1. Navigation tab
2. Primary tab
3. Subtab

With the Service Cloud console, you can:

- [Work with tabs](#)
- [Search for records](#)

- [View and edit record details](#)
- [Jot notes on records using the interaction log](#)
- [Follow records using Chatter](#)
- [Use a Salesforce CRM Call Center SoftPhone](#)

Working with Tabs in the Service Cloud Console



Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with the Service Cloud

All items you click on in the Service Cloud console display as tabs. Tabs let you see all the information you need on one screen without losing context.

Navigation Tab

- The Service Cloud console displays one navigation tab.
- Your Salesforce.com administrator determines the list of objects you can choose in the navigation tab.
- Most object home pages selected from the navigation tab display list views. Views automatically display as enhanced lists.
- The navigation tab doesn't display forecasts, ideas, answers, connections, portals, console, home, or buttons for customizing your organization. Administrators can add Google AdWords to the navigation tab, but it might not display correctly in the Service Cloud console.

Primary Tab and Subtabs

- * displays on tabs where you haven't saved changes, except for tabs that display reports, Visualforce pages, or your organization's setup pages. It also displays on tabs where you haven't saved changes to the interaction log. We recommend that you save your changes often so that you don't lose any updates if your session ends. If you click  and select **Save all changes**, only tabs with * save changes.
- ▲ displays on tabs where you need to fix errors.
- Salesforce.com doesn't limit the number of tabs you can display.
- The tab's name lets you see at a glance its contents. If a name is truncated to fit a tab, you can hover over the tab to view the item's full name. A tab that displays a page outside of Salesforce.com is named `External Page`.
- To return to any item, click on its tab (tabs don't close until you close them).
- To clear your Service Cloud console of all tabs and start fresh, click  and select **Close all primary tabs** or **Close all subtabs**.
- A new tab doesn't display when you click a custom button or change a record's type, owner, or territory. Instead, the current tab goes to the item you selected.
- If you click **Cancel** on a newly created item that you haven't saved, the item and its tab are deleted and not sent to the Recycle Bin.
- All Salesforce CRM Content items display as primary tabs in the Service Cloud console.
- If you click a custom link or a link in a text field, such as `http://www.salesforce.com/` in a case `Description`, the link displays in a popup window instead of a tab.

Searching for Records in the Service Cloud Console

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with the Service Cloud

To search for records while using a Service Cloud console, type keywords in the Search box in the header and click **Go!**.

Search in the Service Cloud console matches the capabilities of sidebar search and advanced search or [global search](#) if it's enabled.









Note: Articles and solutions aren't searched with sidebar search or advanced search.

Viewing and Editing Details on the Service Cloud Console

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with the Service Cloud

Under every primary tab in a Service Cloud console, a highlights panel displays a subset of detail fields. When you change those fields, the highlights panel updates automatically. You can't directly edit details in the highlights panel.

- If your organization enabled inline editing, you can edit fields directly on the detail page. Alternatively, to display the page in edit mode, click **Edit**, make your changes, and click **Save**. To save the current record and create another one, click **Save & New**.
- To quickly create a related item on the current record, click **Create...** and select the item.
- To display or hide the highlights panel, click .
- To specify different fields for the highlights panel, ask your Salesforce.com administrator.
- To display:
 - A link to the record in an email, click .
 - The record and its URL in a new browser window, click .
 - A printable view of the record in a popup window, click .
 - "Customize the display" in the Salesforce.com online help of related lists in the detail view of the record, click .
 - An online help page for the record, click .

Jotting Notes on Records in the Service Cloud Console



Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with the Service Cloud

User Permissions Needed	
To save notes in the interaction log:	“Edit Tasks”

The interaction log lets you jot notes on records that display on primary tabs in the Service Cloud console. You can access the log from the footer of the Service Cloud console if you're [assigned to an interaction log layout](#).

- To add notes to a record, type your notes in the `Enter your notes here . . .` field, update any other fields as necessary, and click **Save Log**. Optionally, click **Save & New Log** to save your notes and start a fresh interaction log. If you use a SoftPhone, you can click **End Call** to end a call and save any updates you've made to the interaction log for screen pops from inbound calls.




`Last Saved` shows when you saved notes during your current session.


- To show or hide the interaction log, click  or . The log only displays in the footer of the console.
- You can drag the bar in between the interaction log and a detail page to resize the height of either one.
- The interaction log only displays on items that have an Activity History related list, such as accounts and contacts. The interaction log isn't available for items like reports, dashboards, Salesforce CRM Content, the Article Management tab, or Visualforce pages that display as primary tabs.
- Interaction logs are archived as tasks on the Activity History related list for easy review and retrieval.
- Administrators can customize interaction logs to include task fields.

Following Records in the Service Cloud Console

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with the Service Cloud

If you're using a Service Cloud console, and Chatter is enabled, you can display or hide a Chatter feed with comments and posts about a record.

- To follow a record, meaning you'll see updates to the record in your Chatter feed, click  **Follow**. To stop following, click  **Following** .
- Show or hide Chatter feeds using the **Show Chatter** and **Hide Chatter** links at the top of a feed.

 **Note:** Your administrator determines which Chatter tabs you can choose in the navigation tab, such as People or Groups.

Using a SoftPhone with the Service Cloud Console

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with the Service Cloud

User Permissions Needed	
To view and use the SoftPhone:	Member of a call center

Click  to display a SoftPhone from the footer of the Service Cloud console. You can access the SoftPhone if you're assigned to a call center using a CTI adapter built with version 3.0 of the [CTI Toolkit](#).

The SoftPhone lets you:

- Make calls by dialing a number in the SoftPhone, choosing a number in an online directory, or clicking a phone number in any record
- Receive calls
- Quickly view all records related to a call, such as contacts, cases, or accounts
- Transfer calls
- Initiate conference calls
- Put callers on hold
- Attach records to calls


Use the [interaction log](#) to write notes in call logs while using the Service Cloud console. A call log is an activity record that automatically generates when you use the SoftPhone; it tracks the phone number, caller, date, time, and duration of the call. You can view call logs in the Activity History related list of any record associated with the call.



Important: Data might not save properly if you:

- Refresh your browser during a call.
- Use the SoftPhone in multiple browsers simultaneously. For example, if you use the SoftPhone in a browser with the Service Cloud console and switch to a SoftPhone in a browser without the Service Cloud console, any changes you made with the SoftPhone might not save.

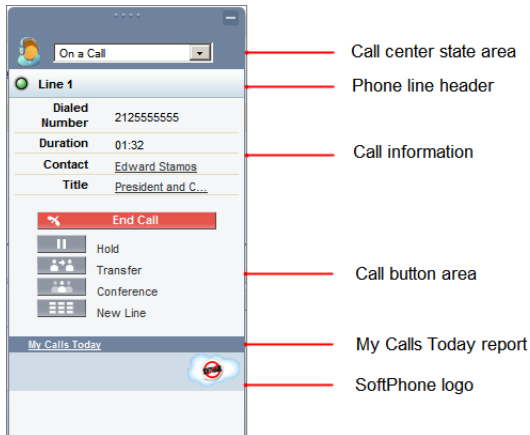
Tips on Using a SoftPhone with the Service Cloud Console

- When you leave the Service Cloud console, the SoftPhone displays in the sidebar of every Salesforce.com page.
- You can't move the SoftPhone away from the footer of the Service Cloud console, but you can drag the bar on top of it to resize its height or hide the SoftPhone by clicking .
- You can click **End Call** on the SoftPhone to end a call and save any updates you've made to the interaction log.

About CTI 3.0 SoftPhones

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with the Service Cloud

A SoftPhone is a customizable call-control tool that appears to users assigned to a call center with machines on which CTI adapters have been installed. SoftPhones built with version 3.0 of the CTI Toolkit display in the footer of the Service Cloud console or in the sidebar of every Salesforce.com page. Although administrators and developers can customize CTI 3.0 SoftPhones, they usually include the following components:



Call center state area

Includes a drop-down list that lets you specify whether you're ready to receive calls. See "Changing Your Call Center State" in the Salesforce.com online help.

Phone line header

Shows the status of the phone line. A status icon changes colors and blinks (●), and provides a text description. You can click the name of the line (Line 1) to show or hide the line's dial pad and call information area.

Call information area

Shows data related to the call, such as the phone number the customer used to dial, the duration of the call, and links to any records associated with the call.

Call button area

Shows buttons that let you make call commands, such as dialing, hanging up, putting a caller on hold, transferring, conferencing, and opening a second line while on a call. See "Using the SoftPhone" in the Salesforce.com online help.

My Calls Today report

Opens a report of all the calls you've made or received in the last day.

SoftPhone logo

Displays a customizable logo for each CTI adapter.



Note: Some Salesforce CRM Call Center features that are described in this help system might not be available with your SoftPhone because of customizations that have been made for your organization or the [CTI Toolkit](#) with which your SoftPhone was built. See your administrator for details.

Computer-Telephony Integration (CTI) 3.0: Service Cloud Console Integration


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

Salesforce CRM Call Center seamlessly integrates Salesforce.com with third-party computer-telephony systems. With Winter '11, developers and partners can use a new CTI Developer's Toolkit to build CTI adapters for call center users working with the Service Cloud console.

Implementation Tips

- Call center users can only use a SoftPhone in the Service Cloud console if they're using a CTI adapter built with version 3.0 of the [CTI Toolkit](#). A SoftPhone is a customizable call-control tool.
- You can't move the SoftPhone away from the footer of the Service Cloud console.

Best Practices




- Although developers and partners with Professional, Enterprise, Unlimited, and Developer Editions can build CTI adapters with version 3.0 of the CTI Toolkit, we recommend they purchase the Service Cloud so that they can use and test CTI adapters with the Service Cloud console.
- Inform call center users that:
 - They can click  to display a SoftPhone from the footer of the Service Cloud console
 - When they leave the Service Cloud console, the SoftPhone displays in the sidebar of every Salesforce.com page

Salesforce.com CTI Toolkit Overview

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

Developers use a CTI (computer-telephony integration) toolkit provided by salesforce.com to build CTI adapters that integrate Salesforce.com with third-party CTI systems. The CTI Toolkit helps developers build CTI adapters that Salesforce CRM Call Center users install on their machines so they can use the features of a CTI system through the Salesforce.com SoftPhone.

There are three versions of the CTI Toolkit. Each version provides users with different Salesforce CRM Call Center functionality. However, salesforce.com only distributes CTI Toolkit version 3.0 or higher. The following table lists the functionality available in CTI adapters built with each CTI Toolkit:

Functionality	Version 1.0 or Higher	Version 2.0 or Higher	Version 3.0 or Higher
Change the fields and order of fields that display in a SoftPhone			

Functionality	Version 1.0 or Higher	Version 2.0 or Higher	Version 3.0 or Higher
Change the objects and order of links to objects that display in a SoftPhone			
Specify the fields that display in the SoftPhone if a single record for a particular object is found			
Specify screen pop settings for inbound calls with single, multiple, or no record matches			
Specify screen pops for inbound calls to display in browser windows that are already open, or in new browser windows or tabs			
Specify screen pops to Visualforce pages for inbound calls			
Specify screen pops to search pages for inbound calls with multiple record matches			
View a call center's version in a <code>Version</code> field (click Your Name ► Setup ► Customize ► Call Center ► Call Centers and choose a call center)			
View an enhanced SoftPhone user-interface in the footer of the Service Cloud console			
Log calls in the customizable interaction log of the Service Cloud console			

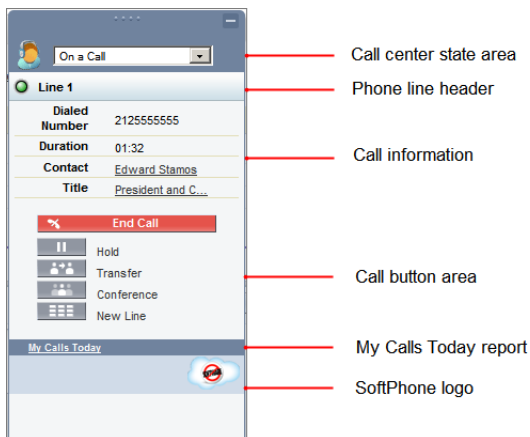
For information on customizing and building CTI adapters, see the [CTI Toolkit Developer's Guide](#).

Partners and developers can download the CTI Toolkit by visiting developer.force.com. The CTI Toolkit provides you with all of the source code, libraries, and files you need to develop your own custom CTI adapter.

About CTI 3.0 SoftPhones

Available in: **Enterprise, Unlimited, and Developer** Editions with the Service Cloud

A SoftPhone is a customizable call-control tool that appears to users assigned to a call center with machines on which CTI adapters have been installed. SoftPhones built with version 3.0 of the CTI Toolkit display in the footer of the Service Cloud console or in the sidebar of every Salesforce.com page. Although administrators and developers can customize CTI 3.0 SoftPhones, they usually include the following components:



Call center state area

Includes a drop-down list that lets you specify whether you're ready to receive calls. See “Changing Your Call Center State” in the Salesforce.com online help.

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Shows the status of the phone line. A status icon changes colors and blinks (●), and provides a text description. You can click the name of the line (Line 1) to show or hide the line's dial pad and call information area.

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Call button area

Shows buttons that let you make call commands, such as dialing, hanging up, putting a caller on hold, transferring, conferencing, and opening a second line while on a call. See “Using the SoftPhone” in the Salesforce.com online help.

My Calls Today report

Opens a report of all the calls you've made or received in the last day.

SoftPhone logo

Displays a customizable logo for each CTI adapter.




Note: Some Salesforce CRM Call Center features that are described in this help system might not be available with your SoftPhone because of customizations that have been made for your organization or the [CTI Toolkit](#) with which your SoftPhone was built. See your administrator for details.

Checking the Version of Your CTI Adapter

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

To check which version of the CTI adapter you've installed on your machine:

1. Run the CTI adapter from where it's installed. For example, from the Start menu, select **All Programs > salesforce.com > CTI Adapter 2.0 > Salesforce.com Adapter 2.0**.
2. Right-click the  icon in the system tray of your computer. The system tray is located next to the clock in the lower-right corner of your screen.
3. Click **About...**

The version of your CTI adapter displays under **CTI Connector**.

Salesforce Knowledge Enhancements

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

Salesforce Knowledge enhancements in Winter '11 include:

Chatter Feeds on Articles

If Salesforce Knowledge article types are enabled for Chatter feed tracking, knowledge base users can follow a published article and see updates in their Home tab feed when the article is removed from publication, republished, or archived. New in Winter '11, enabling an article type for feed tracking also creates a Chatter feed in published articles. The feed allows readers to get a sense of the article's history, contribute comments, and see comments from other readers.

New Visualforce Components for Improving Custom Article-Type Templates

Two [new Visualforce components](#), `knowledge:articleRendererToolbar` and `knowledge:articleCaseToolbar`, allow users who are viewing articles with custom templates to rate the articles or view case details. Previously, these functions were only available for articles assigned to standard article-type templates. For a detailed description of each component, see the [Visualforce Developer's Guide](#). For an example of creating a custom template using a Visualforce page, see “Creating Custom Article-Type Templates” in the Salesforce.com online help.

New Apex Option for Automatically Filling Article Fields

If your organization allows agents to create articles while closing cases, the **Use Apex customization** option on the **Your Name > Setup > Customize > Knowledge > Settings** page lets you customize the field values that agents see in draft articles. For example, you can decide that a specific data category should be selected by default on all draft articles created from cases.

First, define how the article-type fields should be modified by creating a new Apex class that uses the `KnowledgeArticleVersionStandardController` class as its only argument. For a detailed example, see “Example Apex Customization for Submitting Articles from Cases” in the Salesforce.com online help. After creating your custom class, select it from the **Use Apex customization** field on the Knowledge Settings page. Agents who click the **Save and**

Create Article button when closing a case will now see your customizations on their draft articles. For step-by-step instructions on integrating cases with your knowledge base, refer to the *Salesforce Knowledge Implementation Guide*.

Improved PDF Generation on Case Emails

By default, when a case user automatically creates an article PDF on an email, the PDF includes all the fields visible to that user. If you want PDFs to be generated according to a different profile, for example, a profile that hides certain fields from customers, you now have the `Use a profile to create customer-ready article PDFs on cases` option on the **Your Name > Setup > Customize > Knowledge > Settings** page. For more information, see “Sending Articles from Cases” in the Salesforce.com online help.

New API Object for Article Views

With `KnowledgeArticleViewStat` you can now retrieve the average number of views for a specified article across all article types. Alternatively, you can use the article type API Name followed by the `__ViewStat` extension to `query()` or `retrieve()` most viewed articles from a specific article type. Users must have access to the published version of an article to retrieve its views. For more information, see the [Web Services API Developer's Guide](#).

New API Object for Article Votes

The `KnowledgeArticleVoteStat` object provides the average rating for the specified article on a scale of 1 to 5 across all article types. You can also use the article type API Name followed by the `__VoteStat` extension to `query()` or `retrieve()` best rated articles from a specific article type. Users must have access to the published version of an article to retrieve its views. For more information, see the [Web Services API Developer's Guide](#).

Weekly Export Includes Salesforce Knowledge Articles

If your organization is signed up to receive backup files of your data, those files can now include Salesforce Knowledge articles. You can generate backup files manually once every six days or schedule them to generate automatically at weekly or monthly intervals. To sign up for data export, contact [salesforce.com](#).

New Fields on Custom Report Types

In article reports created from custom report types, you can now include the `Summary` and `URL Name` fields.

Additional Service Cloud Enhancements

Dynamic Milestones for Entitlement Processes

Available in: Enterprise , Unlimited , and Developer Editions with the Service Cloud

User Permissions Needed	
To add milestones to entitlement processes:	“Manage Entitlements”

Milestones are required steps in your support processes, such as first response times on cases. Now you can set a new `Start Time` field on milestones to create more complex support processes. For example, after you add a milestone to an entitlement process (support timeline), you can choose when the milestone starts.

Select	To	Use If
Milestone Criteria	Calculate the milestone <i>Target Date</i> when the milestone is applied to a case (matches case criteria). This may or may not match the Entitlement Process start time, which is usually when a case is created.	A milestone's <i>Target Date</i> is based on when it's applied to a case. For example, reassigning a case to development when support believes the problem is a defect. This could occur at any time and it's <i>not</i> based on the start of the entitlement process (timeline).
Entitlement Process	Calculate the milestone <i>Target Date</i> when the entitlement process starts (by default, when a case is created).	A milestone's <i>Target Date</i> is based on the start of the entitlement process (timeline). For example, first response and resolution times on a case, which always calculate their <i>Target Date</i> when the entitlement process starts.

For more information, see “Adding Milestones to Entitlement Processes” in the Salesforce.com online help.

High Volume Customer Portal User License—Generally Available

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

In Winter '11, the High Volume Customer Portal User license is generally available. After you purchase the license, you can assign it to Customer Portal-enabled contacts so that large numbers of users can log in to a Customer Portal without affecting its performance.

Security Sharing Sets

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

User Permissions Needed	
To grant high-volume portal users access to records:	“Customize Application”

With the generally available release of the High Volume Customer Portal User license, we've made sharing for these users more flexible. In Winter '11, administrators can create security sharing sets to group high-volume portal users by their profiles and target them with different levels of access to records. This lets you implement business models that require users within the same account to have different levels of access. For example, a service and support customer can give management or specialist users the ability to see all cases under an account, while still assuring that most users see only their own cases.



Note: High-volume portal users include both the High Volume Customer Portal User and Authenticated Website User license types.

A sharing set allows high-volume portal users to access any record that has a lookup field to an account or contact that matches the user's account or contact. To create a sharing set:

1. Click **Your Name** ► **Setup** ► **Customize** ► **Customer Portal** ► **Settings**.

2. In the Sharing Settings for High-Volume Portal Users related list, click **New** to create a sharing set, or click **Edit** next to an existing sharing set.
3. In the Sharing Set Edit page, enter a name and description.
4. Select the profiles of the users you want to have access.
5. Select the objects you want to grant access to.

The Available Objects list excludes:

- Objects with an organization-wide sharing setting of Public Read/Write
- Custom objects that aren't specified as available for Customer Portal
- Custom objects that don't have an account or contact lookup field

6. In the Configure Access section, click **Set Up** or **Edit** next to an object name to configure access for the selected profiles, or click **Del** to remove access settings for an object.



Note: Objects with **Set Up** in the Action column aren't configured for high-volume portal user access. Until you configure an object, high-volume portal users have limited or no access to its records. For more information on access, see “About High-Volume Portal Users” in the Salesforce.com online help.

7. Grant access based on an account or contact lookup:

- Select **All records where the high-volume portal user's account matches to give high-volume portal users access to all records associated with their account.** For example, choosing this option for cases would give users access to all cases associated with their account.
- Select **Only records where the high-volume portal user's contact matches to give high-volume portal users access only to the records that are associated with their own contact.** For example, choosing this option for cases would give users access only to the cases that they filed, or cases that were filed on their behalf by a support representative.



Note: One of these options may be unavailable if the object doesn't contain the relevant fields.

8. Choose an access level of Read Only or Read/Write. (If the object's organization-wide sharing setting is Public Read Only, then only Read/Write is available.)
9. Click **Update**, then click **Save**.

Your settings apply to all of your organization's Customer Portals or sites.

For more information, see “About High-Volume Portal Users” in the Salesforce.com online help.

Portal Usage Analytics

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

With Winter '11, organizations that have Customer Portals or partner portals enabled can set up workflow site usage rules on the User License object, allowing you to set up an email alert to warn you when your monthly portal logins reach a certain number or percentage of their total limit.

The User Licenses related list on the company information detail page has two new columns:

- **Monthly Logins Used** indicates the number of successful logins for all users associated with a customer or partner portal user license for the month.
- **Monthly Logins Allotted** shows the maximum number of customer or partner portal logins allowed per month.

For more information, see “Creating Workflow Rules” and “Using Workflow for Sites” in the Salesforce.com online help.

Service Contract Fields Available in Custom Report Types

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with the Service Cloud

User Permissions Needed	
To create or update custom report types:	“Manage Custom Report Types”
To delete custom report types:	“Modify All Data”

Custom report types allow you to define report criteria from which users can run and create custom reports. With Winter '11, you can add the following fields to custom report types for service contracts (agreements between you and your customers for a type of support):




- Discount
- Grand Total
- Status

For more information, see “Setting Up Custom Report Types” in the Salesforce.com online help and “Entitlement Management Overview” in the Salesforce.com online help.

Updated Status Icons for Entitlements, Service Contracts, and Contract Line Items

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with the Service Cloud

Now, the following status icons appear for entitlements, service contracts, and contract line items if the `Status Icon` field is added to their page layouts:

-  Active
-  Expired
-  Inactive

For more information, see “Customizing Page Layouts” in the Salesforce.com online help and “Entitlement Management Overview” in the Salesforce.com online help.

Users Field Removed from Customer Portal Settings

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

User Permissions Needed	
To set up and update the Customer Portal:	“Customize Application”

Previously, you could view the number of active users associated with each profile assigned to a Customer Portal by clicking **Your Name** ► **Setup** ► **Customize** ► **Customer Portal**, selecting a portal, and viewing the `Users` field on the Assigned Profiles section. In Winter '11, the `Users` field was removed to display the Customer Portal Settings page faster. You can still view the number of active users associated with each profile assigned to a portal by creating a custom summary report and

adding `Profile` to your report columns. For more information, see “Administrative Reports” in the Salesforce.com online help.

Web-to-Case Limit Increased

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

User Permissions Needed	
To set up Web-to-Case:	“Customize Application”

Web-to-Case automatically transforms support requests from your company's website to new cases. Now, you can generate up to 5000 new cases a day using Web-to-Case. Previously, you could generate up to 500 cases a day. For more information, see “Setting Up Web-to-Case” in the Salesforce.com online help.

Daily Limit for On-Demand Email-to-Case Updated

On-Demand Email-to-Case uses Apex email services to convert email to cases, without you having to download and install an agent behind your network's firewall. Previously, On-Demand Email-to-Case processed up to 2500 email messages per day. Now, Salesforce.com limits the total number of messages that all email services combined, including On-Demand Email-to-Case, can process daily. Salesforce.com calculates the limit by multiplying the number of user licenses by 1,000. For example, if you have ten licences, your organization can process up to 10,000 email messages a day. For more information, see “Enabling and Configuring On-Demand Email-to-Case” in the Salesforce.com online help.

New User Interface Header

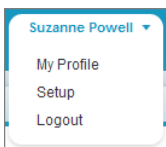
Available in: **All Editions**

Winter '11 introduces a restyled user interface header with new functionality and look and feel, including:

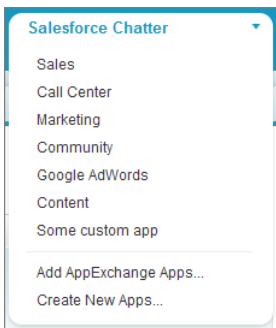
- [Global Search](#), if you have Chatter



- A new location for the Setup and Logout links and a new link for your Chatter profile under your name



- A restyled Force.com app menu



Enabling the New User Interface Header

User Permissions Needed	
To modify user interface settings:	“Customize Application”

Enabling or disabling the new user interface theme in your organization automatically enables or disables the new user interface header. If you previously enabled the new user interface theme, you automatically get the new user interface header with Winter '11.

To enable the new user interface theme:

1. Click **Your Name** ► **Setup** ► **Customize** ► **User Interface**.
2. Select **Enable New User Interface Theme**.
3. Click **Save**.



Note: Disabling the new user interface theme also disables Chatter and Global Search.

The new user interface theme updates the look and feel of Salesforce.com and moves user links, such as Setup and Logout, under the user name for all users in your organization. The new user interface theme is not supported in Portals, Console tab, or Help & Training.

Only users with supported browsers see the new user interface theme. See “Supported Browsers” in the Salesforce.com online help.

Global Search



You asked for it! Global Search addresses these ideas on the IdeaExchange: include [advanced search function](#) and [content](#) in the standard search.

Available in: **All Editions**

From the header search box you can search more records, including articles, documents, products, solutions, and Chatter feeds, files, groups, and people. You can also search more fields, including custom fields, and long text fields such as descriptions, notes, and task and event comments. You can use wildcards, operators, and filters to refine your search.

Implementation Tips

- Enabling and disabling Chatter in your organization automatically enables and disables Global Search.
- Enable Chatter by clicking **Your Name** ► **Setup** ► **Customize** ► **Chatter** ► **Settings**, then clicking **Edit** and selecting **Enable**.
- Global Search is not supported in partner portal or Customer Portal.
- Only users with supported browsers can use Global Search. See “Supported Browsers” in the Salesforce.com online help.

How Global Search Works

Available in: **All Editions**

How your Global Search works depends on your search options, search terms, and the use of wildcards and operators.

Search Options

Global Search searches more record types, including articles, documents, products, solutions, and Chatter feeds, files, groups, and people. Global Search also searches more field types, including custom fields and long text fields such as descriptions, notes, and task and event comments.

[Search options](#) let you choose one or more items, including tags and specific objects, by which to limit your search. You can also restrict your search to records for which you are the owner and to divisions, if your organization uses them.

Search options aren't available to Chatter Only users.

Search Terms

Search terms are treated as separate words and may be found in different searchable fields within a record. For example, searching for `bob jones` returns items with *Bob Jones*, as well as a contact named *Bob Smith* whose email address is *bsmith@jones.com*.

Search terms are separated by letter, number, and punctuation boundaries. For example, searching for `acct!4` returns items with *Acct, !*, and *4*, even if those terms are in separate places in the item.

Wildcards and Operators

You can use the `*` (asterisk) and `?` (question mark) wildcards to refine results. Use `*` to match one or more characters, or `?` to match a single character. For example, searching for `bob jo*` finds items with *Bob Jones* and *Bob Johnson*, and searching for `jo?n` finds items with *john* and *joan*. You can also use the AND, OR, AND NOT, `()` (parentheses), and `" "` (quotation marks) operators to refine results.

Changing Global Search Options

Available in: **All Editions**

1. Click the header search box and select **Search Options...**

Search options aren't available to Chatter Only users.

2. Refine your search results by:

Choosing which objects to search

In the Records section, select the objects for which you want to return search results. If you don't select any objects, your search returns all possible objects. Select **All** or click **Clear All** to quickly select all or no objects.



Note: When **All** is selected, the search results don't return article management and content records. You can search for these records on their respective tabs.

Searching only items you own

In the More Options section, select **Limit to items I own**.



Note: When **Limit to items I own** is selected, the search results don't return article, asset, idea, invoice, order, people, product, question, quote, and reply records because these records don't have owners.


Searching for an exact phrase

In the More Options section, select **Exact phrase**. This is the same as using quotation marks around your search string.

Searching within a division

If you have the “Affected by Divisions” permission, specify which divisions you want to search. If your organization uses divisions but you don't have the “Affected by Divisions” permission, your search results include records in all divisions.

3. Click **Search**.

If you restrict your search options, the options you select appear under the header search text box. Click your selected options to change your search options again. Click  to clear your search terms and restricted options.

Search Results

Available in: **All Editions**

The Search Results page displays items in related lists for each object, custom object, and tag that you have permission to view. From this page:

- Jump directly to an object's results—click a related list item on the left side of the page if you're using Global Search or at the top of the page if you're using Sidebar Search or Advanced Search.

The number of results for each object is displayed. For example, **Contacts [25+]** means there are more than 25 contacts that match your search criteria. If your search returns a large number of results for a particular object, click **Next Page** or **Previous Page** to view the results.

- View or edit items—click an item to open it or click **Edit**, if available.
- Jump to [Chatter feed results](#)—click **Chatter Feed Results** at the top of the page, if available.
- Customize columns in your search results.
- Filter your search results.
- Customize filters for all users' search results, if you're an administrator.
- Refine your search—click the search box and select **Search Options...** if you're using Global Search or click **Advanced Search...** if you're using Advanced Search.

Search options aren't available to Chatter Only users.

Chatter Feed Search Results

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

The Chatter feed Search Results page displays Chatter users' posts and comments that include your search terms.



Note: Feed-tracked changes on records and fields aren't included in search results. For example, if you've enabled feed tracking on the **Billing Address** field for the Acme account and modified the Acme billing address, search results for Acme include *Acme — Suzanne Powell Looking for volunteers to help with the Acme account* but don't include *Acme — Suzanne Powell changed Billing Street to 10 Main Road*.

- To view the detail pages for Chatter files, groups, and people, click the respective name in the update.
- To view a single feed update, click the timestamp below the update, for example, **Yesterday at 12:57 AM**.
- To download or preview files, click **Download** or **Preview** next to the file. Preview lets you see the file without downloading it.
- To refine your search, click the search box and select **Search Options...**

Search options aren't available to Chatter Only users.

To view [search results for records](#), such as accounts, contacts, and Chatter files, groups, and people, click **Record Results** at the top of the page.

Analytics Enhancements

Salesforce.com analytics enhancements in Winter '11 include:

Real-Time Report Builder—Generally Available



You asked for it! Report builder addresses the following ideas on the IdeaExchange: [drag-and-drop report columns](#), [display report type on report](#), [show long report type names](#), [easier customization](#), [better sorting](#), and [consistent button placement](#).

First introduced in Spring '10 as a Developer Preview release, report builder—the powerful new visual editor for reports—is now generally available! The “Report Builder” permission is turned on automatically for the System Administrator profile; administrators can turn it on for other profiles. See the following topics for details:

- [Report Builder Overview](#)
- [Working with Report Builder](#)
- [Working with Fields in Report Builder](#)
- [Working with Summary Fields in Report Builder](#)
- [Working with Groupings in Report Builder](#)
- [Working with Formulas in Report Builder](#)
- [Creating Charts](#)

Dashboard User Switching



You asked for it! This enhancement is from an [idea](#) on the IdeaExchange.

Now, authorized users can switch the running user from the view page of dynamic dashboards. *Dynamic dashboards* run using the security settings of the logged-in user, but users with the “View My Team's Dashboards” or “View All Data” permission can change the running user to view data from the perspective of someone else on their team or organization. The “Manage Dynamic Dashboards” and “View My Team's Dashboards” permissions are turned on automatically for the System Administrator profile; administrators can turn them on for other profiles.

See [Setting Up Dynamic Dashboards](#) for details.

Reports and Dashboards Chatter



You asked for it! This enhancement is from an [idea](#) on the IdeaExchange.

In Winter '11, reports and dashboard have Chatter feeds! Follow posts, comments, files, and links, as well as field updates for your favorite report or dashboard. See [Chatter Feeds Enhancements](#) on page 22 for details.

Chatter Analytics

You can now create custom report types on the following Chatter objects:

- Users | Followers
- Users | User Feed | Comments
- Chatter Groups | Members
- Chatter Groups | Chatter Group Feed | Comments

Users and Chatter Groups are the primary objects. See “Defining Custom Report Types” in the Salesforce.com online help.

API Access for Reports and Dashboards

The following new objects have been added to API version 20.0:

- Dashboard
- DashboardFeed
- DashboardTag
- Report
- ReportFeed
- ReportTag

See [Web Services API Enhancements](#) on page 116 for details.

Click-to-Detail for Dashboard Components

We've added a new option to the `Drill Down to` field for dashboard components. With this option, when users click chart or table elements, axis values, or legend entries, they are taken to the detail page for that record.

To select this option:

1. Edit a dashboard component.
2. Set the `Drill Down to` option to Record Detail Page.

You can only choose this option for tables and charts that use a source report grouped by record name, record owner, or feed post.

Metric Inline Editing

Now you can edit metric labels directly on metric components using dashboard builder, much like component titles, headers, and footers. Just click the empty text field next to the grand total. The “Drag-and-Drop Dashboard Builder” permission is turned on automatically for the System Administrator profile; administrators can turn it on for other profiles.

Improved Chart Validation on Reports

We've made enhancements to chart validation for reports. When you change the report format, chart settings are validated and updated accordingly.

About Analytics Enhancements

Report Builder Overview

Available in: **All** Editions

Report builder is a visual editor for reports. The report builder interface consists of three panes: Fields, Filters, and Preview. Talk to your administrator to enable report builder.



Note: To optimize screen real estate, report builder uses a compressed page header. To view your application tabs, simply close the builder or click the Salesforce.com logo.

Fields Pane

The Fields pane lists all accessible fields in the selected report type, organized by the sections defined in the page layout. Find the fields you want using the Quick Find search box and field type filters, then drag them into the Preview pane to add them to the report.

Create, view, edit, and delete your custom summary formulas in the Fields pane as well.

Filters Pane

Set the view, time frame, and custom filters to limit the data shown in the report.

Preview Pane

The dynamic preview makes it easy for you to customize your report. Add, reorder, and remove columns, summary fields, formulas, and groupings. Change the report format and display options, or add a chart.

The preview shows only a limited number of records. Run the report to see all your results.

Working with Report Builder

Available in: **All** Editions

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

To customize an existing report using report builder, click the name of a report and click **Customize**. Talk to your administrator to enable report builder.



Note: To optimize screen real estate, report builder uses a compressed page header. To view your application tabs, simply close the builder or click the Salesforce.com logo.

Using the report builder, you can:

- Click **Close** to exit the report builder.
- Save or run the report.
- Click **Report Properties** to change a report's name, description, or folder.
- [Find fields](#) using Quick Find and field-type filters.
- [Add fields to the report](#) by double-clicking or dragging them into the Preview pane.
- [Summarize fields](#) on reports.
- [Add and reorder groupings](#) on summary and matrix reports.
- [Add custom summary formulas](#) to summary and matrix reports.
- Set report filters in the Filters pane.
- Click the **Format** drop-down to choose between tabular, summary, and matrix formats.
- Click the **Show** drop-down to toggle the **Details**, **Drop Zones**, and **Chart** options, and edit **Conditional Highlighting** and [Display Currencies Using](#).
- Click [Add Chart](#) to define a chart for the report.
- [Reorder columns](#) by dragging them.
- [Sort the report](#) by a particular column.
- Maximize the Preview pane by resizing or collapsing the Fields and Filters panes.

Working with Fields in Report Builder





Available in: All Editions

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

The Fields pane lists all accessible fields in the selected report type, organized by the sections defined in the page layout. It also lists custom summary formulas, which you can create, edit, and delete. Talk to your administrator to enable report builder.

Finding Fields

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

- Click  to see all field types, as well as custom summary formulas.
- Click  to see just text fields.
- Click  to see just number fields (numeric, percentage, or currency).
- Click  to see just date fields.

Adding and Removing Fields

To add a field to your report, double-click it or drag it into the Preview pane. Drag an entire folder to add all its fields. To remove a field, grab its column header and drag it back to the Fields pane. You can also click the column menu and choose **Remove Column**, or click **Remove All Columns**. While **Show ► Details** is disabled, you can only add summary fields.

Ordering and Sorting Fields

Reorder report columns by grabbing a column header and dragging it to a new location. To sort your report by a column, click its column header. You can also click the column menu and choose **Sort Ascending** or **Sort Descending** from the drop-down list. Sort is disabled when **Show ► Details** isn't selected

Changing the Currency Displayed


If your organization has enabled multiple currencies, you can change the currency shown for all currency fields. Click **Show ► Display Currencies Using**, then select an active currency to display.

Working with Summary Fields in Report Builder

Available in: All Editions


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

The Fields pane lists all accessible fields in the selected report type, organized by the sections defined in the page layout.

A summary is the Sum, Average, Max, or Min for a number field. (Use the  filter to find them faster.) Summary fields show at all grouping levels and the grand total level for summary and matrix reports.

To add a summary field:

- Double-click a number field in the Fields pane.
- Drag a number field into the preview. For matrix reports, there are drop zones before, between, and after sets of summaries. For example, the sum, average, max, and min of `Annual Revenue` are a set, and you can't drop a new summary field between them.
- Choose **Summarize this Field** in the menu for a field already in the report.

To change an existing summary field, or add other summaries on that same field, click  button next to the summary field and choose **Summarize this Field**.

To remove a summary field:

- Click its menu and choose **Summarize this Field** and deselect all options.
- Click its menu and choose **Remove Summary**.
- Drag the summary set back to the Fields pane. Note that all summaries for that field are removed.

Reorder sets of summary fields in matrix reports by dragging them. The summaries for each field move together when dragged. For example, if your report contains the sum and average of `Annual Revenue`, and the max and min of `Probability`, you can drag the `Probability` summaries before or after the `Annual Revenue` summaries, but not between. Summaries can't be placed after custom summary formulas or `Record Count`.

Working with Groupings in Report Builder

Available in: **All Editions**

User Permissions Needed

To create, edit, and delete reports:	“Create and Customize Reports”
To create, edit, and delete reports using the report builder interface:	“Report Builder”

The Fields pane lists all accessible fields in the selected report type, organized by the sections defined in the page layout. A report grouping determines how report data is aggregated for columns or rows for summary and matrix reports.

Add a group by dropping a field onto a drop zone. Click **Show ► Drop Zones** to make them visible. You can also click a column menu for a field in the report and choose **Group by this Field**.



Note: Summary reports can have up to three grouping levels. Matrix reports can have two row and two column groupings. For matrix reports, you can't use the same field for both row and column groupings.

To remove a group, click the group menu and choose **Remove Group**. You can also grab the group and:

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

Drag groups to change their order, or click the group menu and choose **Move Group Up** or **Move Group Down** for column groupings, or **Move Group Left** or **Move Group Right** for row groupings.


Working with Formulas in Report Builder


Available in: **All Editions**

User Permissions Needed

To create, edit, and delete reports:	“Create and Customize Reports”
To create, edit, and delete reports using the report builder interface:	“Report Builder”

The Fields pane lists all accessible fields in the selected report type, organized by the sections defined in the page layout. Formulas let you create custom summaries based on calculated values using report data. These formulas can then be used as columns in your report.

To add a new formula to a summary or matrix report, double-click **Add Formula**. Once you define it and click **OK**, it's automatically added to the preview as a column for summary reports, and a summary field for matrix reports. To edit a formula, hover over the name in the Fields pane and click .

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

Creating Charts

Available in: **All Editions**

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

To add or edit a chart:

1. Click **Add Chart** in report builder. Your report must have at least one grouping before you can add a chart. For existing charts, click **Edit Chart**.
2. Select a chart type.
3. Enter the appropriate settings on the Chart Data tab for the chart type you selected.
4. Enter the appropriate settings on the Formatting tab.
5. Click **OK**.

Chart Considerations

- You can't have more than 250 groups or 4000 values in a chart. If you see an error message saying that your chart has too many groups or values to plot, adjust the report filters to reduce the number. In combination charts, all groups and values count against the total.
- If you lose access to a field used in a chart, another field may be used in its place. If no other fields are available, record count is used.
- Decimal-place precision on charts is not customizable. Numeric and currency values round to two decimal places. Percentage values round to one decimal place.
- If numeric values are too large or too small, they are shown in scientific notation. For example, the number 5,750,000,000 is displayed as 5.75E9; -0.0000000061 is displayed as -6.1E-9.
- Negative values are displayed on all line charts and non-stacked bar and column charts. Negative values on pie, donut, funnel, and stacked charts are not displayed. Groupings containing negative values are displayed in the legend, and negative values are reflected in the calculation of all summary values, including the total for donut charts.
- When creating charts, don't group by a field on a child object then sum by a field on the parent object. It's not good practice. If you do this with a donut chart, the total shown may not match the sum of the wedges.

Setting Up Dynamic Dashboards


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

User Permissions Needed	
To create, edit, and delete dynamic dashboards:	“Run Reports” AND “Manage Dynamic Dashboards”
To create, edit, and delete dashboards using the dashboard builder interface:	“Drag-and-Drop Dashboard Builder”
To enable choosing a different running user for the dashboard:	“View My Team's Dashboards” OR “View All Data”

Your organization can have up to three dynamic dashboards. You can't schedule refreshes for dynamic dashboards. They must be refreshed manually.

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

To create dynamic dashboards:

1. From the Dashboards tab, create a new dashboard or edit an existing one.
2. Click the  button next to the `View dashboard as` field.
3. Select `Run as logged-in user`.
4. Optionally, select `Let authorized users change running user` to enable those with permission to change the running user on the dashboard view page, as follows:
 - Users with “View My Team's Dashboards” can view the dashboard as any user below them in the role hierarchy.
 - Users with “View All Data” can view the dashboard as any user in their organization.
5. Click **OK**.
6. In the `View dashboard as` field, enter a running user. Enter “*” to see all available users.
7. Save your dashboard.

Tips for Source Reports for Dynamic Dashboards

- Set the appropriate `View` option on the report run page. For example, if you choose “My Team's Opportunities,” each dynamic dashboard viewer can see all opportunities for the team.
- To avoid restricting the dashboard's view of the data:
 - Make sure advanced filters don't include specific record owners (for example, `Opportunity Owner equals Frank Smith`).
 - Don't click `Save Hierarchy Level` when saving opportunity reports.

Force.com Flex Framework—Generally Available

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

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

The Force.com Flex framework is generally available in Winter '11. The framework facilitates the development of Flex-based desktop and Web applications that leverage Salesforce.com logic, data, and security. It provides:

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

Force.com Flex is intended for developers with a working knowledge of MXML (Adobe's user interface markup language), ActionScript (Adobe's scripting language), Adobe Flash Builder 4, and the Force.com API.

To develop in the Force.com Flex Framework, download and install Adobe Flash Builder for Force.com—an enhanced version of Adobe's Eclipse-based integrated development environment (IDE) with additional features for developing in Force.com Flex. Adobe Flash Builder for Force.com is available at <http://developer.force.com/flashbuilder>.

Visual Process Manager—Pilot

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

With Winter '11, you can now upload and manage business flows in Salesforce.com. Visual Process Manager, also known as Force.com Flow, and formerly known as Firefly, provides a robust business-friendly call scripting screen interface on the Force.com platform.

Force.com Flow gives you the tools to create an application for easily navigating users through a series of screens, and querying and updating Salesforce.com data, without writing any code. The Flow Designer lets administrators or business analysts quickly build the flow to connect screens together. It also allows you to execute logic and provides branching capability based on user input which can be used to build dynamic applications.



Note: Force.com Flow is currently available through a pilot program. For information on enabling Force.com Flow for your organization, contact salesforce.com.

Force.com Flow features in Winter '11 include:

- [Uploading a New Flow or Flow Version](#)
- [Managing Your Flows](#)

- [Editing a Flow](#)

Force.com Flow Overview

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

User Permissions Needed	
To view a flow:	“View Setup and Configuration”
To upload, activate, deactivate, edit, and delete flows:	“Manage Force.com Flow”
To run a flow from the flow detail page, or to run an inactive flow:	“Manage Force.com Flow” AND Force.com Flow User field enabled
To run a flow from a custom link, tab, or URL:	Force.com Flow User field enabled



Note: Force.com Flow is currently available through a pilot program. For information on enabling Force.com Flow for your organization, contact salesforce.com.

Force.com Flow gives you the tools to create an application for easily navigating users through a series of screens, and querying and updating Salesforce.com data, without writing any code. The Flow Designer lets administrators or business analysts quickly build the flow to connect screens together. It also allows you to execute logic and provides branching capability based on user input which can be used to build dynamic applications.

Popular uses of Force.com Flow:

- Call scripting in a customer-support center: Troubleshooting complex customer problems
- Telesales: Call scripting, cross-selling, up-selling and dynamic generation of quotes in real-time
- Insurance companies: Executing complex and dynamic insurance premium calculations

You can have several different versions of a single flow in Salesforce.com, but only one version of each flow can be active at a time.



Tip: To ensure the latest version of your flow is active, select the “out of date” filter in the menu to see what version is running

To get started using flows, click **Your Name** ► **Setup** ► **Create** ► **Workflow & Approvals** ► **Flows**. From the list page, you can:

- [Upload a flow file.](#)
- Click the name of a flow to view its details.
- [Edit the name or description of a flow.](#)

Consider the following when working with flows in Salesforce.com:

- A flow can't have more than 10 versions in Salesforce.com at a time.

- The maximum number of active flows per organization is 500.
- The maximum number of total flows per organization is 1000.
- A flow can have a maximum of 2000 steps.
- You can't upload a flow larger than 3MB.

Managing Your Flows

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

User Permissions Needed	
To view a flow:	"View Setup and Configuration"
To upload, activate, deactivate, edit, and delete flows:	"Manage Force.com Flow"
To run a flow from the flow detail page, or to run an inactive flow:	"Manage Force.com Flow"
	AND
	Force.com Flow User field enabled
To run a flow from a custom link, tab, or URL:	Force.com Flow User field enabled



Note: Force.com Flow is currently available through a pilot program. For information on enabling Force.com Flow for your organization, contact salesforce.com.

To manage a flow, go to **Your Name** ► **Setup** ► **Create** ► **Workflow & Approvals** ► **Flows** and click the name of a flow.

On the flow detail page you can:

- Delete a flow or flow version:
 - Click **Delete** to delete the flow completely, including all versions.
 - Click **Del** in the Spark Versions list to delete inactive versions of the flow.



Note: You can't delete a whole flow or flow version until 12 hours after deactivating it. This ensures that flows in progress have time to complete. Flows that have never been activated can be deleted immediately.

- Click the **Run** button to run the currently active version of the flow. If there is no version of the flow activated, the **Run** button runs the latest version of the flow. Alternately, to run an individual flow version, click **Run** next to the version name. Only users with both the "Manage Force.com Flow" permission and the Force.com Flow User field enabled may run inactive flows.



Note: To allow other Salesforce.com users to run active flows, create a custom tab, link, or button pointing to the flow URL. Users running flows this way must have Force.com Flow User enabled on their user profile. For more information, see "User Fields" in the Salesforce.com online help.

- [Edit the name or description of the flow.](#)
- View a list of all versions of the flows that you've uploaded. Flow versions are sorted by **Created Date** by default.

- Activate a different version of the flow.



Note: When you activate a new version of a flow, the previous version is automatically deactivated. Flow processes currently running continue to run using the version with which they were initiated.

- Deactivate the active version of the flow.

Uploading a New Flow or Flow Version

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

User Permissions Needed	
To view a flow:	“View Setup and Configuration”
To upload, activate, deactivate, edit, and delete flows:	“Manage Force.com Flow”
To run a flow from the flow detail page, or to run an inactive flow:	“Manage Force.com Flow” AND Force.com Flow User field enabled
To run a flow from a custom link, tab, or URL:	Force.com Flow User field enabled



Note: Force.com Flow is currently available through a pilot program. For information on enabling Force.com Flow for your organization, contact salesforce.com.

The upload feature is the same whether you're uploading a whole new flow or just a new flow version. How does Salesforce.com know which is which? When you upload a flow file, Salesforce.com looks at the `Unique Name` of the file and does a match for it against any other flows in your organization. If there's a match, the file uploads as a new version of the flow it was matched with. If there's no Unique Name match, the file uploads as a new flow.



Tip: If you need to upload both a flow and its subflow, upload the subflow first, then the main flow.

To upload a new flow file, go to **Your Name** ► **Setup** ► **Create** ► **Workflow & Approvals** ► **Flows**.

1. On the flow list page, click **Upload**.
2. Click **Browse...** to select a flow to upload.
3. Click **Upload**.
4. Click **Save**.



Important: Only files with the `.flow` extension can be uploaded into Salesforce.com. To convert `.spark` files into `.flow` files, download the latest version of the Flow Designer from the flow list page, open your file, and save it with the `.flow` extension.

Editing a Flow

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

User Permissions Needed	
To view a flow:	"View Setup and Configuration"
To upload, activate, deactivate, edit, and delete flows:	"Manage Force.com Flow"
To run a flow from the flow detail page, or to run an inactive flow:	"Manage Force.com Flow" AND Force.com Flow User field enabled
To run a flow from a custom link, tab, or URL:	Force.com Flow User field enabled



Note: Force.com Flow is currently available through a pilot program. For information on enabling Force.com Flow for your organization, contact salesforce.com.

When you upload a new flow, its name and description in Salesforce.com are taken from the name and description fields within the flow file. However, if you haven't edited them yourself, the content of the name and description fields can fluctuate. Here's how:

- If you haven't edited the name and description, and there is no version activated, the name and description fields reflect those of the most recently-uploaded version.
- If you haven't edited the name and description, and you activate a version of your flow, the name and description fields update to reflect those of the active version.



Important: Once you edit the name and description of your flow in Salesforce.com, those fields no longer update when you upload or activate a new version.

To edit the name or description of a flow, go to **Your Name** ► **Setup** ► **Create** ► **Workflow & Approvals** ► **Flows** and click **Edit** next to a flow name.

Force.com Apex Code Enhancements

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

Force.com Apex code includes the following enhancements in Winter '11. Refer to the [Force.com Apex Code Developer's Guide](#) for complete information about Apex.

The following enhancements are generally available:

New `isRunningTest` method for System

Returns `true` if the currently executing code was called by code contained in a method defined as `testMethod`, `false` otherwise. Use this method if you need to run different code depending on whether it was being called from a test.

New Extension for `KnowledgeArticleVersionStandardController`

In Winter '11 you can extend the functionality of `KnowledgeArticleVersionStandardController` by using the new `selectDataCategory` or `getSourceId` method. After creating the class, assign it to the **Use Apex customization** option on the **Your Name** ► **Setup** ► **Customize** ► **Knowledge** ► **Settings** page. For a detailed example, see “`KnowledgeArticleVersionStandardController` class” in the [Force.com Apex Code Developer's Guide](#)

New `createPersonAccountPortalUser` Method for the Site class

Use `createPersonAccountPortalUser` to create a person account using either the default record type defined on the guest user's profile or a specified record type, then enable it for the site's portal.

New `REQUIRED_FEATURE_MISSING` Exception

A new exception message has been added. You can download packages from the AppExchange that contain Apex code that relies on Chatter being enabled in your organization. If Chatter isn't enabled, or if you disable it, and this code runs, you receive this error message. This provides managed package developers with a way to catch exceptions related to Chatter being disabled, and gracefully degrade the behavior of their application appropriately.

`void` No Longer Accepted as Variable Type

Prior to Winter '11, you could assign `void` as a variable data type. While `void` is still an acceptable return type, you can no longer use it as a data type. For example, for all Apex code saved using Salesforce.com API version 20.0 or higher, the following is no longer valid:

```
Public class ooga{
    Void v;
    Public void booga(void arg1){
    }
}
```

Improved System Log Console

The improved System Log console is now generally available.

The System Log console is a separate window that displays debugging information, as well as its cumulative limits and source code. It can be considered a context-sensitive execution viewer, showing the source of an operation, what triggered that operation, and what occurred afterward. Use the System Log console to view debug logs that include database events, Apex processing, workflow, and validation logic. Access the System Log console from the Salesforce.com user interface by clicking **Your Name** ► **System Log** in the upper right corner of any page.

New for Winter '11:

- A Limits tab was added to the Executed Units section. Use the Limits tab to track your governor limits. The limits are listed by name and amount.
- Additional filters to control the logs displayed in the log list.
- View logs already generated and monitored, instead of just logs created after the System Log console is open.

Best Practices

- When viewing the debug log in the Execution Log section, click **Executable**. This filters out all of the non-executable steps, as well as cumulative limits information.
- Use the stack to track the steps of your process.
- If your logs are over 2 MB and too large to be displayed, add `System.Debug` statements to your code, set the debug log filter for `Apex Code` to `Info` and run your transaction again. See “Using the System Log Console” in the Salesforce.com online help for more information and for additional scenarios on how to use the System Log console.

Revised Governor Limits

For Winter '11, Salesforce.com is reducing the number of items limited by the Apex governor limits. In addition, many of the remaining items have had their limits increased.

Tests no longer run in a separate context: Prior to Winter '11, governor limits worked with three different contexts, with different amounts of resources allocated for each context. For Winter '11, tests no longer have specific limits. Instead, they've been included with triggers, anonymous blocks, Visualforce controllers, and WSDL methods.

Removed limits:

- Total request time for one callout (HTTP request or Web services call) has been removed.
- Maximum size for a callout (HTTP request or Web services call) has been removed.

Increases to existing limits:

- General heap size has been raised from 2 MB to 3 MB, with no scaling. In addition, batch Apex heap size is 6 MB.
- Apex classes and triggers have been raised from 100,000 characters and 32,000 characters, respectively, and can now be 1 million characters long, not counting comments, test methods, and classes defined with `@isTest`.
- Maximum amount of Apex code allowed in an organization has been raised from 1 MB to 2 MB.
- Total number of `ChildRelationship`, `RecordTypeInfo` and `PicklistEntry` objects allowed and total number of `fields` calls allowed has been raised from 10 to 100.

Visualforce Enhancements

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

Custom controllers and standard controller extensions are not supported in **Group** or **Professional** Editions.

Winter '11 introduces several new features that enhance the capabilities of previous versions of Visualforce. For detailed information on these new features, see the [Visualforce Developer's Guide](#).

The following enhancements are now available in Visualforce:

View State Inspector Available

This View State tab in the development footer is no longer in pilot. The View State tab lists which Visualforce elements are contributing to the size of your view state. You can use this tab to monitor the performance of Visualforce pages where users submit data using forms. By minimizing your view state size, you can reduce load times.

The “Tools for Visualforce Development” chapter contains more information about the View State tab.

Visualforce Support for Record Types

Starting with the Winter '11 release, Visualforce pages now support record types. Record types allow you to offer different business processes, picklist values, and page layouts to different users based on their profiles.

Your record type definitions affect the rendering of `<apex:inputField>` tags in the following ways:

- If the `<apex:inputField>` tag refers to a picklist field that's filtered by a record type:
 - The rendered `<apex:inputField>` component only displays options compatible with that record type.
 - If the `<apex:inputField>` component is bound to a dependent picklist with a rendered and editable controlling field, only options compatible with both the record type and the controlling field value display.
- If the `<apex:inputField>` tag refers to a record type field:
 - If the user can change the field's record type, or select a record type for the new field, the `<apex:inputField>` component renders as a drop-down list. Otherwise, it renders as read-only text.
 - It's the developer's responsibility to either refresh the page or rerender filtered picklists when the list changes.

In addition, the `<apex:outputField>` tag's support for record types is identical to a read-only implementation of the `<apex:inputField>` behavior.

Visualforce Components for Chatter

Visualforce now supports the following Chatter components:

- `<chatter:feed>`: Displays the Chatter feed for a record.
- `<chatter:feedWithFollowers>`: An integrated UI component that displays the Chatter feed for a record, its list of followers, and optionally, a header bar that allows users to show or hide the Chatter feed and subscribe to it.
- `<chatter:follow>`: Renders a button for a user to follow or unfollow a Chatter record.
- `<chatter:followers>`: Displays the list of Chatter followers for a record.

In addition, the `<apex:detail>` component has a new `showChatter` attribute that specifies whether to display the Chatter feed, followers list, and header bar for the record.



Note: Chatter components don't render for organizations that aren't Chatter enabled. Chatter components don't render for Visualforce pages using Force.com sites.

New Visualforce Components for Salesforce Knowledge

Visualforce now supports the following Salesforce Knowledge components:

- `knowledge:articleCaseToolbar`: Allows custom article-type templates to include case detail information. If an article is assigned to a custom article-type template that uses this component, knowledge base users who open the article from a case see case detail information at the same time they're viewing the article's contents. Previously, this ability was only available on articles that use standard article-type templates.
- `knowledge:articleRendererToolbar`: Allows custom article-type templates to include voting capability. If an article is assigned to a custom article-type template that uses this component, knowledge base users viewing the article see the same header (toolbar) information that appears in articles with standard article-type templates.

The <apex:inputField> Tag Keeps Default Values

As of Salesforce.com API 20.0, if an object has a field with a default value, and a Visualforce page is constructed using an <apex:inputField> tag that points to that field, the Visualforce page will be rendered with the default value already set.



Note: Clearing a field's default value in the constructor of a custom Apex controller or extension won't work. For example:

```
public MyConstructor {
    account = new Account();
    account.myFieldWithDefault__c = 'override the default!';
    // this works
}

public MyOtherConstructor {
    account = new Account();
    account.myOtherFieldWithDefault__c = null;
    // this doesn't work
}
```

You must clear a field's value after the page has been loaded, either conditionally or explicitly.

Changes to Date/Time Evaluations in Formula Expressions

All formula expressions and functions that rely on the date/time data type evaluate as date/time types as of Salesforce.com API version 20.0. Previously, they may have been incorrectly interpreted as just a date type.

Web Services API Enhancements

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

The Web services API version 20.0 contains new features and bug fixes that improve the capabilities of applications that leverage the Force.com platform. Considerable effort has been made to ensure backwards capability for applications that have been written against previous versions of the API, starting with API 2.5.

The new API provides a number of powerful enhancements that further improve any integration already in place between Salesforce.com and your other systems.

Generally Available Enhancements

The Web services API has been improved for Winter '11 (API version 20.0):

New Objects

The following new objects have been added in API version 20.0:

- The CaseArticle object represents the association between a case and an article.
- The ContentDocumentFeed object represents a single feed item in a content document record feed.
- The Dashboard object shows data from custom reports as visual components. Access is read-only.
- The DashboardFeed object represents a single feed item in the feed displayed on a dashboard. It shows changes to dashboard fields tracked in feeds, as well as posts and comments about the dashboard.
- DashboardTag associates a word or short phrase with a dashboard.

- The `EventFeed` object represents a single feed item in the feed on an event.
- The `KnowledgeArticleViewStat` object provides statistics on the number of views for the specified article across all article types.
- The `KnowledgeArticleVoteStat` object provides the weighted rating for the specified article on a scale of 1 to 5 across all article types.
- The `Report` object represents a set of data that meets certain criteria and is displayed in an organized way. Access is read-only.
- The `ReportFeed` object represents a single feed item in the feed displayed on a report.
- The `ReportTag` object associates a word or short phrase with a report.
- The `TaskFeed` object represents a single feed item in the feed on a task.

Changed Objects

The following objects have been changed in API version 20.0:

- The `CaseMilestone` object includes a `StartDate` field, which displays the date and time a milestone started on a case.
- The character limit for the `Subject` field on the `Event` and `Task` objects increased from 80 to 255. This change requires you to update any triggers or other platform validation tools that assume event or task subjects are limited to 80 characters. If you prefer, you can create a validation rule on the `Event` or `Task` `Subject` field to artificially limit the subject length.
- The `FeedComment` and `FeedPost` objects now support `search()`.
- The `UserLicense` object includes two new fields: `MonthlyLoginsUsed`, which increments whenever a successful login occurs for any user associated with a customer or partner portal user license, and `MonthlyLoginsEntitlement`, which contains the maximum number of customer or partner portal logins allowed per month.
- The `User` object includes a new `UserPermissionsSupportUser` field, which indicates if a user can use the Service Cloud console.
- The `User` object includes new fields if Chatter is enabled:
 - `FullPhotoUrl`—The URL for a user's profile photo.
 - `SmallPhotoUrl`—The URL for a thumbnail of a user's profile photo.
 - `DigestFrequency`—The frequency at which Salesforce.com sends the user's Chatter personal email digest.
- The `TerritoryId` field in the `UserTerritory` object is now required for `create()`.
- The `Attachment` object includes these changes.
 - Attachments on tasks or events can't be marked private.
 - The owner of an attachment on a task or event must be the same as the owner of the task or event.
- The `ContentVersion` object includes a new `Origin` field, which is the source of the content version.
- The **P** value's label in the `PublishStatus` field on the `ContentDocument` and `ContentVersion` objects, has changed from **Public Workspace** to **Public**.
- The `CollaborationGroup` object includes new fields:
 - `FullPhotoUrl`—The URL for the group's profile photo.
 - `MemberCount`—The number of members in the group.
 - `SmallPhotoUrl`—The URL for a thumbnail of the group's profile photo.
- The `CollaborationGroupMember` object includes a new `NotificationFrequency` field which is the frequency at which Salesforce.com sends Chatter group email digests to this member.

Changed Calls

With API version 20.0, you can process records for multiple object types, including custom objects, in one `create()` or `update()` call. For example, you can create a contact and an account in one call. Previously, you could only process records for one object type in a call. You can process records for up to 10 objects types in one call.

New AllOrNoneHeader SOAP Header

The `AllOrNoneHeader` header allows the `create()`, `delete()`, `undelete()`, `update()`, and `upsert()` calls to roll back all changes unless all records are processed successfully. The default behavior is to allow partial success of a call: records without errors are committed, while records with errors are marked as failed in the call results. This new header gives you more transactional control over commitment of changes.

Increased Number of Relationships Allowed in a SOQL Query

With Winter '11, you can include 25 relationships in a SOQL query in all API versions. Previously, there was a limit of 20 relationships. A custom object allows up to 25 relationships, so you can now reference all the relationships in one query.

API Migration Issues

The following technical notes are available to assist you in migrating from earlier versions:

- Release 19.0: [Web Services API Developer's Guide Version 19.0](#)
- Release 18.0: [Web Services API Developer's Guide Version 18.0](#)
- Release 17.0: [Web Services API Developer's Guide Version 17.0](#)
- Release 16.0: [Web Services API Developer's Guide Version 16.0](#)
- Release 15.0: [Web Services API Developer's Guide Version 15.0](#)
- Release 14.0: [Web Services API Developer's Guide Version 14.0](#)
- Release 13.0:
http://wiki.developerforce.com/index.php/What%27s_New_in_Force.com_Web_Services_API_Summer_%2708
- Release 12.0:
http://wiki.developerforce.com/index.php?title=What%27s_New_in_Force.com_Web_Services_API_Spring_%2708
- Release 11.0:
http://wiki.developerforce.com/index.php/What%27s_New_in_Force.com_Web_Services_API_Winter_%2708
- Release 10.0:
http://wiki.developerforce.com/index.php/What%27s_New_in_Apex_Web_Services_API_Summer_%2707
- Release 9.0:
http://wiki.developerforce.com/index.php/What%27s_New_in_Apex_Web_Services_API_Spring_%2707
- Release 8.0: <http://www.salesforce.com/developer/tech-notes.jsp?tn=TN-19>
- Release 7.0: <http://www.salesforce.com/developer/tech-notes.jsp?tn=TN-17>
- Release 6.0: <http://www.salesforce.com/developer/tech-notes.jsp?tn=TN-15>
- Release 5.0: <http://www.salesforce.com/developer/tech-notes.jsp?tn=TN-13>
- Release 4.0: <http://www.salesforce.com/developer/tech-notes.jsp?tn=TN-10>

Documentation for these earlier versions is also available. See

wiki.developerforce.com/index.php/Earlier_Reference_Documentation on Developer Force for links to online and PDF versions.

Bulk API Enhancements

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

The REST-based Bulk API is optimized to process a large number of records asynchronously. It allows you to load large batches of data that are processed in the background. The Bulk API has been improved for API version 20.0:

Support for Binary Attachments

With API version 20.0, you can submit batches containing binary attachments, such as Attachment records or Salesforce CRM Content.

Uploading Binary Attachments in Data Loader

You can now use the Bulk API to upload binary attachments in Data Loader by enabling the `Upload Bulk API Batch as Zip File (enable to upload binary attachments)` setting.

For more information about the Data Loader, see “Data Loader Overview” in the Salesforce.com online help.

Increased Number of Daily Batches Allowed

The limit of batches allowed per rolling 24-hour period has been increased from 500 to 1000.

Force.com Development as a Service

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

Force.com Development as a Service (DaaS) provides the tools and technologies used by professional developers who build applications for the Force.com platform, as well as those who migrate application changes between development organizations and production. The DaaS feature area includes support for creating, retrieving, and deploying changes to your organization's metadata.

Updated Metadata

The following metadata fields have been added or changed in Metadata API version 20.0:

Metadata Type or Related Object	Field	Change	Description
CustomObject	recordTypeTrackFeedHistory	New	Indicates whether the record type is enabled for feed tracking (<code>true</code>) or not (<code>false</code>).
CustomObject	recordTypeTrackHistory	New	Indicates whether history tracking is enabled for this record type (<code>true</code>) or not (<code>false</code>).
CustomSite	siteRedirectMappings	New	An array of all URL redirect rules set for your site.

Metadata Type or Related Object	Field	Change	Description
Dashboard	dashboardType	Updated	A new valid value has been added: MyTeamUser—Managers can choose to view the dashboard from the point of view of their subordinates in the role hierarchy.
Dashboard	drillToDetailEnabled	New	When enabled, users are taken to the record detail page when they click a record name, record owner, or feed post in a table or chart. When set to true users can click axis and legend values, chart elements, and table entries. The <code>drillDownUrl</code> and <code>drillEnabled</code> fields override this field.

Force.com IDE

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

Winter '11 includes new enhancements to the Force.com IDE. For complete details, visit the Force.com IDE release notes page at http://wiki.developerforce.com/index.php/Force.com_IDE_Release_Notes.



Note: The Force.com IDE for Winter '11 will be released after all instances have been upgraded. Release notes and downloads are not available until that time.

Sandbox Enhancements

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

Winter '11 includes the following enhancements to sandbox:

Daily Sandbox Refresh

Developer and configuration-only sandboxes can be refreshed every day. The refresh interval for full-copy sandboxes remains every 29 days.

Sandbox Delete

In previous releases you could only delete sandboxes that exceeded your sandbox limit. Starting in Winter '11 you can delete sandboxes at any time. Note that you can't create a new sandbox to replace the deleted sandbox until the refresh interval has passed. For full-copy sandboxes, you can create a replacement sandbox after 29 days. For configuration-only sandboxes, you can create a replacement sandbox the next day.

Change Sets-Beta

Winter '11 includes the following enhancements to change sets:

Add Profiles

You can now add profile settings to change sets. On the detail page of an outbound change set, click **Add Profiles**.

Component Inspection

Before you upload or deploy a change set, you can view an XML representation of the components. In the case of a profile, the contents of the profile represented depend on the contents of the change set. For example, profiles only contain field-level security for fields included in the custom object that are part of the change set.

Validate Deployment

You can perform a test deployment of an inbound change set to view the success or failure messages that would occur with an actual deployment. This is a good idea if you are planning a deployment on a schedule (for example during low-use hours) and want to determine if the deployment will succeed ahead of time. You do not need to perform a test deployment before every time, as this process takes time to complete. To test deploy an inbound change set, click its name and then click **Validate**.

Identity Providers and Service Providers

An *identity provider* is a trusted provider that enables you to use single sign-on to access other websites. A *service provider* is a website that hosts applications. You can enable Salesforce.com as an identity provider, then define one or more service providers, so your users can access other applications directly from Salesforce.com using single sign-on. This can be a great help to your users: instead of having to remember many passwords, they will only have to remember one. Plus, the applications can be added as tabs to your Salesforce.com organization, which means users won't have to switch between programs.

Implementation Tips

- You must setup a domain before you can enable Salesforce.com as an identity provider. See “My Domain Overview” in the Salesforce.com online help.
- Salesforce.com uses the SAML 2.0 standard for single sign-on and generates SAML assertions when configured as an identity provider.

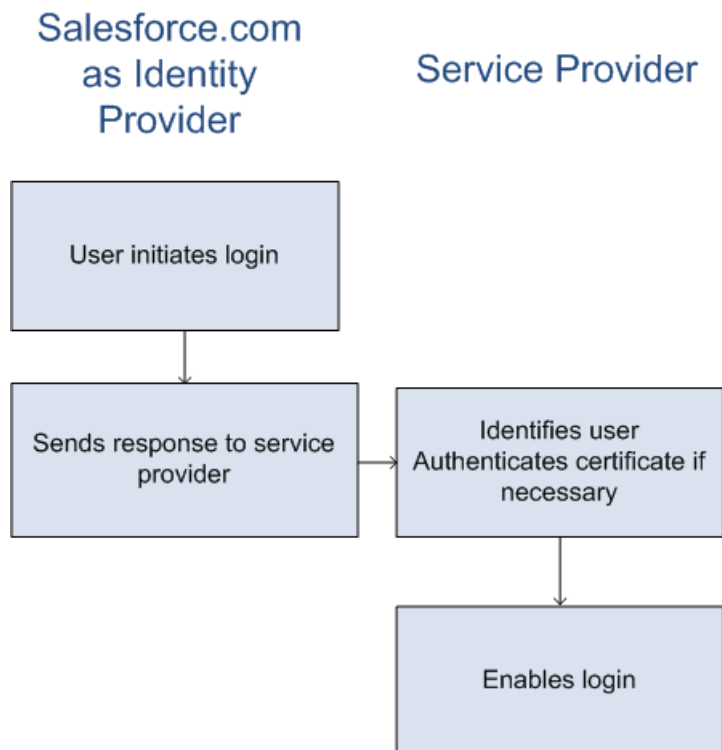
Using Identity Providers and Service Providers

Salesforce.com supports the following:

- Identity-provider-initiated login—when Salesforce.com logs into a service provider at the initiation of the end-user
- Service-provider-initiated login—when the service provider requests Salesforce.com to authenticate a user, at the initiation of the end-user

The following is the general flow when Salesforce.com as an identity provider logs into a service provider.

1. User tries to access a service provider already defined in Salesforce.com.
2. Salesforce.com sends a [SAML response](#) to the service provider. The following is an example of a response (you might want to share this with your service provider):



3. Service provider identifies the user and authenticates the certificate.
4. If the user is identified, they are logged into the service provider.

The following is the general flow when a service provider initiates login and uses Salesforce.com to identify the user.

1. The service provider sends a valid SAML request. The endpoint is automatically generated when the service provider is defined—the SP-Initiated POST Endpoint.
2. Salesforce.com identifies the user included in the SAML request.

```

<samlp:AuthnRequest ID="bndkmeemcaamihajeloilkagfdliilbhjjnmlmfo" Version="2.0"
  IssueInstant="2010-05-24T22:57:19Z"
  ProtocolBinding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST"
  ProviderName="google.com" IsPassive="false"
  AssertionConsumerServiceURL="https://www.google.com/a/resp.info/acs">
  <saml:Issuer>google.com</saml:Issuer>
  <samlp:NameIDPolicy AllowCreate="true"
    Format="urn:oasis:names:tc:SAML:1.1:nameid-format:unspecified"/>
</samlp:AuthnRequest>
  
```

If a certificate was included as part of the definition, Salesforce.com authenticates the certificate.

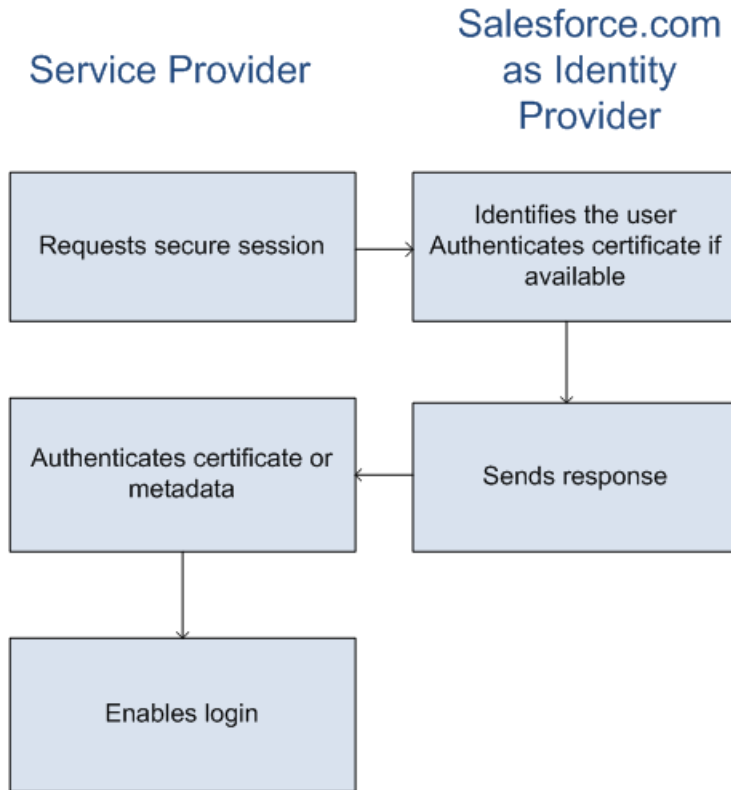


Note: If a certificate is included in the service provider definition, and the SAML request does not contain a certificate, the request fails, and the user is not logged in using Salesforce.com. If the definition does not include a certificate, and the request includes one, the request succeeds if the user is identified correctly.

3. If the user isn't already logged into Salesforce.com, they are prompted to do so.
4. Salesforce.com sends a [SAML response](#) to the service provider.
5. The service provider authenticates the SAML response sent by Salesforce.com. If the user has been authenticated, they are logged into the service provider. The user is also logged into Salesforce.com.



Important: Salesforce.com doesn't provide any mechanism for automatically logging the user out of Salesforce.com when they log out of the service provider.



The following is an example of the SAML response from Salesforce.com. You might want to share this information with your service provider.

```

<samlp:Response Destination="https://www.google.com/a/resp.info/acs"
  ID="_50ee78c999045eae2d52c58b918f04181274741839516"
  InResponseTo="bndkmeemcaamihajeloilkagfdliilbhjjnmlmfo"
  IssueInstant="2010-05-24T22:57:19.516Z" Version="2.0">
  <saml:Issuer
    Format="urn:oasis:names:tc:SAML:2.0:nameid-format:entity">wwilber.salesforce.com
  </saml:Issuer>

  <ds:information>

  <samlp:Status>
    <samlp:StatusCode Value="urn:oasis:names:tc:SAML:2.0:status:Success"/>
  </samlp:Status>
  -
  <saml:Assertion ID="_c460711296b2ad1a139ef55efff2523d1274741839516"
    IssueInstant="2010-05-24T22:57:19.516Z" Version="2.0">
    <saml:Issuer
      Format="urn:oasis:names:tc:SAML:2.0:nameid-format:entity">wwilber.salesforce.com
    </saml:Issuer>
    -
    <saml:Subject>
    <saml:NameID
      Format="urn:oasis:names:tc:SAML:1.1:nameid-format:unspecified">adminqa@resp.info
  </saml:Assertion>
</samlp:Response>
  
```

```

</saml:NameID>
-
  <saml:SubjectConfirmation Method="urn:oasis:names:tc:SAML:2.0:cm:bearer">
    <saml:SubjectConfirmationData NotOnOrAfter="2010-05-24T23:02:19.516Z"
      Recipient="https://www.google.com/a/responder.info/acs"/>
    </saml:SubjectConfirmation>
  </saml:Subject>
-
<saml:Conditions NotBefore="2010-05-24T22:57:19.516Z" NotOnOrAfter="2010-05-24T23:02:19.516Z">
-
  <saml:AudienceRestriction>
    <saml:Audience>google.com</saml:Audience>
  </saml:AudienceRestriction>
</saml:Conditions>
-
<saml:AuthnStatement AuthnInstant="2010-05-24T22:57:19.516Z">
-
  <saml:AuthnContext>
    <saml:AuthnContextClassRef>urn:oasis:names:tc:SAML:2.0:ac:classes:unspecified
    </saml:AuthnContextClassRef>
  </saml:AuthnContext>
</saml:AuthnStatement>
-
<saml:AttributeStatement>
-
  <saml:Attribute Name="userId"
    NameFormat="urn:oasis:names:tc:SAML:2.0:attrname-format:unspecified">
    <saml:AttributeValue xsi:type="xs:anyType">005D0000001AfDg
    </saml:AttributeValue>
  </saml:Attribute>
-
  <saml:Attribute Name="username"
    NameFormat="urn:oasis:names:tc:SAML:2.0:attrname-format:unspecified">
    <saml:AttributeValue xsi:type="xs:anyType">admin@wwilber-NR.com
    </saml:AttributeValue>
  </saml:Attribute>
-
  <saml:Attribute Name="email"
    NameFormat="urn:oasis:names:tc:SAML:2.0:attrname-format:unspecified">
    <saml:AttributeValue xsi:type="xs:anyType">wwilber@salesforce.com
    </saml:AttributeValue>
  </saml:Attribute>
-
  <saml:Attribute Name="is_portal_user"
    NameFormat="urn:oasis:names:tc:SAML:2.0:attrname-format:unspecified">
    <saml:AttributeValue xsi:type="xs:anyType">>false
    </saml:AttributeValue>
  </saml:Attribute>
</saml:AttributeStatement>
</saml:Assertion>
</samlp:Response>

```

OAuth Version 2.0 Supported

Starting in Winter '11, Salesforce.com supports version 2.0 of the OAuth protocol for authenticating Web applications that access data in a Salesforce.com instance.

Salesforce.com supports a number of authentication flows for OAuth 2.0, so you can authenticate users of web applications using JavaScript, redirects, or mobile applications.

Implementation Tips

- Select the appropriate authentication flow for your applications:
 - Web server flow—The Web server authentication flow is used by applications that are hosted on a secure server. A critical aspect of the Web server flow is that the server must be able to protect the consumer secret.
 - User-agent flow—The user-agent authentication flow is used by client applications (consumers) residing in the user's device. This could be implemented in a browser using a scripting language such as JavaScript, or from a mobile device or a desktop application. These consumers cannot keep the client secret confidential.
 - SAML assertion flow—The SAML assertion flow is an alternative for organizations that are currently using SAML to access Salesforce.com using single sign-on, and want to access the Web services API the same way. The SAML assertion flow can only be used inside a single organization. You do not have to create a remote access application to use this assertion flow.
 - Username-password flow—The username-password authentication flow can be used as a replacement for an existing login when the consumer already has the user's credentials.



Caution: This authentication flow involves passing the user's credentials back and forth. Salesforce.com recommends using this authentication flow only when necessary.

- After the consumer has been authorized for access, they can use a refresh token to get a new access token (session ID.) This is only done after the consumer already has received an access token using either the Web server or user-agent flow.

Best Practices

- Only use the username-password authentication flow when absolutely necessary.
- In the user-agent flow, if you are authenticating using JavaScript, Salesforce.com recommends calling `window.location.replace()` to remove the callback from the browser's history.

Force.com Sites Enhancements

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

Winter '11 includes new features that improve the capabilities of Force.com sites. To access these features, sites must be enabled for your organization. Winter '11 enhancements for sites include:

Sites URL Redirects

If you move or reorganize pages on your Force.com site, search engines may have trouble finding the new page locations. To avoid this, set up *site URL redirects* to inform users and search engines that site content has moved.

Sites Self-Registration

You can create and enable a person account as a Customer Portal user using the `createPersonAccountPortalUser` Apex method. Use `createPersonAccountPortalUser` to create a person account using either the default record type defined on the guest user's profile or a specified record type, then enable it for the site's portal. Person Accounts can only be enabled as high-volume portal users. For more information, see the [Force.com Apex Code Developer's Guide](#). For more information on high-volume Customer Portal users, see “Granting High-Volume Portal Users Access to Records” in the Salesforce.com online help.

Customizable My Profile Page

The My Profile page is a new Visualforce page for your Force.com site and Customer Portal. The My Profile page enables users logged into either your Force.com site, or your Customer Portal from Force.com sites, to update their own contact information. When they make changes to this page, the corresponding portal user and contact records are updated.

About the Sites Enhancements

Sites URL Redirects

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

User Permissions Needed	
To create and edit site URL redirects:	“Customize Application”
To view site URL redirects:	“View Setup”

If you move or reorganize pages on your Force.com site, search engines may have trouble finding the new page locations. To avoid this, set up *site URL redirects* to inform users and search engines that site content has moved.

Consider the following while implementing site URL redirects:

- You can't redirect error pages.
- Each site can have a maximum of 1,000 redirect rules.
- Query parameters in site URL redirects are matched exactly.
- If you have URL rewriting enabled on your site, it runs after any site page redirects. For more information about the `Site.UrlRewriter` Apex interface, see the [Force.com Apex Code Developer's Guide](#).

To assign a redirect to a site page:

1. Click **Your Name** ► **Setup** ► **Develop** ► **Sites**.
2. Click a site label.
3. Click **URL Redirects** on the site detail page.
4. Specify the former page location in the `Source URL` field. The page location must:
 - Be a relative URL. It can have any valid extension type, such as `.html` or `.php`.
 - Not contain anchors, such as `/siteprefix/page.html#target`.



Note: Organizations that use sites with prefixes must manually add the prefix to the Source URL and Target URL fields. Also, if your organization has a root level site and one with a prefix, and you want to redirect a page in your prefixed site but don't include the prefix in the redirect rule, Salesforce.com will default to looking for the rule in your root site instead, resulting in a 404 error.

5. Specify the `Redirect Type`:

- Permanent (301)—Select this option if you want users and search engines to update the URL in their systems when visiting the page. Users visiting a page redirected with this type are sent seamlessly to the new page. Using a permanent redirect ensures that your URLs retain their search engine popularity ratings, and that search engines index the new page and remove the obsolete source URL from their indexes.
 - Temporary (302)—Select this option if you want users and search engines to keep using the original URL for the page. Search engines interpret a 302 redirect as one that could change again at any time, and though they index and serve up the content on the new target page, they also keep the source URL in their indexes.
6. Specify the new page location in the `Target URL` field. This can be a relative URL or a fully-qualified URL with an `http://` or `https://` prefix. Unlike source URLs, target URLs can contain anchors.
 7. Click **Save**.

The Redirect Rules section displays all URL redirect rules you've created for your site. In this section you can:

- Edit an assigned redirect rule.
- Activate or deactivate a redirect rule.
- Delete a redirect rule.
- Click the Source URL or Target URL column heading to sort the list in ascending or descending order.

Customizable My Profile Page

Available in: **All Editions**

With Winter '11, the My Profile page is available. It is a new Visualforce page for your Force.com site and Customer Portal. The My Profile page enables users logged into either your Force.com site, or your Customer Portal from Force.com sites, to update their own contact information. When they make changes to this page, the corresponding portal user and contact records are updated.

You can enable the My Profile page in two ways. The first way only enables the page for specific profiles. The second way enables the page for the entire site:

1. Enable the My Profile page for specific profiles:
 - a. Click **Your Name** ► **Setup** ► **Manage Users** ► **Profiles**.
 - b. Click the name of the profile you want to modify.
 - c. In the Enabled Visualforce Page Access related list, click **Edit**.
 - d. Select `MyProfilePage` from the Available Visualforce Pages list and click **Add**.
 - e. Click **Save**.

For more information, see “Setting Visualforce Page Security” in the Salesforce.com online help.

2. Add the My Profile page to your site's detail page:
 - a. Click **Your Name** ► **Setup** ► **Develop** ► **Sites**.
 - b. Click the name of the site you want to modify.
 - c. Click **Edit** on the Site Visualforce Pages related list.
 - d. Use the **Add** button to add the My Profile page to your site.
 - e. Click **Save**.

For more information, see “Managing Force.com Site Visualforce Pages” in the Salesforce.com online help.

The My Profile page is also delivered as part of the Customer Portal Welcome component on your home page layout. To enable the component:

1. Click ***your Name*** ► **Setup** ► **Customize** ► **Home** ► **Home Page Layouts**.
2. Click **Edit** next to the layout you want to add My Profile to.
3. Select **Customer Portal Welcome**.
4. Click **Next**.
5. Place the Customer Portal Welcome component where you want it.
6. Optionally, click **Preview** to display the home page layout.
7. Click **Save**.

For more information, see “Designing Home Tab Page Layouts” in the Salesforce.com online help.

Additional Force.com Enhancements

Browser Support Updates

Available in: **All** Editions

With Winter '11, Salesforce.com now supports Apple® Safari version 5.0.x and Mozilla Firefox version 3.6.x. For more information, see “Supported Browsers” in the Salesforce.com online help.

Custom Field Enhancements

Winter '11 includes these enhancements for custom fields:

API Name Shown for Custom Fields

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

In Winter '11, you can view a custom field's API name on the Custom Fields & Relationships related list of the standard object's fields page or the custom object's detail page.

Rich Text Area Field Enhancements

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

In Winter '11, rich text area fields have two enhancements.

- Inline editing is now supported for rich text area fields on detail pages.
- You can upload images to a rich text area field from the Salesforce.com API version 20 or later.

Changes to rounding in number fields

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

In Winter '11, number fields use the round half up tie-breaking rule. Rounding in Salesforce.com numeric fields are as follows:

- Currency fields use the round half even rule. For example, 23.5 becomes 24, 22.5 becomes 22, -22.5 becomes -22, and -23.5 becomes -24.
- Formula fields with numeric values use the round half up tie-breaking rule for numbers in formula fields. For example, 12.345 becomes 12.35 and -12.345 becomes -12.34.
- Number fields use the round half up tie-breaking rule for numbers in formula fields. For example, 12.345 becomes 12.35 and -12.345 becomes -12.34.

Custom Settings Data Limits Change

Available in: **Group, Personal, Developer, Enterprise, and Unlimited** Editions.

The total amount of cached data allowed for your organization is the **lesser** of these two values:

- 10 MB
- 1 MB multiplied by the number of full-featured user licenses in your organization

For example, if your organization has 3 full licenses, you have 3 MB of custom setting storage. If your organization has 6 full licenses, you have 10 MB of storage.

In addition, to see how much custom settings data your organization is using, click **Your Name** ► **Setup** ► **Develop Custom Settings**.

Packaging Enhancements

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

Winter '11 includes these enhancements for packaging:

API Access Privileges on Unmanaged Packages

In Winter '11, API Access Privileges are no longer available on unmanaged packages in development. API Access Privileges will still be available on existing and newly *installed* unmanaged packages. API Access Privileges for unmanaged packages is scheduled to be de-supported entirely in Spring '11. In order to continue to use API Access Privileges, the unmanaged package must be converted to a managed package by the package developer. Managed packages offer an increased level of security compared to unmanaged packages.

Article Types

Article Types are now packageable. When adding components to your package, custom fields and the default page layout are automatically added.

Field History Tracking Settings

Field History Tracking Settings are now packageable. If tracking is enabled on a field, the tracking history is automatically packaged.

Language Translation for Force.com

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

Beginning with this release, platform languages are available for organizations that use Salesforce.com exclusively as a platform. Platform languages are languages that you can translate your customizations into but Salesforce.com provides no default translations. Administrators must contact their salesforce.com representative to enable platform languages.

Platform languages are available in all of the places one can select language in the application, but selecting a platform language will default all labels in the application to English. All customizations made to Salesforce.com can be translated into a platform language and renaming can be used to provide translations for standard field names on most objects. However, informative text and non-field label text is not translatable.

- English (Australia): en_AU
- English (Canada): en_CA
- English (India): en_IN
- English (Malaysia): en_MY
- English (Philippines): en_PH
- French (Canada): fr_CA
- Georgian: ka
- Norwegian: no
- Serbian (Latin): sh
- Slovak: sk
- Serbian (Cyrillic): sr

Arabic and British English Support

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

In Winter '11, Salesforce.com implemented two new user languages: English (UK) and Arabic (ar), a language read from right to left.

Administrators must contact their salesforce.com representative to enable end-user languages. Right-to-left languages must be specifically requested. Users can update their personal language settings as follows:

1. Go to **Your Name** ► **Setup** ► **My Personal Information** ► **Personal Information**.
2. Click **Edit**.
3. Select a language from the Language picklist.
4. Click **Save**.

Security Enhancements

Winter '11 includes these security enhancements:

Configure Start, Login, and Logout Pages Using Single Sign-On

Available in: **All** Editions

Prior to Winter '11, after an administrator determined the URLs for the start, login, and logout pages for single sign-on, they had to share that information with their identity provider, who would then use those URLs in the SAML assertion. Now, for SAML 2.0 only, an administrator can specify those URLs during the single sign-on configuration.

Enforce Password History Now Can Remember Up To 10 Passwords

Available in: **All** Editions

As part of your organization's password policies, you can now set **Enforce Password History** to remember up to 10 passwords.

Federation ID Only Displays To Users With Adequate Permission

Available in: **All** Editions

Prior to Winter '11, the Federation ID field always displayed on the Personal Information page. Now the field only displays if the current user has permission to edit the field.

Session Time Out Clarification

Available in: **All** Editions

When you set a time out value for user sessions, note that the session is not updated until half the time is used. For example, if you set the value for 30 minutes, update a record after 10 minutes, then sit idle, after another 20 minutes the session times out (total of 30 minutes.) If you update a record after 20 minutes, then sit idle, the session won't time out for an additional 30 minutes (total of 50 minutes.)

Remote Access Application Logo URL Size Defined

Available in: **All** Editions

When you define a remote access application, the logo used for **Logo Image URL** must now be 200x125 pixels, on a white background.

User Interface Setting Name Change

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

In Winter '11, the User Interface setting `Enable Enhanced Profile Management` has changed to `Enable Enhanced Profile List Views`. The functionality has not changed. To access this setting, click ***Your Name*** ► **Setup** ► **Customize** ► **User Interface**.