



Salesforce.com: Spring '14

# Salesforce.com Spring '14 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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# Welcome to Spring '14

Sell, service, market, and innovate like never before with Spring '14. Be productive on the go with new mobile features that let you connect with your customers in a whole new way.

We have all the resources you need to get up to speed quickly.

- Release Notes – Let this document be your comprehensive guide to the release.
- [Success–Release Readiness community](#) – Join now to be in-the-know on Spring '14.
- [Release demos](#) – Get quick video overviews of what's coming this release.
- <https://salesforce.adobeconnect.com/> (login required) – Curious about Standard, Premier, Localized, and ILT training changes and additions? Then look no further than the Training Release Notes, published every four months, to make it easy for you and your customers to stay up on the latest training innovations.

Welcome to Spring '14!

## [About the Release Notes](#)

### [HTML Release Notes—Generally Available](#)

### [Your Feedback Matters](#)

### [You Asked for It!](#)

We delivered the features you asked for on IdeaExchange.

### [Release Notes Changes](#)

This log summarizes changes to the release notes, with the most recent changes first.

## About the Release Notes

For the enhancements in this release, we provide:

- Brief, high-level descriptions of products and features
- Implementation tips to help you get started with setup and administration
- Best practices to help you and your users maximize the benefit
- Complete end-to-end instructions

Use these release notes as your guide to success with the latest release from salesforce.com. For visibility into known issues, refer to the [Known Issues Site](#).

## HTML Release Notes—Generally Available

The [Salesforce.com Release Notes](#) are now available in HTML format. The new format and user interface make it easier to:

- Quickly access information about the latest release, without having to download a big Adobe® PDF file
- Read the release notes from any mobile device as the result of responsive design
- Find the sections that you care about, and avoid those you don't, with better navigation and search
- Bookmark and share specific topics using the unique URLs
- Get better results in search engines due to better search indexing

How can we make the HTML release notes better? What improvements would you like to see? We really want your feedback! Please post your thoughts and suggestions to this [idea](#) on IdeaExchange.



**Note:** The content of the HTML release notes matches what's in the PDF.

## Your Feedback Matters

We know how important these Release Notes and our other documentation are to your company's success. To continually improve the content we deliver to you, we want to know what works and what doesn't. Let us know!

- Feedback forms—Every HTML documentation page, both in the Help and in our developer guides at [Developer Force](#), includes a feedback form for you to submit your suggestions, corrections, and feedback about the documentation. Let us know what you think!
- This release includes some of your top ideas from [IdeaExchange: You Asked for It!](#) on page 2

Want to be notified whenever we publish new documentation or make significant updates to existing documentation? Follow us on Twitter: [@salesforcedocs](#).

## You Asked for It!

We delivered the features you asked for on IdeaExchange.

<a href="#">IdeaExchange</a>	Idea delivered
<b>Chatter</b>	
<a href="#">Promoted/Persistent Chatter Posts for Important Messages</a>	<a href="#">Post Announcements in Chatter Groups</a>
<a href="#">Enable Chatter group owners to post "Sticky" notes</a>	<a href="#">Post Announcements in Chatter Groups</a>
<b>Communities</b>	
<a href="#">Communities should include Chatter Private Message capability</a>	<a href="#">Private Messages in Communities</a>
<b>Sales</b>	
<a href="#">Multiple Forecast Models</a>	<a href="#">Sales Teams Can Now Use Multiple Forecast Types</a>
<a href="#">Create/Add Case from Email</a>	<a href="#">Users Can Now Create Cases from the Salesforce Side Panel</a>
<a href="#">Salesforce for Outlook User Log in and Activity Report</a>	<a href="#">You Can Now Track the Versions of Salesforce for Outlook Your Users Run</a>
<a href="#">Introduce Sales Orders in Salesforce</a>	<a href="#">Orders—Generally Available</a>
<a href="#">Clone order info</a>	<a href="#">Orders—Generally Available</a>
<b>Service</b>	
<a href="#">Knowledge Reporting</a>	<a href="#">Article Report Filters on Data Categories</a>
<a href="#">Relate Case Feed Emails from 'Answer Customer' to Contact</a>	<a href="#">Automatically Associate Outgoing Emails with Contacts</a>
<b>Force.com Customization</b>	
<a href="#">Mass add existing users to permission sets</a>	<a href="#">Mass Assign Permission Sets</a>
<a href="#">Lookup Filter Fields on Opportunity</a>	<a href="#">Lookup Filter Enhancements</a>



<b>IdeaExchange</b>	<b>Idea delivered</b>
Product table lookup filters (partially implemented)	Lookup Filter Enhancements
TEXT(picklist) support in business rules and buttons and links	TEXT() Function Picklist Support Expanded
<b>Analytics</b>	
Floating Report Headers in Summary and Matrix reports	Floating Headers in Summary and Matrix Reports
Allow Removal/Editing of Report Footer; Exclude report footer when using Export Details to Excel	Export Reports Without Footers
Allow Modification/Editing of Dashboard without giving View All data permission	Editing Dashboards Without View All Data
Sort report results by different field than the "Group by" field	Flexible Sorting in Reports
Enable Historical Trending on Cases	History Tracking for Cases
Show Decimals in Dashboard Table and Metric Components	Percentages in Tables and Metrics
<b>Force.com</b>	
View Deployment Errors in the Monitor Deployments Page	New User Interface for Monitoring Deployments
Show Error Details for Completed Deployments	
Show Failed Tests for Deployments	

## Release Notes Changes

This log summarizes changes to the release notes, with the most recent changes first.

### February 5, 2014

#### Customize Salesforce1 App Branding

Administrators can now customize the appearance of the Salesforce1 app to display their own corporate branding.

#### CustomBrand and CustomBrandAsset Updated

Added information on updates to these objects to support custom branding in the Salesforce1 app.

#### Differences in Tracking Your Activities

Clarified that the limitation on the display of task lists (task lists can't be displayed when more than 1,000 overdue tasks exist) applies only to Salesforce1: Moved the information to the section Differences in Tracking Your Activities under Salesforce1 Differences from the Full Salesforce Site.

#### Knowledge Search Enhancements

Removed **Suggested Keyword Search—Pilot**, as it is not available in the Spring'14 release.

### January 29, 2014

#### History Tracking for Cases

Removed reference to Case Owner field, which is not available for history tracking.

**You Asked for It!**

Added links to IdeaExchange items for new Analytics features.

**getInteractionQueries() and getLimitInteractionQueries() Limits Methods Removed**

Noted that these methods are no longer available.

**Salesforce1 Support for Communities and Salesforce Communities Now Available**

Clarified that external members—with Customer Community, Partner Community, or other supported portal licenses—also have access to their communities in Salesforce1.

**Change Sets and Deployment**

Removed the release note about change sets in the Professional Edition.

**New User Interface for Monitoring Deployments**

Clarified that change sets aren't included in the new Deployment Status page.

**January 22, 2014****Multiple Username Login Hints**

Added that this feature isn't available for Internet Explorer versions earlier than 10.0.

**Custom Domain (My Domain) Link Added to the Salesforce Login Page**

Added that this feature isn't available for Internet Explorer versions earlier than 10.0.

**Clickjack Protection**

Clarified that clickjack protection is not automatically turned on for sites created prior to the Spring '14 release.

**January 15, 2014****Sharing Sets**

Sharing sets with indirect lookups to accounts and contacts are now available to all administrators.

**Create Report Page Update**

The positioning of the elements on the Create Report page has been adjusted slightly for improved usability.

**File Storage Per Paid User License Increased from 612 MB to 2 GB for Enterprise, Performance, and Unlimited Editions**

Clarified the data and file storage examples, and made a correction in the data and file storage allocation table.

**Accounts and Contacts for Customer Community Users**

Clarified that external users with Customer Community or High Volume Portal User licenses can now view accounts that are shared with them in a community.

**Reuse Connected App Names**

Names of deleted connected apps can be reused.

**Enhanced Session ID Management for Visualforce**

Deleted this section of the release notes, as this feature isn't available in this release.

**The System Administrator Profile Automatically Gets the App Launcher**

Added a release note about this change to the System Administrator profile.

**Updates to Translated Terminology**

Deleted this section of the release notes because these updates were introduced in a past release.

## Report

Two new fields added to the ReportGrouping subtype in the Metadata API to support flexible sorting in reports.

## AttachedContentDocument

The following objects no longer have a parent-to-child relationship with AttachedContentDocument:

- ContractLineItem
- EmailMessage
- EmailTemplate
- LiveChatTranscript

# Feature Summary and User Impact

Spring '14 has features that immediately affect all users. In this section, you'll learn about some of the features that your users will see. And for these features, it's a good idea to communicate to your users about what they can expect. Other features require your input before users can benefit from the new functionality.

If you want to learn about when you'll start seeing Spring '14 changes on your instance, check the Major Release Schedule section of the Salesforce trust site at [trust.salesforce.com/trust/maintenance/](https://trust.salesforce.com/trust/maintenance/).

## General Enhancements

### Mobile

### Chatter

### Communities

### Sales

### Data.com

### Service

### Analytics

### Site.com

### Force.com Customization

### Force.com Developer

## General Enhancements

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.
Updates to Browser Support	✓			
Using Topics to Organize Records			✓	
File Storage Per Paid User License Increased from 612 MB to 2 GB for Enterprise, Performance, and Unlimited Editions (available within one month after Spring '14)	✓			
Skills—Pilot				✓
<b>Search</b>				
Search More Fields for Users and Opportunities in Enhanced Lookups	✓			
Auto-Saving of Records with Lookup Values Now Supports Enhanced Lookup Searches	✓			

# Mobile

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.
<b>Salesforce1</b>				
<a href="#">Introducing the Salesforce1 App</a>	✓			
<a href="#">Salesforce1 Features</a>	✓			
<a href="#">Salesforce1 Enhancements in this Release</a>	✓			
<a href="#">Set Up Your Organization to Use the Salesforce1 App</a>			✓	
<a href="#">Salesforce1 Differences from the Full Salesforce Site</a>			✓	
<a href="#">Develop for the Salesforce1 App Overview</a>			✓	
<b>SalesforceA</b>				
<a href="#">SalesforceA</a>			✓	
<b>Salesforce Touch</b>				
<a href="#">Salesforce Touch Has Upgraded to Salesforce1</a>	✓			
<b>Chatter Mobile</b>				
<a href="#">Chatter Mobile for Android and iOS Have Upgraded to Salesforce1</a>	✓			
<a href="#">Chatter Mobile for BlackBerry is Now a Connected App</a>			✓	
<b>Additional Mobile Enhancements</b>				
<a href="#">View a Mobile User's Push Registration Information</a>		✓		
<a href="#">"Mobile Ready" Label Changed to "Salesforce Classic Ready"</a>		✓		

# 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.
<b>Files</b>				
Salesforce Files Sync—Pilot			✓	
<b>Topics</b>				
Using Topics to Organize Records			✓	
Find and Endorse People Knowledgeable about a Topic	✓			
Configure Email Notifications for Endorsements	✓			
Topics in Global Search Auto-Complete	✓			
Feed Tracked Changes for Topics	✓			
Number-Only Hashtag Topics	✓			
<b>Groups</b>				
Post Announcements in Chatter Groups	✓			
New Publisher Actions for Creating Chatter Groups and Adding Group Members	✓			
Customize Chatter Group Layouts and Publisher Actions	✓			
Archived Groups Don't Count Toward Individual Chatter Group Limits	✓			
Use Email to Post to Chatter Groups—Generally Available			✓	
Allow Users to Post to Chatter Groups via Email	✓			
<b>Profiles</b>				
Skills—Pilot				✓
<b>Additional Enhancements</b>				
Customize Branding for Email Notifications		✓		
Chatter Expert Message Disabled	✓			

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.
<b>API Enhancements</b>				
Chatter REST API	✓			
Chatter in Apex	✓			

## Communities

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.
Moderation Enhancements			✓	
Salesforce1 Support for Communities	✓			
Private Messages in Communities			✓	
Badges in Communities			✓	
Orders and Communities			✓	
Object Permissions for Contracts and Communities		✓		
Communities Additional Enhancements			✓	

## Sales

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.
<b>Opportunities and Collaborative Forecasts</b>				
Sales Teams Can Now Use Multiple Forecast Types			✓	
New Setup for Forecasts		✓		

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.
Sales Managers Can Now Filter Results for Direct Reports	✓			
Sales Managers Can Now See Results by Forecast Type	✓			
Customizable Forecasting is No Longer in Development			✓	
Forecasts 1.0 (Classic) Will Be Retired in Summer '14			✓	
Streamlined Opportunity Splits			✓	
<b>Salesforce for Outlook</b>				
Users Can Now Create Cases from the Salesforce Side Panel			✓	
You Can Now Track the Versions of Salesforce for Outlook Your Users Run		✓		
Now Users Know When Upgrades are Available	✓			
<b>Accounts, Contacts, and Leads</b>				
Access Social Accounts, Contacts, and Leads in Salesforce1			✓	
Call, Log Calls to, and Email Leads in Salesforce1	✓			
View Profile Images for Leads in Salesforce1	✓			
<b>Contracts and Orders</b>				
Orders—Generally Available			✓	
Place Order REST API—Generally Available			✓	
Contract Approvals No Longer Available to New Organizations	✓			
<b>Salesforce Console</b>				
Salesforce Console Enhancements			✓	
<b>Activities</b>				
Repeat Tasks on a Flexible Schedule			✓	
Other Activities Changes	✓			



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.
<b>Territory Management</b>				
Territory Management Can Now Be Disabled				✓

## Data.com

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.
<b>Prospector</b>				
Improvements to Data.com List Pools	✓			
Enhanced Experience for Adding or Exporting Records	✓			
<b>Clean</b>				
Clean Jobs Can be Set to Bypass Skipped Records, Triggers, and Workflow Rules		✓		
Clean Jobs Can be Set to Overwrite Salesforce Record Field Values		✓		
D&B Company Records Can be Manually Refreshed			✓	
<b>Additional Enhancements</b>				
Updated NAICS Codes from D&B	✓			
Clean Job Logs Stored for 21 Days		✓		
More Data.com Reports from the AppExchange			✓	

## Service

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.
<b>Case Feed</b>				
Support for Drag-and-Drop Attachments in the Case Feed Email Publisher	✓			
Inline Images Now Supported in the Case Feed Email Publisher	✓			
Resizable Message Pane in the Case Feed Email Publisher	✓			
Add Custom Components to Case Feed			✓	
Automatically Associate Outgoing Emails with Contacts	✓			
Convert Page Layouts for Case Feed Users to Case Page Layouts			✓	
Topics List Available as a Case Feed Sidebar Tool			✓	
Adding Status Field to Case Feed Change Status Action Removes Default Fields	✓			
New Ways to Filter Feed Items in Case Feed			✓	
<b>Communities and Customer Portal Users</b>				
Renamed Visible in Self-Service Field to Public	✓			
<b>Entitlement Management</b>				
Make SLAs Scalable with Dynamic Entitlement Processes			✓	
Apply Business Hours to Milestones and Entitlement Processes		✓		
<b>Knowledge</b>				
Knowledge One Widget			✓	
Knowledge One Footer Component			✓	
Article Report Filters on Data Categories			✓	

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.
Knowledge Search Enhancements		✓		✓ (pilot features)
Assign Topics to Articles			✓	
Article Actions on the Case Feed	✓			
Suggested Articles for a Case—Beta			✓	
<b>Live Agent</b>				
Direct-to-Agent Chat Routing—Generally Available			✓	
Chat Routing Enhancements		✓		
Transfer Files During a Chat—Pilot				✓
Supervisor Tab Available in Salesforce Console			✓	
Attach Records to Chat Transcripts	✓			
Changes to the Availability of the Related Entities Panel	✓			
Improve the Customer Chat Window with Visualforce			✓	
New Live Chat Transcript Fields		✓		
New Live Chat Transcript Events	✓			
Live Agent Deployment API: Changed Methods	✓			
<b>Salesforce CTI Toolkit</b>				
Retirement of Support for the Salesforce CTI Toolkit			✓	
<b>Salesforce Console</b>				
Multi-Monitor Support for a Salesforce Console		✓		
Multi-Components for a Salesforce Console		✓		
Salesforce Console Integration Toolkit: New Methods			✓	
Custom Lookup Field Components Now Available for the AppExchange			✓	
<b>Service Communities</b>				

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.
<a href="#">Add Code Examples to Posts</a>			✓	
<b>Social Customer Service</b>				
<a href="#">Social Customer Service</a>				✓

## 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.
<a href="#">History Tracking for Cases</a>	✓			
<a href="#">Flexible Sorting in Reports</a>	✓			
<a href="#">Floating Headers in Summary and Matrix Reports</a>		✓		
<a href="#">Named Dashboard Filter Values</a>	✓			
<a href="#">Export Reports Without Footers</a>		✓		
<a href="#">Hide Unused Report Types</a>		✓		
<a href="#">Embed Report Charts in Visualforce Pages</a>			✓	
<a href="#">Analytics API Available in Apex</a>			✓	
<a href="#">Editing Dashboards Without View All Data</a>		✓		
<a href="#">Percentages in Tables and Metrics</a>	✓			
<a href="#">API Access to List Views</a>			✓	
<a href="#">Embed Charts in Salesforce1</a>	✓			

## Site.com

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.
Deploying Sites with the Metadata API	✓			
Versioning	✓			
Branding Sites	✓			
Site Custom Properties	✓			
Widget Enhancements	✓			
Custom Property Types	✓			
Page Data Connections	✓			
Enhancements to the Contributor's Site.com Studio View	✓			
Live Mode Updates for Site Administrators and Designers	✓			
Exporting Assets Separately	✓			
Clickjack Protection	✓			
Changes to the Company Community Permission Set License				✓

## Force.com Customization

**General Administration**

**Data**

**Business Logic and Process Automation**

**Security**

**Sharing**

**Globalization**

**Additional Customization**

## General Administration

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.
Mass Assign Permission Sets		✓		
Lookup Filter Enhancements		✓		
Field Sets Are Generally Available		✓		
TEXT() Function Picklist Support Expanded		✓		
Feed-Based Page Layouts Now Available			✓	
Page Layout Assignments for Permission Set Licenses		✓		
Hide Standard and Custom Apps from the App Launcher			✓	
Non-Monthly Usage-based Entitlements		✓		
Enhanced User Interface for Permission Set License Assignment		✓		

## Data

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.
Data Import Wizard—Generally Available	✓			
Field History Data Retention—Pilot				✓

## Business Logic and Process Automation

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.
<b>Visual Workflow</b>				
Launch Flows from Workflow Rules—Pilot				✓
SObject Variables—Pilot				✓
Collections—Pilot				✓
Loops—Pilot				✓
DateTime Data Types in Flows		✓		
Automatic Picklist Values		✓		
Improved Logging for Running Flows		✓		
<b>Workflow</b>				
Flow Trigger Workflow Actions—Pilot				✓
Debug Logs for Flow Triggers—Pilot				✓
Daily Limit for Workflow Emails in Free and Trial Organizations		✓		
<b>Approvals</b>				
Enhanced User Search in Approval Processes for Initial Submitters in Large Organizations		✓		

## 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.
<b>Authentication</b>				
Multiple Username Login Hints	✓			
Specify the Username Login Hint	✓			

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.
Delegated Administrators Can Edit the Federation ID Field		✓		
Define Default Scopes for Authentication Providers		✓		
Specify Authorize and Token Endpoint URLs for Salesforce Auth. Providers		✓		
Reset Password Link Expires after 24 Hours	✓			
Repeat Uploading a CA-Signed Certificate	✓			
<b>Identity</b>				
Identity URL Response Includes More Information			✓	
New UserInfo Endpoint for OpenID Connect Compliance			✓	
New Access Token Scopes		✓		
Send Access Tokens in HTTP Headers for OpenID Connect Auth. Providers		✓		
OpenID Connect ID Token and Public Keys		✓		
Upload Your Own Logo for Connected Apps		✓		
Connected Apps Accessible from the Salesforce1 Navigation Menu		✓		
Connected Apps UI Additions and Label Updates		✓		
OAuth-Only Flow for Auth. Providers		✓		
Provide Client Assertion Values for OpenID Connect OAuth Flows		✓		
Encryption for SAML Assertions		✓		
Identity License Users Get AppExchange Access	✓			
Reuse Connected App Names		✓		
The System Administrator Profile Automatically Gets the App Launcher		✓		



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.
<b>Administration</b>				
<a href="#">Obscure Secret Answer for Password Resets</a>	✓			
<b>My Domain</b>				
<a href="#">Custom Domain (My Domain) Link Added to the Salesforce Login Page</a>	✓			
<b>Sessions</b>				
<a href="#">View and Manage User Sessions</a>	✓			
<a href="#">Default Session Settings Protect Your Organization</a>	✓			
<b>Files</b>				
<a href="#">Configure File Upload and Download Security Settings</a>		✓		

## Sharing

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.
<a href="#">Sharing Sets</a>		✓		

## 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.
<a href="#">Better Automatic Hyperlinks for URLs in Text Area Fields</a>	✓			

## Additional 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.
User List View: Is Frozen Field		✓		
My External Authentication Settings Page Location Changed			✓	
Components Category in the Page Layout Editor		✓		

## Force.com Developer

[Sandboxes](#)

[Change Sets and Deployment](#)

[Developer Console](#)

[Visualforce](#)

[Force.com Canvas](#)

[Apex Code](#)

[API](#)

[ISVForce](#)

## Sandboxes

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.
Partial Data Sandboxes		✓		

## Change Sets and Deployment

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.
Sharing Sets Available in Change Sets	✓			
Site.com Available in Change Sets	✓			

## Developer Console

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.
Search and Replace	✓			
Update API Version	✓			
Open Full Screen Editor	✓			
Choose Source Code Editor Theme and Font Size	✓			
Clear Test and Code Coverage Results	✓			
Context Menus	✓			
Visualforce View State Tab Available for ISVs Logging In via the Subscriber Support Console	✓			
Visualforce Development Mode Footer Disabled in Preview Windows	✓			

## 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.
<b>Development Features</b>				
Visualforce Remote Objects—Pilot				✓
namespace Attribute Added to <code>&lt;apex:actionFunction&gt;</code>		✓		
<b>Additional Enhancements</b>				
layout Attribute of <code>&lt;apex:component&gt;</code> Supports All API Versions		✓		
verticalResize Attribute Added to <code>&lt;apex:emailPublisher&gt;</code>		✓		
Accessibility Improvement for <code>&lt;apex:message&gt;</code>	✓			
Changes to title Attribute of <code>&lt;apex:page&gt;</code>	✓			
<code>&lt;analytics:reportChart&gt;</code> —Generally Available		✓		
New <code>&lt;liveAgent:clientChatFileTransfer&gt;</code> Component—Pilot				✓
useMultiline and autoResizeElementId Attributes Added to <code>&lt;liveAgent:clientChatInput&gt;</code>		✓		
PageReference URIs Support Anchors	✓			
JavaScript Remoting Requests Default to System Mode (without sharing)	✓			
Checkbox for Adding Visualforce Tabs to Salesforce Classic Renamed		✓		

## Force.com Canvas

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.
Canvas Apps in the Publisher and the Feed—Generally Available	✓			
Canvas Apps Accessible from the Salesforce1 Navigation Menu	✓			
Hide Publisher Header and Share Button	✓			
Debugging in a Canvas App	✓			
Using Events Between a Canvas App and a Visualforce Page	✓			

## Apex Code

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 and Changed Classes, Methods, and Interfaces		✓		
Chatter in Apex		✓		
Increased Query Timeout in Batch Start Method		✓		
New Independent Auto-Number Sequence Test Option		✓		

## API

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 Objects	✓			
Changed Objects	✓			
Address and Geolocation Compound Fields in the SOAP and REST APIs—Beta		✓		
Allocate API Limit App Quotas—Pilot				✓
<b>SOQL</b>				
SELECT Support for Compound Standard Address and Geolocation Fields		✓		
WHERE DISTANCE () and ORDER BY DISTANCE () Support for Compound Standard Address Fields		✓		
<b>SOSL</b>				
Paging Using the OFFSET Clause	✓			
<b>APIs</b>				
REST API	✓			
SOAP API	✓			
Chatter REST API	✓			
Data.com API	✓			
Bulk API	✓			
Streaming API	✓			
Tooling API	✓			
Metadata API	✓			
Place Order API			✓	

ISVForce

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.
Managed Component Deletion—Generally Available				✓
Usage Metrics—Pilot				✓
Orders Available to Force.com Users				✓

# General Enhancements

These enhancements and changes affect how most users experience Salesforce.

## Updates to Browser Support

We've made some changes to the way Salesforce works with browsers.

### File Storage Per Paid User License Increased from 612 MB to 2 GB for Enterprise, Performance, and Unlimited Editions

File storage limits have increased for Enterprise, Performance, and Unlimited Edition organizations. Review the current per-user and per-organization limits for file storage and data storage.

### Skills—Pilot

Skills allow users to share information about their professional expertise. With skills, users can discover, collaborate with, and endorse others based on their knowledge.

### Search More Fields for Users and Opportunities in Enhanced Lookups

Here are a few changes affecting enhanced lookup searches. You can now enable enhanced lookups for opportunities. Also, enhanced lookups for both users and opportunities now support the All Fields search option. For users, we no longer support single-character searches (except for searches in Chinese, Japanese, Korean, and Thai) nor the use of a wildcard at the beginning of search terms.

### Auto-Saving of Records with Lookup Values Now Supports Enhanced Lookup Searches

When users are editing a record, if they enter a value in a lookup field then save the record without clicking the lookup icon



, Salesforce now automatically performs an enhanced lookup search if the object is configured to use enhanced lookups.

# Updates to Browser Support

We've made some changes to the way Salesforce works with browsers.

Specifically, we:

- Added support for Microsoft® Internet Explorer® 11
- Changed the HTML markup on edit pages in Microsoft® Internet Explorer® 8. Field labels might wrap to the next line. Most users won't see any differences in how the page is displayed.
- Will discontinue support for Google Chrome Frame™ beginning January 14, 2014

## Currently Supported Browsers

Browser	Comments
Microsoft® Internet Explorer® versions 7, 8, 9, 10, and 11	<p>If you use Internet Explorer, we recommend using the latest version. Apply all Microsoft software updates. Note these restrictions.</p> <ul style="list-style-type: none"> <li>• The Compatibility View feature in Internet Explorer isn't supported.</li> <li>• The Metro version of Internet Explorer 10 isn't supported.</li> <li>• Internet Explorer 7, 8, and 9 aren't supported for login hints for multiple accounts, nor do they display the "Log in to a custom domain" link on the salesforce.com login page.</li> <li>• Internet Explorer 7 and 8 aren't supported for the Developer Console or the Data Import Wizard.</li> </ul>



Browser	Comments
	<ul style="list-style-type: none"> <li>Internet Explorer 7 isn't supported for Open CTI.</li> <li>Internet Explorer 7 isn't supported for Salesforce CRM Call Center built with CTI Toolkit version 4.0 or higher.</li> <li>Internet Explorer 7 isn't supported for Force.com Canvas.</li> <li>Internet Explorer 7 isn't supported for Salesforce console features that require more advanced browser performance and recent Web technologies. The console features not available in Internet Explorer 7 include: <ul style="list-style-type: none"> <li>◇ The Most Recent Tabs component</li> <li>◇ Multiple custom console components on sidebars</li> <li>◇ Multi-monitor components</li> </ul> </li> </ul> <p>For configuration recommendations, see "Configuring Internet Explorer" in the Salesforce Help.</p>
Mozilla® Firefox®, most recent stable version	Salesforce.com makes every effort to test and support the most recent version of Firefox. For configuration recommendations, see "Configuring Firefox" in the Salesforce Help.
Google Chrome™, most recent stable version	Google Chrome applies updates automatically; salesforce.com makes every effort to test and support the most recent version. There are no configuration recommendations for Chrome. Chrome isn't supported for the Console tab or the <b>Add Google Doc to Salesforce</b> browser button.
Apple® Safari® versions 5.x and 6.x on Mac OS X	<p>There are no configuration recommendations for Safari. Apple Safari on iOS isn't supported.</p> <ul style="list-style-type: none"> <li>Safari isn't supported for the Salesforce console.</li> <li>Safari isn't supported for Salesforce CRM Call Center built with CTI Toolkit versions below 4.0.</li> </ul>



**Note:** For more information about our browser policy, see "Supported Browsers" in the Salesforce Help.

## Using Topics to Organize Records

Enable topics for objects to allow users to add topics to records. Adding topics helps organize records and makes them easier to find.

Although topics for objects can be an extension of the Chatter topics features you already use, Chatter is not required to enable topics for objects.

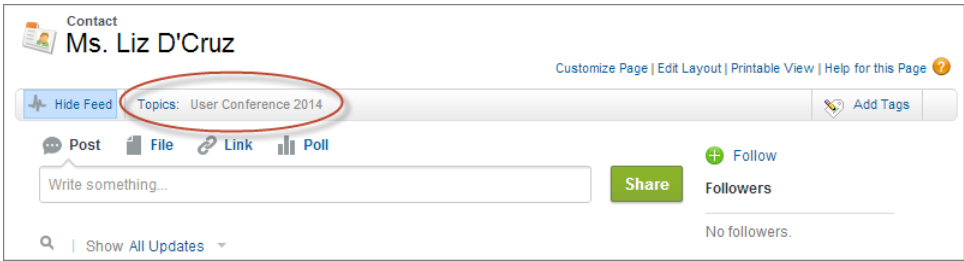
For existing organizations, topics aren't enabled for any objects by default. Administrators must choose which objects to enable. Enabling topics for an object allows users to add topics to records of that object type.



**Warning:** Enabling topics for an object disables public tags on records of that object type, and the public tags aren't migrated to topics. Personal tags aren't affected. If administrators disable topics for an object, all public tags on records of that object type are restored.

For organizations created after the Spring '14 release, topics are enabled for all available standard objects by default. Administrators must choose which custom objects to enable. These organizations don't have public tags on records.

After administrators enable topics for objects, users can add topics to records and retrieve them using list views. For example, if you met a number of contacts at a conference, you might add the topic `User Conference 2014` to their records.



You could then use the `User Conference 2014` topic to filter a contacts list view to retrieve those records.

## Enable and Configure Topics for Objects

Enable topics for objects, even if you don't have Chatter, so users can add topics to records to organize them by common themes.

Available in: All Editions	
User Permissions Needed	
To enable topics for objects:	"Customize Application"

Administrators can enable topics for accounts, assets, campaigns, cases, contacts, contracts, events, leads, opportunities, tasks, and custom objects.

**Warning:** When topics are enabled for an object, public tags are disabled for records of that object type.

When topics are enabled for an object, administrators optionally can configure topic suggestions to use the text from specific fields on that object.

1. From Setup, click **Customize > Topics > Topics for Objects**.
2. Select an object.
3. Select `Enable topics for Object`.
4. For custom objects, select the text fields that you want to use for topic suggestions. For standard objects, optionally deselect `Use topic suggestions from default fields` to see all the fields you can use for topic suggestions. Select `Use topic suggestions from default fields` to use only the object's default set of text fields (typically name and description fields).
5. Click **Save** to save changes for all objects.

After administrators enable topics for an object, users with the appropriate topics permissions can:

- See topic assignments and suggestions on records of that object type that they have access to
- Add and remove topics from records of that object type that they have access to
- Use topics on records of that object type to filter their list views

Additionally, if your organization uses Chatter, users can click topics assigned to records to go to topic pages and discover related information, including posts and comments, files, groups talking about topics, and people who are knowledgeable about topics.


# Add Topics to Records

Add topics to records to organize them by common themes and retrieve them in list views.

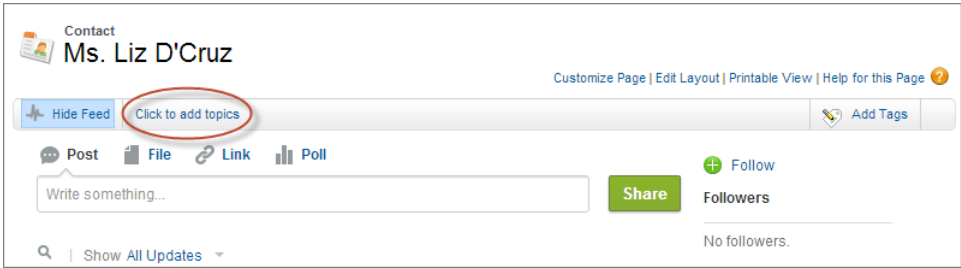
Available in: All Editions

User Permissions Needed	
To add existing topics to a record:	“Read” on the record AND “Assign Topics”
To add new topics to a record:	“Read” on the record AND “Create Topics”

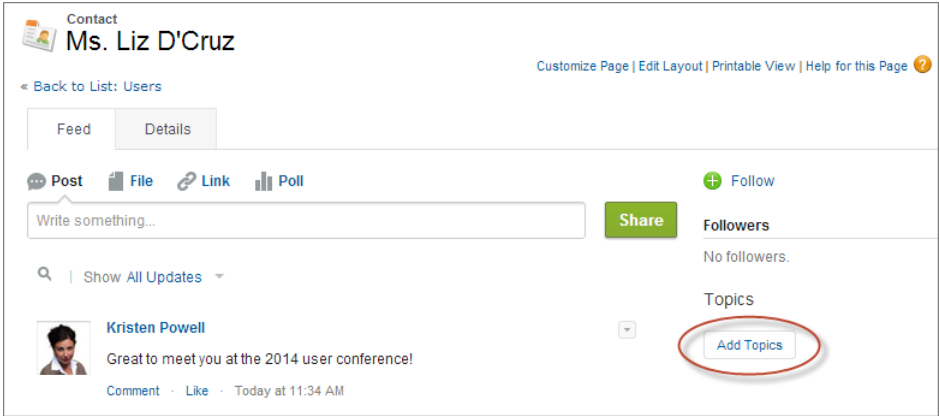
Topics for objects must be enabled before you can add topics to records of that object type.

 **Note:** All topic names are public and appear in search results, but this doesn’t affect the visibility of records that have topics.

- 1. On the top of the record detail page under the record name, click **Click to add topics**. If the record already has topics, click **Topics**.



If your administrator enabled feed-based layouts, click **Add Topics** in the sidebar of the feed view.



- 2. In the topic editor, start typing your text. As you type, you can pick a topic from the list of suggestions, or keep typing to create your own unique topic. To add more than one topic, type a comma after each topic.

Commas ( , ) and closing square brackets ( ] ) automatically end a topic. Other punctuation, symbols, and separators are supported in topic names.

Records can have up to 100 topics.

3. When you're done adding topics, click **Done** or press ENTER.

You can now use topics you added to records to filter your list views. If your administrator enabled Chatter, the topics you add to records become links to topic detail pages. Topic detail pages don't display any information about records that have the topic, but they can provide valuable information, such as people who are knowledgeable about the topic and groups that are talking about the topic. Chatter posts on a record don't automatically have a relationship to topics you add to that record, unless you also add the same topics to posts on that record.

Topics in List Views

Use topics to filter your list views.

Available in: All Editions

If topics are enabled for an object, you can use the `Topics` field to filter your list views for the object.

Opportunities

Create New View

Help for this Page

Save

Cancel

Step 1. Enter View Name

= Required Information

View Name:

NE Pipeline Opportunities

View Unique Name:

NE\_Pipeline\_Opportunitie

Step 2. Specify Filter Criteria

Filter By Owner:

Field Filters Help

Filter By Additional Fields (Optional):

Field	Operator	Value	
Forecast Category	equals	Pipeline	AND
Topics	includes	North East	AND
--None--	--None--		AND

You can't use filter logic if your field filters use the `Topics` field. The `Topics` field isn't available as a field you can display in your list views.

File Storage Per Paid User License Increased from 612 MB to 2 GB for Enterprise, Performance, and Unlimited Editions

File storage limits have increased for Enterprise, Performance, and Unlimited Edition organizations. Review the current per-user and per-organization limits for file storage and data storage.

Available in: Enterprise, Performance, and Unlimited Editions



**Note:** Increased file storage is available within one month after Spring '14.

Each edition offers a minimum amount of data storage and file storage. File storage includes files in attachments, the Documents tab, the Files tab, the File field, Salesforce CRM Content, Chatter (including user photos), and Site.com assets. Data storage includes the following:

- Accounts
- Article types (format: “[*Article Type Name*]”)
- Article type translations (format: “[*Article Type Name*] Version”)
- Campaigns
- Campaign Members
- Cases
- Case Teams
- Contacts
- Contracts
- Custom objects
- Email messages
- Events
- Forecast items
- Google docs
- Ideas
- Leads
- Notes
- Opportunities
- Opportunity Splits
- Quotes
- Quote Template Rich Text Data
- Solutions
- Tags: Tag applications
- Tags: Unique tags
- Tasks

For file storage, Contact Manager, Group, Professional, Enterprise, Performance, and Unlimited Editions are allocated a per-user limit multiplied by the number of users in the organization plus an additional per-organization allocation. For example, an Enterprise Edition organization with 600 users receives 1,211 GB of file storage, or 2 GB per user multiplied by 600 users plus an additional 11 GB. A Professional Edition organization with 600 users receives about 370 GB of file storage, or 612 MB per user multiplied by 600 users plus an additional 11 GB.

For data storage, Contact Manager, Group, Professional, Enterprise, Performance, and Unlimited Editions are allocated either 1 GB or a per-user limit, whichever is greater. For example, a Professional Edition organization with 10 users receives 1 GB because 10 users multiplied by 20 MB per user is 200 MB, which is less than the 1 GB minimum. A Professional Edition organization with 100 users receives more than the 1 GB minimum because 100 users multiplied by 20 MB per user is 2,000 MB.

The values in the Storage Allocation Per User License columns below apply to Salesforce and Salesforce Platform user licenses.

Salesforce Edition	Data Storage Minimum Per Organization	Data Storage Allocation Per User License	File Storage Allocation Per Organization	File Storage Allocation Per User License
Contact Manager	1 GB	20 MB	11 GB	612 MB
Group	1 GB	20 MB	11 GB	612 MB
Professional	1 GB	20 MB	11 GB	612 MB
Enterprise	1 GB	20 MB	11 GB	2 GB
Performance	1 GB	120 MB	11 GB	2 GB
Unlimited	1 GB	120 MB	11 GB	2 GB
Developer	5 MB	N/A	20 MB	N/A
Personal	20 MB (approximately 10,000 records)	N/A	20 MB	N/A



**Note:** If your organization uses custom user licenses, contact salesforce.com to determine if these licenses provide additional storage.

## Skills—Pilot

Skills allow users to share information about their professional expertise. With skills, users can discover, collaborate with, and endorse others based on their knowledge.

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



**Note:** The Skills feature is currently available through a pilot program. For information on enabling skills for your organization, contact salesforce.com.

The Skills feature makes it easier to identify experts in different areas. Users can add or delete skills on their Chatter profile page or on platform detail pages, and other users can endorse those skills. Use the global search bar to search for experts with specific skills.

Chatter is not required to use skills. Users can add, remove, and endorse skills directly on the user detail page and platform detail pages.

Administrators can customize the skill and endorsement objects in the same way they can edit other objects. This includes adding custom fields, modifying page layouts, and adding triggers, workflow, and validation rules.

Additionally, administrators can change object permissions for the skill and endorsement objects to suit the needs of their organization. For example, you can configure object settings so users can't create skills, and only skills created by an administrator can be assigned to others. By default, supported user profiles have the ability to see, create, edit, and remove skills, and administrators have "Modify All Data" and "View All Data" permissions.



**Note:** Chatter Free, Chatter External, and portal users do not have access to skills. The Skills feature is not supported in Communities.

Note the following restrictions:

- All skill records are visible to users with the “Read” permission on Skills.
- Skill User and Endorsement records can only be deleted by the owner and users with the “Modify All Data” permission.
- Users can only endorse others, not themselves. Users can’t be endorsed more than once by the same person on the same skill.

Administrators can endorse users on behalf of other users through the API.

- Users can’t see the skills widget on a Chatter profile page unless Chatter is enabled and users have the “Read” permission on Skills and Skill Users.

**Enable Skills—Pilot**

Enable skills in your organization to allow users to share their professional expertise.

**Add a Skill—Pilot**

Add skills to share your professional expertise.

**Remove a Skill—Pilot**

Remove a skill if it no longer applies.

**Endorse a Skill—Pilot**


Endorse a user’s skill to promote their expertise in a specific area.

Enable Skills—Pilot

Enable skills in your organization to allow users to share their professional expertise.

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

User Permissions Needed	
To enable skills:	“Customize Application”

 **Note:** The Skills feature is currently available through a pilot program. For information on enabling skills for your organization, contact salesforce.com.

1. From Setup, click **Customize > Skills > Settings**.
2. Select `Enable Skills`.
3. Optionally, select `Use Platform UI For Editing Skills` to disable editing skills and endorsements directly within Chatter.  
  
This disables inline editing of skills on Chatter profiles, and instead links users to a list view that allows them to edit the skills.
4. Click **Save**.

Add a Skill—Pilot

Add skills to share your professional expertise.

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

User Permissions Needed	
To add skills:	“Create” on Skills and Skill Users



**Note:** The Skills feature is currently available through a pilot program. For information on enabling skills for your organization, contact salesforce.com.

1. From Setup, click **Manage Users > Users**.
2. Click on your name to open your user detail page.
3. In the User Skills related list, click **New Skill**.
4. Enter the name of your skill and an optional description.
5. Click **Save**.  
The skill is created.
6. Under the People with Skill section, click **Add User**.
7. Enter your name in the User field.
8. Click **Save**.  
The skill is associated with you.

You can also add skills on Chatter profile pages.

## Remove a Skill—Pilot

Remove a skill if it no longer applies.

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

User Permissions Needed	
To remove skills:	“Read” on Skills AND “Delete” on Skill Users



**Note:** The Skills feature is currently available through a pilot program. For information on enabling skills for your organization, contact salesforce.com.

1. From Setup, click **Manage Users > Users**.
2. Click your name to open the user detail page.
3. In the User Skills section, click **Del** next to the skill you want to remove.
4. Click **OK**.

The skill is no longer associated with you, but it’s not deleted. Only skill owners with the proper permissions and users with “Modify All Data” can delete skills.

You can also remove skills on Chatter profile pages.


## Endorse a Skill—Pilot

Endorse a user’s skill to promote their expertise in a specific area.



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

User Permissions Needed	
To add endorsements to skills:	“Create” on Endorsements
	AND
	“Read” on Skills and Skill Users

 **Note:** The Skills feature is currently available through a pilot program. For information on enabling skills for your organization, contact [salesforce.com](https://salesforce.com).

1. From Setup, click **Manage Users > Users**.
2. Click the name of the user you’d like to endorse.
3. In the User Skills section, click the Skill User Name or Endorsements link next to the skill you’d like to endorse.
4. Click **Add Endorsement**.
5. Click **Save**.

You can also endorse skills on Chatter profile pages.


# Search More Fields for Users and Opportunities in Enhanced Lookups

Here are a few changes affecting enhanced lookup searches. You can now enable enhanced lookups for opportunities. Also, enhanced lookups for both users and opportunities now support the All Fields search option. For users, we no longer support single-character searches (except for searches in Chinese, Japanese, Korean, and Thai) nor the use of a wildcard at the beginning of search terms.

By default, enhanced lookups query a limited set of fields, known as *Name* fields, for each object. If your search for a record returns a large number of matches, such as a user with a common name, you can instead query all searchable fields for that record to narrow your results. In the enhanced lookup search dialog, select **All Fields** and enter other search terms unique to the record, such as the user’s email address.

For more information about Name fields and searchable fields per object, see “Searchable Fields in Lookup Searches” and “Searchable Fields by Object” in the Salesforce Help.

# Auto-Saving of Records with Lookup Values Now Supports Enhanced Lookup Searches

When users are editing a record, if they enter a value in a lookup field then save the record without clicking the lookup icon , Salesforce now automatically performs an enhanced lookup search if the object is configured to use enhanced lookups.

By default, saving a record with a typed-in value in a lookup field performs a standard lookup, which queries a limited set of fields. Enhanced lookups allow you to query and search more fields per object and narrow your search results. Here’s what can result from the lookup search.

- One exact match—Assigns that value to the lookup field and automatically saves the record
- More than one possible match—Displays a drop-down list of matches for users to select from

- No matches—Displays an error

For more information on enhanced lookups, see “Lookup Dialog Search” and “Searchable Fields in Lookup Searches” in the Salesforce Help.

# Mobile

Stay productive on the go with Salesforce mobile apps, including Salesforce1 and SalesforceA.

## **Salesforce1**

The Salesforce1 app lets users stay up to date on their most-important records, activities, conversations, and dashboards—from wherever they are.

## **SalesforceA**

Manage users and view information for Salesforce organizations from your mobile device.

## **Salesforce Touch Has Upgraded to Salesforce1**

Salesforce Touch has upgraded to the new Salesforce1 experience. As a result, the Salesforce Touch mobile browser app is no longer available, nor is the Salesforce Touch downloadable app available anymore on the App Store.

## **Chatter Mobile for Android and iOS Have Upgraded to Salesforce1**

The Chatter Mobile for Android and Chatter Mobile for iPhone and iPad apps have upgraded to Salesforce1 v5.0. Chatter Mobile for BlackBerry isn't upgrading to the Salesforce1 app.

## **View a Mobile User's Push Registration Information**

With the Mobile Push Registrations Page, you can view any user's push registration information for general troubleshooting.

## **"Mobile Ready" Label Changed to "Salesforce Classic Ready"**

To clarify the role of the `Mobile Ready` checkbox that exists on Visualforce Tab setup pages, the checkbox has been renamed to `Salesforce Classic Ready`.

# Salesforce1

The Salesforce1 app lets users stay up to date on their most-important records, activities, conversations, and dashboards—from wherever they are.

## **Introducing the Salesforce1 App**

The Salesforce1 app is Salesforce on the go! This enterprise-class mobile app gives you real-time access to the same information that you see in the office, but organized for getting work done faster when you're between customer meetings, waiting for a flight...even when you're in line for coffee.

## **Salesforce1 Features**

The new Salesforce1 app includes a broad range of features and functionality designed to help users stay connected and productive wherever they are. These features are based on the Salesforce experience and are optimized for mobile devices.

## **Salesforce1 Enhancements in this Release**

The Spring '14 release of the Salesforce1 mobile browser and downloadable apps includes several new and enhanced features.

## **Requirements for Using Salesforce1**

These are the requirements and supported environments for using the Salesforce1 downloadable and mobile browser apps.

### **Data That's Supported in Salesforce1**

The Salesforce1 app uses your organization's Salesforce edition, user license types, and assigned user profiles and permission sets to determine the data that's available to each user. In most cases, users see the same objects, record types, fields, and page layouts that they do when working in the full Salesforce site. Not all Salesforce data is supported in this release, however.

### **Options for Accessing the Salesforce1 App**

The way users access Salesforce1 depends on how you configure your organization.

### **Learn about Using Salesforce1**

The Salesforce1 app includes a **Help** link that you can use to learn about using the mobile app.

### **Set Up Your Organization to Use the Salesforce1 App**

There are several ways that you can customize the Salesforce1 app for your organization, to make it easier for your users to work effectively on the go.

### **Salesforce1 Differences from the Full Salesforce Site**

The Salesforce1 app doesn't have all of the functionality of the full Salesforce site, and in some cases includes features that aren't available in the full site.

### **Develop for the Salesforce1 App Overview**

There are several Force.com platform enhancements in the Winter '14 and Spring '14 releases that support Salesforce1 development.

## **Introducing the Salesforce1 App**

The Salesforce1 app is Salesforce on the go! This enterprise-class mobile app gives you real-time access to the same information that you see in the office, but organized for getting work done faster when you're between customer meetings, waiting for a flight...even when you're in line for coffee.

The intuitive interface is optimized for easy navigation and data interaction on a touchscreen, so you can review details, update data, and create new records with just a few taps. And Salesforce1 includes many of your organization's Salesforce customizations, which means your mobile experience is as tailored to your specific business needs as you need it to be.

You can get Salesforce1 in different ways:

- As a downloadable app from the App Store and Google Play™. Users can install the app directly on Apple® and Android™ mobile devices.
- As a mobile browser app that runs in supported mobile browsers on Apple and Android mobile devices. This option doesn't require anything to be installed.



#### **Note:**

This release of Salesforce1 doesn't have all of the functionality of the full Salesforce site. To see data or do actions that aren't supported in Salesforce1, use the full site instead.

## **Salesforce1 Features**

The new Salesforce1 app includes a broad range of features and functionality designed to help users stay connected and productive wherever they are. These features are based on the Salesforce experience and are optimized for mobile devices.

Here's an overview of what Salesforce1 offers.

**Collaborate on the go**

Access Chatter feeds, groups, people, and files to stay connected to colleagues and customers on the go, keep tabs on records you're following, and share files from anywhere.

**Work faster**

Log calls, add meeting notes, create and update records, and more...right in the feed.

**Keep track of community activity**

Switch from your internal organization into any of the communities you're a member of.

**Keep up to date with your customers**

Reach out to accounts and contacts directly from their Salesforce records, log calls and emails after you make them, access customer Twitter profiles, and keep current on news about your customers.

**Stay on top of your CRM data**

Create and edit sales, service, marketing, and custom object records right from your mobile device—no more scribbling notes on scrap paper after client meetings so you can update records when you're back at your desk.

**Find what you need**

Quickly and easily find the data you need with just a few taps. Use list views, recently accessed records lists, and global or record search.

**Manage your day**

Use Today to prepare for meetings, tap your way into conference calls, and get directions to your next appointment.

**Track your activities**

Manage your time in the field effectively: Use lists to track and manage tasks, close or reopen tasks with one tap, create tasks and events on the spot, and view existing Salesforce events.

**Measure your progress**

Monitor dashboards to stay current on whatever you're measuring, wherever you are.

**Keep posted**

Receive notifications in Salesforce1 for approval requests, task assignments, and important feed activity, such as when someone mentions you, posts to your profile, or comments on your post.

**Customize the Salesforce1 experience**

Create and integrate mobile-optimized Visualforce pages and custom publisher actions to put custom tools, functionality, and user interfaces at users' fingertips.

**Use custom and third-party apps**

Easily tailor Salesforce1 to your company's specific needs by integrating custom apps built on the Salesforce1 Platform and third-party apps.

**Maintain permissions**

Use role and profile-based permissions and sharing to ensure that the right users have access to the right data, no matter how they access Salesforce.

**Feel secure**

Salesforce1 uses the same level of identity and security as the full Salesforce site, which means your data is as safe when you're working on your mobile device as it is when you're working on your desktop.

## What's Available in Each App

In most cases, the Salesforce1 downloadable and mobile browser apps include the same features. But there are some differences between the apps.

Feature	Mobile Browser App	Downloadable Apps for iOS and Android
Receive push notifications		✓
Receive in-app notifications	✓	✓
Use the publisher and publisher actions (Requires Chatter)	✓	✓
Use Chatter feeds, people, and groups	✓	✓
Attach photos or files to posts or comments, or use publisher actions to post photos or files	✓	✓
Share Chatter posts		✓
See previews of files posted to a feed	✓	✓
Double-tap to add or remove bookmarks for Chatter posts		✓
Use the app when Chatter is turned off	✓	✓
Search for Salesforce records	✓	✓
Search in a feed		✓
Search for files		✓
Use list views	✓	✓
Use record actions to make phone calls, log calls, send emails, map locations, and view news or Websites (Phone calls supported on Android phone and iPhone devices only)	✓	✓
Locate, associate, and view Twitter profiles for Salesforce accounts, contacts, and leads	✓	✓
Add new records and update existing records	✓	✓
Use Today (Available on Android phone and iPhone devices only)		✓

Feature	Mobile Browser App	Downloadable Apps for iOS and Android
Track, close, or reopen tasks	✓	✓
Create and view Salesforce events	✓	✓
View dashboards and dashboard component details	✓	✓
Use Salesforce Files ( <i>Requires Chatter</i> )		✓
Launch Salesforce1 from Salesforce email notifications		✓
View Visualforce pages	✓	✓
Access communities	✓	
Access custom and third-party apps from the navigation menu or the publisher	✓	✓
Use app settings		✓
Configure connections to multiple instances		✓
Control app access with a security PIN		✓

## Salesforce1 Enhancements in this Release

The Spring '14 release of the Salesforce1 mobile browser and downloadable apps includes several new and enhanced features.

Enhancement	Mobile Browser App	iOS Downloadable App	Android Downloadable App	Setup Menu in Full Site
<a href="#">Access Salesforce Communities in Salesforce1</a>	✓			
<a href="#">Customize the Salesforce1 app to reflect your company's branding</a>	✓			✓
<a href="#">Receive more notification types, and keep notifications up to 90 days</a>	✓	✓	✓	
<a href="#">Set push notifications to include minimal content or full content</a>				✓
<a href="#">Add dashboards to the Salesforce1 navigation menu, either as a separate item or as part of the Smart Search Items in the Recent section</a>				✓
<a href="#">Add canvas apps to the Salesforce1 navigation menu</a>				✓

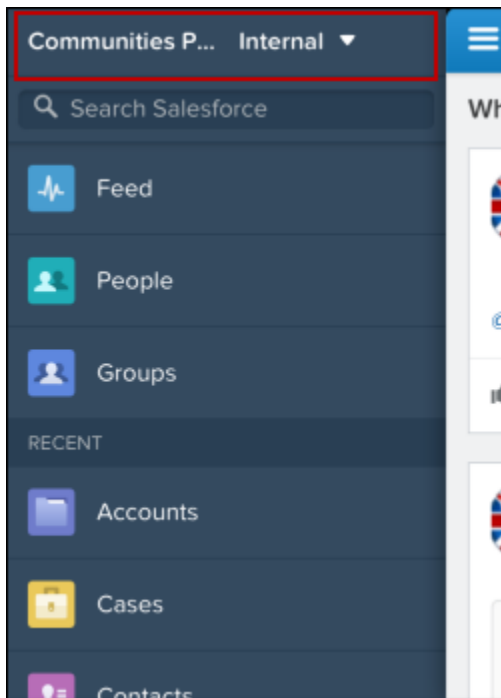
Enhancement	Mobile Browser App	iOS Downloadable App	Android Downloadable App	Setup Menu in Full Site
Use new related information pages in user record views to access related lists for Followers, Following, Files, and Groups	✓	✓ (Previously Released in Winter '14)	✓ (Previously Released in Winter '14)	
View the new Skills related list on user records (Pilot)	✓		✓	
Use new group functionality to: <ul style="list-style-type: none"> <li>Create groups from the publisher</li> <li>Add group members from the publisher</li> <li>Edit group details, owner, and access level</li> <li>Archive and activate groups</li> <li>View group announcements</li> <li>Post and view files in groups</li> </ul>	✓	✓	✓	
Customize Chatter group layouts and publisher actions				✓
Do more with files in the feed, including: <ul style="list-style-type: none"> <li>Upload photos from mobile devices</li> <li>See previews of files posted to feeds</li> </ul>	✓	✓ (Previously Released in Winter '14)	✓ (Previously Released in Winter '14)	
Use global search to find dashboards	✓			
View and edit rich text area fields	✓	✓	✓	
Call, log calls to, or send email to leads	✓	✓	✓	
View profile images for leads	✓	✓	✓	
Access social networking with Twitter for accounts, contacts, and leads	✓	✓	✓	✓
Use more Today features, including: <ul style="list-style-type: none"> <li>Quickly let people know you're running late to a meeting or won't be able to make it</li> <li>Review Salesforce user records, as well as contacts or person accounts, that are associated with a meeting's organizer or invitees</li> <li>Use Today on Apple iPad devices</li> </ul>		✓	✓	
View embedded report charts on record detail pages for any standard or custom object	✓	✓	✓	
Work with these objects that are now available in the mobile apps: D&B Company, Opportunity Products, Opportunity Team, Orders, Quotes, and Quote Line Items	✓	✓	✓	



## Salesforce Communities Now Available

Starting in Spring '14, users can view and switch between communities and their internal organization from the Salesforce1 app.

Salesforce1 offers a convenient way to keep track of community activity from a mobile device. Simply use the drop-down at the top of the Salesforce1 navigation menu to switch from your internal organization into a community. Members of your communities that have Customer Community, Partner Community, or other supported portal licenses, can use the drop-down to access and switch between their communities.



The drop-down lists the communities that users are members of.

Communities in Salesforce1 works similarly to the full Salesforce site, with some minor differences. See [Differences in Using Communities](#).

## Customize Salesforce1 App Branding

Now you can customize the appearance of the Salesforce1 app to match your company's branding.

In the full Salesforce site, in Setup, click **Mobile Administration** > **Salesforce1** > **Branding**.

You can customize:

- The background color for the loading page.
- The image that is used as the logo on the loading page.
- The background color used in the Salesforce1 header.
- The image that is used as the Publisher icon.



**Note:** Currently, custom branding displays in the Salesforce1 mobile browser app only. The Salesforce1 downloadable apps will support custom branding in an upcoming release. The Salesforce1 Branding page in Setup will be updated to let you know when the downloadable apps support custom branding.

## Notifications Enhancements

Spring '14 introduces some enhancements to notifications in Salesforce1.

Notification Type	Enhancement
You were assigned to a task	New notification type. Available as in-app and push notifications.
Someone posted to your profile	Now available as push notifications. Previously available only as in-app notifications.
Someone commented on your post	Now available as push notifications. Previously available only as in-app notifications.
An item was flagged as inappropriate	New notification type. Available as an in-app notification when Salesforce Communities is enabled.
All notifications from communities	When a notification from a community appears in your list of notifications, the community name appears after the time stamp. Available when Salesforce Communities is enabled.
All notifications	Now available up to 90 days. However, the Salesforce1 apps still display only the 20 most recent notifications.

## Control the Content Included in Push Notifications

By default, push notifications include minimal content, for example the name of a user. A new option for iOS devices lets you include the full content of events that trigger notifications, including the text of a post or comment in Chatter, a Chatter group's name, or a task description.

In the full site, in Setup, click **Mobile Administration** > **Notifications** > **Settings**. If you're authorized to do so for your company, select `Include full content in push notifications`. When you click **Save**, a pop-up appears displaying terms and conditions. In the pop-up, click **OK** or **Cancel**.



**Note:** By clicking **OK** and enabling full content in push notifications, you're agreeing to the terms and conditions on behalf of your company. For details, see [Salesforce1 Notifications](#) on page 63.

## Related Information Page Now Available in User Record View

In Spring '14, you can now view related information pages for user records using the Salesforce1 mobile browser app, as well as the downloadable apps. The Followers, Files, and Groups related lists are available in all versions of Salesforce1. The Following related list is available in the Salesforce1 for iOS downloadable app only.

With the related information page, it's easier to find information about the different users, files, and groups someone's worked with. Related information is available as the second page in the user record view.

## New Skills Related List—Pilot

The skills related list is now available on user records when viewed in the Salesforce1 mobile browser app or the Salesforce1 for Android downloadable app. Skills requires that Chatter is enabled.



**Note:** Skills are currently available through a pilot program. For information on enabling skills for your organization, contact salesforce.com.

Skills allow users to share information about their professional expertise. With skills, users can discover and collaborate with others based on their knowledge. Currently, users can't add new skills or endorse others in Salesforce1.

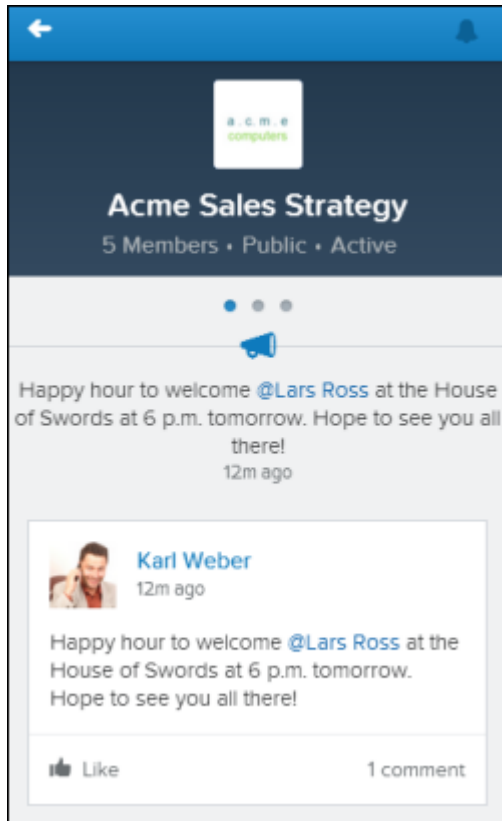
## Chatter Group Enhancements

For groups in Salesforce1, you can now:

- [Customize the group layout and publisher actions](#) to suit your organization's needs.
- Add the New Group global action to global, group, and object-specific publisher layouts to allow users to create groups from the publisher.
- Add the New Group Member action to the group publisher layout to allow users to add group members from the group publisher.
- Add the Announcement action to the group publisher layout to allow group owners and managers to post announcements.
- Customize the fields in the Group Detail section to allow users to edit group details from Salesforce1. Depending on the fields you include, group owners, group managers, and users with the "Modify All Data" permission can:
  - ◇ Update the group name, description, owner, and access levels on the group detail page.
  - ◇ Select or deselect the **IsAutoArchiveDisabled** checkbox to disable or enable automatic archiving for a group.
  - ◇ Select or deselect the **IsArchived** field to archive or activate groups.

In addition, users can:

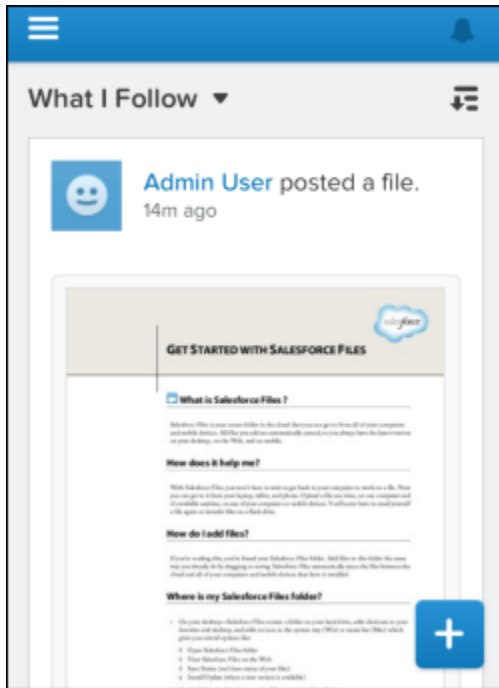
- View the group files related list in addition to group members.
- View, comment on, and (with permissions) delete group announcements. Announcements display below the group highlights. Users tap an announcement to view the announcement post in the group feed, where they can comment on or delete the announcement.



## New Options for Working with Files in Salesforce1

Spring '14 includes some new ways that users can work with files in the Salesforce1 mobile browser app.

- Users can post photos to their feeds using the **Photo** action in the publisher. It's possible to select existing images from a mobile device's photo library or to take and upload new pictures.
- Users now see previews of files shared in the feed. As seen in the example below, the file preview makes it easy for users to identify the contents of a posted file.



## Search and Navigation Enhancements for Dashboards

Prior to Spring '14, users could search for dashboards from the Dashboards search page only. Now dashboards are included in global search results as well.



Related to this change, if you decide to not include the Dashboards item in the Salesforce1 navigation menu, Salesforce1 now includes the dashboards object in the Smart Search Items node on the navigation menu. This allows users to access their dashboards from the Recent section in the menu. If you do add the Dashboards item to the menu, dashboards aren't accessible from the Recent section. For more information, see [Customize the Salesforce1 Navigation Menu](#), and Salesforce1 Navigation Menu in the Salesforce Help.



**Tip:** It can take up to 15 days for objects you work with to appear in the Recent section. To make objects appear under Recent sooner, pin them from your search results in the full Salesforce site.

## Call, Log Calls to, and Send Email to Leads

In the previous release of Salesforce1, users could send email messages, make phone calls, or log calls made to accounts and contacts. Starting with Spring '14, these features are also available for leads.

- Tap  to initiate a phone call, or to log a call made outside Salesforce1. If  isn't visible, make sure a phone number is listed for the lead and that the user has permission to edit tasks.



**Note:** Phone calls are supported on Android phone and iPhone devices only.

- Tap  to open a new email message. If  isn't visible, make sure an email address is listed for the lead.

## View Profile Images for Leads

Previously, profile images displayed for accounts and contacts, but not for leads.

Starting in Spring '14, if a lead is linked to a social network profile, the profile image selected for the lead displays when a user views the lead in Salesforce1. Profile images from LinkedIn appear only when the user is logged in to LinkedIn in the full Salesforce site; images from Facebook or Twitter might appear even if the user isn't currently logged in to those networks.

The profile image that's displayed for a lead can be changed in to the full Salesforce site but not from the Salesforce1 app.

## Access Twitter Profiles, Profile Images, and Tweets for Accounts, Contacts, and Leads

Salesforce1 users can now leverage the power of social media to connect with their customers—anytime, anywhere. Users can locate, associate, and view Twitter profiles for Salesforce accounts, contacts, and leads. Once a Twitter user profile is associated with a record, it's easy to view recent Tweets. And the new *People in Common* feature, exclusive to the Salesforce1 app, helps users discover common connections to accounts, contacts, or leads.



Twitter in Salesforce1 requires that Social Accounts and Contacts is enabled for your organization, and that the Twitter component is added to the Mobile Cards section of your accounts, contacts, and leads page layouts. See [Add the Twitter Card to a Page Layout](#) for details.

### Edit a Twitter Profile Association

Users can associate accounts, contacts, and leads with Twitter profiles, or change or remove existing associations.

User Permissions Needed
To associate, change, or remove Twitter profiles and business account records: “Edit” on accounts
To associate, change, or remove Twitter profiles and person account records: “Edit” on accounts and contacts
To associate, change, or remove Twitter profiles and contacts: “Edit” on contacts
To associate, change, or remove Twitter profiles and leads: “Edit” on leads

As in the full Salesforce site, users must have a Twitter account to edit associations with Twitter user profiles.

- Associate or view Twitter profiles from the Twitter card on the related information page in a record view.
  - To associate a Twitter profile, tap **Sign in to Twitter** and log in to Twitter, or tap **Search for Twitter Profile**.
  - To change the Twitter profile association, tap , then tap **Change Association**.
  - To remove the Twitter profile association, tap , then tap **Remove Association**. The association will be removed.
- Salesforce1 will search for Twitter profiles matching the name of the account, contact, or lead. If the search doesn't return any results, or if none of the results appear to be the right Twitter user, change the search and try again.



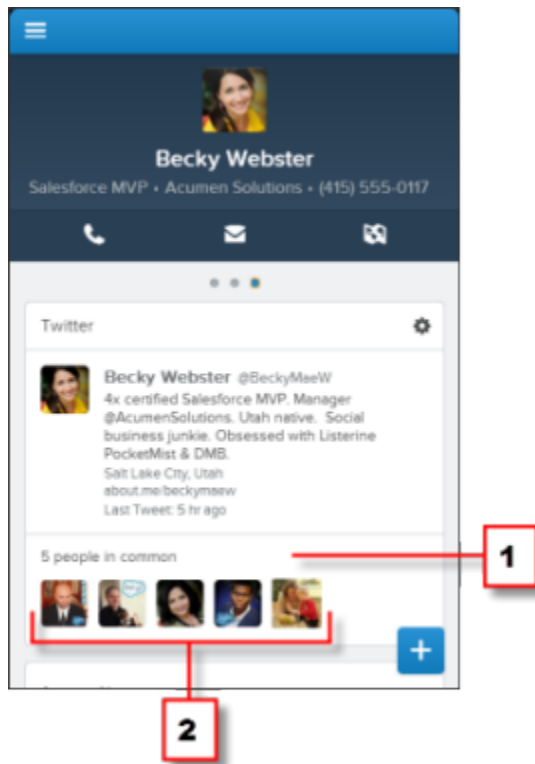
**Note:** No more than 15 Twitter profiles can be associated within 15 minutes.

- Tap a Twitter profile to associate it.

## Use People in Common

Discover common connections with accounts, contacts, or leads using the new *People in Common* feature, which is included in Salesforce1 only. People in Common is available in the Twitter card on the account, contact, or lead related information page. It displays Twitter users who the Salesforce user follows on Twitter, and who the account, contact, or lead also follows.


Salesforce1 only displays Twitter user profile images for up to five common connections, even if more than five common connections exist.



1. People in Common.
2. Tap a Twitter user icon to view that user's Twitter profile.

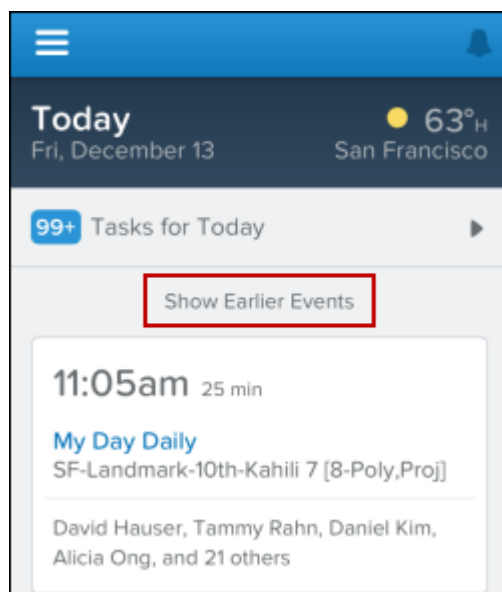
## Today Enhancements

In Spring '14, Today includes these new and improved features.

- Users can quickly let people know they're running late to a meeting or won't be able to make it by tapping the  icon. There are several new, canned "running late" messages to choose from, or users can write their own email messages.

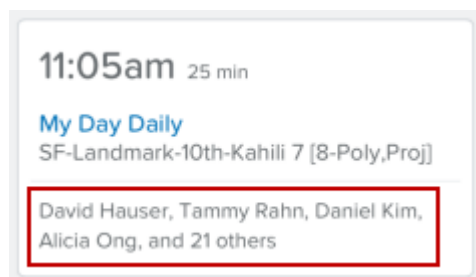


- Today now attempts to link invitees and meeting organizers to matching Salesforce user records, as well as to contacts or person accounts. As with contacts and person accounts, a user record is a match if the `Email` field contains the same email address that's used in the event for an invitee or meeting organizer.
- To make it easier to manage the day, the cards for events that occurred earlier in the day are now collapsed on the event list. Tap **Show Earlier Events** to expand the event list to show all the day's events.



- Event cards now show the names of up to four invitees instead of simply displaying the total number of invitees.





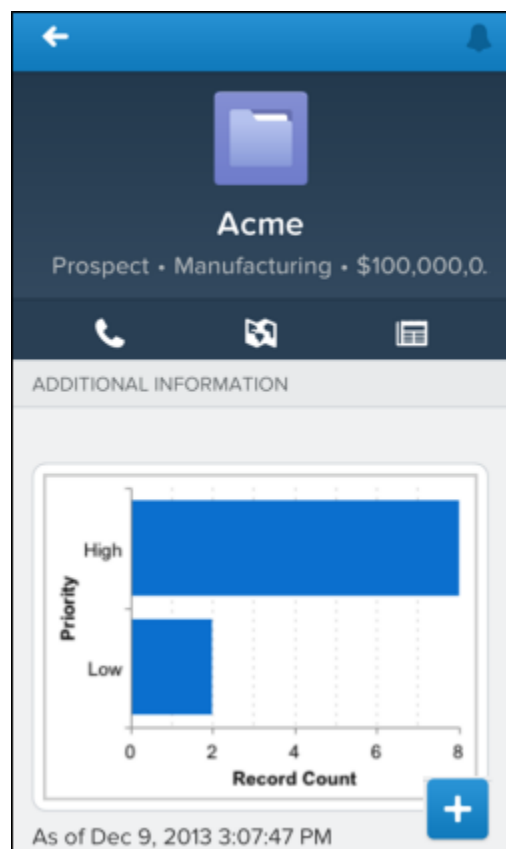
- Today is now available on Apple iPad devices, as well as Android phones and iPhone devices.

## View Embedded Charts in Salesforce1

Report charts that you add to page layouts are now automatically visible in the Salesforce1 app. You can embed report charts in record detail pages for any standard or custom object.

Users can get the report data they need right where they are working in the app, without having to go to the full Salesforce site. Charts are automatically filtered based on the object they are embedded in.

To refresh the chart, just tap the component view.



## New Supported Data

The Salesforce1 app now supports these objects: D&B Company, Opportunity Products, Opportunity Team, Orders, Quotes, and Quote Line Items.

## D&B Company

For organizations that use Data.com Premium Prospector or Data.com Premium Clean, the D&B Company object is now available and gives your users access to over 70 additional D&B fields.

To access the D&B Company object, click the link in the `D&B Company` field on the detail page of any account record. If the record's `D&B Company` field is blank, a link is created, if available, when the record is cleaned in the full Salesforce site.

## Opportunity Products, Opportunity Team, Quotes, and Quote Line Items

These objects are now available as related lists on opportunity records. Users can view and edit these objects in Salesforce1.

The publisher isn't available for these objects.

## Orders

Users can view and edit orders in Salesforce1. The Order object is available as a Smart Search Item in the Salesforce1 navigation menu when all of the following statements are true.

- Orders are enabled for your organization.
- Order records have been created in the full site.
- The Orders tab has been added to a Force.com app.

Orders are automatically enabled for new organizations. If your organization existed before the Spring '14 release, see [Enable Orders](#).

To add the Orders tab to a Force.com app:

1. From Setup in the full site, click **Create > Apps**.
2. Click **Edit** next to one of your Force.com apps, such as Sales.
3. Select **Orders** in `Available Tabs`, and then click the right arrow button to add the Orders tab to the app.
4. Click **Save**.

See [Differences in Working with Salesforce Data](#) for notes about using these objects in Salesforce1.

# Requirements for Using Salesforce1

These are the requirements and supported environments for using the Salesforce1 downloadable and mobile browser apps.

## Supported Devices

You can run the Salesforce1 downloadable and mobile browser apps on these mobile devices.

- Apple mobile devices with iOS 7 or later:
  - ◊ iPhone® 4 and later models
  - ◊ iPad® 2 and later models (including the iPad mini)
- Android phones with Android 4.2 or later

## Supported Browsers

You can run the Salesforce1 mobile browser app in one of these mobile browsers.

- For iOS devices:
  - ◊ The default Apple browser, Safari®

- For Android devices:
  - ◊ Chrome™ for Android devices
  - ◊ The stock Android browser supplied by your manufacturer

For best results, Private Browsing in Safari or Incognito Mode in Chrome should be turned off.

### Salesforce Editions and Licenses

These Salesforce editions allow the use of Salesforce1. A special Salesforce1 or mobile license isn't required.

- Contact Manager Edition
- Developer Edition
- Enterprise Edition
- Group Edition
- Performance Edition
- Personal Edition
- Professional Edition
- Unlimited Edition

Database.com Edition isn't supported.

These user license types can access Salesforce1.

- Salesforce users
- Salesforce Platform and Force.com users
- Chatter Plus users, Chatter Free users, and Chatter customers
- Customer Community and Partner Community external users
- Portal users who are a member of a Salesforce community

These user license types aren't supported: portal users (unless a member of a Salesforce community), Database.com users, Sites and Site.com users, Data.com users, and Work.com users.



**Note:** You can access the same data and functionality that's available to you in the full site, as determined by your organization's Salesforce edition, your user license type, and your assigned user profile and permission sets.

### Wireless Connection

A Wi-Fi® or cellular network connection is required to communicate with Salesforce. For the best performance, we recommend using Wi-Fi.

If Chatter is enabled, however, the Salesforce1 downloadable app includes support for viewing Files when a mobile device is offline.

### Locales and Languages

Salesforce1 works with almost all Salesforce-supported locales and the fully-supported and end user languages. (The Salesforce Help includes a complete list of supported locales and languages.) Languages that are read right to left, including Arabic and Hebrew, aren't supported in this release.

Salesforce1 includes multi-currency support, but advanced currency management isn't available.

### Accessibility

Salesforce1 is designed with accessibility in mind and delivers a fully-accessible mobile experience for all individuals, including users working with screen readers. Unlike the full Salesforce site, Salesforce1 doesn't require accessibility mode to give users working with assistive devices a fully accessible experience.

Check your mobile device's documentation for more information about using a screen reader.

## Data That's Supported in Salesforce1

The Salesforce1 app uses your organization's Salesforce edition, user license types, and assigned user profiles and permission sets to determine the data that's available to each user. In most cases, users see the same objects, record types, fields, and page layouts that they do when working in the full Salesforce site. Not all Salesforce data is supported in this release, however.

These objects are available from the Salesforce1 navigation menu. Unless noted otherwise, users can view, edit, or create records for these objects.

- Accounts and Person Accounts
- Campaigns
- Cases
- Contacts
- Contracts
- D&B Company (*view only, for Data.com Premium Prospector and Data.com Premium Clean customers*)
- Dashboards (*view only*)
- Leads
- Live Chat Transcripts (*view only*)
- Opportunities
- Orders (*view or edit only*)
- Tasks
- Users
- Custom objects that are included in a Salesforce app

Salesforce events are available from Open Activities and Activity History related lists. And with the downloadable apps on Android phones, iPhone devices, or iPad tablets, Today helps users prepare for meetings, stay in touch with customers, quickly join conference calls, and generally manage their day.

With some exceptions, all of the standard and custom fields are available on supported records, as are most of the related lists for supported objects.

If Chatter is enabled, users can access feeds, people, and groups. And Salesforce Files is available in the downloadable apps.

For global searches in Salesforce1, results are returned for objects that the user recently accessed in the full Salesforce site, with the exception of tasks and events. Results for Chatter people and groups are also returned if an administrator added these items to the Salesforce1 navigation menu. Salesforce Files are searchable in the downloadable apps.

## Options for Accessing the Salesforce1 App

The way users access Salesforce1 depends on how you configure your organization.

### Downloadable Apps

The Salesforce1 downloadable apps for Android phones and iPad and iPhone devices are now generally available. Users can download and install an app from Google Play or the App Store, then launch the app from their device's home screen and log in to their Salesforce account.

The Salesforce1 downloadable apps are connected apps. By default, the apps are available to all users in your organization. But you can configure which users are authorized to log in to the downloadable apps. You can also control other security policies, such as requiring that users enter a security PIN to use the app. See [Configure the Salesforce1 Downloadable Apps](#) for more details.


## Mobile Browser App

The Salesforce1 mobile browser app runs in a supported mobile browser and can be used on Android phones and iPad and iPhone devices. The mobile browser app is a great option if your organization doesn't allow downloadable apps to be installed on company-issued devices.

By default, the mobile browser app is enabled for your organization and all of your users are able to access it. Login sessions from supported mobile browsers are automatically redirected to the app. If you disable the mobile browser app, it's turned off for everyone. See [Enable the Salesforce1 Mobile Browser App](#) for more details.

## Learn about Using Salesforce1

The Salesforce1 app includes a **Help** link that you can use to learn about using the mobile app.

The **Help** link is located in the navigation menu, accessible by tapping the  icon. You can also view the Salesforce1 help from one of these links. Select the link for the mobile experience you're interested in.

- [Salesforce1 mobile browser app on a mobile phone](#)
- [Salesforce1 mobile browser app on a tablet](#)
- [Salesforce1 for iPhone](#)
- [Salesforce1 for iPad](#)
- [Salesforce1 for Android phones](#)

## Set Up Your Organization to Use the Salesforce1 App

There are several ways that you can customize the Salesforce1 app for your organization, to make it easier for your users to work effectively on the go.

Using the Setup menu, which you access from the Setup link on the upper-right corner of any Salesforce page, you can:

- Define the users who can access Salesforce1.
  - ◇ For the downloadable apps, click **Manage Apps** > **Connected Apps**, and select the app you want to configure. (See [Configure the Salesforce1 Downloadable Apps](#).)
  - ◇ For the mobile browser app, click **Mobile Administration** > **Salesforce1** > **Settings**. (See [Enable the Salesforce1 Mobile Browser App](#).)
- Customize how data shows up in Salesforce1.
  - ◇ Optimize your page layouts so they'll display well on mobile devices. You can do this by modifying existing page layouts or by creating new page layouts that are mobile-friendly from the outset.
 

For standard objects, click **Customize** > **Object** > **Page Layouts**. For custom objects, click **Create** > **Objects**, click the name of the object, then click **New** in the Page Layouts related list. (See Customizing Page Layouts in the Salesforce Help.)
  - ◇ Add expanded lookups, components (including the Twitter component), or Visualforce pages to the Mobile Cards section of a page layout to have them display as mobile cards in Salesforce1. (See [New Mobile Cards Section in the Enhanced Page Layout Editor](#) and [Add the Twitter Card to a Page Layout](#).)
  - ◇ Make sure that Visualforce pages are enabled for use in Salesforce1, so they'll display in the app. Click **Develop** > **Pages**, click **Edit** next to the name of a page, and select **Available for Salesforce mobile apps**. (See [Enable Visualforce Pages for Use in the Salesforce1 App](#).)
  - ◇ Define the fields that show up in an object's record highlight area and in record preview cards, by creating custom compact layouts.

For standard objects, click **Customize** > **Object** > **Compact Layouts**. For custom objects, click **Create** > **Objects**, click the custom object name, and click **New** from the Compact Layouts related list. (See [Compact Layout Overview](#).)

- ◇ Verify that your existing search layouts populate Salesforce1 search results with the desired fields. Click **Customize** > **Object** > **Search Layouts**. (See [Search Layouts in Salesforce1](#).)
- Make it easy and efficient to work in the field by creating publisher actions tailored to your specific business activities and use cases. Publisher actions are available if Chatter is enabled. (See [Publisher Actions in the Salesforce1 App](#) and [New Publisher Actions for Creating Chatter Groups and Adding Group Members](#).)
  - ◇ Make sure that publisher actions are enabled for your organization. Click **Customize** > **Chatter** > **Settings**.  
Be sure to enable feed tracking on objects for which you want to create publisher actions. Click **Customize** > **Chatter** > **Feed Tracking**.
  - ◇ Create global actions that allow users to add new object records with no automatic relationship to other records. Click **Create** > **Global Actions**. To customize the fields that are used by publisher actions, click **Layout** on the Global Actions page.  
Then add the new actions to the global publisher layout so they'll show up in the Salesforce1 apps. Click **Customize** > **Chatter** > **Publisher Layouts**.
  - ◇ Create object-specific actions that allow users to add new records or update data in existing records. Click **Customize** > **Object** > **Buttons, Links, and Actions**. To customize the fields used by a publisher action, click **Layout** on the Buttons, Links, and Actions page.  
Then add the new actions to the appropriate object page layout so they'll be available in the Salesforce1 apps. Click **Customize** > **Object** > **Page Layouts**.
- Customize the options that are available in the Salesforce1 navigation menu, as well as the order in which items appear. Click **Mobile Administration** > **Mobile Navigation**. (See [Customize the Salesforce1 Navigation Menu](#).)
- Help keep Salesforce1 users aware of important Salesforce activities by enabling in-app and push notifications. Select **Mobile Administration** > **Notifications** > **Settings**. (See [Salesforce1 Notifications](#).)
- Integrate third-party apps into the Salesforce1 navigation menu by adding Flexible Page tabs for the Flexible Pages deployed to your organization. Click **Create** > **Tabs**, then click **New** on the Flexible Page Tabs related list. (See [Creating Flexible Page Tabs](#).)

You may also want to check out the [Salesforce1 App Admin Guide](#), which walks you through using the Salesforce1 declarative tools in Setup to get your organization ready for the Salesforce1 mobile experience.

## Configure the Salesforce1 Downloadable Apps

The Salesforce1 downloadable apps are connected apps. As a result, you can control the users who have access to the apps, as well as other security policies. By default, all users in your organization can log in to the Salesforce1 downloadable apps.

Available in: <b>All</b> editions except <b>Database.com</b>
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User Permissions Needed	
To edit your Salesforce1 downloadable app settings:	"Customize Application"
To view your Salesforce1 downloadable app settings:	"View Setup and Configuration"

You can control security and access policies for each of the Salesforce1 downloadable apps using settings components that are installed from the managed Salesforce1 and Chatter Apps connected apps package. These components need to be installed in Salesforce:

- Salesforce1 for Android
- Salesforce1 for iOS

These components are automatically installed when one of your users installs a Salesforce1 downloadable app from the App Store or Google Play on his or her mobile device and authenticates with your organization by logging in to the mobile app.

Alternatively, you can manually install the Salesforce1 and Chatter Apps connected apps package so you can review and modify the default security and access settings before rolling out the Salesforce1 downloadable apps to your users.

When the Salesforce1 connected apps components are installed, they're added to the Connected Apps page at **Setup > Manage Apps > Connected Apps**. Here, you can view and edit the settings for each of the apps, including controlling user access with profiles, permissions, and IP range restrictions. An error message is displayed if a restricted user attempts to log in to a Salesforce1 downloadable app.

Push notifications for the Salesforce1 downloadable apps aren't managed from the Connected Apps page. To manage these settings, go to **Setup > Mobile Administration > Notifications > Settings**.

## Enable the Salesforce1 Mobile Browser App

You can control whether or not users can access the Salesforce1 mobile browser app when they log in to Salesforce from a mobile browser. By default, the mobile browser app is turned on for your organization.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To view Salesforce1 mobile browser app settings:	"View Setup and Configuration"
To modify Salesforce1 mobile browser app settings:	"Customize Application"
	"Modify All Data"

1. From Setup, click **Mobile Administration > Salesforce1 > Settings**.
2. Select **Enable the Salesforce1 browser app** to allow all users in your organization to access the app. Deselect this option to turn off access to the app.
3. Click **Save**.

When this option is turned on, users who log in to Salesforce from a supported mobile browser are always automatically directed to the Salesforce1 interface. If you want your users to access the full Salesforce site from mobile browsers instead, deselect this option.



### Note:

Automatic redirection to the Salesforce1 mobile browser app is available in supported mobile browsers only. Logging in from an unsupported mobile browser loads the full Salesforce site.

When the mobile browser app is enabled, individual users can turn off the Salesforce1 redirection for themselves in one of these places:

- From the navigation menu in the mobile browser app, by tapping **Full Site**.

- In the full site, by deselecting the `Salesforce1 User` checkbox from either **My Settings > Personal > Advanced User Details** or **Setup > My Personal Information > Personal Information**.

Alternately, you can use SOAP API to quickly turn automatic redirection to the mobile browser app off (or on) for users. When the mobile browser app is enabled, the `UserPreferencesHideS1BrowserUI` field is added to the User object. By default, this field is set to `false`, which turns on automatic access to the mobile browser app for all user records. Change this field to `true` to turn the redirection off for desired users. See the User section in the *SOAP API Developer's Guide* for more information.

## New Mobile Cards Section in the Enhanced Page Layout Editor

You can add components, expanded lookups, and mobile-enabled Visualforce pages to the new Mobile Cards section of the Enhanced Page Layout Editor. The elements you include in this section display as mobile cards in the Salesforce1 app, on the related information page in a record view. Elements in the Mobile Card section don't display on the record detail page in the full Salesforce site.

Components include the new Twitter component, which you can use to add the Twitter card to accounts, contacts, and leads. Twitter cards allows users to locate, associate, and view their customers' Twitter profiles.

The Expanded Lookups category in the enhanced page layout editor contains fields with lookup relationships. These fields, when added to the Mobile Cards section, display as related lookup cards on records. A page layout can include up to 20 expanded lookups.

Mobile-enabled Visualforce pages show up as slightly different-colored elements in the palette than their non-mobile-enabled counterparts. Also, hovering your mouse over a Visualforce page element in the palette shows whether it's mobile-enabled or not. Only Visualforce pages with the `Available for Salesforce mobile apps` checkbox selected will display in Salesforce1.

Some standard objects have mobile cards added for you by default. Customize the page layout to remove them or add additional cards.

## Add the Twitter Card to a Page Layout

If your organization has Social Accounts and Contacts enabled, users can associate accounts, contacts, and leads with Twitter profiles, or change or remove existing associations. To make this feature available in the Salesforce1 app, you need to add the Twitter card to the Mobile Cards section on your accounts, contacts, and leads page layouts.

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

To add the Twitter card to a page layout:

1. Access the page layout for a business account, person account, contact, or lead by doing one of the following:
  - On the detail page for a business account, person account, contact, or lead, click **Edit Layout**.
  - From Setup, click **Customize**, select an object to edit, then click **Page Layouts**



**Note:** If your organization uses both person and business accounts, you'll need to edit layouts for each account type separately. To edit layouts for person accounts, select **Person Accounts** under the Accounts object.

2. Select the Components category on the palette.
3. Drag the `Twitter` component into the Mobile Cards section.



4. Click **Save**.

## Enable Visualforce Pages for Use in the Salesforce1 App

You can use Visualforce to extend the Salesforce1 app and give your mobile users the functionality they need while on the go. Before adding a Visualforce page to Salesforce1, make sure the page is enabled for mobile use or it won't be available in the mobile apps.

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

User Permissions Needed	
To enable the display of Visualforce in Salesforce1:	<p>“Customize Application”</p> <p>“Author Apex”</p>



### Tip:

Before exposing existing Visualforce pages in the Salesforce1 app, consider how they'll look and function on mobile phones and tablets. Most likely, you'll want to create a new page that's designed specifically for mobile form factors.

Visualforce pages must be enabled for mobile use before they can display in these areas of the Salesforce1 user interface:

- The Navigation menu, via a Visualforce tab
- The publisher, via a custom action
- Mobile cards on a record's related information page
- Overridden standard buttons, or custom buttons and links
- Embedded in record detail page layouts

To enable a Visualforce page for Salesforce1:

1. From Setup, click **Develop > Pages**.
2. Click **Edit** for the desired Visualforce page.
3. Select **Available for Salesforce mobile apps** then click **Save**.

Consider these notes about Visualforce support in the Salesforce1 app.

- Standard tabs, custom object tabs, and list views that are overridden with a Visualforce page aren't supported in Salesforce1. The Visualforce page is shown for full site users but Salesforce1 users will see the default Salesforce1 page for the object instead. This restriction exists to maintain the Salesforce1 experience for objects.
- You can also enable Visualforce pages for Salesforce1 through the metadata API by editing the `isAvailableInTouch` field on the `ApexPage` object.
- The **Salesforce Classic Ready** checkbox on Visualforce Tab setup pages is for Salesforce Classic only and has no effect on Visualforce pages in the Salesforce1 apps.

## Compact Layout Overview

Compact layouts are used in Salesforce1 to display a record's key fields at a glance. Compact layouts are designed for viewing records on touchscreen mobile devices, where space is limited and quick recognition of records is important.

Available in: **All** editions except **Database.com**

In the full Salesforce site, compact layouts determine which fields appear in the Chatter feed item that appears after a user creates a record with a publisher action.

In Salesforce1, compact layouts determine the fields that show up in:

- An object’s record highlights area
- An object’s record preview cards (but not the preview cards shown in search results)
- Enhanced lookup cards on a record’s related information page

 **Note:** Compact layouts aren't available for the Salesforce Classic, Chatter Mobile for BlackBerry, or Dashboards for iPad mobile apps.

If you don’t create custom compact layouts, records display using a read-only, predefined system default compact layout. Once you create custom compact layouts, you can set one as the primary compact layout for the object. If you have record types associated with an object, you can override the primary compact layout assignment and assign specific compact layouts to different record types.

Compact layouts support all field types except:

- text area
- long text area
- rich text area
- multi-select picklist

You can clone a compact layout from its detail page.

## Creating Compact Layouts

Create compact layouts to customize the fields that display for object records when viewed in Salesforce1.

Available in: **All** editions except **Database.com**

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

The first four fields you assign to your compact layout populate the record highlights section at the top of each record view in Salesforce1.

1. For standard objects, from Setup, click **Customize**, select an object, and click **Compact Layouts**. For custom objects, from Setup, click **Create > Objects**, click the name of a custom object, then click **New** from the Compact Layouts related list.
2. Click **New** to create a fresh compact layout.
3. Enter a label for your compact layout.
4. Select up to 10 fields to display on the compact layout and click **Add**.
5. Sort the fields by selecting them and clicking **Up** or **Down**.

The order you assign to the fields determines the order in which they display when the record is viewed on a mobile device, and in a Chatter feed item resulting from a record create action.
6. Click **Save**.

## Assigning Compact Layouts to Record Types

If you don't create custom compact layouts, records display using a read-only, predefined system default compact layout. Once you create custom compact layouts, you can set one as the primary compact layout for the object. If you have record types associated with an object, you can override the primary compact layout assignment and assign specific compact layouts to different record types.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To customize compact layouts:	"Customize Application"
To view compact layouts:	"View Setup"

1. For standard objects, from Setup, click **Customize** > **Object** > **Compact Layouts**. For custom objects, from Setup, click **Create** > **Objects**, click the name of a custom object, then scroll down to the Compact Layouts related list. For Salesforce Knowledge articles, from Setup, click **Customize** > **Knowledge** > **Article Types**, click the name of an article type, then scroll down to the Compact Layouts related list.
2. Click **Compact Layout Assignment**.
3. Select a compact layout to use as the primary compact layout for this object.
4. In the Record Type Overrides section, select one or more record types to which you want to assign a compact layout.  
If you don't have record types set for the object, you won't see this section. If you don't set any record type overrides, all record types use the object's primary compact layout by default. Press SHIFT + click or click and drag to select a range of adjacent cells. Press CTRL + click to select individual, non-adjacent cells.  
  
Note that some record types in the list might be inactive. You can assign a compact layout to an inactive record type.
5. Select a compact layout from the Compact Layout To Use drop-down list to assign it to the selected cells.
6. Click **Save**.

## Notes on Compact Layouts

Available in: **All** editions except **Database.com**

- Each record type can have only one compact layout assigned to it. However, a compact layout can be associated with multiple record types.
- Users who don't have access to certain fields in Salesforce won't see them on the compact layout.
- A compact layout must contain at least one field.
- A compact layout can only contain fields from its object. This can include a formula field that is a cross-object reference to another object.
- Removing a field from a page layout doesn't remove it from the object's compact layout. The two layout types are independent.
- If you change a field on a compact layout to an unsupported type, the field is removed from the compact layout.
- Before you can delete a compact layout that's set as the primary compact layout for the object, you must choose another compact layout to replace it.
- In Salesforce1, tasks automatically show whether a task is open or closed and the due date (depending on a user's access to activity dates). When customizing a task compact layout, you don't need to add these fields to the Selected Fields list.

## Search Layouts in Salesforce1

The Salesforce1 app uses your organization’s Search Results search layouts to determine the fields that display in search results. Search layouts allow up to 10 fields, but Salesforce1 search results show only the first four fields from an object’s Search Results layout. You may want to re-order the fields in some or all of your organization’s Search Results layouts so that the most important data is visible for mobile users.

In the Salesforce1 downloadable app for iOS devices, each recent record listed on a record search page shows the record’s name and the value of the second field in that object’s Search Results layout. As a user types a search term in the record search box, the recent record list is filtered based on matching in the second field on the layout, as well as the Name field. This allows users to see records associated with a different object or data value, not just those with simple name matching. For example, if Account Name is the second field in the search layout for the contact object, typing Acme in the search box on the contact search page shows recently-accessed contacts that are related to the Acme account. When you execute the search, however, the search results page shows records that match against any of the searchable fields for the object.

## Publisher Actions in the Salesforce1 App


The publisher actions feature lets you create actions and add them to the publisher, which displays in Salesforce1 on feeds and record views. You can customize the order in which standard Chatter actions, including **Post**, **Link**, and **Poll**, appear in the publisher. You can also use action layouts to specify the fields that are included in each action, and in which order.

There are four general types of actions:

- Create actions let users create records.
- Log-a-call actions let users record the details of phone calls or other customer interactions.
- Update actions let users make changes to a record from the record’s feed.
- Custom actions are Visualforce pages or canvas apps that users can access directly in the publisher.

For create, log-a-call, and custom actions, you can create either object-specific or global actions. Update actions must be object-specific. See [New Publisher Actions for Creating Chatter Groups and Adding Group Members](#), and Publisher Actions Overview in the Salesforce Help for more information.

The publisher actions that are initially available in Salesforce1 depend on the age of your organization—see Default Actions Overview and Mobile Smart Actions Overview in the Salesforce Help. You can also create unique global or object-specific publisher actions that are tailored to your business needs—see Setting Up Publisher Actions in the Salesforce Help.

 **Note:** If you want to assign a custom icon to a publisher action, the optimal icon size for display in the Salesforce1 publisher is 120 x 120 pixels. For best results, don’t use an icon larger than this.

## Customize the Salesforce1 Navigation Menu

Customize your mobile Salesforce experience by selecting apps, standard menu items, Visualforce pages, or Flexible Pages to display in the Salesforce1 navigation menu.

Available in: <b>All</b> editions except <b>Database.com</b>	
User Permissions Needed	
To customize Salesforce1 navigation:	“Customize Application”



**Note:** Before you can include Visualforce pages or Flexible Pages in the Salesforce1 navigation menu, you must create tabs for them in Setup at **Create > Tabs**.

1. From Setup, click **Mobile Administration > Mobile Navigation**.
2. Select items in the Available list and click **Add**.
3. Sort items by selecting them and clicking **Up** or **Down**.

The order you put items in the Selected list is the order that they display in the navigation menu.



**Note:** The first item in the Selected list becomes your users' Salesforce1 landing page.

4. Click **Save**.

Once saved, the navigation menu items and their order should be reflected in Salesforce1. You may need to refresh to see the changes.




**Tip:** When organizing the menu items, put the items that users will want most at the top. The Smart Search Items element can expand into a set of eight or more menu items in the mobile experience, and it may end up pushing other elements below the scroll point if you put it near the top of the menu. Anything you put below the Smart Search Items element will appear in the Apps section of the navigation menu.

## Salesforce1 Notifications

Salesforce1 notifications let your users know when certain events occur in Salesforce, for example when they receive approval requests or when someone mentions them in Chatter.

Two types of notifications can appear to Salesforce1 users.

*In-app notifications* keep users aware of relevant activity while they're using Salesforce1. By tapping , a user can view the 20 most recent notifications received within the last 90 days.

*Push notifications* are alerts that appear on a mobile device when a user has installed the Salesforce1 downloadable app but isn't using it. These alerts can consist of text, icons, and sounds, depending on the device type. If an administrator enables push notifications for your organization, users can choose individually whether to receive push notifications on their devices.



**Note:** Some notifications include text that your users enter in Salesforce. To ensure that sensitive information isn't distributed through a third-party service without proper authorization, push notifications include minimal content (such as a user's name) unless you enable full content in push notifications.

For example, suppose an in-app notification reads: "Allison Wheeler mentioned you: @John Smith, heads-up! New sales strategy for Acme account." By default, the equivalent push notification would be "Allison Wheeler mentioned you." However, if you enabled full content in push notifications, this push notification would include the same (full) content as the in-app notification.

### Terms and Conditions for Including Full Content in Push Notifications

If you go to the Notifications Settings page on the full site and select the option to include full content in push notifications, a pop-up window displays the following terms and conditions. If you click **OK** in the pop-up window, you're agreeing to these terms and conditions on behalf of your company.

## Salesforce1 Mobile Push Notifications

The Salesforce1 full-content push notifications feature will provide your organization's Users (collectively, "you" or "your") with real-time updates whenever you receive an @mention in a post or an approval request, or when updates occur to someone or something you are following in the Salesforce1 application. The frequency of notifications sent to you will depend on the number of these actions occurring for you. You may enable or disable full-content push notifications at any time by navigating to Setup, then Mobile Administration, then Notifications, then Settings, and then checking or unchecking the box marked "Include full content in push notifications."

For Users within your organization whose mobile devices run the iOS platform, usage of the full-content push notifications feature will result in transmission of your data contained in those notifications (potentially including Customer Data and/or Confidential Information, as those terms are defined in the subscription agreement that governs your use of salesforce.com products) to Apple Inc. and its affiliated entities (collectively, "Apple"). To the extent that any such data is transmitted to Apple, salesforce.com is not responsible for the privacy, security, or integrity of that data.

If you are authorized by the company that has purchased the subscriptions associated with your use of the salesforce.com Services to enable this functionality and agree to these terms and conditions, please confirm your acceptance by checking the box marked "OK" below. If you are not authorized by such company to accept these terms and enable this functionality, you must click "Cancel".

## Enable Notifications

Allow all users in your organization to receive mobile notifications about events in Salesforce, for example when they receive approval requests or when someone mentions them in Chatter.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To view notifications settings:	"View Setup and Configuration"
To modify notifications settings:	"Customize Application"

1. From Setup, click **Mobile Administration** > **Notifications** > **Settings**.
2. Select the notifications you want your Salesforce1 users to receive.
3. If you're authorized to do so for your company, select **Include full content in push notifications**.
4. Click **Save**. If you checked the box to include full content in push notifications, a pop-up appears displaying terms and conditions. Click **OK** or **Cancel**.

By enabling this option, you're agreeing to the terms and conditions on behalf of your company. For details, see "Notifications Overview" in the Salesforce Help.

A user can receive approval requests in Salesforce1 notifications only when the user receives approval requests as email notifications. You or your user can change the `Receive Approval Request Emails` user field to set this preference.

## Creating Flexible Page Tabs

Before you include a Flexible Page in the Salesforce1 navigation menu, you must create a custom tab for it.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To create and edit custom tabs:	"Customize Application"



**Note:** Flexible Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the plus icon (+) that appears to the right of your current tabs. Flexible Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

You must have at least one Flexible Page in your organization for the Flexible Page Tabs section to show up.

1. From Setup, click **Create > Tabs**.
2. Click **New** in the Flexible Page Tabs related list.
3. Choose a Flexible Page for the tab.
4. Enter a label.

This text is the display name for the Flexible Page in the Salesforce1 navigation menu.

5. Click the **Tab Style** lookup icon to display the Tab Style Selector.

If a tab style is already in use, a number enclosed in brackets [] appears next to the tab style name. Hover your mouse over the style name to view the tabs that use the style. Click **Hide styles which are used on other tabs** to filter this list.

6. Click a tab style to select a color scheme and icon for the Flexible Page tab.

The icon you choose here is the icon that displays to the left of the Flexible Page label in the Salesforce1 navigation menu.

Optionally, click **Create your own style** on the Tab Style Selector dialog if you want to create a custom tab style and your organization has access to the Documents tab. To create your own tab style:

- a. Click the **Color** lookup icon to display the color selection dialog and click a color to select it.
- b. Click **Insert an Image**, select the document folder, and select the image you want to use.

Alternatively, click **Search in Documents**, enter a search term, and click **Go!** to find a document file name that includes your search term.



**Note:** This dialog only lists files in document folders that are under 20 KB and have the Externally Available checkbox selected in the document property settings. If the document used for the icon is later deleted, Salesforce replaces it with a default multicolor block icon (📁).

- c. Select a file and click **OK**. The New Custom Tab wizard reappears.

7. Enter a description of the tab, if desired, and click **Next**.
8. Choose the user profiles for which the new custom tab will be available:
  - Select **Apply one tab visibility to all profiles** and choose Default On, Default Off, or Tab Hidden from the drop-down list.
  - Alternatively, select **Apply a different tab visibility for each profile** and choose Default On, Default Off, or Tab Hidden from the drop-down list for each profile.



**Note:** The Default On and Default Off options for Flexible Pages don't work as they would with other custom tabs. The Flexible Page menu item appears for the selected profiles in Salesforce1 whether you choose Default On or Default Off. Select the Tab Hidden option to hide the Flexible Page menu item for the selected profiles in Salesforce1.

9. Click **Save**.

## Salesforce1 Differences from the Full Salesforce Site

The Salesforce1 app doesn't have all of the functionality of the full Salesforce site, and in some cases includes features that aren't available in the full site.

There are differences in these areas:

- [Supported Salesforce data](#)
- [Chatter feeds, groups, and profiles](#)
- [Communities](#)
- [Searching for information](#)
- [Creating and editing records](#)
- [Tasks and events](#)
- [Approval requests](#)
- [Notifications](#)
- [The new Today feature](#)
- [Supported Salesforce customizations](#)

## Differences in Working with Salesforce Data

Currently, Salesforce1 doesn't support:

- Objects other than those mentioned in [Data That's Supported in Salesforce1](#).
- Standard or custom Salesforce apps. (Instead, the navigation menu gives users access to all of the objects that are available to them in the mobile app, including the Salesforce1-supported standard objects and all custom objects that are included in one of your organization's Salesforce apps.)
- List views on objects other than accounts, campaigns, cases, contacts, contracts, groups, leads, opportunities, and custom objects.
- A few record fields, including:
  - ◇ division fields
  - ◇ territory management fields
- Links on formula fields.
- The default custom links on a record detail page.
- Salesforce console, Agent console, or other Service Cloud features besides Cases and Live Chat Transcripts.
- Advanced currency management.

### Related Lists

- Related lists in the Salesforce1 app are read-only. Action buttons on related lists, including the ability to create new related records, aren't available.
- Some related lists aren't available in this release, including:
  - ◇ Content Deliveries
  - ◇ External Sharing
  - ◇ Related Content

See the following sections for related lists that aren't available for specific objects.



- Files, notes, attachments, and Google docs attached to records display in the related list for that specific record. Files, notes, attachments, and Google docs on child records don't display in the parent record's related list. You can't add notes to related lists on records, and you can't delete files, notes, attachments, and Google docs from related lists.

## Accounts

- Social accounts:
  - You can't access social accounts features for LinkedIn, Facebook, Klout, or YouTube in Salesforce1.
  - If an account has been linked to a social network profile, the profile image selected for the account may display when viewing the account in Salesforce1 even when you aren't logged in to the social network. Profile images from LinkedIn appear when you're logged in to LinkedIn; images from Facebook or Twitter may appear even if you aren't currently logged in to those networks. You can't switch to a different profile image in Salesforce1.
  - In Salesforce1, you can log in to Twitter, but you can't log out. If you need to log out of Twitter, use the full Salesforce site.
  - You can view Tweets, retweets, replies, or favorites for an associated Twitter user if you're using a Salesforce1 downloadable app, but not if you're using the Salesforce1 mobile browser app. Also, in the Salesforce1 mobile browser app, you can't see who is following a Twitter user, or who the Twitter user is following.
  - Salesforce1 lists common connections you and your account share on Twitter. You can't view common connections in the full Salesforce site.
  - To view the Twitter card on accounts in Salesforce1, you must add Twitter to the page layout. Access the full Salesforce site to edit page layouts. If your organization uses person accounts, the card must be added separately for business account layouts and person account layouts.
- The **Clone**, **Manage External Account**, and **Enable As Partner** buttons aren't available.
- You can't view the account hierarchy.
- You can't merge contacts, or add new partners, account users, or attachments on an account.
- You can view account teams, partners, and case teams, but you can't edit them.
- Reports and tools aren't available.


## Campaigns

- The **Manage Members** and **Advanced Setup** buttons aren't available.
- Campaign Hierarchy is available only as a related list. The option to **View Hierarchy** from a link on the campaign detail page isn't available. When viewing a parent campaign, the Campaign Hierarchy related list shows only the child campaigns, while the full site displays both the parent and child campaigns.
- The Campaign Members related list isn't available.

## Cases

- Case Feed layouts and Case Feed-specific buttons, including **Email**, **Portal**, **Case Note**, **Change Case Status**, and the Case Feed version of **Log a Call**, aren't supported in the Salesforce1 app. Users assigned to Case Feed layouts in the full Salesforce site see the standard case layout in the mobile app.
- Some fields on Service Contract and Contact Line Item related lists aren't available.
- These case related lists aren't available:
  - Business Hours on Holiday List
  - Case Contact Role
  - Milestone List
  - Solution List
  - Team Member List
  - Team Member on Team List
  - Team Template Member List

## Contacts

- Social contacts:
  - ◇ You can't access social contacts features for LinkedIn, Facebook, Klout, or YouTube in Salesforce1.
  - ◇ If a contact has been linked to a social network profile, the profile image selected for the contact may display when viewing the contact in Salesforce1 even when you aren't logged in to the social network. Profile images from LinkedIn appear when you're logged in to LinkedIn; images from Facebook or Twitter may appear even if you aren't currently logged in to those networks. You can't switch to a different profile image in Salesforce1.
  - ◇ In Salesforce1, you can log in to Twitter, but you can't log out. If you need to log out of Twitter, use the full Salesforce site.
  - ◇ You can view Tweets, retweets, replies, or favorites for an associated Twitter user if you're using a Salesforce1 downloadable app, but not if you're using the Salesforce1 mobile browser app. Also, in the Salesforce1 mobile browser app, you can't see who is following a Twitter user, or who the Twitter user is following.
  - ◇ Salesforce1 lists common connections you and your contact share on Twitter. You can't view common connections in the full Salesforce site.
  - ◇ To view the Twitter card on a contact in Salesforce1, you must add Twitter to the page layout for contacts. Access the full Salesforce site to edit page layouts.
- Activity logs aren't created when you use the  icon to send emails from the Salesforce1 app.
- The **Clone**, **Request Update**, **Manage External User**, and **Enable Customer User** buttons aren't available.
- You can't add opportunities, account users, or attachments on a contact, and you can't add a contact to a campaign.
- You can't add contacts from Data.com or clean contact records with Data.com Clean.

## Contracts

- The **Clone**, **Activate**, and **Deactivate** buttons aren't available.
- These contracts related lists aren't available:
  - ◇ Contract History
  - ◇ Items to Approve

## Dashboards

- Dashboards are read-only.
- Filters and source reports aren't available.
- Dynamic dashboards let you see data as yourself only.
- Chatter feeds for dashboards aren't available, nor can you post dashboards or components to feeds.

## Files, Attachments, and Content

- You can't add files to posts or comments but you can see files that were posted to updates in the full Salesforce site.
- Salesforce CRM Content isn't available.

## Leads

- Social leads:
  - ◇ You can't access social leads features for LinkedIn, Facebook, Klout, or YouTube in Salesforce1.
  - ◇ If a lead has been linked to a social network profile, the profile image selected for the lead may display when viewing the lead in Salesforce1 even when you aren't logged in to the social network. Profile images from LinkedIn appear when you're logged in to LinkedIn; images from Facebook or Twitter may appear even if you aren't currently logged in to those networks. You can't switch to a different profile image in Salesforce1.

- ◇ In Salesforce1, you can log in to Twitter, but you can't log out. If you need to log out of Twitter, use the full Salesforce site.
- ◇ You can view Tweets, retweets, replies, or favorites for an associated Twitter user if you're using a Salesforce1 downloadable app, but not if you're using the Salesforce1 mobile browser app. Also, in the Salesforce1 mobile browser app, you can't see who is following a Twitter user, or who the Twitter user is following.
- ◇ Salesforce1 lists common connections you and your lead share on Twitter. You can't view common connections in the full Salesforce site.
- ◇ To view the Twitter card on a lead in Salesforce1, you must add Twitter to the page layout for leads. Access the full Salesforce site to edit page layouts.
- The **Convert**, **Find Duplicates**, and **Unlock Record** buttons aren't available.
- The Lead History related list isn't available.
- When adding a new lead, the Campaign field and the Assign using active assignment rule" checkbox aren't available. You can add values to these fields in the full Salesforce site.

### Live Chat Transcripts

- Live chat transcript records are read-only.

### Opportunities

- The **Competitors** button isn't available.
- These fields aren't available: Opportunity Splits amount field, Products subtotal field, and Stage History connection field.
- The Similar Opportunities related list isn't available.
- These related lists are available but the lists display record preview cards only; you can't tap to open any of the list records.
  - ◇ Campaign Influence
  - ◇ Competitors
  - ◇ Opportunity Splits
  - ◇ Stage History
- You can't edit the Probability or Forecast Category fields. However, field values are automatically entered when you save the record (based on the value of the Stage Opportunities field). You can manually edit the values for these fields in the full Salesforce site.

### Opportunity Team

- The **Clone** and **Display Access** buttons aren't available.

### Orders

- The **Create**, **Clone**, **Activate**, **Deactivate**, **Reduce Order** buttons aren't available.
- You can't delete activated orders.
- You can't add, edit, or remove order products.

### Quotes

- Quote PDFs appear in the related list but aren't viewable.
- You can't perform these actions:
  - ◇ **Email Quote**
  - ◇ **Create PDF**
  - ◇ **Start Sync**
  - ◇ **Stop Sync**

## ◇ Submit for Approval

## Differences in Using Chatter

When using Chatter in the Salesforce1 app, you can't:

- Create or update your profile information, or upload profile pictures.
- Use custom profiles.
- Send or view Chatter messages.
- See Chatter activity statistics or Chatter influence status.
- Receive Chatter recommendations.
- See trending topics.
- Invite coworkers to sign up for Chatter.
- View or download files that were uploaded via Files or that were uploaded to a comment. You can, however, view files that are attached to a post on a Chatter feed. (Salesforce1 can display these file types: .doc, .docx, .pdf, .ppt, .pptx, .xls, .xlsx, and all image files, including .gif, .jpg, and .png formats.)
- Share public posts.
- Add or view Chatter favorites.
- Filter records.
- Search Chatter feeds in the Salesforce1 mobile browser app or the Salesforce1 downloadable app for Android phones
- See group list views in the Salesforce1 downloadable app. You can see group list views in the Salesforce1 mobile browser app, but not until at least one user visits a group in Salesforce1.
- View the Information field on the group detail page.
- Invite Chatter customers to join private customer groups.
- Use publisher actions other than the standard actions, such as Post, File, Link, and Poll, in customer groups in the Salesforce1 mobile browser app, even if they display in the publisher.
- Perform the following group owner and manager actions:
  - ◇ Post group announcements
  - ◇ Remove members from a group
  - ◇ Change group member roles
  - ◇ Delete groups

## Differences in Using Communities

Communities in Salesforce1 works similar to the full site, with the following differences:

- The Chatter tab is divided into three menu options in Salesforce1. If your community includes the Chatter tab, you'll see Salesforce1 navigation menu items for Feeds, People, and Groups.
- When accessing a community, the navigation menu shows only tabs that are included in that community.
- There is no All Company Feed.
- Site.com branding is not supported.
- External users accessing communities don't see a help link.
- Search is scoped by community and returns only items from the current community. The only exception is records, since they are shared across communities.
- A user's list of notifications includes notifications from all communities the user is a member of. The name of the community in which the notification originated appears after the time stamp.

- The URL for an external user accessing Salesforce1 is slightly different. For instance, if your domain is *universaltelco.force.com* and your community prefix is *customer*, the URL to access the community in Salesforce1 is *universaltelco.force.com/customer/one/one.app*.

## Differences in Finding Information

If you're new to Salesforce and don't yet have a history of recent items, you initially see these objects in the Recent section of the navigation menu:

- Accounts
- Cases
- Contacts
- Files (if you're using one of the downloadable apps and Chatter is enabled)
- Groups (unless added directly to the navigation menu)
- Leads
- Opportunities
- People (unless added directly to the navigation menu)

As you spend more time in Salesforce and the Salesforce1 app, the objects that you use the most will display in the Recent section instead.

To be available in Salesforce1—in the navigation menu, in the list of recently accessed records that appears when you begin a search, or in search results—an object must be included in a standard or custom Salesforce app. This is true for the supported standard objects and your organization's custom objects.

When searching in Salesforce1, you can't:

- Search by division
- Cancel a search that's in progress
- Sort or filter search results
- Pin frequently used items
- Search Chatter feeds in the Salesforce1 mobile browser app or the Salesforce1 downloadable app for Android phones

In addition, list views aren't included in the search results from a global search or record searches. To find list views, open the record search page and type your search terms. As you type, the list of matching items expands to show the list views you've most recently accessed in the full Salesforce site.

## Differences in Creating and Editing Records

There are some differences between the full Salesforce site and the Salesforce1 app when you're adding new records or updating existing data.

Category	Issue	Creating Records	Editing Records
Any Record	Inline editing isn't available.	✓	✓
	You can't modify a record's owner or its record type.		✓
	You can't enter data in geolocation custom fields.	✓	✓

Category	Issue	Creating Records	Editing Records
	Combo boxes, which combine a picklist with a text field, aren't available. Typically the text field is available but the picklist is not.	✓	✓
	If territory management is enabled, you can't assign or modify a record's territory rules.	✓	✓
Accounts and Contacts	The <b>Copy Billing Address to Shipping Address</b> and <b>Copy Mailing Address to Other Address</b> links aren't available.	✓	✓
	If territory management is enabled, the <b>Evaluate this account against territory rules on save</b> option isn't available when editing account records.		✓
Events	An event owner can't change, add, or remove an event's invitees. If two or more contacts are related to an event, the owner can't edit them; if the event has just one related lead or contact, the owner can edit it but not add more.		✓
	Events that aren't related to a contact or object aren't displayed.	✓	✓
	You can't accept or decline an event you've been invited to.		✓
	You can't use Shared Activities to relate multiple contacts to an event.	✓	✓
	Proposed Events (the <b>New Meeting Request</b> button) aren't supported.	✓	✓
	The <code>Related To</code> field remains editable when the <code>Name</code> field is set to <code>Lead</code> , but you'll receive an error if the <code>Related To</code> field contains data when you save the record.	✓	✓
	You can't create recurring events or change the details of a recurring event series. (You can change the details of individual occurrences in an event series.)	✓	✓
	The <code>Subject</code> field doesn't include a picklist of previously defined subjects.	✓	✓
	The <code>Email</code> and <code>Phone</code> fields for an associated contact aren't displayed.	✓	✓
	Spell-checking for the <code>Description</code> field isn't available.	✓	✓
	You can't add attachments.	✓	✓
	You can't send notification emails.	✓	✓
	You can't set event reminders.	✓	✓
Leads	When you add a new lead, the <code>Campaign</code> field and the <code>Assign using active assignment rule</code> checkbox aren't available. You can add values to these fields in the full site.	✓	
Opportunities	You can't edit the <code>Probability</code> or <code>Forecast Category</code> fields. However, values are automatically added to these fields (based on the value of the <code>Stage</code> field) when you save the record. You can manually edit the values for these fields in the full site.	✓	✓
Tasks	The <code>Subject</code> field doesn't include a picklist of previously defined subjects.	✓	✓

Category	Issue	Creating Records	Editing Records
	The <code>Related To</code> field remains editable when the <code>Name</code> field is set to <code>Lead</code> , but you'll receive an error if the <code>Related To</code> field contains data when you save the record.	✓	✓
	The <code>Email</code> and <code>Phone</code> fields for an associated contact aren't displayed.	✓	✓
	You can't use <code>Shared Activities</code> to relate multiple contacts to a task.	✓	✓
	You can't create recurring tasks or change the details of a recurring task series. (You can change the details of individual occurrences in a task series.)	✓	✓
	Spell-checking for the <code>Comments</code> fields isn't available.	✓	✓
	You can't add attachments.	✓	✓
	You can't send notification emails.	✓	✓
	You can't set task reminders.	✓	✓
Lookup Fields	Enhanced lookups aren't supported, so you can't use wildcards in lookup searches and you can't sort, filter, and page through search results.	✓	✓
	Dependent lookups aren't supported.	✓	✓
	Lookup filters aren't respected, so lookup search results aren't restricted in any way. You may wind up selecting an item that isn't valid for your organization, resulting in an error message when you save your record.	✓	✓
Phone Number Fields	Phone number fields display a keypad, from which you tap out the phone number. The keypad doesn't include parentheses, hyphens, or periods, and Salesforce1 doesn't apply any phone number formatting when you save the record. To apply a specific phone number format, edit the record in the full site.	✓	✓
Picklist Fields	Controlling and dependent picklists are supported, but Salesforce1 doesn't display indicators on create and edit pages for these fields. To determine if a picklist field is dependent, and which picklist field controls it, switch to the full site.	✓	✓

## Differences in Tracking Your Activities

### Events

- Archived events aren't available, and you can't use `Shared Activities` to relate multiple objects to an event.
- You can't accept or decline an event you've been invited to.
- Invitee related lists display slightly different content from the full Salesforce site. In the full site, the Invitee list includes the event owner and related contacts and leads who aren't also invitees. In Salesforce1, the Invitee related list includes invitees only. The following queries let you reproduce the full site functionality in Salesforce1.

To allow the event organizer to see all the invitees if your organization uses `Shared Activities`, use this query:


```
SELECT RelationId FROM EventRelation WHERE isInvitee = true AND eventId='[Event_Id]'
```

where `Event_Id` is the child event's ID.





To allow the event organizer to see all the invitees if your organization doesn't use Shared Activities, use this query:

```
SELECT RelationId FROM EventRelation WHERE eventId='[Event_Id]'
```

These queries get the main event's relations and display them for the given child event. You can add a `WHERE` clause to further filter the results.

- Each event in a related list shows:
  - ◇ The  icon, identifying the item as an event
  - ◇ Subject
  - ◇ Location
  - ◇ Start date and time
  - ◇ End date and time
  - ◇ Up to three more fields, depending on your organization's settings

## Tasks

- Archived tasks aren't supported, and you can't use Shared Activities to relate multiple contacts to a task.
- New, edited, and deleted tasks don't appear in a task list until you refresh the list. When you close a task by tapping the  icon, the task is shown crossed out until you refresh the list.
- In task lists, the sorting of priority tasks is determined by the order of the fields in the priority picklist.
- The more tasks you view, and the more relationships tasks have to other records, the longer it may take to view tasks or use other features in the Salesforce1 app.
- When more than 1,000 overdue tasks exist, task lists in Salesforce1 don't display any tasks at all. Use the full site to view your overdue tasks and close them, postpone them, or delete their due dates.
- Task layouts contain a few unique elements that make tasks easier to work with. These elements don't appear in a compact layout because you can't change them, but users always see them:
  - ◇ The  and  icons represent the status of the `IsClosed` field to users with the Edit Task permission.
  - ◇ The  icon represents a task marked high priority (including custom high priority).
  - ◇ All tasks show the subject.
  - ◇ All tasks show the due date, if it exists and a user has permission to view it.
  - ◇ Tasks include the primary contact and the account or other record, if they exist.

The fields in each list may vary, depending on your organization's settings.

You control the layout of task records and tasks in the task list using the new compact layout feature. You control related lists, as always, using the page layout editor. Adding the subject or due date field to either layout doesn't change the appearance of tasks—those fields won't appear twice.

Below the built-in task elements, Salesforce1 displays up to three additional fields.

- ◇ The default compact layout for tasks includes two fields: the name of a lead or contact, and an opportunity, account, or other record the task is related to.
- ◇ In an Activities related list, a task's fields depend on what record you're viewing and how you've defined the layout for that object.

For more information, see [Compact Layout Overview](#).



## Differences with Approvals

These approval-related options aren't available in the Salesforce1 app:

- Submitting records for approval.
- Recalling approval requests.
- Reassigning approval requests.
- Accessing an approval request from the record view. Instead, approvers need to tap the Salesforce1 notification.
- Manually selecting the next approver. For approval requests that require this manual selection, the approver needs to log in to the full Salesforce site.

In addition:

- The Approval History related list doesn't display comments.
- The Items to Approve related list isn't available.
- Salesforce1 notifications for approval requests aren't sent to queues. For each approval step involving a queue, we recommend adding individual users as assigned approvers, so at least those individuals can receive the approval request notifications in the mobile app. To have both queues and individual users as assigned approvers, select **Automatically assign to approver(s)** instead of **Automatically assign to queue** in the approval step.
- Salesforce1 notifications for approval requests are sent only to users who have access to the record being approved. Assigned approvers who don't have record access can still receive email approval notifications, but they won't be able to complete the approval request until someone grants record access.

## Notifications in the Salesforce1 App

- The notifications list in the app displays the 20 most recent notifications you received within the last 90 days.
- To ensure that sensitive information isn't distributed through a third-party service without proper authorization, push notifications include only minimal content by default. To include full content in push notifications (for example, a post or a comment, a Chatter group's name, or a task description), go to Setup in the full site, click **Mobile Administration** > **Notifications** > **Settings**, check **Include full content in push notifications**, and agree to the terms and conditions on behalf of your company. For details, see [Salesforce1 Notifications](#) on page 63.
- [Streaming API limits](#) apply to notifications.

## Using Today

Today is a new feature that's available in the Salesforce1 downloadable apps for Android phones and iPhone and iPad devices. It's not available in the Salesforce1 mobile browser app, nor in the full Salesforce site.

There are some considerations when using Today.

- You see local events from selected calendars on your mobile device but Salesforce events aren't available in this release.
- If some or all of your calendar servers don't automatically push data to your device, you need to update your calendars before you can see the most current information in Today.
- The 24-hour time format isn't supported.
- When viewing a multi-day event, only the ending date and time are displayed in the highlights area.
- The wrong date and time may display for recurring multi-day events.
- If your calendar doesn't display invitee names because the list is too long, Today shows a count of "1 invitee" on the event card and doesn't show any invitees when you open the event.
- If an event doesn't include invitees and there aren't any notes, only the detail page displays.

- Today supports links in the Notes card on the event home page, provided they use the `http://`, `https://`, or `www` protocols. But links aren't active in the `Notes` field on the event detail page.
- The meeting organizer's acceptance status isn't displayed on iPhone devices.
- Today is unable to find a matching Salesforce record for a meeting organizer of an iCloud event because the iCloud API doesn't return an email address.
- On Android devices, a meeting organizer's name may not display correctly if there isn't a matching Salesforce record for the person.
- On Android devices, if a meeting organizer of a Microsoft Exchange® event is also an invitee, the person appears in both the Invitees and Invitation from cards. The person's acceptance status may be displayed in multiple locations and may not be accurate. Also, if there's a matching Salesforce record for the organizer, the event page might not display correctly.
- Chatter Free users and Chatter Customers aren't able to access Today because these user license types don't have access to contacts or person accounts.

## Support for Salesforce Customizations

- **Custom Home Pages**
  - ◇ Salesforce1 doesn't support login redirection to Salesforce apps or custom home tabs like the full Salesforce site does. If you prefer to retain this redirection for users who log in to Salesforce from a mobile browser, [turn off the Salesforce1 mobile browser app](#). This can be done on a user-by-user basis or for your entire organization.
- **Visualforce Pages**
  - ◇ Standard tabs, custom object tabs, and list views that are overridden with a Visualforce page aren't supported in Salesforce1. The Visualforce page is shown for full site users but Salesforce1 users will see the default Salesforce1 page for the object instead. This restriction exists to maintain the Salesforce1 experience for objects.
  - ◇ Embedded Visualforce pages—that is, those added to a page layout—that contain an `<apex:enhancedList>` component may cause the Salesforce1 app to crash when used on iOS devices.
  - ◇ When viewing Visualforce pages on an Android device, horizontal scrolling doesn't work if the page is wider than the viewport. Redesign the page so that it's narrower than the viewport.
- **Flexible Pages**
  - ◇ You can't add more than 25 components to a Flexible Page.
  - ◇ The recent items component doesn't support standard objects.
- **Programmatic Customizations**
  - ◇ These programmatic customizations to the UI aren't supported: Web tabs and S-controls.

## Develop for the Salesforce1 App Overview

There are several Force.com platform enhancements in the Winter '14 and Spring '14 releases that support Salesforce1 development.

- [Visualforce](#)
- [Force.com Canvas](#)
- [Publisher Actions](#)
- [Flexible Pages](#)
- [API Support](#)

The *Salesforce1 App Developer Guide* contains complete, in-depth information about working with the programmatic (code-based) features of Salesforce1.

## Visualforce

You can use Visualforce to extend the Salesforce1 app, letting users access your Visualforce pages from the navigation menu, the publisher, or record detail or related information pages.

When developing Visualforce pages for the Salesforce1 app, consider how they'll look and behave on a mobile device. Also note that you can develop your Visualforce pages to work with both Salesforce1 and standard Salesforce.

You'll need to indicate that a Visualforce page is mobile-ready and can be used in the Salesforce1 app by enabling the `Available for Salesforce mobile apps` checkbox in your Visualforce page settings under **Develop > Pages**.

There are several updates in the Winter '14 and Spring '14 releases that make development with Visualforce easier, including improvements for HTML5 and JavaScript development. You'll want to consider these changes when developing mixed HTML and Visualforce pages for Salesforce1. You'll also want to utilize HTML5 pass-through attributes on your Visualforce components to enable HTML5 features, such as client-side validation. See the [Visualforce Guidelines and Best Practices](#) section of the *Salesforce1 App Developer Guide*.

The `sforce.one` JavaScript utility object is automatically added to all Visualforce pages when run inside the Salesforce1 container. This object is used to manage programmatic navigation in Salesforce1. See [Managing Navigation](#) in the *Salesforce1 App Developer Guide*.

## Force.com Canvas

Force.com Canvas lets you easily integrate a third-party Web application in the Salesforce1 app.

In Spring '14, you can make your Force.com Canvas apps available from the Salesforce1 navigation menu. You can also expose Canvas apps in Salesforce1 as publisher actions in the Publisher or as items in a feed. See [Canvas Apps Accessible from the Salesforce1 Navigation Menu](#), and [Integrating Your Web Applications in Salesforce1 with Force.com Canvas](#) in the *Salesforce1 App Developer Guide* for more details.

Force.com Canvas supports Streaming API notifications, which you can use in your Canvas app exposed in Salesforce1. See [Using Streaming API in a Canvas App](#) in the *Force.com Canvas Developer's Guide*.

## Publisher Actions

Actions appear in the publisher in the Salesforce1 app, and are a quick way for mobile users to access commonly used tasks or functionality. You can create custom actions using Visualforce or Force.com Canvas.

Custom actions aren't specific to mobile users, and can appear in both the Salesforce1 app and in the full Salesforce site. In the Salesforce1 app, custom actions appear in the publisher. In the full Salesforce site, custom actions appear in the publisher menu.



**Note:** If you want to assign a custom icon to a publisher action, the optimal icon size for display in the Salesforce1 publisher is 120 x 120 pixels. For best results, don't use an icon larger than this.

Custom actions automatically get their own REST API endpoints of the form `/services/data/API version/objects/Object name/quickActions/Custom action name`. For example, a custom `Create_Delivery` action created for the `Invoice__c` object would get an endpoint that looks like: `/services/data/v29.0/objects/Invoice__c/quickActions/Create_Delivery`. See [Calling Actions from the API](#) in *Salesforce1 App Developer Guide*.

## Flexible Pages

You can use Flexible Pages to create custom app home pages in Salesforce1. A Flexible Page is a new type of custom layout, designed for mobile apps. See [What is a Flexible Page?](#) and [Extending the User Interface with Flexible Pages](#) in the *Salesforce1 App Developer Guide* for more details.

Flexible Pages can be used with change sets and within app packages.

## API Support

The Force.com APIs support Salesforce1 development. Unless otherwise noted, these enhancements for Salesforce1 development were made available in API version 29.0.

### Objects

The `AppMenuItem` object represents an item in the Salesforce1 navigation menu, exposing metadata for tab sets, service providers, and Connected Apps.

These fields on the `AppMenuItem` object are new in API version 30.0: `CanvasAccessMethod`, `CanvasEnabled`, `CanvasReferenceId`, `CanvasSelectedLocations`, and `CanvasUrl`.

In the `Organization` object, the `PreferencesS1BrowserEnabled` field controls access to the Salesforce1 mobile browser app.

In the `User` object, the `UserPreferencesHideS1BrowserUI` field controls user redirection to the Salesforce1 mobile browser app.

In the `UserProfile` object, the `UserPreferencesHideS1BrowserUI` field controls user redirection to the Salesforce1 mobile browser app. (New in API version 30.0.)

### SOAP API

The `describeAppMenu()` call retrieves metadata about items in the Salesforce1 navigation menu.

The `describeCompactLayouts()` call retrieves metadata details about compact layouts for the specified object type.

The `describeFlexiPages()` call retrieves metadata details about a set of Flexible Pages.

The `describeTheme()` and `describeGlobalTheme()` calls return information about color and icon themes available to the current logged-in user.

Several changes have been made to the `QuickActions` calls (`describeAvailableQuickActions()`, `describeQuickActions()`, `performQuickActions()`) and their return types to provide information about custom actions, and support additional action types and contexts.

In API version 30.0, for the `DescribeQuickActionResult()` call, the name of the `sourceObjectType` field, which denotes the object used for the action, was changed to `contextObjectType`.

### REST API

The `AppMenu` resource retrieves metadata about items in the Salesforce1 navigation menu.

The `FlexiPage` resource returns a list of Flexible Pages and their details. Information returned includes Flexible Page regions, the components within each region, and each component's properties, as well as any associated `QuickActions` (publisher actions).

The `SObject Quick Actions` resource has a new URI to evaluate the default values for an action.

The `Themes` resource returns information on icons and colors used by themes in the Salesforce1 app.

### Chatter REST API

Chatter REST API supports Force.com Canvas app feed attachments. You can post a feed item with a canvas app attachment to the News Feed, Record Feed, and User Profile Feed using POST parameters for the REST resources for those feeds. REST request and response body parameters are available to manage canvas app attachments.

Clients can use the `X-Connect-Theme` HTTP header to specify a UI theme for any API request. There are two themes, each with their own set of motif icons: `Classic` and `Salesforce1`. Theme names are case sensitive.

### Apex

Chatter in Apex provides an easy, efficient way to work with Chatter data in Apex.

A variety of methods and classes are available for working with publisher actions.

### Metadata API

The `AppMenu` type represents the Salesforce1 navigation menu or the Force.com app menu.

The `CustomObject` type has `compactLayout` and `compactLayoutAssignment` fields that contain metadata about the compact layouts associated with the given custom object.

The `CustomTab` type has a `flexipage` field that contains the name of the Flexible Page to display in this tab.

The `FlexiPage` type represents the metadata associated with a Flexible Page.

The `Layout` type has a new `component` field for adding components (such as the Twitter component) to the Mobile Cards section on a page layout. (New in API version 30.0.)

The `QuickAction` type has a `canvas` field that contains the fully-qualified name of the Force.com Canvas app associated with the quick action (if the quick action is a custom action created using a Canvas app).

## SalesforceA

Manage users and view information for Salesforce organizations from your mobile device.

Available in: <b>Contact Manager, Group, Professional, Enterprise, Unlimited, Performance, and Developer</b> Editions
---

User Permissions Needed	
To use SalesforceA:	"Manage Users"

The SalesforceA mobile app offers greater flexibility for Salesforce administrators. With SalesforceA, you can perform essential user management tasks—including editing user details, resetting passwords, assigning permission sets, and unlocking, freezing, and deactivating user accounts—all from your mobile device.

## Supported Devices for SalesforceA

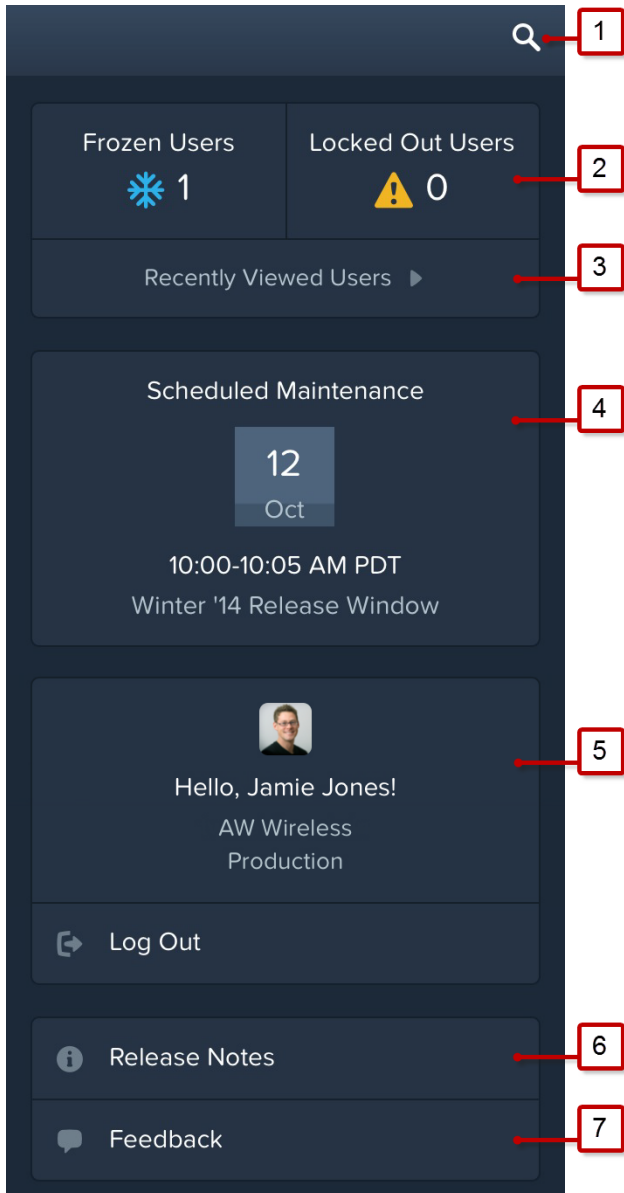
SalesforceA is free and available for:


- Android phone or tablet with OS 4.2 or higher
- Apple iPhone and iPod Touch with iOS 5.0 or higher

Download SalesforceA from [www.salesforce.com/mobile/](http://www.salesforce.com/mobile/), the Apple App Store, or Google Play.

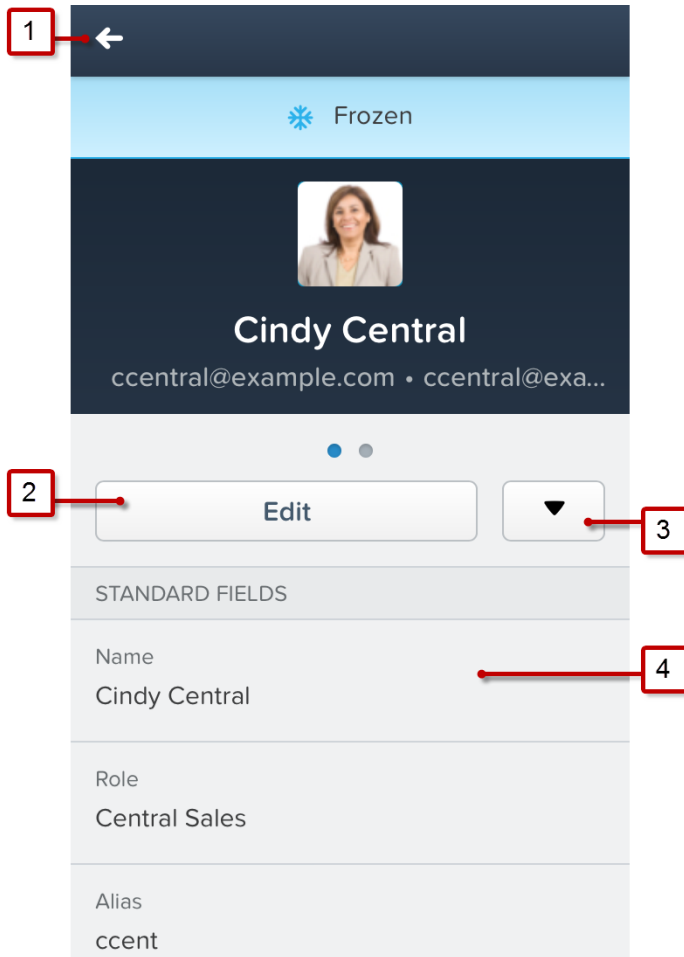
## SalesforceA Navigation Basics


The following items and tasks are available on the home screen.



1. Tap  to search for users in your organization. From the search box, type a few letters of a user's name, then select it from the list that appears.
2. Tap **Frozen Users** or **Locked Out Users** to open a list of frozen or locked user accounts. From the list, tap a user to view and edit the user's details.
3. Tap **Recently Viewed Users** to open a list of the users you most recently accessed.
4. View the date, time, and type of the next scheduled maintenance.
5. Verify your username, organization name, and the type of organization you're logged into. Tap **Log Out** to log out of your account.
6. Tap **Release Notes** to view the latest release notes in HTML format. (HTML-format release notes are currently in Beta.)
7. Tap **Feedback** to take a short survey.

The following items and tasks are available on the user screen.



1. Tap  to return to the home screen.
2. Tap **Edit** to update the user details.
3. Tap the down arrow to reset the user's password, assign permission sets, or unlock (if locked), freeze, or deactivate the user account.
4. Anywhere below the buttons, swipe left to view assigned permission sets and login history. Swipe right to return to the user details.


## Connect to a Different Instance

By default, SalesforceA is set up to connect to your production environment. You can set up SalesforceA to connect to your sandbox environment or a custom host.

To connect from an iPhone or iPod touch:

1. From the Home screen, tap **Settings**.
2. Scroll down and tap **SalesforceA**.
3. Under Connection, tap **Login Host**, then select a host.
4. If you selected Custom Host, tap SalesforceA to return to the **SalesforceA** Settings page, then in the Custom Host field, enter the host name.
5. Tap **Settings** to return to the Settings page.

To connect from an Android phone:

1. Tap to open the SalesforceA app.
2. Tap , then tap **Change Server**.
3. Select a host.

Optionally, to add a host, tap **Add Connection**, enter the host name and URL, then tap **Apply**. The URL must start with `https://`.

## SalesforceA Limitations

The user screen in SalesforceA has the following differences from the user detail page in the full Salesforce site:

- The user screen doesn't include these fields, which appear on the user detail page in the full site:

- ◇ User License
- ◇ Call Center
- ◇ Delegated Approver

- For users with the Japan (Japanese) locale, addresses appear in the following format:

*Street  
City, State/Province Zip/Postal Code Country*

- The user screen includes a read-only `User Type` field, which doesn't appear on the user detail page in the full site. `User Type` is the category of user license.

## Inactive Users Filtered from Frozen and Locked Users Lists

Starting in Spring '14, the number of frozen and locked out users on the SalesforceA home screen no longer includes inactive users. Also, the lists of frozen and locked out users don't include inactive users.

## Salesforce Touch Has Upgraded to Salesforce1

Salesforce Touch has upgraded to the new Salesforce1 experience. As a result, the Salesforce Touch mobile browser app is no longer available, nor is the Salesforce Touch downloadable app available anymore on the App Store.

The Salesforce1 app gives you the same Salesforce Touch features you've come to expect (including support for Salesforce Communities), in an updated interface that makes it easy for users to find what they need and get their work done faster. On top of that, Salesforce1 gives you more, with many new enhancements.

- Expanded Chatter functionality, including the ability to post links, post and vote on polls, sort your feeds, and bookmark posts. The Salesforce1 downloadable apps also include access to Salesforce Files.
- The Chatter publisher, with a default set of publisher actions and the option to add custom actions that are suited to your business needs.
- List views, enhanced global search, and object-specific searches.
- The new Today feature, which helps you prepare for meetings, quickly join conference calls, and get directions to meetings.
- Improved tasks, with different types of task lists and the ability to close and reopen tasks.
- New in-app and push notifications.
- The ability to integrate custom and third-party apps into the navigation menu or the publisher.



- Support for Android phones, as well as iPad and iPhone devices.

As part of the transition to Salesforce1:

- The Salesforce Touch Settings page that was available from **Setup > Mobile Administration** has been removed from the Setup interface.
- The **Touch User** checkbox has been removed from the **My Settings > Personal > Advanced User Details** and **Setup > My Personal Information > Personal Information** pages.
- Salesforce Touch mobile browser users are now automatically directed to the Salesforce1 mobile browser app. It's no longer possible to restore access to the Salesforce Touch mobile browser app.
- Salesforce Touch downloadable app users are no longer able to connect to Salesforce and see a message instructing them to download and install the Salesforce1 downloadable app from the Apple App Store.

See [Salesforce1](#) for details about the new Salesforce mobile experience and how to get started optimizing the Salesforce1 apps for your users.

## Chatter Mobile for Android and iOS Have Upgraded to Salesforce1

The Chatter Mobile for Android and Chatter Mobile for iPhone and iPad apps have upgraded to Salesforce1 v5.0. Chatter Mobile for BlackBerry isn't upgrading to the Salesforce1 app.

For the enhancements and improvements your Android and iOS users get with Salesforce1, as well as details about optimizing Salesforce1 for your organization, see [Salesforce1](#).

The Chatter Mobile for BlackBerry app remains available for download from BlackBerry World. For a refresher on how to set up the Chatter Mobile for BlackBerry connected app for your users, see these topics.

### **Chatter Mobile for BlackBerry is Now a Connected App**

The Chatter Mobile for BlackBerry app is now a connected app. Because of this change, the Chatter Mobile for BlackBerry settings have moved to the connected apps area in the Setup menu.

### **Changes to Chatter Mobile for BlackBerry Settings**

Your original Chatter Mobile for BlackBerry settings are labeled differently in the connected apps settings.

## Chatter Mobile for BlackBerry is Now a Connected App

The Chatter Mobile for BlackBerry app is now a connected app. Because of this change, the Chatter Mobile for BlackBerry settings have moved to the connected apps area in the Setup menu.

A connected app is an application that integrates with Salesforce using APIs. Moving the Chatter Mobile for BlackBerry app to connected apps gives administrators all the benefits of connected apps, such as greater control over who can access the apps, the IP restrictions they're subject to, and how long their sessions remain active.

Administrators can view and manage the Chatter Mobile for BlackBerry settings in the same way they view and manage other connected app settings. In Setup, click **Manage Apps > Connected Apps**, then click **Edit** for the Chatter Mobile for BlackBerry app. To view details about the Chatter Mobile connected app, click the app's name.

Chatter Mobile for BlackBerry is automatically installed as part of a managed Salesforce connected apps package when one of these events occurs:

- A user in your organization downloads the Chatter Mobile for BlackBerry mobile app and authenticates with your organization by logging in to the mobile app.
- An existing Chatter Mobile user's session refreshes.



**Note:** Sessions refresh automatically between every 15 minutes and 12 hours while a user is in the app based upon the session `Timeout` value set for your organization; this is often undetected by the user.

Alternatively, an administrator can manually install the Salesforce1 and Chatter Apps connected apps package to view and manage the settings before the package is automatically installed.

The connected apps package includes a separate connected app for the BlackBerry mobile device type.



**Important:** Unless an administrator manually installs the package, you'll only see the Chatter Mobile for BlackBerry connected app after someone in your organization activates a mobile app or an existing user's session refreshes.

If your organization was using Chatter Mobile before the switch to connected apps, your original settings were migrated to the connected apps settings.

## Changes to Chatter Mobile for BlackBerry Settings

Your original Chatter Mobile for BlackBerry settings are labeled differently in the connected apps settings.

Use this table to see how the original Chatter Mobile settings map to the connected apps settings. To see the connected apps settings, click **Setup** > **Manage Apps** > **Connected Apps**.

Original Chatter Mobile Settings	New Chatter Mobile Connected App Settings	Changes for Existing Organizations	Default Settings for New Organizations
<b>Enable Chatter Mobile</b>	N/A	Once the connected apps package is installed, Chatter Mobile for BlackBerry is set to Admin-approved users are pre-authorized by default.	As a connected app, Chatter Mobile for BlackBerry is enabled by default; any user in your organization can download the app.
<b>Authorized Devices</b>	<b>Permitted Users</b> under OAuth policies	If you previously deselected Chatter Mobile for BlackBerry, it is set to Admin-approved users are pre-authorized.	All Users may self-authorize
<b>Session Timeout</b>	<b>Session Timeout</b> under Mobile Integration	Settings persist.	Never Expire
	<b>Pin Length</b> under Mobile Integration	This connected app setting is new for Chatter Mobile for BlackBerry. <sup>4</sup>	
<b>IP Restricted Users</b>	<b>IP Relaxation</b> under OAuth policies	Restricted users stay restricted.	Enforce IP Restrictions

## Users and Devices


To view Chatter Mobile for BlackBerry activity in your organization (including the date each user activated or used the app since moving to connected apps), to remotely revoke access to the app for a specific device (if the device is lost or stolen, for example), or to block a user's access to the app, from Setup, click **Manage Apps > Connected Apps OAuth Usage**.

## Edit Chatter Mobile for BlackBerry Connected App Settings

Administrators can view and manage the Chatter Mobile for BlackBerry settings in the same way they view and manage other connected app settings.

Available in: **Group, Professional, Enterprise, Performance, Unlimited, Contact Manager, Developer, and Database.com Editions**

User Permissions Needed	
To edit your Chatter Mobile for BlackBerry settings:	"Customize Application"
To view your Chatter Mobile for BlackBerry settings:	"View Setup and Configuration"

1. From Setup, click **Manage Apps > Connected Apps**.
  2. Click **Edit** next to the name of the app you want to modify. (To review information about an app on the connected app Detail page, click the app name.)
    - OAuth policies are available for every connected app.
      - ◇ `Permitted Users` determines who can run the app.
        - `All Users may self-authorize`: Default. Anyone in the organization can self-authorize the app. This means each user has to approve the app the first time they access it.
        - `Admin-approved users are pre-authorized`: Access is limited to those users with a profile or permission set specified, but these users don't need to approve the app before they can access it. Manage profiles for the app by editing each profile's Connected App Access list. Manage permission sets for the app by editing each permission set's Assigned Connected Apps list.
-  **Note:** If you switch from `All Users may self-authorize` to `Admin-approved users are pre-authorized`, anyone currently using the app will lose their access unless they belong to a permission set or profile you have specified for the app.
- ◇ `IP Relaxation` refers to the IP restrictions that the users of the connected app are subject to. An administrator can choose to either enforce or bypass these restrictions by choosing one of the following options.
    - `Enforce IP restrictions`: Default. A user running this app is subject to the organization's IP restrictions, such as IP ranges set in the user's profile.
    - `Relax IP restrictions with second factor`: A user running this app bypasses the organization's IP restrictions if either of these conditions are true:
      - The app has IP ranges whitelisted and is using the Web server OAuth authentication flow. Only requests coming from the whitelisted IPs are allowed.
      - The app has no IP range whitelist, is using the Web server or user-agent OAuth authentication flow, and the user successfully completes Identity Confirmation.
    - `Relax IP restrictions`: A user running this connected app is not subject to any IP restrictions.
  - ◇ `Expire Refresh Tokens` specifies how frequently a user must log in to maintain the permissions their client application needs from the connected app. You may specify that they only need to log in the first time they use the app, every time they use it, after a certain period of inactivity, or after a certain period of time.

- ◇ The current permissions for the connected app are also listed here.
- Session Level Policy is available for all connected apps. Select High Assurance session required to require users to enter a time-based token during login to access the app.
- Mobile App settings are available for Chatter Mobile for BlackBerry.
  - ◇ `Session Timeout` specifies how much time can pass while the app is idle before the app locks itself and requires the PIN before continuing. Allowable values are none (no locking), 1, 5, 10, and 30 minutes.
  - ◇ `Pin Length` sets the length of the identification number sent for authentication confirmation. The length can be from 4 to 8 digits, inclusive.

## View a Mobile User's Push Registration Information

With the Mobile Push Registrations Page, you can view any user's push registration information for general troubleshooting.

Available in: All editions
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User Permissions Needed	
To view mobile push registration information:	"View Setup and Configuration"

To view a user's device push registration information:

1. From Setup, click **Manage Users** > **Users**.
2. Select a user.
3. On the user detail page next to `Mobile Push Registrations`, click **View**.

## "Mobile Ready" Label Changed to "Salesforce Classic Ready"

To clarify the role of the `Mobile Ready` checkbox that exists on Visualforce Tab setup pages, the checkbox has been renamed to `Salesforce Classic Ready`.

This checkbox displays on the Setup pages you access by clicking **Create** > **Tabs**, then selecting **New** or **Edit** in the Visualforce Tabs related list. Selecting the checkbox indicates that the Visualforce page associated with the tab will display and function properly in the Salesforce Classic mobile app and adds the tab to the list of available tabs for your Salesforce Classic mobile configurations.

This checkbox has no effect on the use of Visualforce tabs or pages in the Salesforce1 app. To make Visualforce tabs and pages available in Salesforce1, see [Enable Visualforce Pages for Use in the Salesforce1 App](#).

# Chatter

With groups, Salesforce Files Sync, and powerful ways to work in the feed, Chatter helps everyone in your organization stay connected and get more done faster.

## **Salesforce Files Sync—Pilot**

Salesforce Files Sync lets your users securely store, sync, and share files between Chatter, their desktops, and mobile devices. Access files and folders from anywhere, and keep them instantly updated across your organization.

### **Topics**

Topics help you organize posts and see what people are talking about.

### **Chatter Groups**

Chatter groups make it easy for users to communicate with each other.

### **Chatter Profiles**

Chatter profile pages let you learn more about other Chatter users.

### **Additional Enhancements**

There are changes to private messages and email notifications.

# Salesforce Files Sync—Pilot

Salesforce Files Sync lets your users securely store, sync, and share files between Chatter, their desktops, and mobile devices. Access files and folders from anywhere, and keep them instantly updated across your organization.

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



**Note:** Salesforce Files Sync is currently available through a pilot program. For information on enabling Salesforce Files Sync for your organization, contact [salesforce.com](https://salesforce.com).

## **Salesforce Files Sync Features**

Salesforce Files Sync makes file management, syncing, sharing, and versioning easier than ever.

### **Changes to the Files Tab with Salesforce Files Sync Enabled**

After enabling Salesforce Files Sync, you and your users will notice some changes on the Files tab in Chatter.

### **Enable Salesforce Files Sync for Your Organization**

For people in your organization to be able to sync and store files on multiple devices, you need to enable the Salesforce Files Sync organization preference.

### **Enable Salesforce Files Sync for People in Your Organization**

After Salesforce Files Sync is enabled for your organization, you can enable Salesforce Files Sync for people or profiles in your organization.

### **Install the Salesforce Files Client**

Users can install the Salesforce Files client so they can sync files between their desktop, Chatter, and mobile devices.

### ***Share Synced Files from the Web, Salesforce Files Client, or Mobile Devices with Salesforce1***

Share synced files with people and groups on Chatter, or with anyone outside your organization via a generated link. Share them directly from the Salesforce Files folder on your desktop, the Files tab in Chatter, or your mobile device with Salesforce1.

## **Salesforce Files Sync Features**

Salesforce Files Sync makes file management, syncing, sharing, and versioning easier than ever.



**Note:** Salesforce Files Sync is currently available through a pilot program. For information on enabling Salesforce Files Sync for your organization, contact [salesforce.com](https://salesforce.com).

### **Sync Files**

Access files saved in your Salesforce Files folder on your desktop from the Synced filter on the Files tab in Chatter and in Salesforce1.

### **Share Files Right from the Salesforce Files Folder on Your Desktop**

Right-click a file to share it with people and groups in Chatter, or share the file with anyone using a link.

### **Always Have the Latest Version of Every File**

When you edit a file saved in the Salesforce Files folder on your desktop, the file is instantly updated for you and everyone you've shared the file with on Chatter. Chatter supports versioning, so all file collaborators can access older versions of the file, just in case

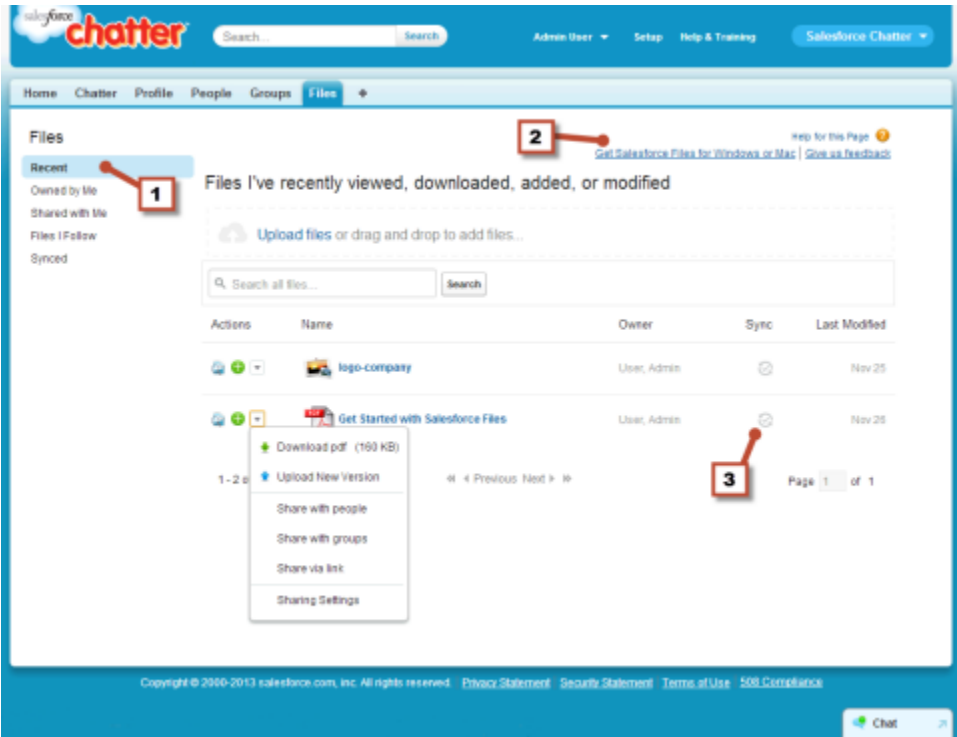
## **Changes to the Files Tab with Salesforce Files Sync Enabled**

After enabling Salesforce Files Sync, you and your users will notice some changes on the Files tab in Chatter.



**Note:** Salesforce Files Sync is currently available through a pilot program. For information on enabling Salesforce Files Sync for your organization, contact [salesforce.com](https://salesforce.com).



With Salesforce Files Sync enabled, you can search, filter, upload, and sync files right from the Files tab.



- 1. New filter names—Filter the files list by recent, owned, shared, followed, and synced files. The new Synced filter shows the files in your Salesforce Files folder. From the Synced filter, users can search, preview, follow, share, and upload new versions of their synced files.



**Note:** Users who have the “Sync Files” permission see the new filter names. Users without the “Sync Files” permission will continue to see their existing filter names.

- 2. Download the Salesforce Files client—One-click access to download the Salesforce Files desktop client.
- 3. Sync most existing Chatter files—Click  to sync a file in Chatter. Once synced, the file will be accessible in three places: the Salesforce Files folder on your desktop, the Synced filter on the Files tab in Chatter, and the synced filter in Salesforce1. Click  to stop syncing.

## Enable Salesforce Files Sync for Your Organization

For people in your organization to be able to sync and store files on multiple devices, you need to enable the Salesforce Files Sync organization preference.

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

User Permissions Needed	
To enable Salesforce Files Sync:	“Customize Application”



**Note:** Salesforce Files Sync is currently available through a pilot program. For information on enabling Salesforce Files Sync for your organization, contact salesforce.com.

1. From Setup, click **Customize > Chatter > Settings**.
2. At the top of the Chatter Settings page, click **Edit**.
3. Under File Sync, select **Allow File Sync**.
4. Click **Save**.

## Enable Salesforce Files Sync for People in Your Organization

After Salesforce Files Sync is enabled for your organization, you can enable Salesforce Files Sync for people or profiles in your organization.

You can either create a Salesforce Files Sync permission set and assign the permission set to specific users or enable the permission for specific user profiles.



**Note:** Salesforce Files Sync is currently available through a pilot program. For information on enabling Salesforce Files Sync for your organization, contact [salesforce.com](https://salesforce.com).

### Create a Salesforce Files Sync Permission Set

When you enable Salesforce Files Sync on a user-by-user basis using a permission set, it's easier to revoke the ability to sync files to Salesforce Files Sync, should that need arise.

#### Enable Salesforce Files Sync for Profiles

Enable Salesforce Files Sync for all users with particular standard profiles, or for custom profiles specific to your Salesforce organization.

#### Enable Salesforce Files Sync for Multiple Profiles

If Enhanced User Profile Lists are enabled for your organization, you can enable Salesforce Files Sync for up to 200 profiles directly from a custom list view, without accessing individual profile pages.

## Create a Salesforce Files Sync Permission Set

When you enable Salesforce Files Sync on a user-by-user basis using a permission set, it's easier to revoke the ability to sync files to Salesforce Files Sync, should that need arise.

User Permissions Needed	
To enable Salesforce Files Sync for individual users:	"Customize Application"



**Note:** Salesforce Files Sync is currently available through a pilot program. For information on enabling Salesforce Files Sync for your organization, contact [salesforce.com](https://salesforce.com).

1. From Setup, click **Manage Users > Permission Sets**.
2. In the top-left of the Permission Sets list view, click **New**.
3. Fill out the required fields.

#### Label

The unique label for the permission set. For example, you might call this permission set "Salesforce Files Sync Enabled".



**API Name**

The unique name used by the Force.com API.

**Description**

A description of this permission set. For example, “Enables Salesforce Files Sync for assigned users. Salesforce Files Sync allows users to automatically sync files across devices.”

4. Select a user license option.



**Note:** If you plan to assign this permission set to users with both Salesforce and Chatter Only licenses, select —None—.

5. Click **Save**.  
The overview page for your new permission set appears.
6. Under System, click **System Permissions**.
7. At the top of the System Permissions list, click **Edit**.
8. Under System Permissions, select **Sync Files**.
9. Click **Save**.

## Enable Salesforce Files Sync for Profiles

Enable Salesforce Files Sync for all users with particular standard profiles, or for custom profiles specific to your Salesforce organization.

User Permissions Needed	
To enable Salesforce Files Sync for profiles:	“Customize Application”



**Note:** Salesforce Files Sync is currently available through a pilot program. For information on enabling Salesforce Files Sync for your organization, contact [salesforce.com](https://salesforce.com).

1. From Setup, click **Manage Users > Profiles**.
2. Select the profile that will have the Salesforce Files Sync permission.
3. On the profile detail page, click **Edit**.
4. Under Administrative Permissions, select **Sync Files**.
5. Click **Save**.

## Enable Salesforce Files Sync for Multiple Profiles

If Enhanced User Profile Lists are enabled for your organization, you can enable Salesforce Files Sync for up to 200 profiles directly from a custom list view, without accessing individual profile pages.

Available in: <b>Enterprise, Performance, Unlimited, Developer, and Database.com</b> Editions
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User Permissions Needed	
To enable Salesforce Files Sync for profiles:	“Customize Application”



**Note:** Salesforce Files Sync is currently available through a pilot program. For information on enabling Salesforce Files Sync for your organization, contact [salesforce.com](https://salesforce.com).



**Warning:** Use care when editing profiles with this method. Because profiles affect a user's fundamental access, making mass changes may have a widespread effect on users in your organization.

1. From Setup, click **Manage Users > Profiles**.
2. On the Profiles page, click **Create New View**.
3. Enter the view name.  
For example, you might call this view "Salesforce Files Sync Enabled Profiles".
4. Under Step 2. Specify Filter Criteria, specify the conditions that the list items must match.
5. Under Step 3. Select Columns to Display, specify the columns to show in the list view. In this case, one of the Available Settings should be "Sync Files".
6. Click **Save**.
7. On the Profiles page, choose your new list view from the drop-down list.
8. Select the checkbox next to each profile you want to edit.
9. Double-click the Sync Files checkbox.
10. In the Edit Sync Files dialog box, select **Sync Files**.
11. Click **Save**.

## Install the Salesforce Files Client

Users can install the Salesforce Files client so they can sync files between their desktop, Chatter, and mobile devices.



**Note:** Salesforce Files Sync is currently available through a pilot program. For information on enabling Salesforce Files Sync for your organization, contact [salesforce.com](https://salesforce.com).

The Salesforce Files client is supported on Microsoft® Windows® 7 and Apple® OS X 10.6 and 10.7. The client will automatically notify you when an update is available.

1. Click **Your Name > My Settings > Desktop Add-Ons > Salesforce Files**.
2. Click **Download**.
3. Follow the installation instructions for your operating system.
4. Log in with your Salesforce credentials.

Be aware of these limits as users adopt the Salesforce Files client:

- The maximum amount of data that an individual user can sync in their Salesforce Files folder is 5 GB. If the Salesforce Files folder reaches this limit, new files won't sync until other files are removed from the folder.
- The maximum file size that can be uploaded using the Salesforce Files folder is 500 MB.

For more information about Salesforce Files Sync limits, refer to the limits section of the Salesforce Help.

## Share Synced Files from the Web, Salesforce Files Client, or Mobile Devices with Salesforce1

Share synced files with people and groups on Chatter, or with anyone outside your organization via a generated link. Share them directly from the Salesforce Files folder on your desktop, the Files tab in Chatter, or your mobile device with Salesforce1.



**Note:** Salesforce Files Sync is currently available through a pilot program. For information on enabling Salesforce Files Sync for your organization, contact [salesforce.com](https://salesforce.com).

Synced files can be shared on the Web and in Salesforce1 by using the Synced filter. Share a file from the Salesforce Files folder by right-clicking the file and choosing a menu option under **Salesforce Files**. From the right-click menu, you can share with people in your organization, Chatter groups, or with people outside your organization via link. You'll then be directed to Chatter to finish sharing the file.

If you share a file with a person or group with Collaborator rights, then when collaborators download, edit, and upload a new version of the file, you'll get the latest version automatically synced. When you edit and sync a new version of the file, the people and groups you've shared with will automatically get the latest version on Chatter.

## Topics

Topics help you organize posts and see what people are talking about.

### *Using Topics to Organize Records*

Enable topics for objects to allow users to add topics to records. Adding topics helps organize records and makes them easier to retrieve using list views. If your organization uses Chatter, topics help you link records to related conversations, content, and knowledgeable people.

### *Find and Endorse People Knowledgeable about a Topic*

Use the Knowledgeable People section on the topic detail page to discover who is knowledgeable about that topic. You can also endorse people you think are knowledgeable about a topic.

### *Configure Email Notifications for Endorsements*

If your administrator configured email notifications, you can receive an email each time someone endorses you on a topic.

### *Topics in Global Search Auto-Complete*

As you type search terms in global search, the list of suggested matches now includes Topics below My Recent Items.

### *Feed Tracked Changes for Topics*

Feed tracked changes for topics now appear on the topic detail page and in your feed if you're following the topic.

### *Number-Only Hashtag Topics*

To support the use of the number sign (#) in mathematical and other non-topic contexts, Chatter no longer automatically creates a topic when you type a hashtag followed by a series of numbers in a post or comment.

## Using Topics to Organize Records

Enable topics for objects to allow users to add topics to records. Adding topics helps organize records and makes them easier to retrieve using list views. If your organization uses Chatter, topics help you link records to related conversations, content, and knowledgeable people.

Administrators can enable topics for objects even if they don't have Chatter. For more information on topics for objects, see [Using Topics to Organize Records](#) in the General Enhancements section.

## Find and Endorse People Knowledgeable about a Topic

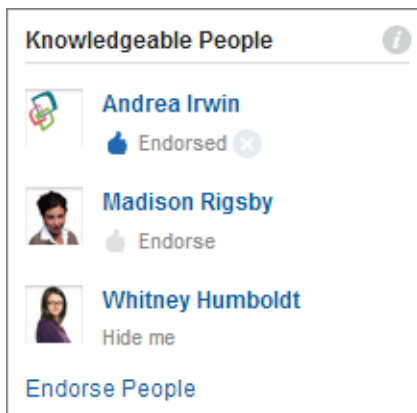
Use the Knowledgeable People section on the topic detail page to discover who is knowledgeable about that topic. You can also endorse people you think are knowledgeable about a topic.

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

The topic page shows the three most knowledgeable people on that topic based on their activity on the topic and recognition received for the topic. For example, Chatter considers how often people:


- Were mentioned in posts or in comments on posts with the topic
- Received likes on comments on posts with the topic
- Received endorsements for the topic

Endorsements are a strong signal of knowledge, so if someone endorses you, you're automatically included in the list of knowledgeable people.



To see the full list of knowledgeable people, click **Endorse People**. If you're included in the knowledgeable people list and don't want to be, opt out by clicking **Hide me** under your name. No one can see you in the list after you hide yourself. If you change your mind, you can opt back in by clicking **Endorse People** and then **Show me** next to your name and **Done**.

Endorse someone you think is knowledgeable about a topic by clicking **Endorse** under the person's name. If the person you want to endorse doesn't appear in the Knowledgeable People section, click **Endorse People** to see the full list and to search for other people. You can't endorse yourself, Chatter Free users, or customers. You can remove your endorsement of someone

at any time by clicking  next to Endorsed under the person's name. Removing your endorsement of someone doesn't necessarily remove them from the knowledgeable people list because they might be endorsed by other people or have sufficient activity on the topic.

Knowledgeable people are calculated and updated once a day.

## Configure Email Notifications for Endorsements

If your administrator configured email notifications, you can receive an email each time someone endorses you on a topic.

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

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
  - If you clicked **Setup**, select **My Chatter Setting** > **Chatter Email Settings**.
  - If you clicked **My Settings**, select **Chatter** > **Email Notifications**.
3. Under Mentions, Messages, or Endorsements, select or deselect **Endorses me on a topic**, depending on your preference.



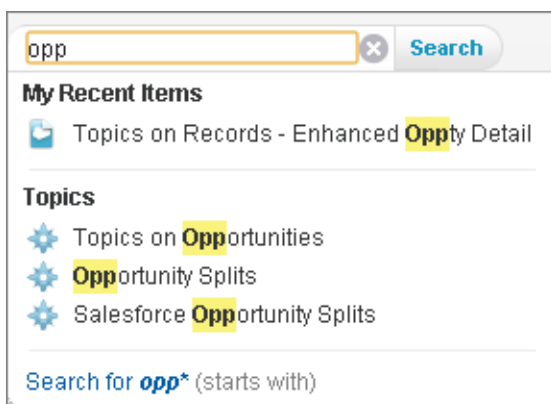
4. Click **Save**.

## Topics in Global Search Auto-Complete

As you type search terms in global search, the list of suggested matches now includes Topics below My Recent Items.

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

Topic matches include all topics, even those used solely in private groups or on records. But don't worry, posts and records with topics retain their security and privacy. Depending on the number of My Recent Items matches, you can see up to five suggested topics ordered by the number of people talking about the topic in the last two months. Topics with no activity in the last two months don't appear as matches in global search auto-complete. Click a topic to go to the topic detail page.



## Feed Tracked Changes for Topics

Feed tracked changes for topics now appear on the topic detail page and in your feed if you're following the topic.

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

Previously, feed tracked changes for topics (changes to a topic's description) appeared only on the profile page of the person who made the change. Now feed tracked changes for topics appear:

- On the profile page of the person who made the change
- On the topic detail page
- In your feed if you're following the topic

## Number-Only Hashtag Topics

To support the use of the number sign (#) in mathematical and other non-topic contexts, Chatter no longer automatically creates a topic when you type a hashtag followed by a series of numbers in a post or comment.

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

Hashtag topics containing only numbers can be useful. For example, you might use a case number or a part number as a topic. Beginning with Spring '14, if you want to create a number-only hashtag topic, you must pick the topic from the list of suggestions as you type or press ENTER when you finish typing the topic. Existing number-only hashtag topics that were created in this way are not affected and continue to link to topic detail pages. Existing number-only hashtag topics that were created unintentionally (by typing the hashtag followed by a series of numbers and not choosing a suggested topic or pressing ENTER) no longer link to topic pages. However, the topic (without the hashtag) still appears on the top-level post, and the post still appears in the feed on the topic page.

## Chatter Groups

Chatter groups make it easy for users to communicate with each other.

### ***Post Announcements in Chatter Groups***

Post group announcements to highlight important messages on the group page.

### ***New Publisher Actions for Creating Chatter Groups and Adding Group Members***

Administrators can now add the New Group and New Group Member publisher actions to the group publisher layout.

### ***Customize Chatter Group Layouts and Publisher Actions***

Customize the information and publisher actions for groups.

### ***Archived Groups Don't Count Toward Individual Chatter Group Limits***

Archived groups don't count toward your group membership limit. For example, if you're a member of 100 groups, of which 10 are archived, you can request to join 10 more groups.

### ***Use Email to Post to Chatter Groups—Generally Available***

Email your posts to Chatter groups you have access to.

## Post Announcements in Chatter Groups

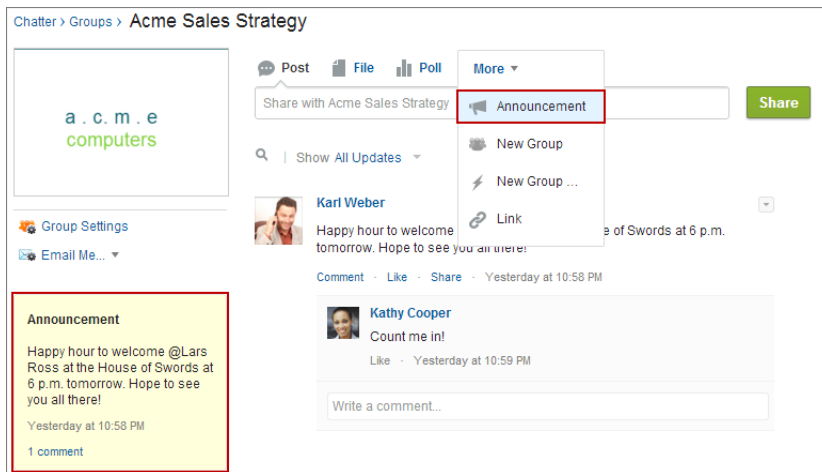
Post group announcements to highlight important messages on the group page.

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

If your administrator has added the Announcement action to the group publisher, group owners, group managers, and users with the “Modify All Data” permission can post and delete group announcements.

1. On the group page, click **Announcement** in the publisher.
2. Type your message and specify an expiration date for the announcement. You can include links and mention users and groups in your announcement.
3. Click **Share**.

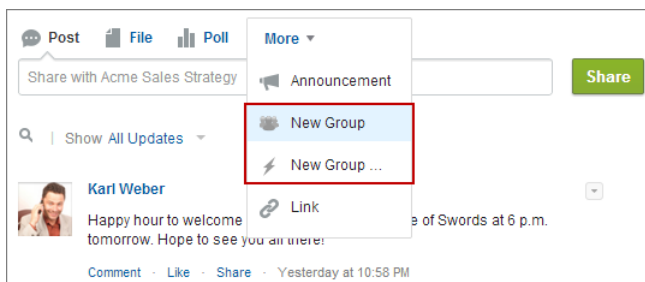
The group announcement displays in a yellow highlighted area below the group photo and as a post in the group feed.



Group announcements display until 11:59 p.m. on the selected expiration date, unless they’re replaced by a new group announcement. Users can discuss, like, and post comments on announcements in the group feed. Group members receive an email notification when you post an announcement, same as for other posts, depending on their selected group email notification frequency. Deleting the feed post deletes the announcement.

## New Publisher Actions for Creating Chatter Groups and Adding Group Members

Administrators can now add the New Group and New Group Member publisher actions to the group publisher layout.



- The New Group action is a global action, but it isn’t added to the global publisher layout by default. You can add it to the global publisher layout, the group publisher layout, and the publisher layout for any object. Like all global actions, you can change the fields and layout for the New Group action from the global actions list view in Setup.

- The New Group Member action is an object-specific action for Chatter groups that allows users to add members to the group directly from the group's publisher. You can add the New Group Member action from the list of actions on the page layout editor for groups. You can't customize the fields and layout of the New Group Member action.

For more information on adding these actions to the group publisher layout, see [Customize Chatter Group Layouts and Publisher Actions](#).



## Customize Chatter Group Layouts and Publisher Actions

Customize the information and publisher actions for groups.

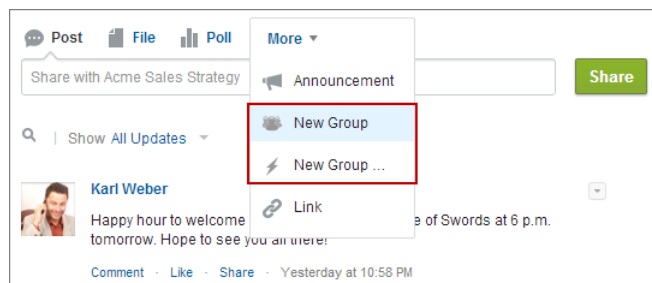
Available in: <b>Group, Professional, Enterprise, Performance, Unlimited, Contact Manager, and Developer</b> Editions
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User Permissions Needed	
To customize Chatter group layouts:	"Customize Application"

Changes to Chatter group layouts, except for publisher action and layout changes, reflect in the Salesforce1 app only. Changes to publisher actions and layouts for groups reflect in both the full Salesforce site and in Salesforce1.

- From Setup, click **Customize > Chatter > Groups > Group Layouts**.
- Click **Edit** next to the group layout you want to customize, or click **New** to create a new layout.
- On the Page Layout Editor, drag and drop fields, actions, and other user interface elements from the palette to the different sections on the page to add them to the layout. Drag and drop them back to the palette to remove them from the layout.
  - To customize the publisher actions for Chatter groups without customers, click **override the global layout** or  in the Publisher Actions section. The standard actions for groups (such as Post, File, Link, Poll, and Announcement) are automatically added to the new publisher layout. Add, remove, or reorder actions as necessary.
  - Chatter groups with customers display only standard actions, such as Post, File, Link, and Poll, in the publisher. You can't add, remove, or reorder publisher actions in customer groups.
  - To revert to the global publisher layout, hover over the Publisher Actions section and click .
- Click **Save**.
- Optionally, click **Page Layout Assignment** on the group layout list view to assign group layouts by user profiles.

For example, to allow group owners and managers to archive, configure automatic archiving, and activate groups from the Salesforce1 app, add the **IsArchived** and **IsAutoArchiveDisabled** fields to the Group Detail section. Or, add the **New Group** and **New Group Member** actions to the group publisher to allow users to create groups, add group members, and post announcements directly from the group publisher. You can also reorder the actions, including the standard publisher actions, by popularity for ease of use.



The following considerations apply to group publisher actions:



- The New Group action is a global action, but it isn't added to the global publisher layout by default. You can add it to the global publisher layout, the group publisher layout, and the publisher layout for any object. Like all global actions, you can change the fields and layout for the New Group action from the global actions list view in Setup.
- The New Group Member action is an object-specific action for Chatter groups that allows users to add members to the group directly from the group's publisher. You can add the New Group Member action from the list of actions on the page layout editor for groups. You can't customize the fields and layout of the New Group Member action.

## Archived Groups Don't Count Toward Individual Chatter Group Limits

Archived groups don't count toward your group membership limit. For example, if you're a member of 100 groups, of which 10 are archived, you can request to join 10 more groups.

Archived groups still count toward the organization group limit (10,000).

## Use Email to Post to Chatter Groups—Generally Available

Email your posts to Chatter groups you have access to.

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

If your admin has enabled this feature, you can email your posts to any public group. You can email posts to a private group only if you're a member. You must use the email address associated with your Salesforce user account.

1. From the group detail page, click **Post by email** below the group description to launch a blank email to the group from your local email client.



**Tip:** Save the group's email address as a contact in your mail client or mobile device for easy access in the future.

2. Type your message in the email body and send the email.

The email content displays as a post on the group detail page. Any hashtags you include in the email body (for example, #TeamExcellence) are converted to topics on the post.

The following limitations apply to posting to a group using email:

- The 5,000 character limit for Chatter posts applies to posts created using email. Any text in your email beyond this limit is not included in the post.
- The email subject and any attachments are not included in the post.
- You can create text posts using email and include links in the text. You can't @mention people, attach files, create polls, or give titles to links when posting to the group by email.
- Character-level formatting, such as the use of bold or different type sizes, is not supported.

### Allow Users to Post to Chatter Groups via Email

Users can post to groups by sending emails from the email address associated with their Salesforce account. By default, this preference is turned off for your organization.

# Allow Users to Post to Chatter Groups via Email

Users can post to groups by sending emails from the email address associated with their Salesforce account. By default, this preference is turned off for your organization.

- 1. From Setup, click **Customize > Chatter > Email Settings**.
- 2. Select **Allow Posts via Email** to [allow users to post to groups using email](#).
- 3. Click **Save**.

# Chatter Profiles

Chatter profile pages let you learn more about other Chatter users.

The Skills feature is currently available through a pilot program. Administrators can enable skills even if they don’t have Chatter. For more information on skills, see [Skills—Pilot](#) in the General Enhancements section.

## Add a Skill in Chatter—Pilot

Add skills to your profile page to share your professional expertise.

## Remove a Skill in Chatter—Pilot

Remove a skill from your profile if it no longer applies.

## Endorse a Skill in Chatter—Pilot


Endorse a user’s skill on their profile to promote their expertise in a specific area.


# Add a Skill in Chatter—Pilot

Add skills to your profile page to share your professional expertise.

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

User Permissions Needed	
To add skills:	“Create” on Skills and Skill Users

 **Note:** The Skills feature is currently available through a pilot program. For information on enabling skills for your organization, contact [salesforce.com](#).

- 1. On your profile page, click the Overview tab.
- 2. Click  in the Skills section.
- 3. In the skill editor, start typing the skill name. As you type, you can pick a skill from the list of suggestions, or keep typing to create your own unique skill. To add a skill to your list, click **Add** or press ENTER.

Users can have up to 100 skills.

- 4. When you’re done adding skills, click **Save**.

## Remove a Skill in Chatter—Pilot



Remove a skill from your profile if it no longer applies.

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

User Permissions Needed	
To remove skills:	“Read” on Skills AND “Delete” on Skill Users



**Note:** The Skills feature is currently available through a pilot program. For information on enabling skills for your organization, contact salesforce.com.

1. On your profile page, click the Overview tab.
2. Click  in the Skills section.
3. Click  next to the skill you want to remove.
4. Click **Save**.

The skill is no longer associated with you, but it’s not deleted. Only skill owners with the proper permissions and users with “Modify All Data” can delete skills.

## Endorse a Skill in Chatter—Pilot


Endorse a user’s skill on their profile to promote their expertise in a specific area.

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

User Permissions Needed	
To add endorsements to skills:	“Create” on Endorsements AND “Read” on Skills and Skill Users



**Note:** The Skills feature is currently available through a pilot program. For information on enabling skills for your organization, contact salesforce.com.

1. On a user’s profile page, click the Overview tab.  
You can’t endorse yourself.
2. Click  on the skill you’d like to endorse.  
To remove a previous endorsement, click **Del** under Endorsements on the Skill User detail page.

## Additional Enhancements

There are changes to private messages and email notifications.

### **Customize Branding for Email Notifications**

Chatter email notifications can display sender information, footer text, and a footer logo that is personalized for your organization.

### **Chatter Expert Message Disabled**

The initial Chatter Expert message is no longer displayed.

## Customize Branding for Email Notifications

Chatter email notifications can display sender information, footer text, and a footer logo that is personalized for your organization.

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

User Permissions Needed	
To customize Chatter email settings:	"Customize Application"

1. From Setup, click **Customize > Chatter > Email Settings**.
2. Enter custom values for the email sender's name and address to replace the default values.



**Note:** If you change the sender's email address, we send a verification email to the new address. The change is pending, and we continue to use the existing address while we await verification. The requested address doesn't take effect until you click the confirmation link in the email, which is valid for 72 hours. If verification is already pending for a new email address and you specify a different new address, we retain the latest value and use that for verification.

If you enter a custom value for the sender's address and you have enabled mail relay, your Chatter emails will use the relay.

3. Customize what displays in the footer of Chatter emails.



**Note:**

- All Chatter emails display the Chatter logo and salesforce.com information unless you replace them with your organization's own logo and information.
- If you previously customized the logo or footer text and want to restore the default values, use the API to set these fields to `null`.

- a. Choose a logo to replace the default Chatter logo.

The logo must be an existing document in the Documents tab and must be marked `Externally Available Image`. Images with a maximum size of 150 x 50 pixels on a transparent background work best.

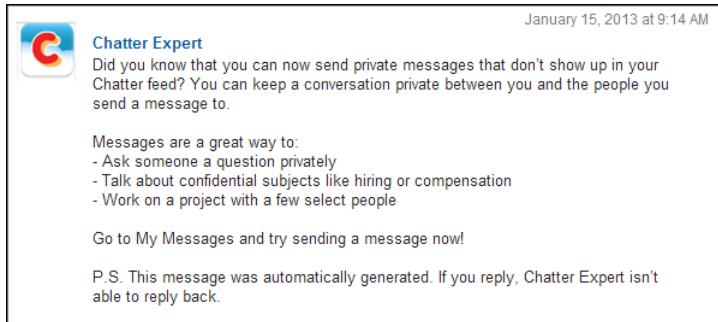
- b. Enter custom text to replace the default footer text, up to a maximum of 1,000 characters.

The default text includes salesforce.com's name and physical address. We strongly recommend including your organization's physical address to comply with applicable anti-spam laws.

4. Click **Save**.

## Chatter Expert Message Disabled

The initial Chatter Expert message is no longer displayed.



The default message explaining how to use private messaging is no longer displayed to new users and users who have never used private messages. This doesn't prevent administrators from using Chatter Expert to post messages to their organization. In fact, creating custom messages for new and experienced users can help promote increased Chatter usage.

# Communities

Build your brand and engage with your customers and partners through Salesforce Communities.

## **Moderation Enhancements**

Communities moderation improves in Spring '14 with the addition of file flagging, an audit trail, and the ability to track activity using the API.

## **Salesforce1 Support for Communities**

Starting in Spring '14, you can view and switch between your communities and your internal organization in Salesforce1.

## **Private Messages in Communities**

Users can now send Chatter messages to other members within a community.

## **Badges in Communities**

You can now show appreciation for users in your communities by giving badges.

## **Customize Communities Miscellaneous Settings**

Enable or disable content flagging, Chatter messages, and knowledgeable people in your community.

## **Orders and Communities**

New in Spring '14, orders are now available as a standard object. Keep these considerations in mind when using orders and Communities in the same organization.

## **Object Permissions for Contracts and Communities**

Object permissions for contracts have been added to standard profiles. If your organization uses contracts and Communities, note that external users assigned to standard profiles may have access to your organization's contracts.

## **Communities Additional Enhancements**

There are other important enhancements to Communities in 'Spring 14.

# Moderation Enhancements

Communities moderation improves in Spring '14 with the addition of file flagging, an audit trail, and the ability to track activity using the API.

Starting in Spring '14, you now have two options for flagging items in your community.

- Allow members to flag—This existing method now includes files. Select this option in your community settings and allow community members to flag posts, comments, or files they find inappropriate. By selecting this option, you're empowering members of the community to self-police.
- Set up triggers to automatically flag items—This new option allows you to set up triggers that are automatically fired when a post, comment, or file meets certain defined criteria. This options allows you to silently moderate a community using the API.

This option is available regardless of whether you allow members to flag. To begin using it, simply define triggers based on custom logic. For instance, your triggers could be set up to detect:

- ◇ offensive language
- ◇ mentions of competitors or competitor products
- ◇ new files that need to be reviewed

- ◇ sensitive information that shouldn't be widely shared
- ◇ business trolls using link bait

Flags that result from triggers are not visible to community members. Moderators can view them in either the user interface or the API. Group owners and managers can see them on items in their groups, if `Allow members to flag content` is enabled for the community.

You may use these methods together if your organization requires it. Regardless of how you choose to flag items in your community, moderators still have the ability to see a list of flagged items from within the community. They can now also view flagged items using both the API and the Chatter REST API, and in reports.

Regardless of which option you choose, the following new enhancements are available:

### Flagging Files

When flagging is enabled in your community, members can now flag files they think are inappropriate or contain information that shouldn't be shared in the community. Support for flagging files is also available in the API and Chatter REST API. Flag files by selecting "Flag as Inappropriate" on the file detail page.

### Audit Trail

Moderation actions in a community are now tracked using the [NetworkActivityAudit](#) object in the API. Specifically, the following actions are tracked:

- a post, comment, or file is flagged
- a flag on a post, comment, or file is removed
- all flags on a post or comment are removed
- a flagged post, comment, or file is deleted

You can create custom reports types based on this data, so that you can generate reports about moderation activity in your communities.

### Custom Report Types for Moderation

Moderators can use custom reports to view an audit trail of moderation activity within their community. For instance, you might want to create reports to track the following information:

- All moderation activity in your communities

Create a custom report type using `Networks` as the primary object. Select `Networks Audits` as the related report object.

- A list of users in a community who either flagged items or moderated a flagged item.

Create a custom report type using `Networks` as the primary object. Select `Network Members` as the first related object and `Network Activity Audit – Moderators` as the final related object.

- A list of users in a community whose items were flagged. Create a custom report type using `Networks` as the primary object.

Select `Network Members` as the first related object and `Network Activity Audit – Users` as the final related object.

### API Support for Moderation

Use the [NetworkModeration](#) object in the API to monitor flagged items in your communities.

## Salesforce1 Support for Communities

Starting in Spring '14, you can view and switch between your communities and your internal organization in Salesforce1.

Salesforce1 provides access to your communities while on the go! The intuitive interface and easy navigation make it simple to switch between communities and get the information you need. Simply use the drop-down at the top of the navigation menu to switch from your internal organization into a community. Members of your communities that have Customer Community, Partner Community, or other supported portal licenses, can also use Salesforce1 to access their communities.

Communities is available in the Salesforce1 mobile browser app and works similar to the full site, with some minor differences. For more information, see [Differences in Using Communities](#).

## Private Messages in Communities

Users can now send Chatter messages to other members within a community.

Send a Chatter message on another member's profile page, on the **Messages** link on the Chatter tab, or by selecting **Send a message** when hovering over a member's name or picture. These messages allow you to have secure private conversations with other users, and they don't appear in your feed, your profile, global search results, or any other part of Chatter that's publicly visible.

Conversations can involve just one other person, or up to 10 people total, including yourself. Conversation participants are established when someone sends the first message in the conversation. No one can add people or remove people from the conversation after the first message is sent. Users can manage their email notifications for private messages in **Email Settings**.

Administrators can [enable Chatter messages](#) in individual communities in **Miscellaneous** settings.



**Note:** Within the Salesforce user interface, a user must log in to a community to initiate a Chatter message to another member of that community. The API allows users to send Chatter messages across communities.

In the list of Chatter messages, users can see private messages they have sent or received in their internal organization and any communities that they're a member of.

## Badges in Communities

You can now show appreciation for users in your communities by giving badges.

Starting in Spring '14, users in your communities can give, receive, and create badges without any additional licenses. External members also have access to a Recognition tab, where they can view their badges; an administrator must simply add it to the community. If you want to expose the Recognition tab to internal members of your community, you must purchase Work.com licenses for those users.

Any member in a community can grant a badge to another member of the community. If the badge is granted to an external user in the community, it is only visible on the user's profile within that community; not in any other community the user is a member of. If granted to a member of the community who is an employee of the internal organization, the badge is visible to that member in the internal organization.

To enable badging for your communities, you must:

- Enable Thanks settings. From Setup, click **Customize > Work.com > Settings**.
- Add the Recognition tab to the community. To add this tab, you must have the Work.com user permission.

If you have a Work.com license and create more badges in the internal organization, they will be available in all communities associated with that organization.



## Customize Communities Miscellaneous Settings

Enable or disable content flagging, Chatter messages, and knowledgeable people in your community.

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

User Permissions Needed	
To create, customize, or publish a community:	“Create and Manage Communities”

To use these settings, you must enable Chatter in your organization.

1. From Setup, click **Customize > Communities > Manage Communities**, then click **Edit** next to the community name.
2. Click **Miscellaneous**.
3. Change the desired settings.
  - Allow members to flag posts, comments, or files for moderation within your community. Members may want to flag items that contain inappropriate language or sensitive information.
  - Enable Chatter messages, which allow you to have secure private conversations with other Chatter users. To expose Chatter messages for external users, administrators must also enable the Chatter tab.
  - Enable knowledgeable people so you can discover who’s knowledgeable on topics and endorse people for their knowledge on a topic.
4. Click **Save**.

## Orders and Communities

New in Spring ’14, orders are now available as a standard object. Keep these considerations in mind when using orders and Communities in the same organization.

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

- Orders follow the sharing model of the parent account. This means that a user with read access to an account also has read access to all of that account’s orders.
- Once orders are enabled, standard profiles automatically include all object permissions for orders, as well as read access for products and price books. If your external users are assigned to a standard profile and these object permissions aren’t appropriate for them, consider creating custom profiles that don’t include these object permissions.
- User permissions for orders aren’t available for users with Customer Portal, Partner Portal, Platform Portal, Partner Community, or Customer Community user licenses. These user permissions are “Activate Contracts,” “Activate Orders,” “Delete Activated Contracts,” “Edit Activated Orders,” and “Create Reduction Orders.”

For more information about orders, see [Orders—Generally Available](#).

## Object Permissions for Contracts and Communities

Object permissions for contracts have been added to standard profiles. If your organization uses contracts and Communities, note that external users assigned to standard profiles may have access to your organization’s contracts.

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

Consider creating custom profiles if these permissions aren't appropriate for them.

The following are the object permissions for contracts for each standard profile.

	Read	Create	Edit	Delete	View All	Modify All
Contract Manager	✓	✓	✓	✓		
Marketing User	✓	✓	✓	✓		
Read Only	✓					
Solution Manager	✓	✓	✓	✓		
Standard User	✓	✓	✓	✓		
System Administrator	✓	✓	✓	✓	✓	✓

## Communities Additional Enhancements

There are other important enhancements to Communities in 'Spring 14.

### Accounts and Contacts for Customer Community Users

External users with Customer Community or High Volume Portal User licenses can now view accounts or contacts that are shared with them in a community. These users can also edit contacts that are shared with them, and create new contacts on the accounts they have access to.

Users with these licenses can also edit accounts if sharing on Accounts is set to Public Read/Write or you create a sharing set that grants users Read/Write access to accounts.

The Accounts and Contacts tabs are also now available to external users with Customer Community or High Volume Portal User licenses, however, the tabs are hidden by default so you must manually expose them using profiles or permission sets.

### Data Loader Available to Partner Community Users

Users with Partner Community or partner portal licenses can now use the Data Loader to import data into their communities.

### Allow Members to Flag Content Option Moved to Miscellaneous Settings


In the setup wizard for communities, the `Allow members to flag content` option was moved from the Members page to the Miscellaneous page.

### Manage Login Settings for Community Users

There is a new Login Settings link on the Force.com site community detail page. This link opens the community Login Page where you can set options.

**Internal Only Filter on Record Feed**

Internal users can use the new Internal Only filter on a record feed to show only posts to their internal Salesforce organization.

On a record feed, click  next to Show and select **Internal Only**.

**Public Checkbox on Tasks Always Available**

The checkbox to mark a task public is now always available, regardless of whether other objects are related to the task. This checkbox is used to control the visibility of tasks in portals and communities.

**Renamed Visible in Self-Service Field to Public**

The Visible in Self-Service field on solutions was renamed to Public because it applies to communities, customer portals, and self-service portals.

# Sales

Help your sales team close bigger deals faster.

## **Collaborative Forecasts and Opportunities**

Help your sales team better plan for and predict sales based on opportunities your team has in their pipeline. We've increased flexibility around how sales teams work with forecasts, and made changes to the configuration tasks that complement the setup of these new features.

## **Salesforce for Outlook**

We're continuing to help users become more productive when they use the Salesforce Side Panel. We're also making efforts to help you better support your users.

## **Accounts, Contacts, and Leads**

Build stronger connections with your accounts, contacts, and leads while you're on the go with new features for Salesforce1.

## **Contracts and Orders**

Orders and the Place Order REST API are now generally available.

## **Activities**

Activities include events and tasks.

## **Salesforce Console Enhancements**

The Salesforce Console for Sales gives users easy access to sales intelligence in a dashboard-like interface that means more access to contextual data with fewer clicks and less scrolling.

## **Territory Management Can Now Be Disabled**

Beginning in Spring '14, organizations that use Territory Management can disable the feature if necessary.

# Collaborative Forecasts and Opportunities

Help your sales team better plan for and predict sales based on opportunities your team has in their pipeline. We've increased flexibility around how sales teams work with forecasts, and made changes to the configuration tasks that complement the setup of these new features.

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions. Opportunities enhancements are also available in **Group** Edition.

## **Sales Teams Can Now Use Multiple Forecast Types**

Give users the flexibility of having up to four types of forecasts, so they can predict sales from multiple perspectives.

## **New Setup for Forecasts**

Easily get your sales teams ready to forecast on up to four types of data.

## **Forecast Reports Changes**

Sales managers can now easily display results by forecast type. Managers can also filter reports to display data for only their direct reports.

### Customizable Forecasting is No Longer in Development

We're now focusing our development efforts on Collaborative Forecasting.

### Forecasts 1.0 (Classic) Will Be Retired in Summer '14

Effective Summer '14, Forecasts 1.0 (Classic) will be officially retired. For more information, please contact salesforce.com Customer Support.

### Streamlined Opportunity Splits

Quickly configure and edit splits with a visual workflow.

## Sales Teams Can Now Use Multiple Forecast Types

Give users the flexibility of having up to four types of forecasts, so they can predict sales from multiple perspectives.

Here are the types of forecasts you can let your users choose from.

- Opportunities based on revenue, quantity, or both
- Opportunity splits based on revenue
- Product families based on revenue, quantity, or both

When you enable more than one type of forecast, Custom Forecast Views lets you customize the opportunity information that's displayed for each forecast.

Here's an example—your sales team forecasts revenue from both opportunities and product families. You'll enable both opportunity and product family forecasts based on revenue.

Here you can see the Opportunities Revenue forecast page, which shows revenue totals for each sales rep in each forecast category.

Home Chatter Leads Accounts Contacts Opportunities Reports Dashboards Forecasts Edit Quotas +						
Jump to...   Elliot Smith > Jeff Diamond >		Forecasts Setup   Video Tutorial   Guided Tour   Help for this Page ?				
Valerie Jones Forecast		Opportunities Revenue in U.S. Dollar ▼			Display Options ▼ Refresh	
	Quota	Closed	Commit	Best Case	Pipeline	
Total: <b>1 Quarter</b> (Change)	USD 950,000.00	USD 600,000.00 63.2%	USD 560,050.00 59.0%	USD 1,257,501.00 132.4%	USD 2,579,419.00 271.5%	
<b>FQ4 FY 2013</b>	USD 950,000.00	USD 600,000.00 63.2%	USD 560,050.00 59.0%	USD 1,257,501.00 132.4%	USD 2,579,419.00 271.5%	
Cindy Long	USD 200,000.00	USD 110,000.00 55.0%	USD 10,000.00 5.0%	USD 195,707.00 97.9%	USD 676,475.00 338.2%	
Ely McCrane	USD 200,000.00	USD 146,252.00 73.1%	USD 112,000.00 56.0%	USD 511,500.00 255.8%	USD 123,750.00 61.9%	
Kasey Lee	USD 200,000.00	USD 188,750.00 94.4%	USD 61,229.00 30.6%	USD 229,500.00 114.8%	USD 427,750.00 213.9%	
Scott Thompson	USD 250,000.00	USD 74,998.00 30.0%	USD 300,000.00 120.0%	USD 179,794.00 71.9%	USD 992,444.00 397.0%	
Wendy Johnson	USD 100,000.00	USD 80,000.00 80.0%	USD 76,821.00 76.8%	USD 141,000.00 141.0%	USD 359,000.00 359.0%	
My Opportunities	-	USD 0.00	USD 0.00	USD 0.00	USD 0.00	

Each user can change the forecast view from one forecast type to another using the forecast type menu, which we see here.

Home
Chatter
Leads
Accounts
Contacts
Opportunities
Reports
Dashboards
Forecasts
Edit Quotas
+

Jump to... | Elliot Smith > Jeff Diamond >

Forecasts Setup | Video Tutorial | Guided Tour | Help for this Page

Valerie Jones Forecast

Opportunities Revenue in U.S. Dollar

Forecast Type

- Opportunities Revenue
- Product Family Revenue

Display Options

Refresh

	Quota	Closed				Pipeline
Total: <b>1 Quarter</b> (Change)	USD 950,000.00	USD 600,000.00 63.2%	USD 560,050.00 59.0%	USD 1,257,501.00 132.4%	USD 2,579,419.00 271.5%	
<b>FQ4 FY 2013</b>	USD 950,000.00	USD 600,000.00 63.2%	USD 560,050.00 59.0%	USD 1,257,501.00 132.4%	USD 2,579,419.00 271.5%	
Cindy Long	USD 200,000.00	USD 110,000.00 55.0%	USD 10,000.00 5.0%	USD 195,707.00 97.9%	USD 676,475.00 338.2%	
Ely McCrane	USD 200,000.00	USD 146,252.00 73.1%	USD 112,000.00 56.0%	USD 511,500.00 255.8%	USD 123,750.00 61.9%	
Kasey Lee	USD 200,000.00	USD 188,750.00 94.4%	USD 61,229.00 30.6%	USD 229,500.00 114.8%	USD 427,750.00 213.9%	
Scott Thompson	USD 250,000.00	USD 74,998.00 30.0%	USD 300,000.00 120.0%	USD 179,794.00 71.9%	USD 992,444.00 397.0%	
Wendy Johnson	USD 100,000.00	USD 80,000.00 80.0%	USD 76,821.00 76.8%	USD 141,000.00 141.0%	USD 359,000.00 359.0%	
My Opportunities	-	USD 0.00	USD 0.00	USD 0.00	USD 0.00	

And when users change the forecast type to Product Family Revenue, they can see each sales rep's totals by product family.

Home

Chatter

Leads

Accounts

Contacts

Opportunities

Reports

Dashboards

Forecasts

Edit Quotas

+

Jump to...

Elliot Smith

Jeff Diamond

Valerie Jones Forecast

Product Family Revenue in U.S. Dollar

Display Options

Refresh

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Help for this Page

	Quota	Closed	Commit	Upside	Pipeline
Total: <b>1 Quarter</b> <a href="#">(Change)</a>	USD 925,000.00	USD 280,000.00	USD 1,722,000.00	USD 3,744,010.00	USD 3,845,250.00
<b>- FQ4 FY 2013</b>	USD 925,000.00	USD 280,000.00	USD 1,722,000.00	USD 3,744,010.00	USD 3,845,250.00
<b>+ Cindy Long</b>	USD 200,000.00	USD 0.00	USD 8,000.00	USD 13,000.00	USD 54,000.00
<b>+ Ely McCrane</b>	USD 200,000.00	USD 0.00	USD 22,000.00	USD 1,146,000.00	USD 74,000.00
<b>+ Kasey Lee</b>	USD 200,000.00	USD 120,000.00	USD 671,000.00	USD 168,900.00	USD 68,000.00
<b>- Scott Thompson</b>	USD 250,000.00	USD 160,000.00	USD 413,000.00	USD 344,110.00	USD 515,250.00
Hardware	USD 175,000.00	USD 160,000.00	USD 100,000.00	USD 2,000.00	USD 0.00
Software	USD 75,000.00	USD 0.00	USD 35,000.00	USD 1,110.00	USD 0.00
Products Not Categorized	-	USD 0.00	USD 278,000.00	USD 341,000.00	USD 515,250.00
<b>+ Wendy Johnson</b>	USD 75,000.00	USD 0.00	USD 608,000.00	USD 352,000.00	USD 2,834,000.00
<b>+ My Opportunities</b>	-	USD 0.00	USD 0.00	USD 1,720,000.00	USD 300,000.00

## Set Up Multiple Types of Forecasts

User Permissions Needed	
To add a forecast type:	"Customize Application"

1. From Setup, click **Customize** > **Forecasts** > **Settings**.
2. If your organization:
  - Doesn't yet have any forecast types enabled, click **Add a Forecast Type**.
  - Already has at least one forecast type enabled, click **Add another forecast type**.
3. From the Forecast Type menu, choose the data source you want to use for the forecast.

- 4. Choose the Forecast Measurement you want to use: Revenue or Quantity. If you want both, add separate forecast types for each.
- 5. Choose the columns you want to display in the related opportunities list on the Forecast tab for the forecast type.
- 6. Click **OK**.

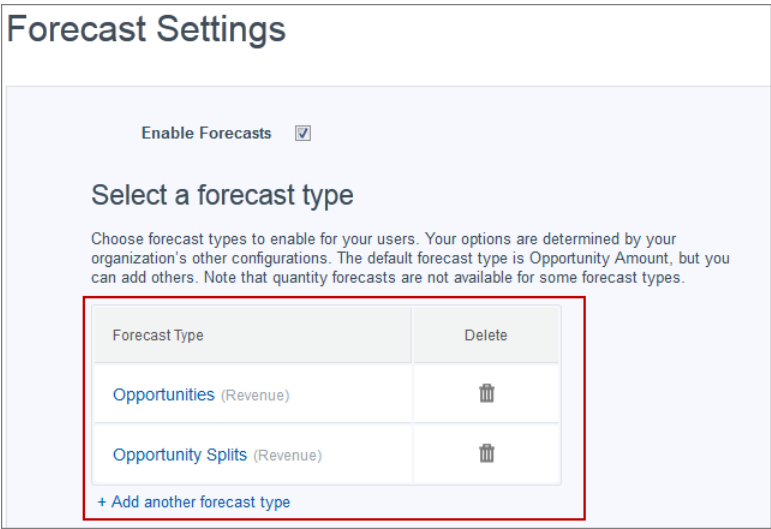
Repeat this procedure for each forecast type you want to add.

## New Setup for Forecasts

Easily get your sales teams ready to forecast on up to four types of data.

When you set up Collaborative Forecasts, you'll notice a new layout for configuring forecast types and global forecast settings.

From Setup, you'll click **Customize > Forecasts > Settings**. Here, you'll configure settings for adjustments, forecast range, currency, and quotas. These settings apply to all forecast types. You'll also notice a new section that displays the enabled forecast types and lets you add or delete them.



Depending on whether you want to view an existing forecast type or add a new one, you'll select different options.

When you select	The setup page
An existing forecast type	Displays the data source and forecast measurement for that forecast type, and lets you change the columns that appear in the related opportunities list for that forecast type.
Add another forecast type	Lets you to select a new data source and forecast measurement, as well as choose the columns to display in the related opportunities list for the new forecast type.

If you want to add a new type, you'll choose the forecast type, forecast measurement, and the columns that appear in the related opportunities list for the new forecast type. Here's what you'll see.

### Forecast Settings

#### Configure a forecast type

Select a forecast type you want to enable for users. Depending on your organization's configurations, some forecast types will be available and others will not. No two configurations can have the same forecast type and measurement.

Forecast Type

Opportunities

Depending on the forecast type, you can select the forecast measurement to use. Quantity forecasts are not available for Opportunity Revenue Splits or Opportunity Overlay Splits.

Forecast Measurement

Revenue

Quantity

#### Select fields to display in the list of related opportunities

When a user clicks a cell in the forecast table, the opportunities that roll up into that cell appear in a list below the table. Select the Opportunity fields to display in the list. Arrange the fields from top to bottom to order them left to right in the list.

Available Columns

Opportunity Owner Alias  
Owner First Name  
Owner Last Name  
Description  
Expected Revenue  
Lead Source  
Next Step  
Private

Selected Columns

Opportunity Name  
Account Name  
Amount  
Close Date  
Stage  
Probability (%)  
Forecast Category  
Owner Full Name

## Forecast Reports Changes

Sales managers can now easily display results by forecast type. Managers can also filter reports to display data for only their direct reports.

**Sales Managers Can Now See Results by Forecast Type**

When your sales managers run forecast reports, they can easily display the results by forecast type.

**Sales Managers Can Now Filter Results for Direct Reports**

Using the “My Direct Reports” filter, your sales managers can easily filter forecast reports to display only data from their direct reports.

## Sales Managers Can Now See Results by Forecast Type

When your sales managers run forecast reports, they can easily display the results by forecast type.

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

When sales managers create custom reports, the Forecasting Type field appears by default in the report layout. This field lets managers filter forecasting items and forecasting quotas reports by forecast type. For example, your sales manager wants to

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create a quota attainment report that shows quantity quotas for product families. In this case your sales manager will filter by the Product Family Quantity forecasting type. Here's how they'll do it.

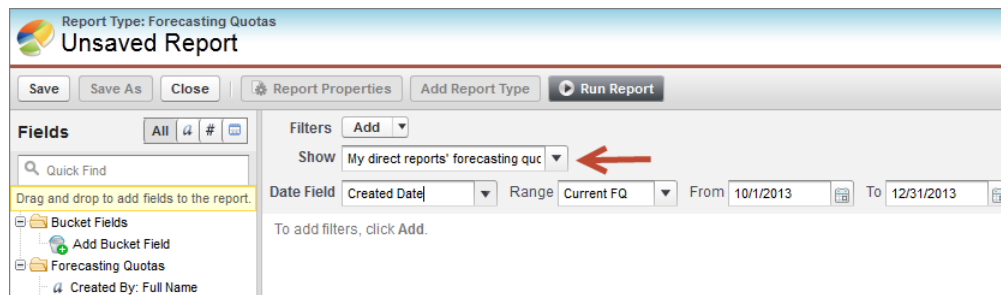
1. From Setup, click **Create > Report Types**.
2. Click **New Custom Report Type**.
3. For Primary Object, select either Forecasting Items or Forecasting Quotas.
4. Fill in the remaining fields for your report.
5. Click **Next**.
6. On the next screen, click to relate another object, or just click **Save**.
7. In the Fields Available for Reports section of the Custom Report Type detail page, click **Edit Layout**.

Your sales managers will see the Forecasting Type field in the default list of fields included in the report layout. The value of this field is the same as the Forecasting Type API Name value.

## Sales Managers Can Now Filter Results for Direct Reports

Using the “My Direct Reports” filter, your sales managers can easily filter forecast reports to display only data from their direct reports.

When sales managers create forecasting items or quotas reports from custom report types, they can filter the results to display only those for their direct reports. Your sales managers will choose **My direct reports** from the Show menu when defining the report.



## Customizable Forecasting is No Longer in Development

We're now focusing our development efforts on Collaborative Forecasting.

While we're continuing to support Customizable Forecasting, we have no plans to further develop it. Customers who want to work with the most current and developing features should consider migrating to Collaborative Forecasts.

## Forecasts 1.0 (Classic) Will Be Retired in Summer '14

Effective Summer '14, Forecasts 1.0 (Classic) will be officially retired. For more information, please contact [salesforce.com](mailto:salesforce.com) Customer Support.

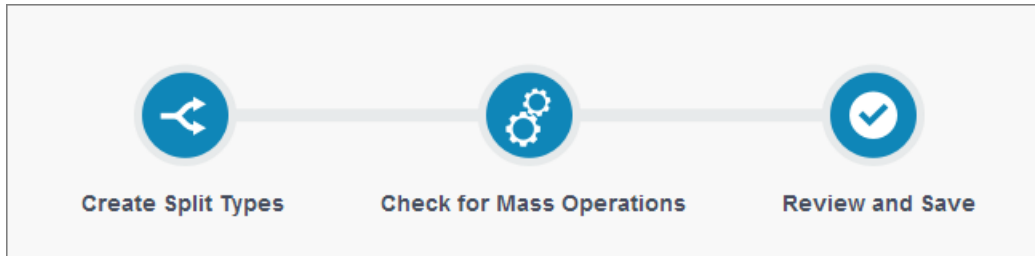
We recommend using Collaborative Forecasts to manage your forecasts. To get started, see the [Forecasts Administrator's Workbook](#), which provides a full step-by-step description of how to set up Collaborative Forecasts for your organization.



**Note:** Customizable Forecasts is not affected by this announcement. Only Forecasts 1.0 (Classic) is being retired.

## Streamlined Opportunity Splits

Quickly configure and edit splits with a visual workflow.



Opportunity Splits now include a streamlined workflow that visually walks you through the setup process. After splits are enabled, you can make the splits workflow faster for users as well, letting them add team members while editing split amounts. To access these enhancements, from Setup, click **Customize > Opportunities > Opportunity Teams > Opportunity Splits**.

For more information, search Salesforce Help for “Enabling Opportunity Splits.”

## Salesforce for Outlook

We’re continuing to help users become more productive when they use the Salesforce Side Panel. We’re also making efforts to help you better support your users.

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

Before we get into the enhancements we’ve included in Salesforce for Outlook, we’d like to encourage any remaining folks using Connect for Outlook to upgrade to Salesforce for Outlook, because in addition to including Connect for Outlook features your users know, Salesforce for Outlook includes features your users will love, like:

- The Salesforce Side Panel
- Support for Microsoft® Exchange Online—the Microsoft-hosted service that integrates with Office 365™
- Support for Microsoft Outlook® 2013 installed using Click-to-Run (a streaming installer for Microsoft Office)
- Options to sync some or all contacts, events, and tasks
- Automatically scheduled sync cycles

Let’s now take a look at our latest enhancements to Salesforce for Outlook and the side panel.

### **Users Can Now Create Cases from the Salesforce Side Panel**

If your users track customer support issues and gripes with cases they create in Salesforce, they can now create them directly from the side panel.

### **You Can Now Track the Versions of Salesforce for Outlook Your Users Run**

Quickly see which versions of Salesforce for Outlook your users are running from the Login History report.

### **Now Users Know When Upgrades are Available**

It’s easy for users to know when they need to upgrade to the latest version of Salesforce for Outlook. The Salesforce Side Panel notifies users when to upgrade, and includes a link to their Outlook configuration page where they can download the latest version.

## Users Can Now Create Cases from the Salesforce Side Panel

If your users track customer support issues and gripes with cases they create in Salesforce, they can now create them directly from the side panel.

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

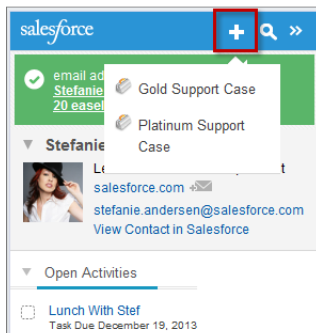
### User Permissions Needed

To display the Salesforce Side Panel: “Side Panel” in Outlook configurations

If your Outlook configurations have **Create Case** selected for the original **Create Case** feature, it’s a good idea to familiarize yourself with the differences between that feature, which appears on the Ribbon in Outlook, and the new one in the side panel.

Details	New Create Case Feature	Original Create Case Feature
Includes email attachments		✓
Uses global create actions	✓	
Simplified setup for administrators	✓	

Here’s how users can create cases from the side panel.



1. After selecting an email in Microsoft Outlook®, click **+** and then a create case action.
2. Type details that are relevant to the case.
3. Click **✓** to save the case. Keep in mind that email attachments aren’t included in the created cases.

## You Can Now Track the Versions of Salesforce for Outlook Your Users Run

Quickly see which versions of Salesforce for Outlook your users are running from the Login History report.

### User Permissions Needed

To run reports: “Run Reports”

**Login History**

Still Using IE6?  
Salesforce is phasing out support for IE6. Use the download options provided to find out what browsers are being used in your organization.

Download Options

File Type: ☒ CSV File ☐ GZIP File

File Contents: All Logins

Download Now

This page only allows you to filter and display the last 20,000 login records. If you need more records, download the last 6 months as a CSV, or access the LoginHistory via the API.

Username	Login Time	Source IP	Login Type	Status	Browser	Platform	Application	Client Version	API Type	API Version	Login URL
hdonovan@cnvoc.demo	10/7/2013 2:16:05 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	Unknown	Unknown	Salesforce for Outlook	241	N/A	N/A	na9.salesforce.com
christinawill@cnvoc.demo	10/7/2013 2:14:16 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	Unknown	Unknown	Salesforce for Outlook	241	N/A	N/A	na9.salesforce.com
madisonrigs@cnvoc.demo	10/7/2013 2:16:57 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	Unknown	Unknown	Salesforce for Outlook	241	N/A	N/A	na9.salesforce.com
stuartmiddle@cnvoc.demo	10/7/2013 3:00:51 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	Unknown	Unknown	Salesforce for Outlook	241	N/A	N/A	na9.salesforce.com
adamsmith@cnvoc.demo	10/7/2013 3:00:28 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	Unknown	Unknown	Salesforce for Outlook	234	N/A	N/A	na9.salesforce.com
timmeadow@cnvoc.demo	10/7/2013 5:03:58 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	Unknown	Unknown	Salesforce for Outlook	234	N/A	N/A	na9.salesforce.com
andygib@cnvoc.demo	10/8/2013 1:23:03 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	Unknown	Unknown	Salesforce for Outlook	231	N/A	N/A	na9.salesforce.com
jimtemp@cnvoc.demo	10/7/2013 2:13:51 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	IE 8 (Compatibility View)	Windows 7	Salesforce for Outlook	231	N/A	N/A	login.salesforce.com
hwakamatsu@cnvoc.demo	10/8/2013 2:18:26 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	IE 9 (Compatibility View)	Windows 7	Salesforce for Outlook	226	N/A	N/A	login.salesforce.com

1. From Setup, click **Manage Users** > **Login History**.
2. See each user's version of Salesforce for Outlook in the Application and Client Version columns.

## Now Users Know When Upgrades are Available

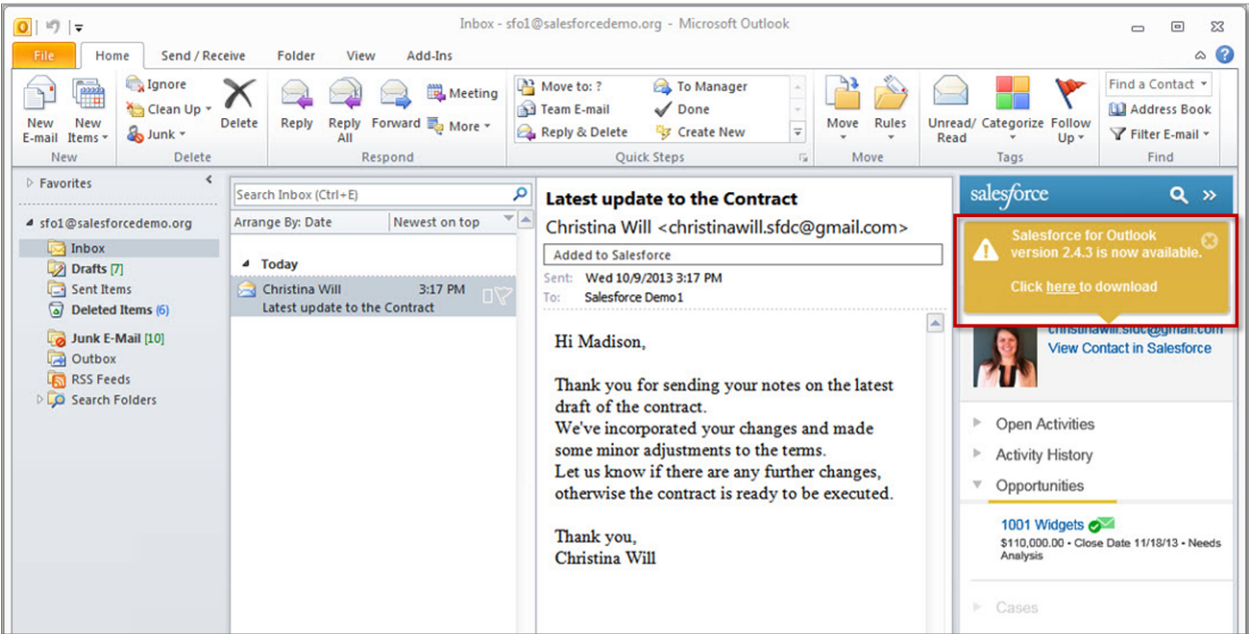
It's easy for users to know when they need to upgrade to the latest version of Salesforce for Outlook. The Salesforce Side Panel notifies users when to upgrade, and includes a link to their Outlook configuration page where they can download the latest version.

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

### User Permissions Needed

To display the Salesforce Side Panel:	"Side Panel" in Outlook configurations
To notify users when upgrades are available:	"Notify of product updates" in Outlook configurations

Here's what your users will see.



Side Panel Now Displays Some Search Results Content Differently

When users search for records in the Salesforce Side Panel, and the search results include records with custom field types, specific types of data appear differently. Here are the affected custom type fields.

For a	We displayed in earlier releases	We now display
Check box	An image of a check box	Text for either <i>True</i> or <i>False</i>
Rich text field	An image	The location of the image
Percent figure	A number proceeded with the symbol %	Just the number without the symbol %
URL	A hyperlink	Just the text without a hyperlink

Accounts, Contacts, and Leads

Build stronger connections with your accounts, contacts, and leads while you’re on the go with new features for Salesforce1.

Access Social Accounts, Contacts, and Leads in Salesforce1

Salesforce1 users can now leverage the power of social media to connect with their accounts, contacts, and leads.

Call, Log Calls to, and Email Leads in Salesforce1

Previously, users could send email messages, make phone calls, or log calls only to accounts and contacts with Salesforce1. Starting with Spring '14, users can now use the same features for leads.

View Profile Images for Leads in Salesforce1

If a lead has been linked to a social network profile, the lead’s profile might display in Salesforce1.

## Access Social Accounts, Contacts, and Leads in Salesforce1

Salesforce1 users can now leverage the power of social media to connect with their accounts, contacts, and leads.

Starting in Spring '14, you can find and link to Twitter profiles, and view Twitter profile images, Tweets, and followers for your accounts, contacts, and leads with Salesforce1. And, use the new *People in Common* feature to discover shared connections.

For more information, see [Access Twitter Profiles, Profile Images, and Tweets for Accounts, Contacts, and Leads](#).

## Call, Log Calls to, and Email Leads in Salesforce1

Previously, users could send email messages, make phone calls, or log calls only to accounts and contacts with Salesforce1. Starting with Spring '14, users can now use the same features for leads.

For more information, see [Call, Log Calls to, and Send Email to Leads](#).

## View Profile Images for Leads in Salesforce1

If a lead has been linked to a social network profile, the lead's profile might display in Salesforce1.

For more information, see [View Profile Images for Leads](#).

## Contracts and Orders

Orders and the Place Order REST API are now generally available.

### **Orders—Generally Available**

Orders are now generally available. Use Orders to customize your order management process.

### **Place Order REST API—Generally Available**

The REST-based Place Order REST API allows you to programmatically create a combination of contracts, orders, order products, and custom object records. You can easily integrate Salesforce order data into any web or mobile application, inside or outside of the Salesforce1 Platform.

### **Contract Approvals No Longer Available to New Organizations**

Starting in Spring '14, the contract-specific approval functionality isn't available for new organizations. Instead, you can create standard approval processes for contracts, which are located in Setup at **Create > Workflow & Approvals**. Existing organizations that are already using contract-specific approvals may continue to use them or transition to the standard approval processes. If you transition to the standard approval processes, remember to notify your users about how their interactions with approvals have changed.

## Orders—Generally Available

Orders are now generally available. Use Orders to customize your order management process.

Orders are available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Reduction orders are available in: **Enterprise, Unlimited, Performance, and Developer** Editions

An *order* is an agreement between a company and a customer to provision services or deliver products with a known quantity, price, and date. *Order products* represent those services or products. Depending on your company’s needs, you might require your users to add orders to a contract or allow them to be added directly to an account.

Orders follow the sharing model of the parent account. This means that a user with read access to an account also has read access to all of that account’s orders.

For information on how to get started with orders, see [Setting Up Orders for Your Organization](#).

If you’re extending your organization’s use of orders by code, the SOAP API includes reference information about objects related to orders and order products. In addition, a new REST-based API for orders is generally available. See [Place Order REST API—Generally Available](#) for more information.

**Enable Orders**

Orders are automatically enabled for new organizations. If your organization existed before Spring ’14, you need to manually enable orders.

**Understanding Orders Permissions and Profiles**

Once orders are enabled, object permissions for orders are automatically enabled in standard profiles. In addition, we’ve provided some new user permissions for orders.

**Limitations for Orders**

There are some limitations when choosing a price book for an order, as well as when editing, deleting, activating, and deactivating orders.

**Reduction Orders**


If your organization needs a solution for processing changes to orders that have been fulfilled, consider implementing reduction orders.

**Enable Orders**

Orders are automatically enabled for new organizations. If your organization existed before Spring ’14, you need to manually enable orders.

Available in: <b>Professional, Enterprise, Performance, Unlimited, and Developer</b> Editions
---

User Permissions Needed	
To modify order settings:	“Customize Application”

 **Note:** If your organization uses Communities, see [Orders and Communities](#) before enabling orders.

1. From Setup, click **Customize > Orders > Settings**.
2. Select `Enable Orders` if it isn’t already selected.
3. Click **Save**.

## Understanding Orders Permissions and Profiles

Once orders are enabled, object permissions for orders are automatically enabled in standard profiles. In addition, we've provided some new user permissions for orders.

	Read	Create	Edit	Delete	View All	Modify All
Contract Manager	✓	✓	✓	✓		
Marketing User	✓	✓	✓	✓		
Read Only	✓					
Solution Manager	✓	✓	✓	✓		
Standard User	✓	✓	✓	✓		
System Administrator	✓	✓	✓	✓	✓	✓

In addition to object permissions, you can assign these user permissions to your users.

### Activate Orders

Allows a user to activate orders. Requires “Read” and “Edit” on orders.

### Edit Activated Orders

Allows a user to edit orders, even if they've been activated, as well as deactivate orders. If a user doesn't have this permission but has “Edit” on orders, the user can change orders only if they aren't activated. Requires “Read” and “Edit” on orders, as well as “Activate Orders.”

### Create Reduction Orders

Allows a user to reduce orders that are activated. Requires “Read” and “Edit” on orders.

## Limitations for Orders

There are some limitations when choosing a price book for an order, as well as when editing, deleting, activating, and deactivating orders.

### Choosing Price Books

- Each order must be associated with only one price book. If the order is a child of a contract, the order inherits the contract's price book. Once a price book has been assigned to an order, users can't switch or remove the price book.

### Editing and Deleting

- Users can't edit the account or contract fields on an order.
- To edit an activated order, users must have the “Edit Activated Orders” user permission.
- To delete an activated order, users must first deactivate it.
- If an order has an associated reduction order, users can't edit the order's end date.
- If an order product has been reduced, users can no longer edit or delete the order product in that order.



Activating and Deactivating

- To activate or deactivate orders, users must have the “Activate Orders” user permission.
- An order must have order products before it can be activated.
- If an order has been activated, users can’t delete its order products or add new ones.
- Users can’t deactivate an order if it’s been reduced, regardless of the status of the reduction order.
- To deactivate an order, users must first deactivate and delete any associated reduction orders.

Reduction Orders

If your organization needs a solution for processing changes to orders that have been fulfilled, consider implementing reduction orders.

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

A *reduction order* is an agreement between a company and a customer to process product returns, de-provision services, or reduce services that have been provisioned. For example, if a customer has purchased 30 items through an order and later requests to cancel that order, your user can create a reduction order to track and process the request.

Some read-only fields on the Order and Order Product objects are relevant only in the context of a reduction order. On Order, these fields are `Original Order` and `Reduction Order`. On Order Product, these fields are `Available Quantity` and `Original Order Product`. Consider creating record types for reduction orders and only including these fields on the relevant page layouts.

Enable Reduction Orders

To let your users process returns or reductions on orders that have been activated, enable reduction orders for your organization.

Limitations for Reduction Orders

There are some limitations when creating, editing, deleting, activating, and deactivating reduction orders.

Enable Reduction Orders

To let your users process returns or reductions on orders that have been activated, enable reduction orders for your organization.

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

User Permissions Needed	
To modify order settings:	“Customize Application”

Before you can enable this setting, orders must be enabled for your organization. See [Enable Orders](#) on page 121.

1. From Setup, click **Customize > Orders > Settings**.
2. Select `Enable Orders` if it isn’t already selected.
3. Select `Enable Reduction Orders`.
4. Click **Save**.

## Limitations for Reduction Orders

There are some limitations when creating, editing, deleting, activating, and deactivating reduction orders.

### Reducing

- To reduce an order, users must have the “Create Reduction Orders” user permission.
- An order must be activated before users can reduce it.
- Users can’t reduce multiple orders with a single reduction order.
- Users can reduce up to 200 order products in each reduction order.

### Editing and Deleting

- The associated account and contract are inherited from the original order. Users can’t edit these fields. To edit an activated reduction order, users must have the “Edit Activated Orders” user permission.
- To delete an activated reduction order, users must first deactivate it.

### Activating and Deactivating

- To activate or deactivate reduction orders, users must have the “Activate Orders” user permission.
- Order products must have been reduced before a reduction order can be activated.
- If a reduction order has been activated, users can’t delete its order products or add new ones.

## Place Order REST API—Generally Available

The REST-based Place Order REST API allows you to programmatically create a combination of contracts, orders, order products, and custom object records. You can easily integrate Salesforce order data into any web or mobile application, inside or outside of the Salesforce1 Platform.

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions with API and Orders enabled

To access the Place Order REST API in an organization with orders and API enabled, establish an authenticated OAuth session and encode responses and requests in JSON.

### [Resources for the Place Order REST API](#)

The Place Order REST API provides resources for creating orders on a new or existing contract, creating order products on a new or existing order, and querying or filtering order data based on the parent order or contract.

### [Place Order REST API Limits and Limitations](#)

The Place Order REST API has some restrictions in addition to the general API limits.

## Resources for the Place Order REST API

The Place Order REST API provides resources for creating orders on a new or existing contract, creating order products on a new or existing order, and querying or filtering order data based on the parent order or contract.

The API has the following resources.

Resource	Supported HTTP Method	Description
<code>/services/data/<b>latest API version</b>/commerce/sale</code>	POST	Add new orders, order products, and custom objects to a new contract.
<code>/services/data/<b>latest API version</b>/commerce/sale/<b>contract ID</b></code>	PATCH, GET	Add new orders, order products, and custom objects to an existing contract. Retrieve a contract's child orders, order products, and custom objects.
<code>/services/data/<b>latest API version</b>/commerce/sale/order</code>	POST	Add new order products and custom objects to a new order.
<code>/services/data/<b>latest API version</b>/commerce/sale/order/<b>order ID</b></code>	PATCH, GET	Add new order products and custom objects to an existing order. Retrieve an order's child order products and custom objects.

## Place Order REST API Limits and Limitations

The Place Order REST API has some restrictions in addition to the general API limits.

### Limits and Limitations

- 2000 records per request or the API maximum limit for your organization—whichever is lower.
- Responses and requests are in JSON.

When using Place Order REST API resources that require a request or response body, use Content-Type: application/json.

- Each call can only affect one top-level entity.

For orders under a contract, you need one call for each new or existing contract you're adding orders, order products, or custom objects to. For orders not under a contract, you need one call for each new or existing order you're adding order products or custom objects to.

- In each resource, you can create custom objects at a depth of one level below the top-level entity.

◇ `/services/data/latest API version/commerce/sale` supports custom object records on contracts and orders.

◇ `/services/data/latest API version/commerce/sale/order` supports custom object records on orders and order products.

- Custom objects are not supported as children of other custom objects.
- To filter GET results, query parameters must be a fully qualified field name. The parent entity must be lower-cased (such as `order`), and the field must match the defined relationship name (such as `orders.StatusCode`).

For example, to get a list of all orders with a draft status under a given contract, you must use `contract.orders.StatusCode='Draft'`.

- You can't update existing records.

# Contract Approvals No Longer Available to New Organizations

Starting in Spring '14, the contract-specific approval functionality isn't available for new organizations. Instead, you can create standard approval processes for contracts, which are located in Setup at **Create > Workflow & Approvals**. Existing organizations that are already using contract-specific approvals may continue to use them or transition to the standard approval processes. If you transition to the standard approval processes, remember to notify your users about how their interactions with approvals have changed.

For more information about standard approval processes, see "Approval Processes Overview" in the Salesforce Help.

## Activities

Activities include events and tasks.

### Repeat Tasks on a Flexible Schedule

Ever wish you could easily adjust the due date of a recurring task? Or cut the clutter of recurring tasks in your future task list? Use repeating tasks to make a task recur a specified number of days after a trigger that you choose: The next task in the series is created only when the current task is due or marked completed. Repeating tasks are a streamlined alternative to regularly recurring tasks when you don't need to get a task done on a specific day.

### Other Activities Changes

These changes affect Salesforce events and tasks.

## Repeat Tasks on a Flexible Schedule

Ever wish you could easily adjust the due date of a recurring task? Or cut the clutter of recurring tasks in your future task list? Use repeating tasks to make a task recur a specified number of days after a trigger that you choose: The next task in the series is created only when the current task is due or marked completed. Repeating tasks are a streamlined alternative to regularly recurring tasks when you don't need to get a task done on a specific day.

To enable repeating tasks, add the relevant fields to a page layout. For more information, see Customizing Page Layouts in the Salesforce online help.

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

User Permissions Needed	
To create tasks:	"Edit Tasks"

1

Repeat This Task

After date completed

2

Recurrence Interval

14

- 1. For Repeat This Task, select **After due date** or **After date completed**.
- 2. For Recurrence Interval, enter the number of days after the task's due date or completed date when you want the next task to be due.

If **Repeat This Task** on an existing task is set to **(Task closed)**, it indicates the task was closed as part of a repeating series. You can use this information to distinguish repeating tasks from other tasks for reporting purposes.



**Note:**

If a task is set to repeat after the due date, and the date you close the task precedes the due date by more than the recurrence interval, then the due date of the next task is set to a date the same as or later than the current task's due date. For example, if you set a task to repeat three days after its due date, but you close the task five days before the due date, the due date of the next task is set to one day after the current task's due date (due date minus five plus twice the three-day interval).

## Other Activities Changes

These changes affect Salesforce events and tasks.

### Reports display contacts differently for administrators

If your organization uses Shared Activities, reports (including custom report types and Tasks and Events reports) display different results depending on your permissions. Say you're reporting on events, and your report results include an event that is related to two or more contacts and also has invitees. If you're an administrator, your report results show an event for the primary contact plus a separate event for each invitee. If you're not an administrator, your report results show just one event, for the primary contact.

### Labels have been modified

On event and task detail pages, a hyphen has been added in the labels **Create Follow-Up Event** and **Create Follow-Up Task**. On event detail and event edit pages, a hyphen has been added in the label **All-Day Event**.

### Tasks can always be marked public

The checkbox to mark a task public is now always available, regardless of whether other objects are related to the task.

## Salesforce Console Enhancements

The Salesforce Console for Sales gives users easy access to sales intelligence in a dashboard-like interface that means more access to contextual data with fewer clicks and less scrolling.

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

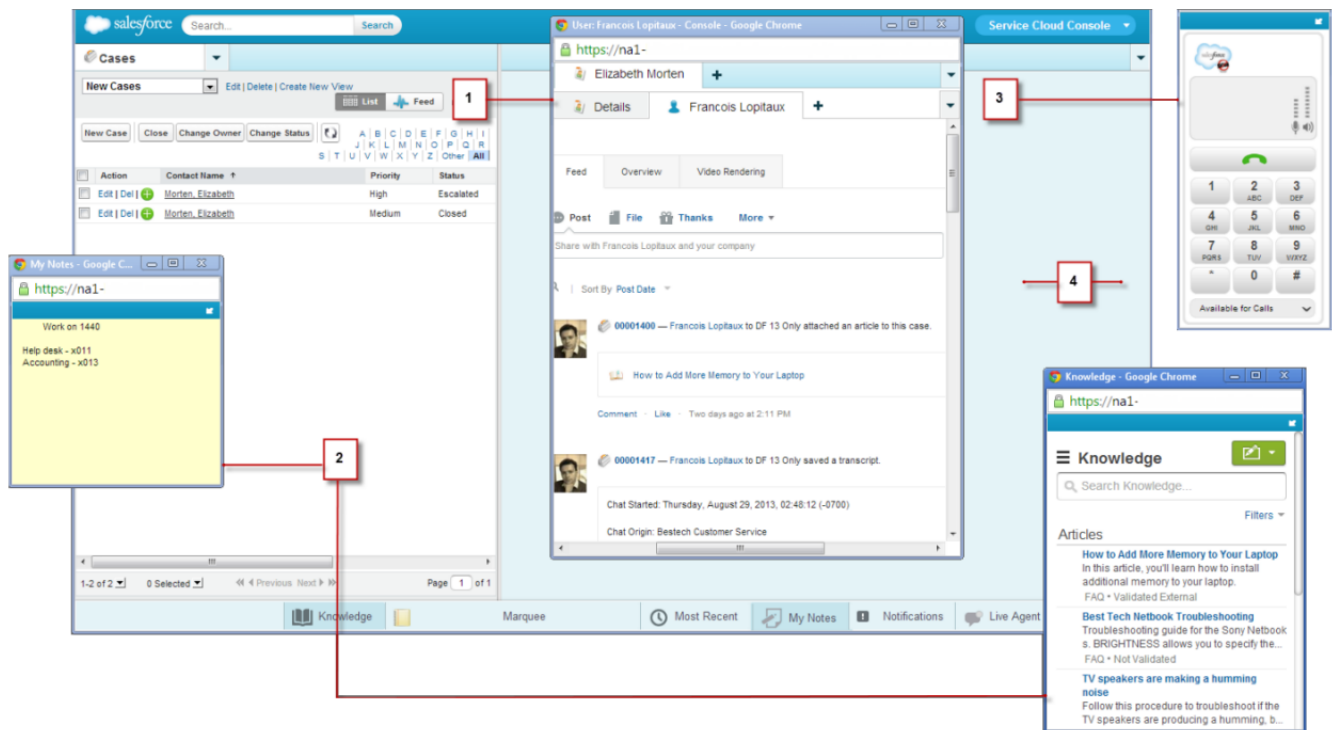
Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an additional cost

Updates to the Salesforce Console for Sales for Spring '14 include these new features:

### Multi-Monitor Components

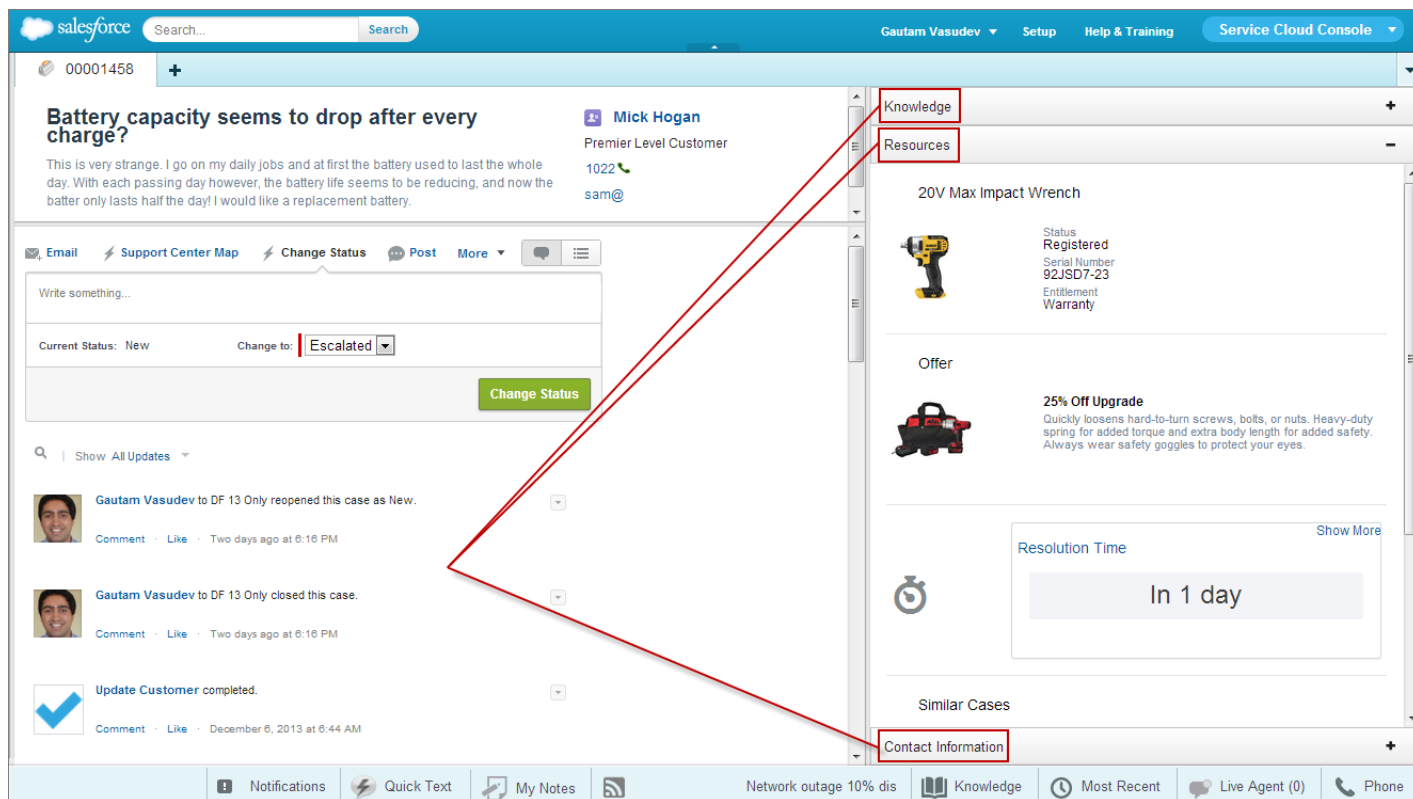
Multi-monitor components let users pop out portions of the Salesforce console so they can move them to any location on their screens.



1. Primary tab
2. Custom components
3. SoftPhone
4. Playground

## More Custom Console Components in the Sidebar

Add and organize multiple custom console components on each sidebar of a console.



### Additional Enhancements

For more information, see [Salesforce Console for Service](#).

## Territory Management Can Now Be Disabled

Beginning in Spring '14, organizations that use Territory Management can disable the feature if necessary.

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

### User Permissions Needed

To access territory management features: "Manage Territories"



**Important:** If you disable Territory Management, your users lose record access that's based on territory assignments, your organization no longer has access to territory management data, and Customizable Forecasting is automatically disabled.

To disable Territory Management for your organization, contact [salesforce.com](https://salesforce.com) Customer Support.

# Data.com

Deliver fresh, accurate business-to-business data inside Salesforce. The Data.com product suite includes Data.com Prospector and Data.com Clean, as well as related Data.com features: Social Key, Data.com Reports, and the Data.com Assessment App.

## Data.com Prospector

Use Data.com Prospector to search for Data.com accounts and contacts directly on the Data.com tab. If you have a Data.com Prospector license, you can add records to Salesforce.

## Data.com Clean

Data.com Clean is an important part of the Salesforce Data.com product suite. With Data.com Clean, users can clean individual records manually or clean groups of records from a list view. Your organization can also clean batches of records using automated Clean jobs. There are two versions of Data.com Clean: Corporate Clean and Premium Clean. They differ based on the D&B fields that are available when you clean account or lead records, either manually or via automated jobs.

## Data.com Additional Enhancements

We've made a number of additional improvements to Data.com: updated NAICS Codes, increased storage of Clean job logs, and more Data.com reports.

# Data.com Prospector

Use Data.com Prospector to search for Data.com accounts and contacts directly on the Data.com tab. If you have a Data.com Prospector license, you can add records to Salesforce.

Data.com Prospector license available in: <b>Contact Manager</b> (no Lead object), <b>Group</b> , <b>Professional</b> , <b>Enterprise</b> , <b>Performance</b> , and <b>Unlimited</b> Editions
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Data.com Clean license available in: <b>Professional</b> , <b>Enterprise</b> , <b>Performance</b> , and <b>Unlimited</b> Editions
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## Data.com List Pools Improved

We've made improvements to how Data.com List Users use their list pool limits and how you track list pool usage.

## Adding and Exporting Experiences Enhanced

We've enhanced the experience users have when they add or export records.

# Data.com List Pools Improved

We've made improvements to how Data.com List Users use their list pool limits and how you track list pool usage.

User Permissions Needed	
To implement Data.com:	"Customize Application"
To enable Data.com users:	"Manage Users"



### Better Visibility Into Your Organization's Data.com List Pool Purchases (available February 17, 2014)

Data.com List users share account, contact, and lead record additions from a pool. Your organization can purchase record additions at any time. Additions expire one year after the purchase date. Because organizations can have multiple purchases—all with different expiration dates—we've given you better visibility into your purchase history and usage.

To see a summary of your Data.com List user limits, from Setup, click **Data.com Administration > Licenses & Limits**. There, you'll see key information, such as your organization's total pool record limit and balance, as well as details about individual list pool purchases.

Data.com List User Limits					
Total Pool Record Limit	2,500				
Balance	1,500				
Next Expiration Date	09/10/2012 (500 record additions left)				
Expiration Date	Purchased Date	Pool Record Limit	Added or Exported	Balance	
10/30/2012	10/30/2011	500	0	500	
09/25/2012	09/25/2011	500	0	500	
09/10/2012	09/10/2011	1,500	1,000	500	
07/31/2012 (Expired)	07/31/2011	2,000	2,000	0	
06/30/2012 (Expired)	06/30/2011	1,000	900	100	
06/12/2012 (Expired)	06/12/2011	1,500	1,484	16	
06/13/2012 (Expired)	06/03/2011	2,500	2,500	0	
05/12/2012 (Expired)	05/12/2011	1,500	1,500	0	
03/22/2012 (Expired)	03/22/2011	1,000	1,000	0	
1-9 of 9		« Previous Next »		Page 1 of 1	

### Data.com List Users Now Use Monthly Limit Before Pool Limit

Data.com List Users are automatically given a monthly record addition limit. Now, before the records they add or export are deducted from the list pool they share with the organization's other Data.com List Users, they'll first use up their monthly record additions. This new approach ensures that the List User's monthly limit, which expires at the end of each month, doesn't go to waste.

### Fields on Data.com Usage Report Updated

If you use the Data.com Usage object to run reports about your organization's Data.com usage, you'll notice we've changed a few things to make the report easier to understand.

- The `Data.com User Type` field is now `Data.com Usage Type`.
- The values for the `Data.com Usage Type` field are now `Data.com Monthly Usage` and `Data.com List Pool Usage`.

## Adding and Exporting Experiences Enhanced

We've enhanced the experience users have when they add or export records.

User Permissions Needed	
To add or export accounts from Data.com:	"Create" on accounts
To add or export contacts from Data.com:	"Create" on contacts
To add or export leads from Data.com:	"Create" on leads

A green dot (●) appears in search results next to records *already in Salesforce*. A blue checkmark (✓) appears in the search results next to records that were *already purchased by any Data.com user in your organization*. Both of these types of records are considered to be records your organization *already owns*.

### Enhanced Adding Experience

If a user selects more records to add than their record balance, we'll let them know. They can then proceed to *add* as many records as their balance and other settings allow without having to adjust their selection. When users add object records, duplicates of records your organization already owns (● or ✓) are included if your organization allows duplicates for that object.

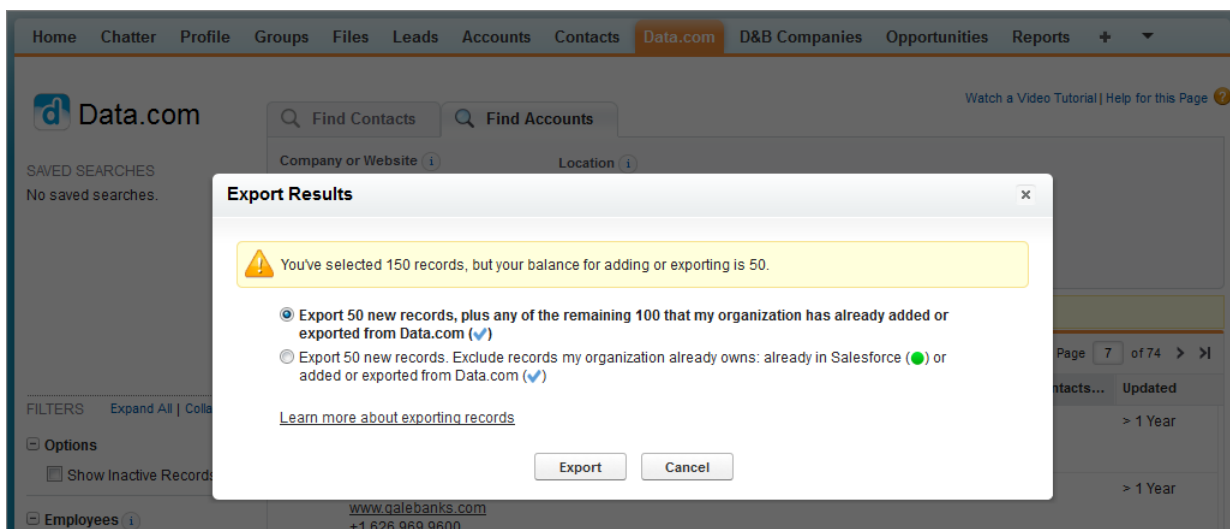
**Example:** The user has a record balance of 133, but selects 200 contact records to add. Your organization allows duplicates for contacts, and 50 of the selected contacts are duplicates of contact records your organization already owns. We'll add all of the 50 duplicate contacts (adding duplicates does not affect the record balance), plus 133 of the remaining new contacts, and the user's record balance will be 0.

### Enhanced Exporting Experience

If a user selects more records to export than their record balance, we'll let them know. They can then proceed to *export* as many records as their balance allows without having to adjust their selection. When exporting records, the user can opt to either:

- Include already purchased records (✓) along with new records; or
- Exclude all selected records that the organization already owns (● or ✓) and export only new records.

**Example:** The user has a record balance of 50, but selects 150 account records to export. She opts to export both new and already purchased records. Thirty (30) of the selected records have already been purchased by your organization. We'll export all of the 30 previously purchased records, plus 50 of the remaining new records. After the export, the user's record balance will be 0.



**Tip:** You can determine users' record balances on the All Data.com Users page. From Setup click **Data.com Administration** > **Users**. For individual Data.com Users, subtract the number in the Added or Exported column from number in the Monthly Limit column to determine at the balance. For the group of Data.com List Users, subtract the number in the Added or Exported column from the List Users Limit number.

## Data.com Clean

Data.com Clean is an important part of the Salesforce Data.com product suite. With Data.com Clean, users can clean individual records manually or clean groups of records from a list view. Your organization can also clean batches of records using automated Clean jobs. There are two versions of Data.com Clean: Corporate Clean and Premium Clean. They differ based on the D&B fields that are available when you clean account or lead records, either manually or via automated jobs.

Data.com Prospector license available in: <b>Contact Manager</b> (no Lead object), <b>Group, Professional, Enterprise, Performance,</b> and <b>Unlimited</b> Editions
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Data.com Clean license available in: <b>Professional, Enterprise, Performance,</b> and <b>Unlimited</b> Editions
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Spring '14 includes a number of important enhancements administrators will want to know about, as outlined here. For complete instructions on implementing Clean, including these new features, see “Implementing Data.com Clean” in the Salesforce Help.

### ***Clean Jobs Can be Set to Bypass Skipped Records, Triggers, and Workflow Rules***

Spring '14 offers three bypass options for Clean jobs. For certain conditions, bypassing Clean can help eliminate unnecessary processing and extraneous errors.

### ***Clean Jobs Can be Set to Overwrite Salesforce Record Field Values***

Spring '14 lets you enable Clean jobs to overwrite selected Salesforce record field values that differ from corresponding values on matched Data.com records. This feature makes sure your users have the very latest Data.com data in fields that are important for your business.

### ***D&B Company Records Can Be Manually Refreshed***

If your organization doesn't use Clean jobs for updating D&B Company records, your users can still get the latest D&B Company data by manually refreshing those records. D&B Company records are available in organizations that use either Data.com Premium Prospector or Data.com Premium Clean.

## Clean Jobs Can be Set to Bypass Skipped Records, Triggers, and Workflow Rules

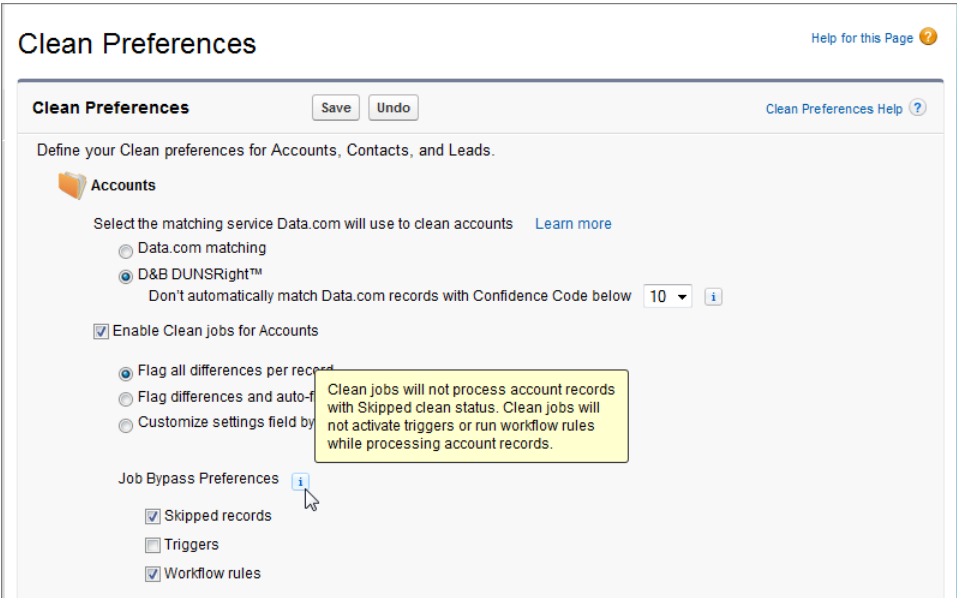
Spring '14 offers three bypass options for Clean jobs. For certain conditions, bypassing Clean can help eliminate unnecessary processing and extraneous errors.

User Permissions Needed	
To implement Data.com Clean:	“Customize Application”

For all CRM objects (accounts, contacts, leads), Clean jobs can now bypass skipped records, triggers, and workflow rules. For D&B Company records, Clean jobs can bypass triggers and workflow rules. You can find Bypass settings on the Clean Preferences page. Here's how the options work.

- If you have records with **Skipped** clean status, select the **Skipped records** Job Bypass preference to skip those records when full sync clean jobs run. (Note that *incremental* Clean jobs *always* bypass records with **Skipped** clean status, regardless of this setting.) For more information on **Skipped** clean status, see “Understanding Data.com Clean Status” in the Salesforce Help.

- If your organization uses triggers on CRM or D&B objects, consider selecting the `Triggers Job Bypass` preference. Clean jobs will clean affected records but they will not activate triggers.
- If your organization uses workflow rules on CRM or D&B objects, consider selecting the `Workflow rules Job Bypass` preference. Clean jobs will clean affected records but they will not run workflow rules.



Make sure to review triggers and workflow rules you use on CRM or D&B Company objects before selecting a related bypass option.

## Reviewing Triggers and Workflow Rules for Clean Compatibility

If your organization uses triggers or workflow rules on objects enabled for Clean (Account, Contact, Lead, or D&B Company), review the triggers and workflows and consider making adjustments or bypassing them so users don’t encounter unexpected results when records are cleaned.

Data.com Prospector license available in: <b>Contact Manager</b> (no Lead object), <b>Group, Professional, Enterprise, Performance,</b> and <b>Unlimited</b> Editions
Data.com Clean license available in: <b>Professional, Enterprise, Performance,</b> and <b>Unlimited</b> Editions

User Permissions Needed	
To implement Data.com Clean:	“Customize Application”
To implement Data.com Prospector:	“Customize Application”
To define triggers:	“Author Apex”
To define workflow rules:	“Customize Application”

For example: your organization has a trigger that creates and assigns a task every time a lead record is updated by any means. If you clean leads using Clean jobs, your users could get more tasks than expected, so you might want to adjust the trigger so that tasks are only created and assigned when records are *manually edited* or *cleaned by Salesforce users*. You can determine who

last updated a record by checking the Last Modified By field. Records last updated by a Clean job show Data.com Clean in that field, and records updated by users show the first and last name of the user.

1. If you use triggers on any object that’s cleaned manually or by Clean jobs, from Setup, click **Customize**. Select the object and then select **Triggers**.
2. Open and examine each trigger to make sure that your system or users won’t encounter any unexpected results when records are cleaned. If you find that one or two triggers might cause unexpected results, you may be able to adjust those triggers. If you use Clean jobs and find multiple triggers that may cause unexpected results, consider bypassing triggers when jobs are run. You can select that option on the Clean Preferences page: from Setup, click **Data.com Administration > Clean > Preferences**.
3. If you use workflows, from Setup, click **Create > Workflow & Approvals > Workflow Rules**.
4. Open and examine each workflow rule to make sure that your system or users won’t encounter any unexpected results when records are cleaned. If you find that one or two workflow rules might cause unexpected results, you may be able to adjust those rules. If you use Clean jobs and find multiple rules that may cause unexpected results, consider bypassing workflow rules when jobs are run. You can select that option on the Clean Preferences page. You can select that option on the Clean Preferences page: from Setup, click **Data.com Administration > Clean > Preferences**.
5. For all triggers and workflow rules you’re using, check results on affected object records after the next Clean job runs for that object.

## Clean Jobs Can be Set to Overwrite Salesforce Record Field Values

Spring ‘14 lets you enable Clean jobs to overwrite selected Salesforce record field values that differ from corresponding values on matched Data.com records. This feature makes sure your users have the very latest Data.com data in fields that are important for your business.

User Permissions Needed	
To implement Data.com Clean:	“Customize Application”

You can find the Overwrite settings on the Clean Preferences page. For any object enabled for Clean jobs, just select *Customize settings field by field*, then select the fields you want to overwrite with Data.com data. Your options remain flexible: you may want to overwrite some fields that differ, flag others, and auto-fill some fields that have blank values.

For example: you might want *Clean* to automatically overwrite fields like Phone on account records, but want your *users* to review updates to other fields, such as those used for territory assignments.

If you overwrite Salesforce record values, it’s important to set history tracking for those fields so you can view previous values.

Clean Preferences

Help for this Page ?

Clean Preferences

SaveUndo

Clean Preferences Help ?

Define your Clean preferences for Accounts, Contacts, and Leads.

Accounts

Select the matching service Data.com will use to clean accounts [Learn more](#)

☐ Data.com matching

☒ D&B DUNSRight™

Don't automatically match Data.com records with Confidence Code below 10 ⓘ

☒ Enable Clean jobs for Accounts

☐ Flag all differences per record

☐ Flag differences and auto-fill blank fields per record

☒ Customize settings field by field

⚠ If you select Overwrite for any field, you should set history tracking for that field. [Set History Tracking](#)

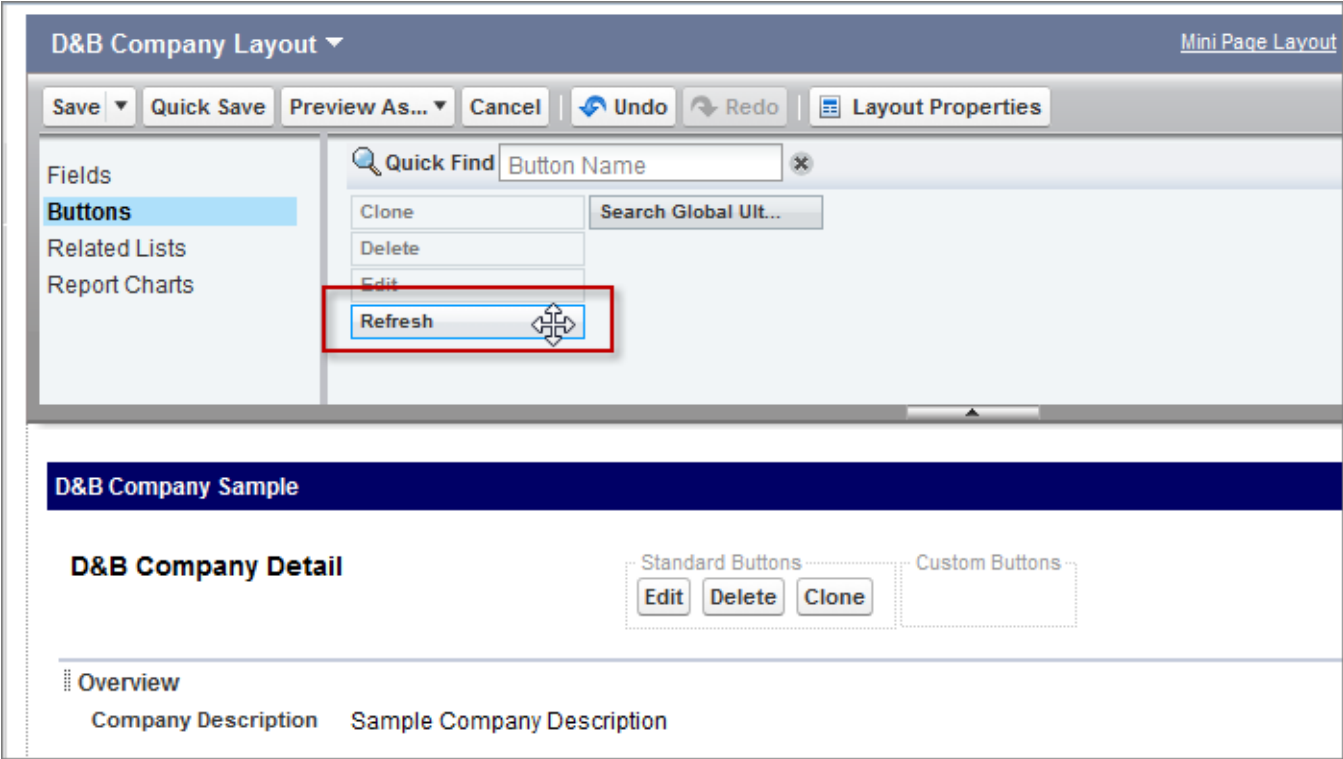
Accounts Field	Flag	Flag & Auto-Fill	Overwrite	Custom-Mapped Field
	<a href="#">Select All</a>	<a href="#">Select All</a>	<a href="#">Select All</a>	
Company Name	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
D-U-N-S Number	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
D&B Company	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Number of Employees	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Annual Revenue	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Ticker Symbol	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Website	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Industry	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Ownership	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Phone	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
Fax	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

## D&B Company Records Can Be Manually Refreshed

If your organization doesn’t use Clean jobs for updating D&B Company records, your users can still get the latest D&B Company data by manually refreshing those records. D&B Company records are available in organizations that use either Data.com Premium Prospector or Data.com Premium Clean.

User Permissions Needed	
To implement D&B Companies:	“Customize Application”
To refresh D&B Company records:	“Edit” on accounts

To let your users manually refresh D&B Company records, add the **Refresh** button to your D&B Company page layouts. For instructions on adding buttons, see “Customizing Page Layouts” in the Salesforce Help. And make sure to let your users know this feature is available.



# Data.com Additional Enhancements

We’ve made a number of additional improvements to Data.com: updated NAICS Codes, increased storage of Clean job logs, and more Data.com reports.

Data.com Prospector license available in: <b>Contact Manager</b> (no Lead object), <b>Group</b> , <b>Professional</b> , <b>Enterprise</b> , <b>Performance</b> , and <b>Unlimited</b> Editions
Data.com Clean license available in: <b>Professional</b> , <b>Enterprise</b> , <b>Performance</b> , and <b>Unlimited</b> Editions

User Permissions Needed	
To install packages:	“Download AppExchange Packages”

## NAICS Codes from D&B Updated

If you use Data.com Premium Prospector or Data.com Premium Clean, you’ll be happy to know we’ve updated the NAICS codes with the most recent values from D&B. So now the NAICS information you find on account records and D&B Company records is more up to date than ever.

## Clean Job Logs Stored for 21 Days

In previous releases, we stored Data.com Clean job logs for 7 days. We now store logs for 21 days.

## More Data.com Reports Available from the AppExchange

We’ve retired the Data.com Reports package from the AppExchange and replaced it with several more specific report packages. Now you can easily find the exact report you need to analyze the effect Data.com is having on your business.



**Note:** The Block Auto-Update validation rule is no longer included in the Data.com Reports packages. For information on how to create your own custom field and validation rule, see “Preventing Data.com Clean Auto-Updates for Account, Contact, and Lead Records” in the Salesforce Help.

Available AppExchange Reports Package	Contents	Considerations
<a href="#">Data.com Prospector Reports</a>	Dashboard and associated reports used primarily by sales management to see the value Data.com provides in terms of converted leads, sales forecast, and revenue.	To install this package, your organization must use Data.com Prospector.
<a href="#">Data.com Premium Reports</a>	Dashboard and associated reports utilize the rich set of D&B Company data to give you and your users unparalleled insight into your accounts, to help improve sales planning and business strategy.	To install this package, your organization must use Data.com Premium Prospector or Data.com Premium Clean.
<a href="#">Data.com Clean Reports</a>	Dashboard and associated reports used primarily by sales operations and those responsible for keeping Salesforce data clean.	To install this package, your organization must use Data.com Clean.
Data.com Data Assessments	Information on how Data.com can enrich your data. For more information, see “Analyzing Data Quality with Data.com Data Assessments” in the Salesforce Help.	Your organization can request one assessment every 30 days.



# Service

Help support agents deliver exceptional customer service on every channel.

## **Case Feed**

Case Feed gives support agents a more streamlined way of working with cases. It lets agents communicate in a Chatter-like feed, and it includes publishers that help agents quickly add notes, log calls, or change the status of cases.

## **Communities and Customer Portal Users**

Communities and customer portal users are external users with appropriate licenses who can access Salesforce through Web channels.

## **Entitlement Management**

Entitlement Management helps support agents verify and fulfill customers' service contracts.

## **Knowledge**

Salesforce Knowledge provides a knowledge base to users and customers that's Knowledge-Centered Support certified.

## **Live Agent**

Live Agent lets support agents connect with customers or website visitors in real time through text-only chat.

## **Salesforce CTI Toolkit**

The Salesforce CTI Toolkit helps partners build adapter programs that call center users install on their machines to integrate Salesforce with computer-telephony integration systems.

## **Salesforce Console for Service**

The Salesforce Console for Service is an app that helps support agents find, update, and create records quickly to support customers on any channel.

## **Service Communities**

Chatter Answers and Ideas provides customers with a self-service community where they can post questions and receive answers from other customers or support agents, as well as post, vote for, and comment on innovative ideas on the Web.

## **Social Customer Service**

Social Customer Service allows you to respond to your customers via social networks and capture important case information.

# Case Feed

Case Feed gives support agents a more streamlined way of working with cases. It lets agents communicate in a Chatter-like feed, and it includes publishers that help agents quickly add notes, log calls, or change the status of cases.

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

## **Support for Drag-and-Drop Attachments in the Case Feed Email Publisher**

Drag and drop files from your computer or Salesforce to an email message in Case Feed to quickly and easily add multiple attachments that help customers resolve their issues.

### ***Inline Images Now Supported in the Case Feed Email Publisher***

Add inline images to your email messages in Case Feed to include pictures that enhance your text. For example, you might add an image after each step in a complex troubleshooting process.

### ***Resizable Message Pane in the Case Feed Email Publisher***

Make the message pane in the Case Feed email publisher larger to see more of the message you're writing or replying to, or make it smaller to see more of the case activity in the feed without scrolling.

### ***Add Custom Components to Case Feed***

Use Visualforce pages as custom components in Case Feed to give support agents easy access to special tools or functionality while they're working with cases.

### ***Automatically Associate Outgoing Emails with Contacts***

Email messages you write using the Case Feed Email action are now automatically associated with contacts, making the Related Activity list on cases and the Activity History list on contacts more comprehensive and useful.

### ***Convert Page Layouts for Case Feed Users to Case Page Layouts***

As of Spring '14, we've made creating and customizing case layouts easier by replacing page layouts for Case Feed users with feed-based layouts for case pages. By converting your older page layouts, you can use the advanced page layout editor to manage them and can assign Case Feed to users more easily.

### ***Topics List Available as a Case Feed Sidebar Tool***

Add the topics list to your Case Feed layouts to make it easy for support agents to find relevant troubleshooting information quickly.

### ***Adding Status Field to Case Feed Change Status Action Removes Default Fields***

The default fields that appear in the Change Status action, `Current Status` and `Change to`, remain unchanged. However, if you add the standard `Status` field, it will now automatically replace these fields.

### ***New Ways to Filter Feed Items in Case Feed***

Two new feed filters—Attached Articles and Milestone Status—make it easier to find specific information in the feed quickly.

## **Support for Drag-and-Drop Attachments in the Case Feed Email Publisher**

Drag and drop files from your computer or Salesforce to an email message in Case Feed to quickly and easily add multiple attachments that help customers resolve their issues.

To attach files, drag and drop them into the area at the bottom of the Case Feed email publisher. (You can also click **Upload files**.) You can attach up to a total of 10 MB to each email message. Salesforce supports all file types.




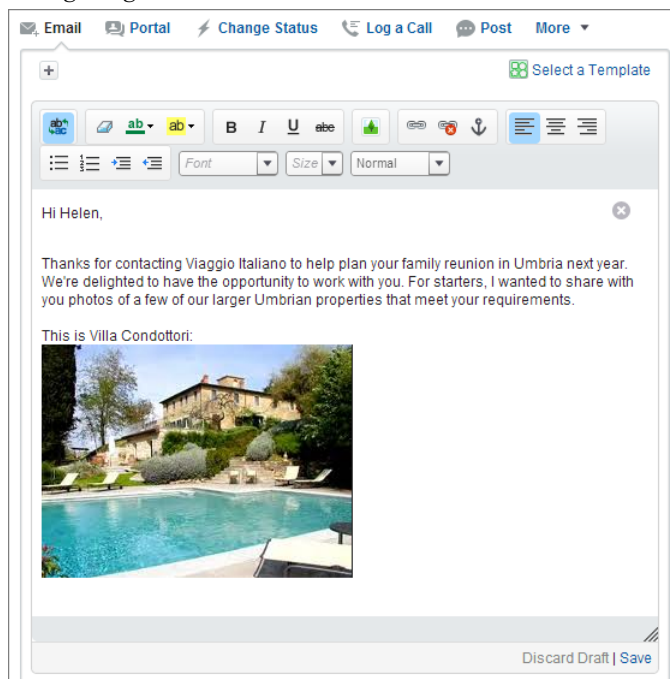
**Note:** Drag-and-drop functionality is available only on browsers that support HTML5.

If the total size of everything you attach to a message is greater than 3 MB, all of the attachments appear as links, which the recipient can use to download the files. If the total attachment size is less than 3 MB, each file appears as an attachment.

## Inline Images Now Supported in the Case Feed Email Publisher

Add inline images to your email messages in Case Feed to include pictures that enhance your text. For example, you might add an image after each step in a complex troubleshooting process.


To add an inline image, click  in the toolbar of the Case Feed email publisher and upload or link to the image you want. Each image you embed must be no larger than 1 MB, and in .png, .jpg, .jpeg, .jpe, .jfif, .pjpeg, .bmp, or .gif format. The total size of your email message, including images and text, can be no more than 12 MB.



**Note:** You need to use the rich text editor in the email publisher to embed images. You can't embed images in plain text messages.

## Resizable Message Pane in the Case Feed Email Publisher

Make the message pane in the Case Feed email publisher larger to see more of the message you're writing or replying to, or make it smaller to see more of the case activity in the feed without scrolling.

Click and drag  to change the size of the message pane. Once you resize the message pane, it appears in the new size each time you write an email, until you resize it again.

## Add Custom Components to Case Feed


Use Visualforce pages as custom components in Case Feed to give support agents easy access to special tools or functionality while they're working with cases.

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

User Permissions Needed	
To change Case Feed settings:	“Manage Cases”
	AND
	“Customize Application”

For example, you might create a map component that lets agents see where a customer is located, or a tool agents can use to look up the products related to cases they’re working on. You can use any Visualforce page that includes the standard case controller as a custom component.

Once you’ve created a Visualforce page to use as a custom component, add it to the Case Feed layout.

- How you access the Case Feed Settings page depends on what kind of page layout you’re working with.
  - For a layout in the Case Page Layouts section, click **Edit**, and then click **Feed View** in the page layout editor.
  - For a layout in the Page Layouts for Case Feed Users section, click  and choose **Edit feed view**. (This section appears only for organizations created before Spring ’14.)
- In the Other Tools and Components section, click **+ Add a Visualforce page** and choose the page you want. The width of the component is determined by the width of the column it’s in. To make the component look best, we recommend setting the width of the Visualforce page to 100%.
- Set the height of the component.
- Choose where you want the component to appear on the page.



**Tip:** Components in the right column are hidden when agents view the Case Detail page, so use the left column for any components you want to be accessible all the time.

## Automatically Associate Outgoing Emails with Contacts

Email messages you write using the Case Feed Email action are now automatically associated with contacts, making the Related Activity list on cases and the Activity History list on contacts more comprehensive and useful.

When you start typing an email address in the **To** field in the Email action, you see a list of addresses and the contacts they belong to. The more characters you type, the shorter this list becomes. Once you select an address, it appears in the **To** field.

After you send the message:

- The name of the contact you selected appears in the **Name** field in the entry that’s created in the Activity History list on the case.

Activity History						
<a href="#">Log a Call</a> <a href="#">Mail Merge</a> <a href="#">Send an Email</a> <a href="#">View All</a> <a href="#">Activity History Help ?</a>						
Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
<a href="#">Edit</a>   <a href="#">Del</a>	Email: Issue with hotel reservation for 12/20-12/23 [ref: 00DD0JWA_r_500D03Wpwz.ref]	<b>Jon Amos</b>	✓	11/25/2013	<a href="#">Karen Williams</a>	11/25/2013 11:47 AM

- An entry for the message appears in the Activity History list on the contact.

Activity History						
<a href="#">Log a Call</a> <a href="#">Mail Merge</a> <a href="#">Send an Email</a> <a href="#">Request Update</a> <a href="#">View All</a> <a href="#">Activity History Help ?</a>						
Action	Subject	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
<a href="#">Edit</a>   <a href="#">Del</a>	Email: Issue with hotel reservation for 12/20-12/23 [ref: 00DD0JWA_r_500D03Wpwz.ref]	00001010	✓	11/25/2013	<a href="#">Karen Williams</a>	11/25/2013 11:47 AM



**Note:** These updates are made only if the email address you use is the same as the email address on the contact associated with the case. For example, let's say you're working on a case associated with John Doe, whose email address is johndoe@company.com, and you use the Email action to send a message to contact Jane Doe, whose email address is janedoe@company.com. Jane's name won't appear in the Name field in the entry in the Activity History list on the case, and the email message won't appear in the Activity History list on her contact record.

## Convert Page Layouts for Case Feed Users to Case Page Layouts

As of Spring '14, we've made creating and customizing case layouts easier by replacing page layouts for Case Feed users with feed-based layouts for case pages. By converting your older page layouts, you can use the advanced page layout editor to manage them and can assign Case Feed to users more easily.

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

User Permissions Needed	
To create and edit page layouts:	"Customize Application"
To assign page layouts:	"Manage Users"



**Note:** Page layouts for Case Feed users are available only in organizations created prior to Spring '14.

Feed-based case layouts include the same features as page layouts for Case Feed users: a feed, which includes a publisher with actions, feed filters, tools such as an articles tool, and sidebar components such as custom buttons and links; a highlights panel; and a detail page, with related lists and other in-depth information about the case. You can use the standard page layout assignment tool to assign feed-based case page layouts to users, which means you no longer have to use permission sets or custom profiles to give users access to Case Feed.


To convert page layouts for Case Feed users to feed-based case layouts:

- From Setup, click **Customize > Cases > Page Layouts**.
- Click next to a layout in the Page Layouts for Case Feed Users list and choose **Convert to case page layout**. We recommend using this option so you can review the converted layout before you delete the original, but to save time, you can choose **Convert to page layout and delete**.
- The converted layout appears in the Case Page Layouts list with the prefix **Converted:**. Click **Edit** next to it.
- In the page layout editor, confirm that the layout includes the elements you want. To see and edit what's included in the feed view, including feed filters and sidebar components, click **Feed View**.

- Once you're happy with the case page layout, click **Page Layout Assignment** in the Case Page Layouts list to assign it to the appropriate user profiles.



**Note:** For custom profiles with the `Use Case Feed` permission, or profiles with permission sets that include `Use Case Feed`, these page assignments won't take effect until you remove the permission or permission set. If your organization was created between Winter '14 and Spring '14, you can't remove `Use Case Feed` from standard profiles, so these assignments won't take effect until you delete all of your page layouts for Case Feed users.

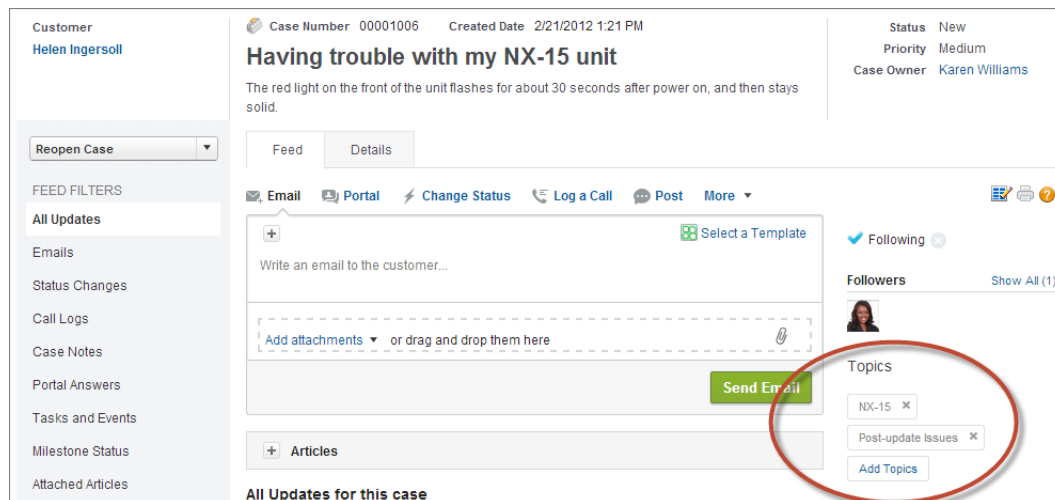
- Click  next to the older version of the layout in the Page Layouts for Case Feed Users list and choose **Delete**. In the confirmation that appears, click **OK**.
- If there are users assigned to the layout you delete, you're prompted to choose another layout as a replacement. This is only a formality: Once you assign users to a case page layout, that's what they'll see.

If you have multiple layouts for Case Feed users, we recommend converting and deleting them all at the same time. Once you delete the last of your older layouts, the Page Layouts for Case Feed Users list will disappear.

## Topics List Available as a Case Feed Sidebar Tool

Add the topics list to your Case Feed layouts to make it easy for support agents to find relevant troubleshooting information quickly.

The topics list shows the topics that have been added to items in the feed for a case, or to the case itself. Agents can click on a topic to see other records or feed items tagged with it, giving them more context about the case and more information that will help them solve customers' issues. They can also add and remove topics.



To add the topics list to Case Feed, set up the list and then add it to a Case Feed feed view layout. For more information on topics, see [Using Topics to Organize Records](#). For information on customizing Case Feed, see “Creating and Editing Feed Layouts in Case Feed” in the Salesforce Help.

## Adding Status Field to Case Feed Change Status Action Removes Default Fields

The default fields that appear in the Change Status action, `Current Status` and `Change to`, remain unchanged. However, if you add the standard `Status` field, it will now automatically replace these fields.

When you add the standard `Status` field, things that rely on that field, such as triggers or dependent picklists, will work as designed when an agent updates a case’s status using the Change Status action.

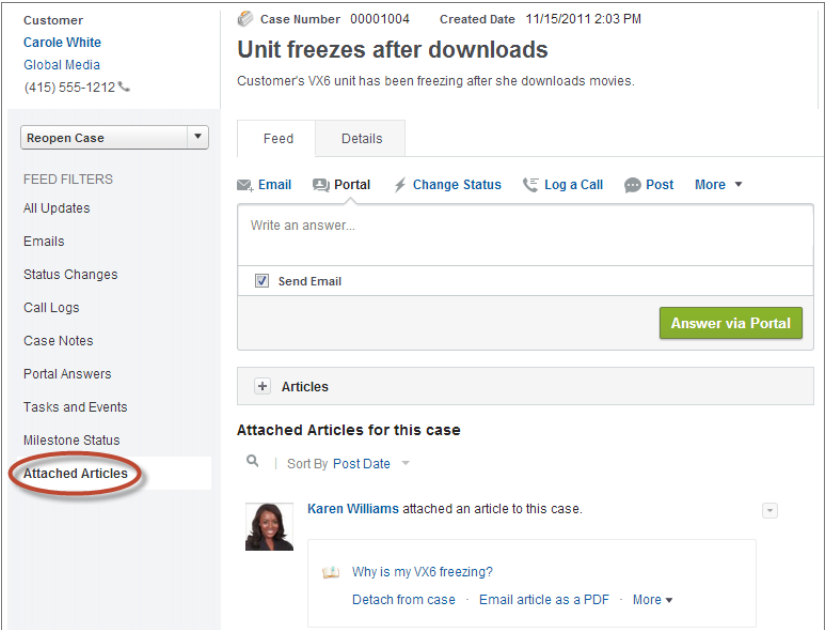
For information on changing the fields that appear in Case Feed actions, see “Creating and Editing Feed Layouts in Case Feed” in the Salesforce Help.

## New Ways to Filter Feed Items in Case Feed


Two new feed filters—Attached Articles and Milestone Status—make it easier to find specific information in the feed quickly.


User Permissions Needed	
To create and edit page layouts:	“Customize Application”

Attached Articles shows feed items related to articles attached to the case an agent is viewing. Milestone Status shows feed items for changes to the milestone on the case.



To add these new feed filters:

1. From Setup, click **Customize > Cases > Page Layouts**.
2. How you access the Case Feed Settings page depends on what kind of page layout you’re working with.
  - For a layout in the Case Page Layouts section, click **Edit**, and then click **Feed View** in the page layout editor.
  - For a layout in the Page Layouts for Case Feed Users section, click  and choose `Edit feed view`. (This section appears only for organizations created before Spring ’14.)
3. In Feed and Filter Options, move the filters from the Available list to the Selected list.



**Note:** The Attached Articles filter is available only in organizations that use Salesforce Knowledge, and the Milestone Status filter is available only in organizations that have entitlement management and milestone feed items enabled.

# Communities and Customer Portal Users

Communities and customer portal users are external users with appropriate licenses who can access Salesforce through Web channels.

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

## *Renamed Visible in Self-Service Field to Public*

This field controls the visibility of solutions for communities and customer portal users.

## Renamed Visible in Self-Service Field to Public

This field controls the visibility of solutions for communities and customer portal users.

The `Visible in Self-Service` field on solutions was renamed to `Public` because it applies to communities, customer portals, and self-service portals.

# Entitlement Management

Entitlement Management helps support agents verify and fulfill customers' service contracts.

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

## *Make SLAs Scalable with Dynamic Entitlement Processes*

Create business logic to dynamically calculate milestone start times.

## *Apply Business Hours to Milestones and Entitlement Processes*

Model more complex SLAs with business hours on milestones and entitlement processes. Applying business hours to an entitlement process lets you use the same entitlement process for cases with different business hours, and applying them to a milestone allows the business hours to change with the severity of a case.

## Make SLAs Scalable with Dynamic Entitlement Processes

Create business logic to dynamically calculate milestone start times.

Calculate the time trigger for a milestone based on the milestone type, the properties of the case, and case-related objects by implementing the `Support.MilestoneTriggerTimeCalculator` Apex interface with a custom Apex class. With this interface, you can reduce the number of entitlement processes your agents have to work with.

With this interface, Salesforce calculates the trigger time for a milestone based on variables in a case. For example, you might want to use dynamically calculated trigger times, or “time to complete,” for milestones in order to generate different milestone trigger times for different case priority levels. This Apex interface provides the flexibility to use nearly any aspect of a case to influence the trigger time.

Dynamically calculated milestone trigger times also allow you to simplify your entitlement management. Instead of creating hundreds of entitlement processes that map to differing conditions on a case, you can use one entitlement process with the `Support.MilestoneTriggerTimeCalculator` interface to dynamically generate hundreds or thousands of variations in



processes. And your support agents won't have to search through hundreds of entitlement processes when a new case comes in.

See [MilestoneTriggerTimeCalculator Interface](#) for more information.

## Apply Business Hours to Milestones and Entitlement Processes

Model more complex SLAs with business hours on milestones and entitlement processes. Applying business hours to an entitlement process lets you use the same entitlement process for cases with different business hours, and applying them to a milestone allows the business hours to change with the severity of a case.

You can specify the business hours at which your customer support team operates and then apply those business hours to cases, entitlement processes, and milestones. Applying business hours to an entitlement process lets you use the same one for cases with different business hours. For example, if you set the business hours on an entitlement process to weekdays from 9 to 5 and a customer requests evening and weekend updates to the case, you can then create an Update Customer milestone with its own 24x7 business hours.

Applying business hours to a milestone also allows business hours to change with the severity of a case. For example, a "Last Touch" milestone can change its business hours with a change in severity level, while the other milestones in the entitlement process, such as an Initial Contact milestone, remain unchanged. If the severity of the case goes up, the customer needs to be contacted more frequently, but the initial contact milestone would have already passed and would not need a business hours adjustment.

Business hours applied to a milestone override those applied to an entitlement process, which override those applied to a case. If no business hours are set on the milestone, then the ones for the entitlement process are used. If neither are set, then the hours on the case are used.

Search for "business hours" in the Salesforce Help for more information.

## Knowledge

Salesforce Knowledge provides a knowledge base to users and customers that's Knowledge-Centered Support certified.

Salesforce Knowledge is available in **Performance** and **Developer** editions.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

### **Knowledge One Widget**

Knowledge One is available as a widget you can plug in to the Salesforce Console for Service.

### **Knowledge One Footer Component**

Put the Knowledge One footer on any object via the Salesforce Console.

### **Article Report Filters on Data Categories**

Create knowledge base reports by data category to find the top articles, contributors, linked articles, and more.

### **Knowledge Search Enhancements**

Three REST API resources improve the Salesforce Knowledge search experience.

### **Assign Topics to Articles**

Attach topics to an article to improve search quality. Suggested topics are automatically provided.

### Article Actions on the Case Feed

Agents can do more with articles directly on the case feed.

### Suggested Articles for a Case—Beta

Suggested articles are available in the Salesforce Console for Service and your portals when viewing existing cases and creating new ones.

## Knowledge One Widget

Knowledge One is available as a widget you can plug in to the Salesforce Console for Service.

If you are using the Knowledge tab, you get the same easy-to-use interface for articles and external sources on cases and within the Salesforce Console for Service. You can search articles and external objects, send articles, and create articles, all without leaving the case.

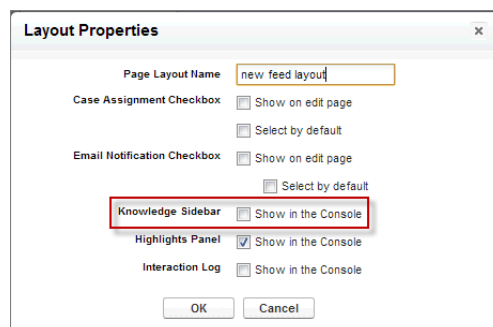
The Knowledge One widget lets you:

- Attach a published Salesforce Knowledge article to the case in one click.
- Share an article as a URL.
- Email an article as a PDF.
- Create and manage articles.
- Make adjustments based on your window width. In the console, in windows smaller than 600 pixels, the searchable objects are displayed in a drop-down menu.

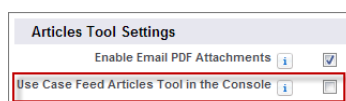
To enable the Knowledge One widget:

#### 1. Disable previous article sidebar components.

- To disable the Knowledge sidebar, in Setup go to **App Setup > Customize > Cases > Page Layouts** and click **Edit** next to your case page layout. In the page layout editor, click **Layout Properties** and ensure Knowledge Sidebar Show in the Console is unchecked.

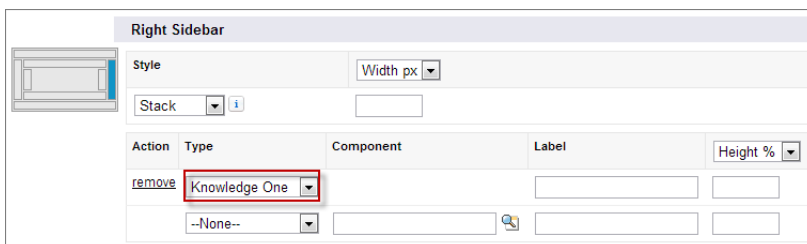


- To disable the case feed article tool, go to **Setup > App Setup > Customize > Cases > Page Layouts** and click **Edit** next to your case page layout. In the page layout editor, click **Feed View** and ensure Use Case Feed Article Tool in the Console is unchecked.



2. Go to **Setup > App Setup > Customize > Cases > Page Layouts** and click **Edit** next to the case page layout where you want to display the Knowledge One widget.
3. In the page layout editor, click **Custom Console Components**.

4. In the sidebar where you want the Knowledge One widget, select Knowledge One in the Type drop down and set the sidebar parameters.



The screenshot shows the 'Right Sidebar' configuration window. It includes a 'Style' section with a 'Width px' dropdown. Below this is a 'Stack' section with a dropdown menu and an information icon. The main configuration area is a table with columns: Action, Type, Component, Label, and Height %. The 'Type' column has a dropdown menu that is highlighted with a red box, showing 'Knowledge One' as the selected option. The 'Component' column has a text input field. The 'Label' column has a text input field. The 'Height %' column has a dropdown menu. There is also a 'remove' button in the 'Action' column.

Action	Type	Component	Label	Height %
remove	Knowledge One			
	--None--			

In the Salesforce Console for Service, the Knowledge One widget is displayed as a sidebar or within the case feed.

00001005 +

**Just bought a 3D HDTV and can't get the 2D to work. Now what?**
Geoffrey Akinya  
Premier Level Customer

my cusotmer som eiseu

Email
Support Center Map
Change Status
Post
More

+
Select a Template

Write an email to the customer...

Status Escalated

Add attachments or drag and drop them here

Send Email

Show All Updates

**Gautam Vasudev** to DF 13 Only attached an article to this case.

Just bought a 3D HDTV and can't get the 2D to work. Now what?  
[Detach from case](#)

Comment · Like · Today at 3:00 PM

**Gautam Vasudev** to DF 13 Only sent an email.

To: [lingram3@salesforce.com](mailto:lingram3@salesforce.com) Subject: Best Tech Customer Support - Just bought a 3D HDTV and can't get the 2D to work. Now what? - Case #00001005  
Dear Geoffrey Akinya,

**Know**

Search

Back to S

**Articles**

**Ho**  
In the  
evate  
How

**Acces**  
Instru  
Sony  
FAQ

**He**  
Troub

**Ini**  
3T Ph  
Troub

**Insta**  
A guid  
TV.  
Troub

**20V M**  
You a  
nt is a  
Video

Show

Share

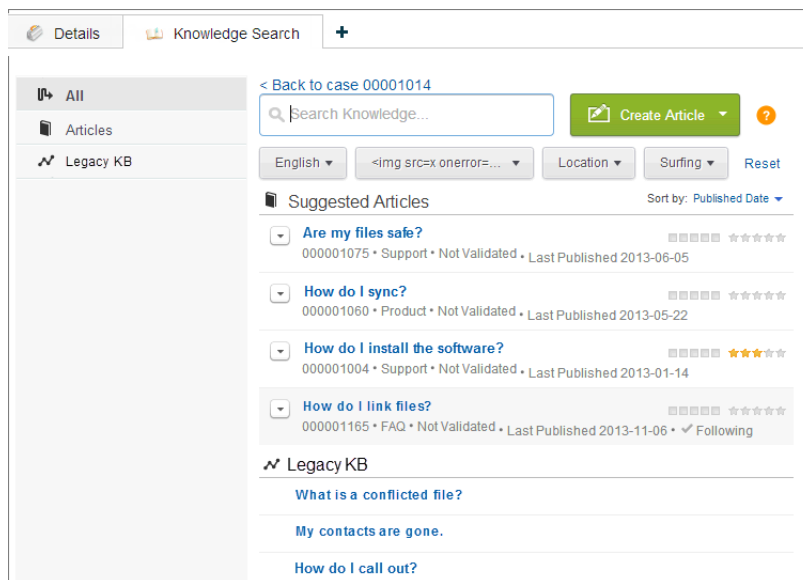
How

Brand

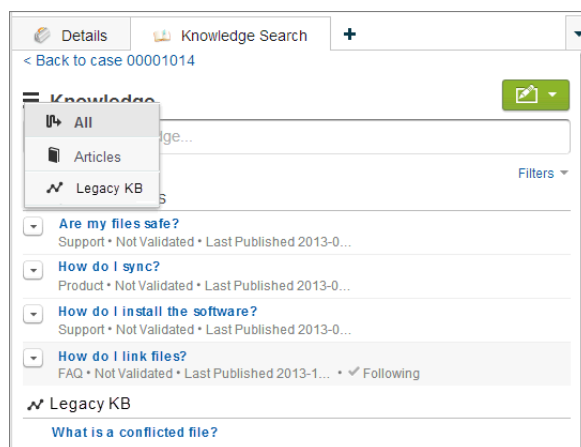
Com

If the initial suggested articles don't answer your question, you can enter new search keywords. For attached articles, depending on where an article is published, you can email it, share it as a link, and detach it from the case.

On the Knowledge Search tab, search your Salesforce Knowledge base and any other external sources you have connected to your organization.



For smaller windows using the Salesforce Console for Service the searchable objects are in a drop-down menu.



Use this table to compare the article widgets for cases.

Does the widget...	Article Widget	Article Case Feed Widget	Knowledge One Widget
Filter on data category	Yes	No	Yes
Create a new article	No	No	Yes
Search an external object	No	No	Yes
Access your draft articles	No	No	Yes
Attach an article to a case	Yes	Yes	Yes
Send an article as a PDF	No	Yes	Yes
Share an article's public URL	No	Yes	Yes
Adjust with the window size	No	No	Yes
Have more than one way to suggest articles	No	No	Yes

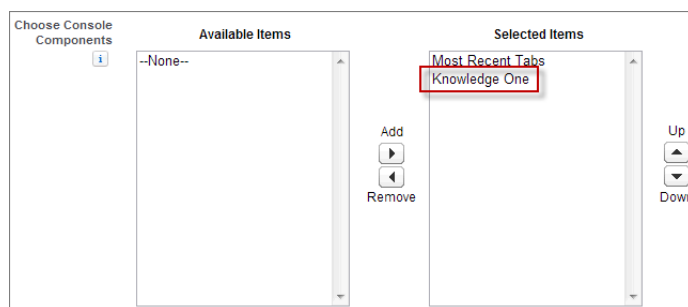
## Knowledge One Footer Component

Put the Knowledge One footer on any object via the Salesforce Console.

You can put the Knowledge One footer on Opportunities, Accounts, Contacts, and any object in the Salesforce Console. With the Knowledge One footer, your sales staff can easily find articles and other sources to help close deals and your support agents can access to your knowledge base in one click.

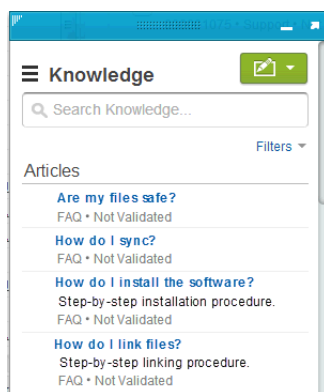
To enable the Knowledge One footer:

1. Go to **Setup > Create > Apps**.
2. Select the console app where you want to add the Knowledge One footer.
3. Under Choose Console Components, move **Knowledge One** to the Selected Items box.



4. Click **Save**.

The Knowledge One footer appears in the Salesforce Console, where you can open within your current window or pop it out in a window of its own.

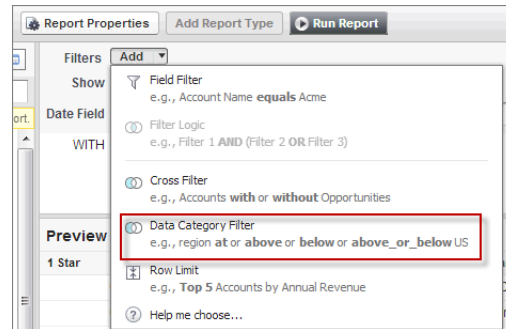


## Article Report Filters on Data Categories

Create knowledge base reports by data category to find the top articles, contributors, linked articles, and more.

Now, custom reports that are based on KnowledgeArticleVersion, except KnowledgeArticleVersionHistory, can filter by data category.

1. Go to the Reports tab.
2. In the Action column, select **Edit** next to a custom article report you want to filter by data category.
3. Select the new data category filter.

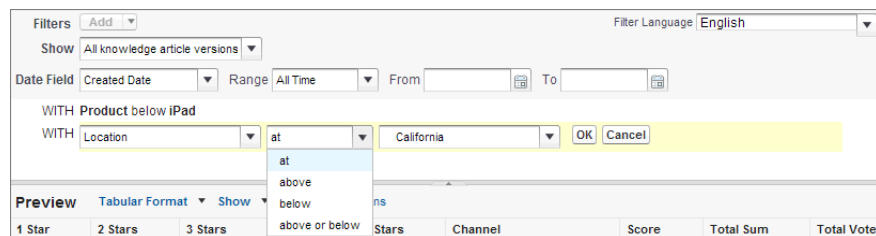


4. Optionally, filter further, add more categories, and set logic to:

- at
- above
- below
- above or below



**Note:** You can add up to four data category filters. The logic between filters is OR. You can use the same category group multiple times, however, you must use the same operator each time.



## Knowledge Search Enhancements

Three REST API resources improve the Salesforce Knowledge search experience.

- **Search Suggested Article Title Matches:** Suggests articles whose titles match the user's search query string
- **Search Suggested Queries:** Suggests searches that other users have performed that match the user's search query string



**Note:** This REST feature is currently available through a pilot program and is available in all Development Edition organizations. For information on enabling it for your organization, contact salesforce.com.

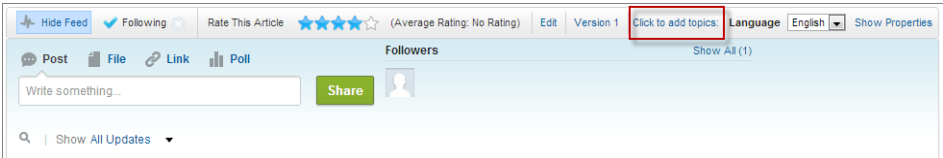
- **SObject Suggested Articles for Case:** Suggests articles that are relevant to a case

For more information, see [New Resources](#) in the REST API section. For details and code samples, refer to the [REST API Developer's Guide](#).

## Assign Topics to Articles

Attach topics to an article to improve search quality. Suggested topics are automatically provided.

With topics on articles, you can classify and search articles by assigning topics. Topics can be added from the article view and detail pages.



Suggested topics are terms extracted from the article, so that they are more concrete and precise than a data category assignment. When searching, topics can be used to index the article, so the matched articles are more relevant to keyword searches. Topics for articles is set for each article type. To enable topics for articles:

- 1. Go to **Setup > Customize > Topics > Topics for Objects**.
- 2. Click on the article type name where you want to enable topics.
- 3. Check **Enable topics**.
- 4. Select which fields you want to use for suggestions.

Save

Object	Enabled
<script>alert(1)</script>	Disabled
Account	Disabled
ApexType	Disabled
Asset	Disabled
Big Wave	Disabled
CO	Disabled
Campaign	Disabled
Case	Disabled
Contact	Disabled
Contract	Disabled
Event	Disabled
FAQ	Enabled

☒ Enable topics for FAQs

Topic Suggestions: FAQs

Select the fields that you want to use for topic suggestions or use topic suggestions from a default set of fields, if available.

Fields	Use for Suggestions
Title	<input checked="" type="checkbox"/>
URL Name	<input checked="" type="checkbox"/>
Summary	<input checked="" type="checkbox"/>
Description	<input checked="" type="checkbox"/>
new RTA	<input checked="" type="checkbox"/>
file	<input checked="" type="checkbox"/>
text field	<input checked="" type="checkbox"/>

- 5. Click **Save**.
- 6. Via profile or permission set, under System Permissions, define which users can assign, create, delete, and edit topics.

# Article Actions on the Case Feed

Agents can do more with articles directly on the case feed.

Now, while on the case feed, agents can detach articles from the case, email articles as PDF attachments, and share articles via URLs.



00001005 **+**

**Just bought a 3D HDTV and can't get the 2D to work. Now what?** **Geoffrey Akinya**  
Premier Level Customer

my cusotmer som eiseu

**Email** **Support Center Map** **Change Status** **Post** **More**

**Select a Template**

Write an email to the customer...

**Status** **Escalated**

**Add attachments** or drag and drop them here

**Send Email**

| **Show All Updates**

## Suggested Articles for a Case—Beta

Suggested articles are available in the Salesforce Console for Service and your portals when viewing existing cases and creating new ones.

Agents and customers can reduce time-to-resolution with one click access to articles used to solve similar cases. Articles are suggested based on their content similarity as well as their links between similar cases.

**Knowledge**

**Search Knowledge...**

**Filters**

**Suggested Articles**

- Sony V515W LCD TV Setup Guide**  
Sony V515W LCD TV Setup Guide  
FAQ • Not Validated • Last Published 11/5/2013
- How do I get more information on your products?**  
Product FAQ  
FAQ • Not Validated • Last Published 11/5/2013
- Connecting your wireless printer to your WiFi network**  
This article describes how to connect your wireless printer to your WiFi network  
FAQ • Validated External • Last Published 11/5/2013

This improved suggested articles for a case experience is currently available through a beta program. To enable, from Setup go to **Customize > Knowledge > Settings**, under Knowledge One check `Suggest articles for cases considering case content (Beta)`. Contact salesforce.com to alter the algorithm. For example to suggest articles with similar titles and content to the case, ignoring articles linked to similar cases.

## Live Agent

Live Agent lets support agents connect with customers or website visitors in real time through text-only chat.

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

### ***Direct-to-Agent Chat Routing—Generally Available***

Route incoming chat requests that originate from a particular chat button directly to a specific agent using the Deployment API and pre-chat forms.

### ***Chat Routing Enhancements***

Use enhanced chat routing to improve the way incoming chat requests are routed to agents.

### ***Transfer Files During a Chat—Pilot***

Give Live Agent customers the ability to upload and transfer files to agents during a chat so they can easily share important information without leaving their chat window.

### ***Supervisor Tab Available in Salesforce Console***

Add the Supervisor tab to the Salesforce console to give your Live Agent supervisors easy access to information about their agents' activities without disrupting supervisors' workflow.

### ***Attach Records to Chat Transcripts***

Search for existing records or create new ones to attach to a transcript when you chat with Live Agent customers in the Salesforce console, giving you easy access to information related to the chat.

### ***Changes to the Availability of the Related Entities Panel***

Search for existing records or create new ones to attach to a transcript when you chat with Live Agent customers in the Salesforce console, giving you easy access to information related to the chat.

### ***Improve the Customer Chat Window with Visualforce***

Use Visualforce to resize the chat input field and the live chat transcript in the customer chat window to make it easier for customers to chat with agents.

### ***New Live Chat Transcript Fields***

There are a few new fields you can include on live chat transcript records to help provide more complete information about the chats that occur within your organization.

### ***New Live Chat Transcript Events***

Record activities that occur during chats using live chat transcript events.

### ***Live Agent Deployment API: Changed Methods***

Use the enhanced Live Agent Deployment API methods to route incoming chat requests directly to agents.

## Direct-to-Agent Chat Routing—Generally Available

Route incoming chat requests that originate from a particular chat button directly to a specific agent using the Deployment API and pre-chat forms.

By editing a few parameters in Live Agent's Deployment API, you can route all chats that originate from a specific button to a single agent with specialized skills. Direct-to-agent routing helps you connect customers to the person who can answer their questions right the first time.

For example, if only one of your company's agents is an expert on a specialized product that you sell, you can associate that agent with a chat button that appears on that product's Web page. Instead of routing chats from that button to a pool of customer service agents who may or may not specialize in that subject matter, direct-to-agent routing lets you connect customers to the agent in your company who can help them most. If that agent isn't available, you can configure rules that allow the chat to be rerouted to other agents.

Use the following Deployment API methods to set up direct-to-agent routing.

- `startChat`
- `startChatWithWindow`
- `showWhenOnline`
- `showWhenOffline`

For more information on these methods, see [Live Agent Deployment API: Changed Methods](#).

## Chat Routing Enhancements

Use enhanced chat routing to improve the way incoming chat requests are routed to agents.

As more customers move to online platforms to seek help for their questions and problems, companies are seeking more efficient ways to route incoming chat requests to the right agents. In Spring '14, we've added some new options to help you route chat requests to agents quickly and efficiently.

### Reroute Declined Chat Requests to Available Agents

You now have the option to reroute chat requests that have been declined by all agents back to agents who are still available. Previously, if all agents declined a chat request, the chat would automatically be canceled. As a result, customers whose chats were canceled weren't getting the help they needed. Now, chats that have been declined by all agents can be sent to these agents again for the number of iterations you specify. This functionality is available for both chat buttons and automated invitations.

To enable this option, in Setup, click **Customize > Live Agent > Chat Buttons & Automated Invitations**.

### Automatically Accept Chats After They're Assigned to an Agent

You now have the option of having chats be automatically accepted after they're assigned to an agent. Previously, agents had to manually accept a chat that was assigned to them from the list of incoming chats. However, if the agent wasn't able to accept the chat in a timely manner, the customer might have to wait for the agent to accept the chat for an indefinite amount of time. Now, you can specify that these chats are automatically accepted after they are assigned, opening the chat in a new tab for the agent in the Salesforce Console. This functionality is available for both chat buttons and automated invitations.

To enable this option, in Setup, click **Customize > Live Agent > Chat Buttons & Automated Invitations**.

## Transfer Files During a Chat—Pilot

Give Live Agent customers the ability to upload and transfer files to agents during a chat so they can easily share important information without leaving their chat window.



**Note:** File transfer in Live Agent is available as a pilot feature in Spring '14. To enable this feature for your organization, contact your salesforce.com representative.

Agents associate incoming files with new or existing records. For example, if a customer is receiving an error when they try to complete a process, they can upload and transfer a screenshot of the error message to the agent, which the agent could attach to an existing case to provide more context for the customer's issue.

## Supervisor Tab Available in Salesforce Console

Add the Supervisor tab to the Salesforce console to give your Live Agent supervisors easy access to information about their agents' activities without disrupting supervisors' workflow.

Previously, supervisors couldn't view the Supervisor tab in the Salesforce console; instead, they could only access information about their agents' activities from the Live Agent Supervisor panel, located in a different part of the application. This caused supervisors to have to switch back and forth between the Salesforce console and the Supervisor panel to do their work.

Now you can add the Supervisor tab to your organization's Salesforce console to allow supervisors to access agents' information without interrupting their workflow.

1. From Setup, click **Create** > **Apps**.
2. Click **Edit** next to the name of the Salesforce console you want to add the tab to.
3. In the Choose Navigation Tab Items field, select Live Agent Supervisor and add it to the Selected Items list.
4. Click **Save**.

Here's how the Supervisor tab looks in the Salesforce console:

The screenshot displays the Salesforce console interface for the Live Agent Supervisor Overview. The top navigation bar shows 'Live Agent Supervisor' as the active tab. Below the header, the 'Queue Status' section contains a table with the following data:

Button Name	ID	Queue Length	Longest Wait
Accounts Support	573D000000001H8	0	N/A

The 'Agent Status' section includes filters for 'All Skills', 'All Buttons', and 'All Statuses'. Below the filters is a table with the following data:

Agent Name	Status	Action	No. Chats in Progress	No. Requests Assigned	Time Elapsed Since Login	Time Elapsed Since Last Accept
John Smith	Offline		0	0	N/A	N/A

A 'Live Agent (0)' indicator is visible in the bottom right corner of the console.

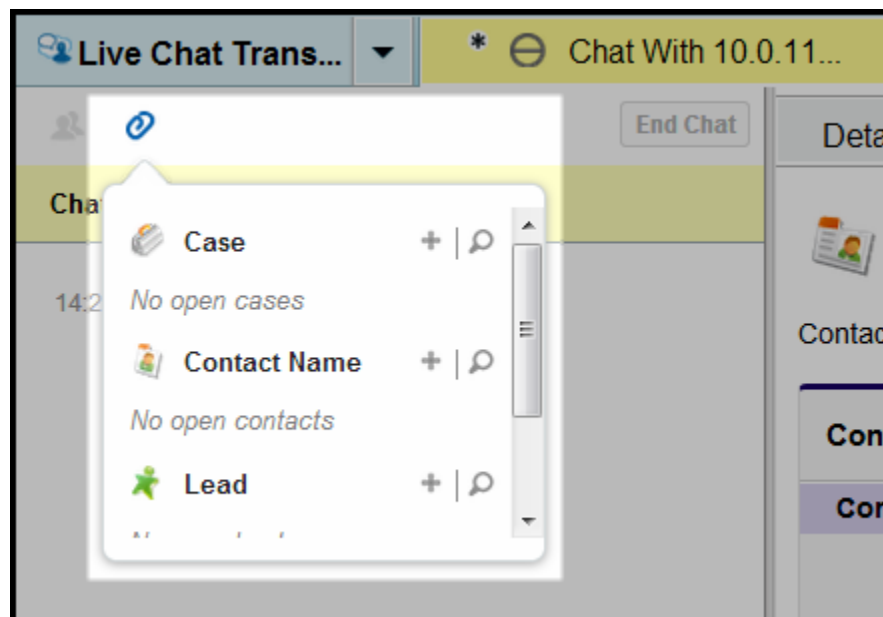
## Attach Records to Chat Transcripts

Search for existing records or create new ones to attach to a transcript when you chat with Live Agent customers in the Salesforce console, giving you easy access to information related to the chat.

User Permissions Needed	
To use Live Agent in the Salesforce console:	“Live Agent” is enabled and set up AND Live Agent is set up in a Salesforce console app
To search for and view a record:	“Read” on the object AND “Create” on Live Chat Transcripts
To create a new record:	“Create” on the object AND “Create” on Live Chat Transcripts
To edit a record:	“Edit” on the object AND “Create” on Live Chat Transcripts
To delete a record:	“Delete” on the object AND “Create” on Live Chat Transcripts

Agents can now attach related records to transcripts as they chat with customers without breaking their workflow. They can search for existing records or create new ones within the Salesforce console and link them to transcripts, providing reference information about the customer or their issue. For example, an agent can create a new case based on the customer’s issue, or search for the customer’s existing contact record and attach these records to the transcript for later reference. You can attach standard or custom records to your chat transcripts.

Here’s a look at the attachment tool:






From here, agents can search for existing records, create a new record if one doesn’t exist yet, and link those records to the transcript.

1. While chatting with a customer, click  to attach a record to the transcript.



**Note:** You can only attach one of each type of record to a chat transcript. For example, you can't attach more than one case to a single transcript.

2. To search for an existing record:
  - a. Click the search icon (  ) in the records window next to the type of record you want to search for.
  - b. Type the name of the record and press ENTER.  
The record opens in a new tab in the Salesforce console.
  - c. Click the attach icon (  ) again.
  - d. Select the check box next to the record you searched for to link it to the chat transcript.
3. To create a new record:
  - a. Click the create icon (  ) next to the type of record you want to create.
  - b. Complete the information in the new record and save it.  
The record will automatically link to the transcript once the record is created.
4. After you complete the chat with the customer, exit the chat.
5. If prompted, click **Save**.  
The records you linked are now attached to the transcript. You can access them from the transcript's detail view.

## Changes to the Availability of the Related Entities Panel

We've made some changes to the availability of the Related Entities panel, located in the details tab in the Salesforce console.

Starting in Spring '14, the Related Entities panel in the details tab isn't available for new Live Agent customers. Existing customers will continue to have access to the Related Entities panel.

However, new and existing customers now have another option for linking new and existing records to chat transcripts: using the freshly minted attachment tool, available in this release. For more information about the attachment tool, see [Attach Records to Chat Transcripts](#).

## Improve the Customer Chat Window with Visualforce

Use Visualforce to resize the chat input field and the live chat transcript in the customer chat window to make it easier for customers to chat with agents.

There are two new attributes on the `<liveAgent:clientChatInput>` Visualforce component: `useMultiline` and `autoResizeElementId`.

The `useMultiline` attribute specifies whether a customer chat window supports a multiple-line text input field. Without this attribute, the text input field in the customer's chat window won't expand or allow line breaks, even if the customer's message exceeds one line of text.

The `autoResizeElementId` attribute allows you to dynamically resize the element that contains your live chat transcript when the transcript exceeds a certain length. Without this attribute, the element that contains your live chat transcript remains a fixed size regardless of the length of the live chat transcript.



**Note:** The `useMultiline` attribute must be set to `true` to resize elements with the `autoResizeElementId` attribute.

For more information on these attributes, see [useMultiline and autoResizeElementId Attributes Added to <liveAgent:clientChatInput>](#).

For more information about using Visualforce, see *Visualforce Developer's Guide*.

## New Live Chat Transcript Fields

There are a few new fields you can include on live chat transcript records to help provide more complete information about the chats that occur within your organization.

The following fields are now available on live chat transcripts:

Field	Definition
Abandoned After	The amount of time in seconds an accepted chat went unanswered by an agent before the chat was disconnected by the customer.
Agent Maximum Response Time	The maximum time in seconds it took an agent to respond to a chat visitor's message.
Chat Duration	The total duration of the chat in seconds.
Visitor Maximum Response Time	The maximum time in seconds it took a customer to respond to an agent's message.
Wait Time	The total amount of time in seconds a chat request was waiting to be accepted by an agent.

Previously, administrators or developers had to develop code to derive these values and add them to live chat transcripts. Now administrators can add these fields to your live chat transcripts right in Setup.

To add these or other fields to your live chat transcripts:

1. In Setup, click **Customize > Live Agent > Live Chat Transcripts > Page Layouts**.
2. Click **Edit** next to the transcript page layout you want to add new fields to.
3. Using the Mini Console, drag the fields you want to add into your live chat transcript layout.
4. Click **Save**.

## New Live Chat Transcript Events

Record activities that occur during chats using live chat transcript events.

The following live chat transcript events are now available:

Field	Definition
Critical Wait Alert Time Reached	Agent failed to respond to the customer's message before reaching the critical wait alert time.
Critical Wait Alert Cleared	Agent responded to the customer's message after the critical wait alert was received.

Field	Definition
Transfer Request Canceled	Chat transfer request was canceled by the agent who sent the request.
Transfer Request Declined	Chat transfer request was declined by the agent who received the request.

## Live Agent Deployment API: Changed Methods

Use the enhanced Live Agent Deployment API methods to route incoming chat requests directly to agents.

### Changed Methods

These methods have been changed in version 30.0 of the Live Agent Deployment API.

- In the `showWhenOffline` method, the optional **String** `userId` parameter has been added. This parameter lets you associate a chat button with an agent with a specific agent ID, allowing you to display a specific element on the chat button when that agent is unavailable to chat with customers.
- In the `showWhenOnline` method, the optional **String** `userId` parameter has been added. This parameter lets you associate a chat button with an agent with a specific agent ID, allowing you to display a specific element on the chat button when that agent is available to chat with customers.
- In the `startChat` and `startChatWithWindow` methods, the optional **String** `userId` and **Boolean** `fallback` parameters have been added.

You can route chats from a specific button directly to the agent with the `userId` you specify using the **String** `userId` parameter.

If the agent you specify is unavailable, you can specify whether or not to fall back to the button's routing rules (`true`) or not (`false`) using the **Boolean** `fallback` parameter.

For more information (English only) about the Live Agent Deployment API, see the [Live Agent Developer's Guide](#).

## Salesforce CTI Toolkit

The Salesforce CTI Toolkit helps partners build adapter programs that call center users install on their machines to integrate Salesforce with computer-telephony integration systems.

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

### Retirement of Support for the Salesforce CTI Toolkit

Starting with Spring '15, salesforce.com will no longer provide support for all versions of the Salesforce CTI Toolkit.

## Retirement of Support for the Salesforce CTI Toolkit

Starting with Spring '15, salesforce.com will no longer provide support for all versions of the Salesforce CTI Toolkit.

The toolkit helps partners build adapter programs that call center users install on their machines to integrate Salesforce with computer-telephony integration systems. We understand that retiring support for this feature might cause a disruption for partners, but we strongly encourage partners to move to Open CTI at their earliest convenience so that they can provide greater value to their customers and the Salesforce community.



# Salesforce Console for Service

The Salesforce Console for Service is an app that helps support agents find, update, and create records quickly to support customers on any channel.

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

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an additional cost

## ***Multi-Monitor Support for a Salesforce Console***

Move portions of a console from your browser to any locations on your screens that help you work best.

## ***Multi-Components for a Salesforce Console***

Add and organize multiple customizations to each sidebar of a console to suit your business needs.

## ***Salesforce Console Integration Toolkit: New Methods***

Access API methods to customize a console programmatically.

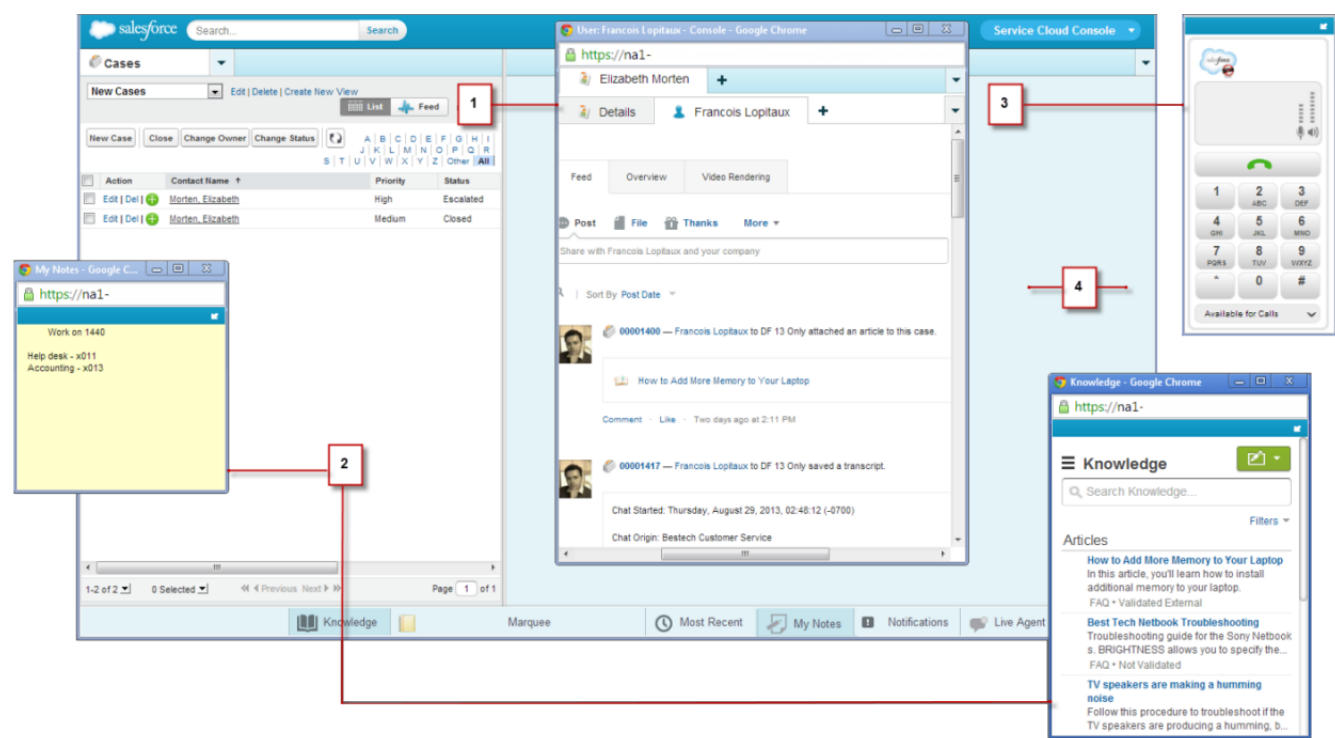
## ***Custom Lookup Field Components Now Available for the AppExchange***

Add lookup field components to AppExchange packages to distribute lookup field components for console apps to other Salesforce users and organizations outside of your company.

# Multi-Monitor Support for a Salesforce Console

Move portions of a console from your browser to any locations on your screens that help you work best.

Pop out primary tabs, custom components, and other console items and drag them to any area on your screens. If pinned lists are set up, place popped out items in a playground to keep track of Salesforce windows when several applications share your screens.



- 1. Primary tab
- 2. Custom components
- 3. SoftPhone
- 4. Playground

Turn on Multi-Monitor Components for a Salesforce Console

Turn on multi-monitor components so that users can move portions of a console to different areas of their screens or to a secondary computer monitor.

Work with Multi-Monitor Components in a Salesforce Console

Move portions of a console to different areas of your computer screen to view information in ways that help you work most efficiently.

Turn on Multi-Monitor Components for a Salesforce Console

Turn on multi-monitor components so that users can move portions of a console to different areas of their screens or to a secondary computer monitor.

Available in: <b>Enterprise</b> , <b>Performance</b> , <b>Unlimited</b> and <b>Developer</b> Editions with the Service Cloud
Available in: <b>Performance</b> and <b>Developer</b> Editions with the Sales Cloud
Available in: <b>Enterprise</b> and <b>Unlimited</b> Editions with the Sales Cloud for an additional cost

User Permissions Needed	
To turn on multi-monitor components:	“Customize Application”

If a Salesforce console is set up, you can turn on multi-monitor components so that users can move portions of a console to different areas of their screens. For example, users can pop out primary tabs or an Open CTI SoftPhone from browsers and drag them across multiple monitors to view information in ways that help them work best. However, users can't move all components away from a console. Currently, users can move primary tabs, Open CTI SoftPhones, the Most Recent Tabs component, Live Agent chats but not the footer component, and any custom console components or Force.com Canvas components included in a console's footer.

1. From Setup, click **Create > Apps**.
2. Select a Salesforce console app.
3. Click **Edit**.
4. Click **Enable Multi-Monitor Components**.
5. Click **Save**.

Repeat these steps for each console.



**Tip:** After you enable multi-monitor components, let users know:

- To pop out components, they might need to update browser settings to:
  - ◇ Allow popup windows
  - ◇ Set links to open in new windows, not tabs
- Popped out items close and lose their positions on screen when they log out of Salesforce, click **Setup**, click a link to leave a console, or refresh or close browsers.

## Work with Multi-Monitor Components in a Salesforce Console

Move portions of a console to different areas of your computer screen to view information in ways that help you work most efficiently.

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

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an additional cost





Multi-monitor components let you move portions of a console to different areas of your screens so that you can view information in ways that help you work best. For example, you can pop out and drag a primary tab from a console to other locations on your screens to view it next to other applications. However, you can't move all components away from a console. Currently, you can pop out and drag:

- A primary tab window
- Open CTI SoftPhones
- The Most Recent Tabs component
- Live Agent chats, but not the Live Agent footer component
- Any custom console components or Force.com Canvas components included in a console's footer

Only administrators can enable multi-monitor components for a Salesforce console. To use multi-monitor components, you might need to update your browser's settings to:

- Allow popup windows
- Set links to open in new windows, not tabs

To pop out or return portions of a console to your browser:

- For primary tabs, click  and select **Pop out primary tabs**. To return primary tabs to their original browser, click  and select **Pop tabs back into console**.
- For components in a console's footer, click the items and select . To return items to their original browser, click .



**Important:** Popped out items close and lose their positions on your screen when you log out of Salesforce, click **Setup**, click a link to leave a console, or refresh or close your browsers.

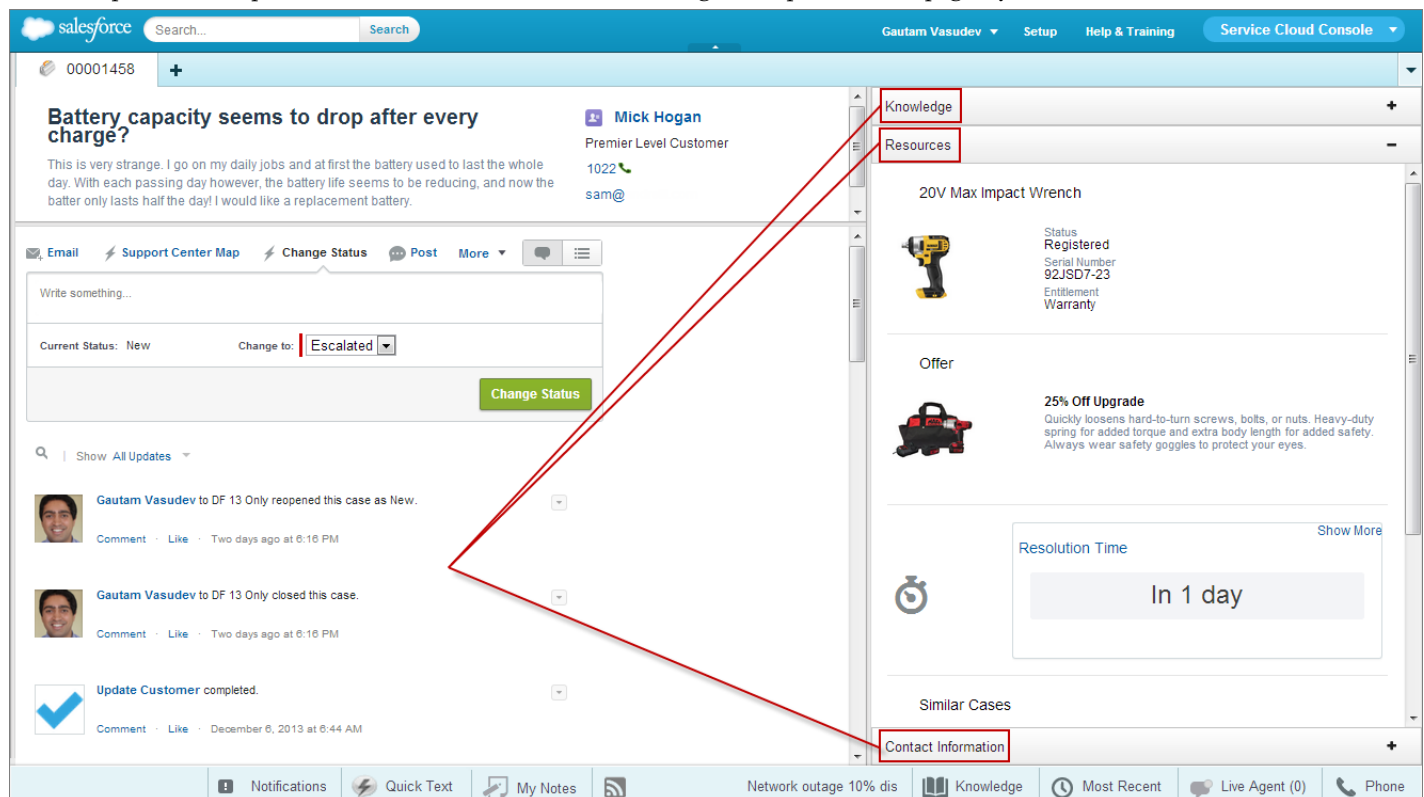
When working with popped out components:

- Any items popped out of the console have blue headings to help you locate them among other windows on your screen.
- If pinned lists are set up, a playground appears as a blank area next to lists and it says **Drag Footer Components Here**. Use this area to keep track of Salesforce windows among several applications on your screens.
- To use keyboard shortcuts from popped out components, focus on the right window. For example, if you're focused on a window with the navigation tab, the default shortcut to go to primary tabs, key command P, won't work.
- To refresh a popped out footer component, right-click on it and choose **Reload** or **Refresh**. When you refresh a popped out footer component, it's returned to the console's footer.
- You can't pop out SoftPhones built with versions 3.0 or 4.0 of the CTI Toolkit.

## Multi-Components for a Salesforce Console

Add and organize multiple customizations to each sidebar of a console to suit your business needs.

Custom console components let you customize the sidebars, footers, and highlights panels of a Salesforce console using Visualforce, canvas apps, or lookup fields. Previously, you could add one component to each sidebar on a console. Now, you can add up to five components to a sidebar and a maximum of eight components to a page layout.



The screenshot displays a Salesforce Service Cloud Console interface. The main content area shows a case record titled "Battery capacity seems to drop after every charge?" with a status of "Escalated". The sidebar on the right contains several components: "Knowledge", "Resources", "20V Max Impact Wrench", "Offer", "25% Off Upgrade", "Resolution Time" (showing "In 1 day"), and "Similar Cases". The footer of the console includes components like "Notifications", "Quick Text", "My Notes", "Network outage 10% dis", "Knowledge", "Most Recent", "Live Agent (0)", and "Phone". Red boxes highlight the "Knowledge", "Resources", and "Contact Information" components in the sidebar, with red lines indicating their placement within the sidebar structure.

Sidebar Styles for Custom Console Components

Customize the style of your sidebar to improve the layout of your Salesforce console.

Adding Custom Console Components to Page Layouts


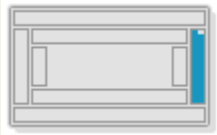
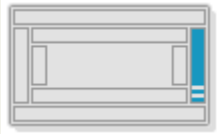
After you create a custom console component, you can add it to page layouts so that users can access it from a sidebar in a Salesforce console.

Sidebar Styles for Custom Console Components

Customize the style of your sidebar to improve the layout of your Salesforce console.

- Available in: **Enterprise**, **Performance**, **Unlimited** and **Developer** Editions with the Service Cloud
- Available in: **Performance** and **Developer** Editions with the Sales Cloud
- Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an additional cost

When administrators add custom console components to page layouts, they choose how to display the components to users by organizing them in a sidebar style. The following sidebar styles are available for a Salesforce console.

Multi-Component Type	Description
Stack	<div>A content area with multiple frames.</div> <div></div>
Tabs	<div>A single content area with a list of multiple panels.</div> <div></div>
Accordion	<div>A collapsible content area.</div> <div></div> <div>This style is only available for vertical sidebars.</div>

Adding Custom Console Components to Page Layouts


After you create a custom console component, you can add it to page layouts so that users can access it from a sidebar in a Salesforce console.

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

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an additional cost

User Permissions Needed	
To add custom console components:	“Customize Application”
To create Visualforce pages:	“Customize Application”
To manage canvas apps:	“Customize Application”

1. For standard objects, from Setup, click **Customize** > **Object** > **Page Layouts**.  
For custom objects, from Setup, click **Create** > **Objects**, then choose the object.
2. Click **Edit** next to a page layout.
3. Click **Custom Console Components**.
4. Next to the sidebar in which you want to add your component, choose how to display and organize your components by **Style**. You can choose either Stack, Tabs, or Accordion. See [Sidebar Styles for Custom Console Components](#).
5. Specify the size of the sidebar in the console by selecting height or width, and typing its percentage or number of pixels.
6. Under **Type**, specify whether your component is a Visualforce Page, Canvas App, or Lookup. If the Knowledge tab is set up, you have the option to specify the Knowledge One component for case pages. You can add up to five components to a sidebar and a maximum of eight components to a page layout. Any canvas app components you add can't be added to AppExchange packages.
7. Under **Component**, click  to find and select your component. Or if your component is a lookup field, choose the field's name. Optionally, you can add more fields to the lookup component by defining the object's mini page layout.
8. Under **Label**, type the name for your component as it should display to console users from the sidebar.
9. Specify the size of the component in the sidebar by selecting height or width, and typing its percentage or number of pixels.
10. Click **Save**.

## Salesforce Console Integration Toolkit: New Methods

Access API methods to customize a console programmatically.

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

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an additional cost

For example, developers and advanced administrators can use the toolkit to open and close tabs in a console to streamline a business process.

With Spring '14, the following methods have been updated or are new.

### **addEventListener()**

Adds a listener for a custom event type or a standard event type when the event is fired. This method adds a listener for custom event types in API version 25.0 or later; it adds a listener for standard event types in API version 30.0 or later.

**isCustomConsoleComponentPoppedOut ()**

Determines if a custom console component is popped out from a browser. To use this method, multi-monitor components must be turned on. For more information, see “Turn on Multi-Monitor Components for a Salesforce Console” in the online help. This method is only available in API version 30.0 or later.

**removeEventListener ()**

Removes a listener for a custom event type or a standard event type. This method removes a listener for custom event types in API version 25.0 or later; it removes a listener for standard event types in API version 30.0 or later.

**setCustomConsoleComponentPopoutable ()**

Sets a custom console component to be popped out or popped into a browser. To use this method, multi-monitor components must be turned on. For more information, see “Turn on Multi-Monitor Components for a Salesforce Console” in the online help. This method is only available in API version 30.0 or later.

For more information (English only) about the toolkit, see the [Salesforce Console Integration Toolkit Developer's Guide](#).

## Custom Lookup Field Components Now Available for the AppExchange

Add lookup field components to AppExchange packages to distribute lookup field components for console apps to other Salesforce users and organizations outside of your company.

You can now add lookup field components created for a Salesforce console to AppExchange packages. This lets you distribute lookup field components for console apps to other Salesforce users and organizations outside of your company. For more information, see “Custom Console Components Overview” in the Salesforce Help and “Overview of Packages” in the Salesforce Help.

## Service Communities

Chatter Answers and Ideas provides customers with a self-service community where they can post questions and receive answers from other customers or support agents, as well as post, vote for, and comment on innovative ideas on the Web.

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

Ideas is available in: **Enterprise, Developer, Performance, Unlimited, and Professional** Editions.

### Add Code Examples to Posts

Your users can now add code samples to posts when the rich text editor is enabled in Chatter Answers and Ideas.


## Add Code Examples to Posts

Your users can now add code samples to posts when the rich text editor is enabled in Chatter Answers and Ideas.

User Permissions Needed	
To create or change custom fields:	"Customize Application"

You can enable the rich text editor on the Settings page for each product:

- For Ideas, select **Enable Text-Formatting, Images and Links**.
- For Chatter Answers, select **Enable Rich Text Editor**.

When creating a post, users can copy a code sample from any text editor and click the  button to open the Add a code sample text box. Then they paste the code sample into the text box and click **OK**. The code sample appears in the body of the post with its formatting intact.



## Social Customer Service

Social Customer Service allows you to respond to your customers via social networks and capture important case information.

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



User Permissions Needed	
To administer Social Customer Service	“Manage Users” AND “Customize Application” AND “Social Objects” AND “Social Publisher”
To create case feed items:	Feed Tracking for All Related Objects on the Case object
To send and receive social media posts or messages	“Social Objects” AND “Social Publisher” AND Case Feed enabled AND Social handle assignment



**Important:** Log a salesforce.com support ticket to enable the Social Objects and Social Publisher permissions.

### **Social Customer Service**

Learn what Social Customer Service can do for your organization and how to set it up.

## **Social Customer Service**

Learn what Social Customer Service can do for your organization and how to set it up.

Social Customer Service integrates with Radian6 so service agents can engage customers by responding to cases created from Twitter and Facebook. Administrators can customize how the inbound social content is processed using an Apex class and configure who in their organization has permission to respond using the social channels. Case feed items are created on the case for inbound and outbound content, making it easy for support agents to solve customers’ questions. With Salesforce1, agents can see social content from mobile devices.

In Twitter, agents can see the content they are responding to, retweet, mark as favorite and follow tweets, and send replies to tweets and direct messages.

Case Number 00001072 Created Date 11/13/2013 9:40 AM

### TWEET FROM: Paul Demit

No Description

Feed Details

Social Post File Link Poll

In Reply To

Paul Demit @PaulDemit  
@CustomerCompany Hi, when is the next release coming?

Managed Social Account @CustomerCompany Message Type Reply

Content 130  
@PaulDemit

Tweet

All Updates for this case

Sort By Post Date

Paul Demit sent a Reply

Paul Demit @PaulDemit  
@CustomerCompany Hi, when is the next release coming?

Reply Retweet Favorite Follow

Comment Like November 13, 2013 at 9:40 AM

In Facebook, cases are created from your managed Facebook page and agents can see the content they are replying to, like posts and comments, and send posts, comments, replies, and private messages.

Social Post File Link Poll

In Reply To

Mick Hogan  
Hey guys, love your new release. Where can I find release notes?

Managed Social Account CustomerCompany Message Type Comment

Content

Post to Facebook

All Updates for this case

Sort By Post Date

Mick Hogan created a Post

Mick Hogan > CustomerCompany  
Hey guys, love your new release. Where can I find release notes?

Reply Like Delete

Comment Like November 21, 2013 at 11:16 AM



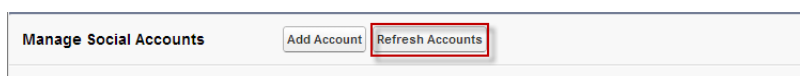
**Important:** Log a salesforce.com support ticket to enable the Social Objects and Social Publisher permissions.

Your organization must have Radian6 set up with a data source to gather inbound social content from Twitter and Facebook. For information on Salesforce Social Hub rules see *Adding Data Sources* in the Salesforce online help.

1. From Setup, go to **Build > Customize > Social Apps Integration > Social Customer Management > Settings**.
2. Check `Enable Social Customer Service`.

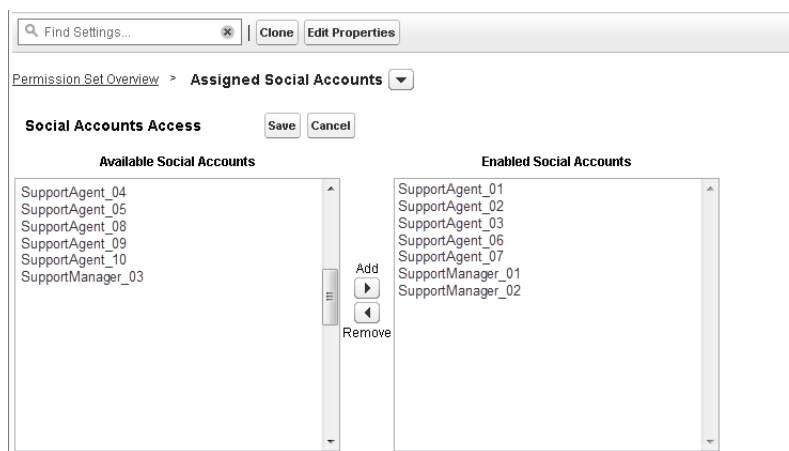
The `socialcustomerservice` package is installed.

3. Under `Radian6 Credentials`, click **Login** and enter your `Radian6` credentials.
  4. Under `Manage Social Accounts`, click **Add Account**.
- The Salesforce Marketing Cloud Social Account Manager application opens.
5. Select your social network, for example Twitter or Facebook, in the `+ New Account` drop down.
  6. Enter your social network account credentials.
  7. Click **Authorize app**.
  8. Register your social network account.
  9. Back in Salesforce on the Social Customer Service settings page, click **Refresh Accounts**.




**Note:** Social accounts a user no longer has access to are automatically disabled and hidden from the active accounts.

10. In the `Inbound Settings` section you can see which Apex class controls how the inbound content is processed and which user it's set to run under. The default Apex class creates a social post, social persona, case, contact, and supports common use cases.
11. To assign social handles to a permission set, still within Setup, go to **Administer > Manage Users > Permission Sets**.
12. Click an existing permission set or create a new one.
13. In the `Apps` section, click **Assigned Social Accounts**.
14. Click **Edit**.



15. Enable the social accounts you need available to your users with this permission set.



**Important:** On the Case object, Feed Tracking for All Related Objects must be enabled for case feed items to be created.

16. Click **Save**.

# Analytics

Salesforce offers a powerful suite of analytics tools that work together to help you view and analyze your data.

## **Analytics Platform**

Let users access analytics from anywhere. Develop your own analytics apps with Apex and Visualforce, using the Analytics API.

## **Core Analytics Enhancements**

Sort report results at multiple levels, export report data, and scroll through reports on screen without losing your place.

## **Dashboards**

We've made it easier to filter dashboards, edit someone else's dashboard, and display percentage amounts in table components.

## **History Tracking for Cases**

Monitor activity across cases and identify your case status changes in the last three months of a case's life cycle. Track a wide variety of fields, such as escalation status or priority level, to understand case trends and make more informed decisions.

# Analytics Platform

Let users access analytics from anywhere. Develop your own analytics apps with Apex and Visualforce, using the Analytics API.

## **Analytics API Available in Apex**

Use the Analytics API via Apex for faster performance and easier maintenance. All the capabilities of the Analytics REST API are also available in the Apex API.

## **Embed Report Charts in Visualforce Pages**

Define charts using the report builder and reuse them in any Visualforce page, often with only a single line of code. Charts can include dynamic filters, auto-refresh based on expiration time, and many other options.

## **Embed Charts in Salesforce1**

Embed report charts in record detail pages for any standard or custom object. Charts that you add to page layouts are automatically visible in the Salesforce1 app.

# Analytics API Available in Apex

Use the Analytics API via Apex for faster performance and easier maintenance. All the capabilities of the Analytics REST API are also available in the Apex API.

The Analytics REST API, introduced in Winter '14, gives developers access to many reporting and charting features that were previously available only through the web interface. If your customization strategy rests on Apex coding rather than the REST API, you can now use Apex to make all the same calls you can make with the REST API.

For example, here's a way you could use Apex to automate a reporting workflow. This Apex code takes a report ID and message as input, runs the specified report, and posts a Chatter message to every user or entity listed as a grouping.

```
Reports.ReportResults res = Reports.ReportManager.runReport(reportId);  
FeedItem[] posts = new FeedItem[res.getgroupingsDown().getgroupings().size()];
```

```

for(Integer i=0;i<posts.size();i++) {
    FeedItem post = new FeedItem();
    post.ParentId = UserInfo.getUserId();
    post.Body = message + res.getreportmetadata().getname() +
        '(' + res.getgroupingsDown().getgroupings()[i].getlabel()
            + ':'
            +
res.getfactmap().get(''+i+'!T').getaggregates()[0].getlabel()+')';
    posts[i] = post;
}
insert posts;
return true;

```



**Note:** Synchronous and asynchronous report runs via the API are subject to different limits.

- Synchronous: 500 per hour.
- Asynchronous: 1200 per hour.

In either case, calls to the Analytics Apex API and to the Analytics REST API count toward the same limits pool.

## Embed Report Charts in Visualforce Pages

Define charts using the report builder and reuse them in any Visualforce page, often with only a single line of code. Charts can include dynamic filters, auto-refresh based on expiration time, and many other options.

With this enhancement, all of your most critical charts and analytics are in context, wherever you are working. You no longer need workarounds such as iframes or Javascript to create a Visualforce page with dashboard-like functionality. You can just pull the chart into your Visualforce component by its report ID.

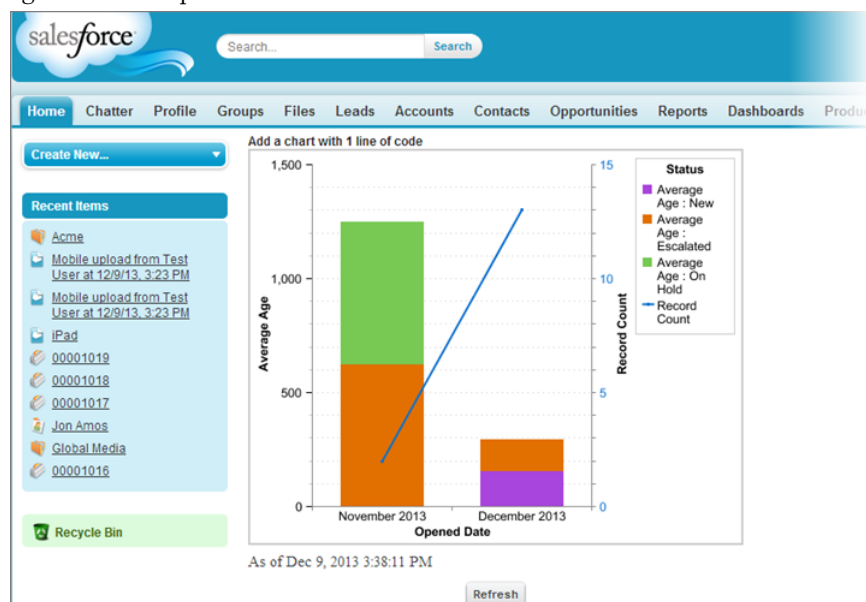
For example, here's how you might bring in a report with the ID 000xxxxxxxxxxxxx.

```

<apex:page>
<analytics:reportChart reportId="000xxxxxxxxxxxxx"></analytics:reportChart>
</apex:page>

```

And here's the resulting embedded report:



For details, see the [Visualforce Developer Guide](#).

## Embed Charts in Salesforce1

Embed report charts in record detail pages for any standard or custom object. Charts that you add to page layouts are automatically visible in the Salesforce1 app.

See [View Embedded Charts in Salesforce1](#) for more details.

## Core Analytics Enhancements

Sort report results at multiple levels, export report data, and scroll through reports on screen without losing your place.

### Flexible Sorting in Reports

In a report with multiple grouping levels, sort groupings by the summary value that defines each grouping.

### Hide Unused Report Types

If your users only use a subset of the available standard report types, show only those report types, and hide the ones they don't need.

### Export Reports Without Footers

Remove the information that's normally displayed in the footer when users export a report to an Excel or .csv file.

### Floating Headers in Summary and Matrix Reports

It's tough to remember the headers when you're viewing a report with lots of data. Instead of having to scroll, create floating headers by freezing columns and rows. When you scroll down or across to read a report, you can choose to have the header rows at the top or the left of the report stay visible.

### API Access to List Views

The "Create and Customize List Views" permission, introduced in Winter '14, is now available via the Metadata API.

### Create Report Page Update

The positioning of the elements on the Create Report page has been adjusted slightly for improved usability.

## Flexible Sorting in Reports

In a report with multiple grouping levels, sort groupings by the summary value that defines each grouping.

Available in: All editions except Database.com	
User Permissions Needed	
To sort report results:	"Run Reports"

For example, you've grouped an Opportunities report by type of business, in order to highlight the most promising deals. Each Type grouping is in turn grouped by Stage, and each Stage grouping is grouped by Lead Source. Now you can sort the Type grouping by Amount, the Stage grouping by Stage, and the Lead Source grouping by Record Count.

This includes both standard summary values and values that are generated by a custom summary formula.

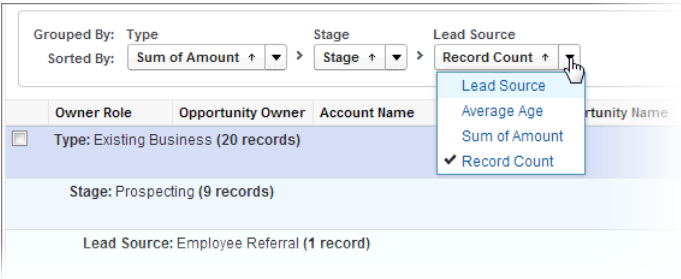


Figure 1: Each grouping level can be sorted independently.

## Hide Unused Report Types

If your users only use a subset of the available standard report types, show only those report types, and hide the ones they don't need.

Available in: **All** editions except **Database.com**

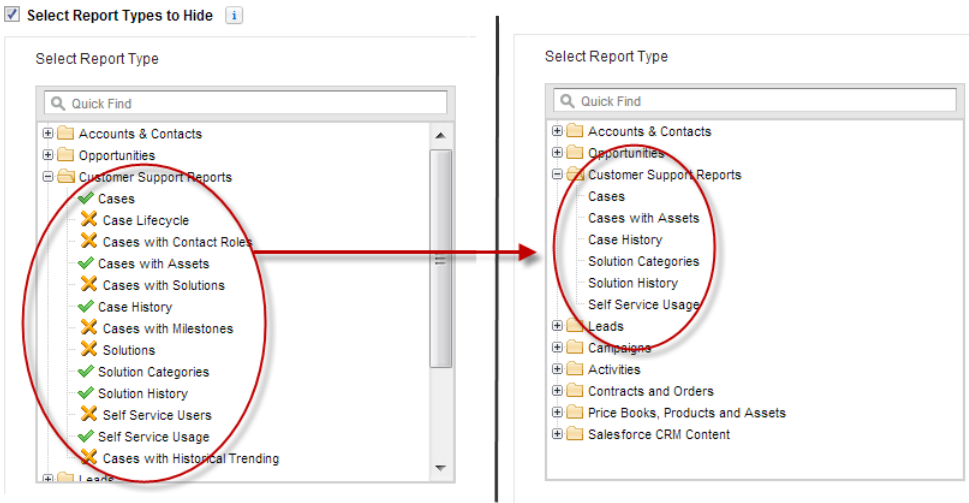
User Permissions Needed	
To hide report types:	“Manage Custom Reports”

Hidden report types don't show up when you use the search box on the Create New Report page.

If you hide all the report types in a folder, the folder is hidden too.

On the Reports tab, click **New Report**, then select **Select Report Types to Hide**. The green check mark next to a report means it's visible to everyone. Click the check mark to change it to an X and hide that report type.

### Create New Report



## Export Reports Without Footers

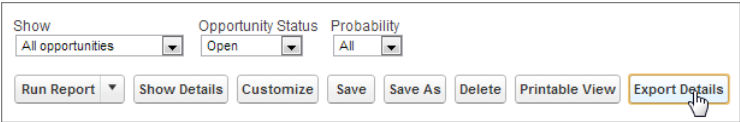
Remove the information that's normally displayed in the footer when users export a report to an Excel or .csv file.

Available in: All editions except Database.com

User Permissions Needed

To export reports: “Export Reports”

Users can export reports in order to work with specialized applications, such as Microsoft Excel, by clicking **Export Details** on the report run page.



By default, Salesforce adds five rows to the bottom of the .csv or Excel file that’s created, containing some metadata that may be useful.

57	Canson	Canson Widget Deal	USD	2461250	Q
58	Canson	Canson - 18 Spider 3 Series Laptops	USD	383250	N
59	Jam Television	Jam Television - Platinum Support	USD	161325	P
60	Northtech Communication	Northtech Communications Inc - 16 AW 500	USD	1500000	N
61	Arbuckle Laboratories	Arbuckle Laboratories - 8 Star 10 Series Des	USD	20000	V
62	Canson	Canson - Laser free memory upgrade	USD	175200	N
63	Dixon Chemical - Spain	Dixon Chemical - 2000 Desktops	USD	2750000	N
64	Dizon.net	Dizon.net - Desktops	USD	20000	V
65	Ecotech - Germany	Ecotech - Laptops	USD	511000	P
66					
67					
68	Opportunities by Rep and Close Month				
69	Copyright (c) 2000-2013 salesforce.com, inc. All rights reserved.				
70	Confidential Information - Do Not Distribute				
71	Generated By: Ted Kuster 11/25/2013 12:06 PM				
72	Asteroid188				
73					

You can suppress this information for all reports that users export. From Setup, click **Customize > Reports & Dashboards > User Interface**, then select **Export Reports Without Footers**.

Floating Headers in Summary and Matrix Reports

It's tough to remember the headers when you're viewing a report with lots of data. Instead of having to scroll, create floating headers by freezing columns and rows. When you scroll down or across to read a report, you can choose to have the header rows at the top or the left of the report stay visible.

Available in: All editions except Database.com

User Permissions Needed

To modify report and dashboard settings: “Customize Application”

When the top row of data passes the top of the browser window, click the up arrow that appears just under the address bar. The grouping rows remain in view no matter how far down you scroll. You could already do this in tabular reports; now you can do it in summary and matrix reports too.





Opportunity Owner		September 2013	October 2013	November 2013		Account Name
<a href="#">Anjana Shah</a>	Sum of Amount	USD 240,000.00	USD 4,325,250.00	USD 0.00	USD 4,565,250.00	
	Record Count	1	2	0	3	
<a href="#">Ecotech Germany - 10 Spider 3 Series Laptops</a>	Amount	USD 240,000.00				<a href="#">Ecotech - Germany</a>
<a href="#">HomeNet Technologies -</a>	Amount		USD 821,250.00			<a href="#">HomeNet Technologies</a>

**Figure 2: Click the down arrow to show a stationary header row.**



Opportunity Owner		September 2013	October 2013	November 2013	Grand Total	Account Name
<a href="#">Anjana Shah</a>	Sum of Amount	USD 240,000.00	USD 4,325,250.00	USD 0.00	USD 4,565,250.00	
	Record Count	1		0	3	
<a href="#">Ecotech Germany - 10 Spider 3 Series Laptops</a>	Amount					<a href="#">Ecotech - Germany</a>
<a href="#">HomeNet Technologies - Laptops</a>	Amount		USD 821,250.00			<a href="#">HomeNet Technologies</a>
<a href="#">TMI - 40 free memory upgrade</a>	Amount		USD 3,504,000.00			<a href="#">TMI Inc</a>

**Figure 3: Click the up arrow to hide the header row.**

Similarly, when you scroll to right and the left-most column of data passes the left edge of the browser, you can click the rightward arrow to see a stationary display of the row labels in the left column.



<a href="#">Howe - 36 Laptops</a>				
<a href="#">American Bank - 38 Printers</a>	Amount			USD 5,000.00
				1
<a href="#">United Business Solutions - 25 Laptops</a>	Amount			USD 16,000.00
				1
<a href="#">Starfish Publishing- Printers</a>	Amount			USD 16,000.00
				1
<a href="#">West Airlines - 10 AW 5000 Series Printer</a>	Amount			USD 20,000.00
				1

**Figure 4: Click the right arrow to show a stationary label column.**



<a href="#">Cheatham &amp; Howe - 36 Laptops</a>			1	
<a href="#">American Bank - 38 Printers</a>	Amount			USD 5,000.00
				1
<a href="#">United Business Solutions - 25 Laptops</a>	Amount			USD 16,000.00
				1
<a href="#">Starfish Publishing- Printers</a>	Amount			USD 16,000.00
				1
<a href="#">West Airlines - 10 AW 5000 Series Printer</a>	Amount			USD 20,000.00
				1
<a href="#">Acme Inc -</a>	Amount			USD 20,000.00

**Figure 5: Click the right arrow to hide the label column.**

## API Access to List Views

The "Create and Customize List Views" permission, introduced in Winter '14, is now available via the Metadata API.

# Create Report Page Update

The positioning of the elements on the Create Report page has been adjusted slightly for improved usability.

Available in: All editions except Database.com

User Permissions Needed

To modify report and dashboard settings: “Customize Application”

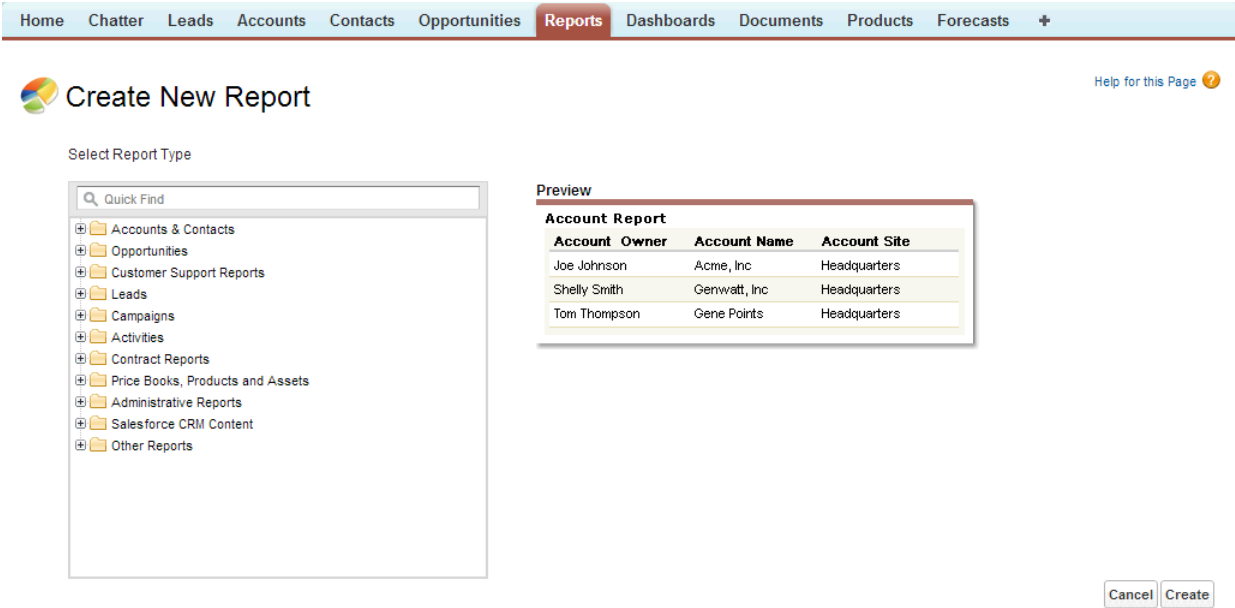


Figure 6: Previously, the Create and Cancel buttons were off to the far right of the screen.

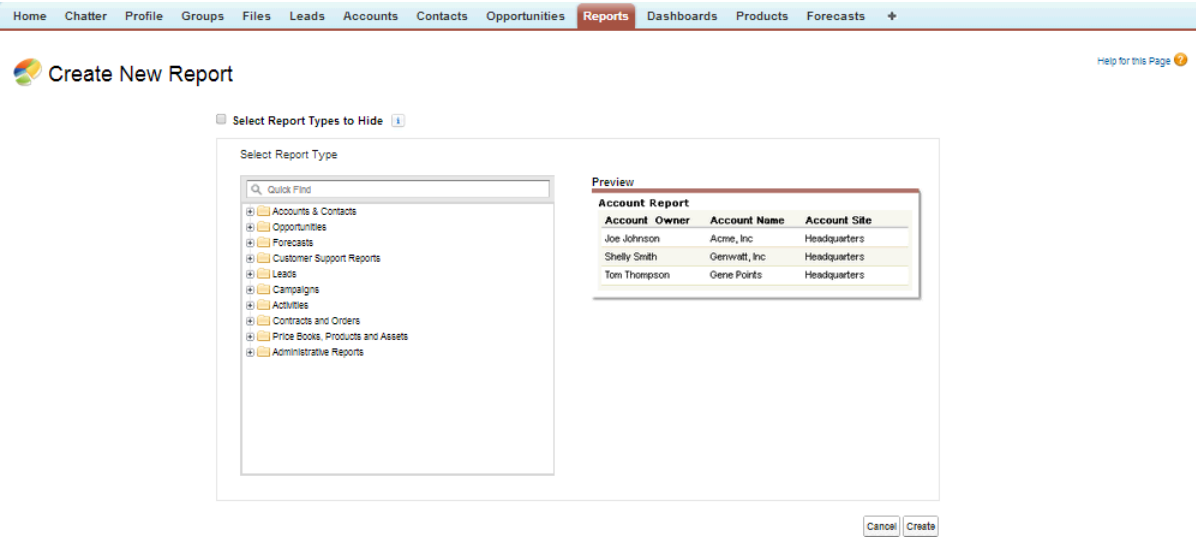


Figure 7: Now the Create and Cancel buttons are closer to the Report Types panel.

# Dashboards

We've made it easier to filter dashboards, edit someone else's dashboard, and display percentage amounts in table components.

## *Named Dashboard Filter Values*

Reduce screen clutter by assigning a nickname to a group of values you've identified as one filter selection, then save and reuse those values. By providing different named views of a single dashboard, you multiply the dashboard's utility without having to edit the underlying reports or dashboard components.

## *Editing Dashboards Without View All Data*

Edit dashboard components and save the changes as the current running user of the dashboard, even if you're not the running user.

## *Percentages in Tables and Metrics*

When a column in a table or metric component contains amounts that are expressed as fractions, you can convert the fractions to percentages.

# Named Dashboard Filter Values

Reduce screen clutter by assigning a nickname to a group of values you've identified as one filter selection, then save and reuse those values. By providing different named views of a single dashboard, you multiply the dashboard's utility without having to edit the underlying reports or dashboard components.

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

For example, on a sales dashboard, you might gather several stages of Opportunities into groups called "Early," "Under Way," and "Advanced." When each of those categories is the nickname of a specific set of filter values, users can quickly switch their view of the dashboard to show only data relevant to deals that are in the stage they're interested in.

The screenshot shows the 'Add Filter' dialog box. The 'Field' dropdown is set to 'Stage'. The 'Display Label' is 'Stage'. Under 'Filter Options', there is a table with three rows, each with an 'Operator' dropdown set to 'equals' and a 'Value' field. The 'Value' fields contain 'Early', 'Under Way', and 'Advanced'. A red circle highlights the 'Value' column. The 'Early' value has a tooltip that reads 'Initial Contact, Prospecting, Qualification, Ne'. The 'Under Way' value has a tooltip that reads 'Value Proposition, Id. Decision Makers, Perc'. The 'Advanced' value has a tooltip that reads 'Proposal/Price Quote, Negotiation/Review, C'. At the bottom are 'OK' and 'Cancel' buttons.

Operator	Value
equals	Early Initial Contact, Prospecting, Qualification, Ne
equals	Under Way Value Proposition, Id. Decision Makers, Perc
equals	Advanced Proposal/Price Quote, Negotiation/Review, C

**Figure 8: Named dashboard filter values help users get the right information quickly.**

## Editing Dashboards Without View All Data

Edit dashboard components and save the changes as the current running user of the dashboard, even if you're not the running user.

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

### User Permissions Needed

To edit a dashboard for another running user:	"Enable Other User's Dashboard"
---	---------------------------------

Until now, you needed the "View All Data" permission to edit a dashboard in place of the running user if you were not the running user yourself. For example, say an admin wanted to change a threshold in a gauge component on a dashboard designed for an executive. The executive, who has greater viewing access, is the running user of the dashboard. Without the "View All Data" permission, the admin might not be able to see the data she needed to see in order to make the required changes, or save the dashboard as the running user. The new "Enable Other User's Dashboard" makes that possible.

## Percentages in Tables and Metrics

When a column in a table or metric component contains amounts that are expressed as fractions, you can convert the fractions to percentages.

For example, customer satisfaction scores may be recorded as fractions of 1, with 1 being a perfect score. You can now express a score of .6 as 60 percent.



**Note:** Don't do this with amounts that are not in the form of fractions of 1. The results may not make sense.

## History Tracking for Cases

Monitor activity across cases and identify your case status changes in the last three months of a case's life cycle. Track a wide variety of fields, such as escalation status or priority level, to understand case trends and make more informed decisions.

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

### User Permissions Needed

To create, edit, and delete reports:	"Create and Customize Reports"
	AND
	"Report Builder"

For example, one way to optimize contact center operations is to watch the `Status` field over time, watching for cases that move backward to a previous status. This can help reveal ways to resolve cases more effectively.

For another example, try analyzing historical values of the `Priority` field to identify cases that may have been incorrectly classified when they were opened. Watching for frequent changes in priority may also lead to ways to improve the handling of complex cases.

# Site.com

Design and publish websites, social pages, and mobile experiences with simple drag-and-drop tools.

## **Deploying Sites with the Metadata API**

You can now use the Metadata API to deploy a site from sandbox to production and from your production site to a sandbox organization. You can do so for Site.com sites and Salesforce Communities sites by using the Metadata API.

## **Versioning**

New for Spring '14, versioning is a great way to keep track of the development of your site, and an easy way to restore a previous version. Each time you publish your site, you create a new site version that is tracked in the Change History view. You can use versioning to restore your site back to one of the previously published versions.

## **Branding Sites**

Branding provides a flexible way for you to define different aspects of your website's brand. Once branding properties are defined, your editors can easily customize everything in one centralized place, the Branding Editor. When your website editors customize the properties, they get a preview of their branding changes immediately.

## **Site Custom Properties**

In Winter '14, we introduced custom properties for widgets, so now in Spring '14, we're making custom properties available at the site level also. Site custom properties let you save time by defining commonly used values and reusing them throughout your site.

## **Widget Enhancements**

We've improved the way you create custom widget properties. Additionally, everyone on your team can now take advantage of the widgets you build, whether they're site administrators, designers, or contributors.

## **Custom Property Types**

As part of the Spring '14 widget improvements and the new site custom properties and branding features, we've added several new custom property types.

## **Page Data Connections**

Page data connections make it easy for site administrators and designers to create a detail page for a single record when working with Salesforce objects.

## **Enhancements to the Contributor's Site.com Studio View**

We've introduced some significant improvements to Site.com Studio for contributors. Check out this overview to see how the updates affect you, whether you're a contributor, designer, or site administrator.

## **Live Mode Updates for Site Administrators and Designers**

We've made some updates to live mode. Live mode lets site administrators and designers preview how pages and templates appear on devices such as cell phones and tablets.

## **Exporting Assets Separately**

Designers and site administrators can now export assets separately from all the other site components. You can export assets together or individually.

## **Clickjack Protection**

Clickjacking is a type of attack that tries to trick a user into clicking something, maybe a button or link, because they perceive they are clicking something safe. Instead, the button or link performs malicious actions on your site leading to data intrusion, unauthorized emails, changed credentials, or other site-specific actions.

### Changes to the Company Community Permission Set License

The Company Community Add-on permission set license has been renamed to Company Community for Force.com. This permission set license now also allows read and create access on cases.

## Deploying Sites with the Metadata API

You can now use the Metadata API to deploy a site from sandbox to production and from your production site to a sandbox organization. You can do so for Site.com sites and Salesforce Communities sites by using the Metadata API.

There are several tools that you can use to create a package:

- Change sets (for Site.com and Site.com Communities sites only). The component type is called `Site.com`.
- Workbench, which works for creating all site types. The metadata type is called `SiteDotCom`.
- Force.com migration tool for Ant, which works for creating all site types. The metadata type is called `SiteDotCom`.



**Note:** There is a file size limitation when using the Metadata API to deploy a site from sandbox to production. The assets in the `.site` file can't be larger than 40 MB. The site gets created, but the assets show in the new site as broken. To fix the assets, export the assets from the sandbox environment separately and then import them into your new site.

## Versioning

New for Spring '14, versioning is a great way to keep track of the development of your site, and an easy way to restore a previous version. Each time you publish your site, you create a new site version that is tracked in the Change History view. You can use versioning to restore your site back to one of the previously published versions.



**Note:**

When working in Site.com Studio, you're always working on an unpublished version of your site. It's your *working copy*. When you restore a version, you overwrite your working copy, not your live site. You must publish the restored version before you see the change on your live site.

## Branding Sites

Branding provides a flexible way for you to define different aspects of your website's brand. Once branding properties are defined, your editors can easily customize everything in one centralized place, the Branding Editor. When your website editors customize the properties, they get a preview of their branding changes immediately.

By adding branding properties to your website or widgets, you can easily define and change those aspects of your website's brand without needing to edit your Cascading Style Sheet.

Here are examples of aspects that you might define that are related to your website's brand:

- The website's background, page, or link colors
- Font size and color
- The logo or header background image
- The thickness and color of lines

To use branding in your website, you must:

1. Define the parts of your site that make up your brand by creating a branding property for each aspect such as background color, logo, and fonts. You complete this task from Branding Properties within Site Configuration.
2. Use expression language syntax to replace the current definitions for these properties within your Cascading Style Sheets with the new branding properties.
3. Use the Branding Editor to customize the properties and preview how your website will look.

The branding properties can also be accessed by using expression language syntax directly from within a custom code block or content block.

## Site Custom Properties

In Winter '14, we introduced custom properties for widgets, so now in Spring '14, we're making custom properties available at the site level also. Site custom properties let you save time by defining commonly used values and reusing them throughout your site.

Available for purchase in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available (with limitations) in: **Developer** Edition

We've added a new Custom Properties view (1) to the Site Configuration section of the Overview tab. In the Custom Properties view, you can create custom properties and group them into sections (2).

The screenshot shows the 'Overview' tab in Site Configuration. The left sidebar has a 'Site Configuration' section with 'Custom Properties' highlighted (marked with a red box and '1'). The main area is titled 'Custom Properties' and contains a 'Company Information' section. This section has a '+ New Property' button and a table of properties (marked with a red box and '2').

Label	Expression Name	Default Value	Type	Required
Address	Address	The Landmark @ One M...	Text	No
Phone Number	PhoneNumber	1-800-667-6389	Text	No
Logo	Logo	/logo-company.png	Image	No

After you create a new property and specify its value and **type**, you can access the property in custom code or content blocks using expressions. Expressions serve as placeholders for data that will be replaced with information when the page loads.

To reference a site custom property in custom code or a content block, use the syntax `{!Site.expression_name}`. So for example, you could create a custom property to store the company phone number with `PhoneNumber` as the expression name.



In a content block, you could enter `Contact us at {!Site.PhoneNumber}`. Then, when the page loads, it would replace the value represented by `{!Site.PhoneNumber}` to display “Contact us at 1-800-667-6389” on the page.

Because expressions are just placeholders, if you update the value of a property in the Custom Properties view, the value is updated automatically wherever the custom property is referenced on a page.

## Widget Enhancements

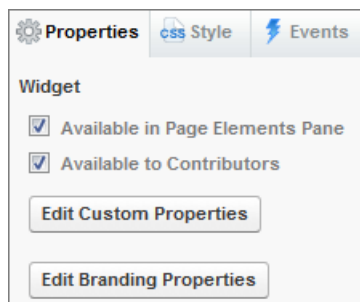
We’ve improved the way you create custom widget properties. Additionally, everyone on your team can now take advantage of the widgets you build, whether they’re site administrators, designers, or contributors.

Available for purchase in: **Enterprise**, **Performance**, and **Unlimited** Editions

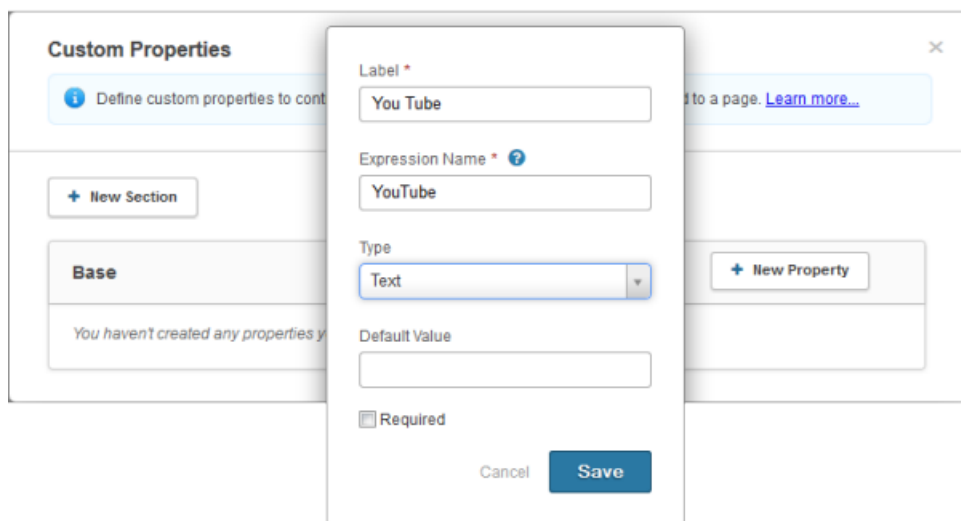
Available (with limitations) in: **Developer** Edition

Custom widget properties give you flexibility over how your widgets are reused, so for Spring ’14 we’ve added [custom property types](#) to let you create widgets that are even more versatile.

We’ve also updated the way you add custom widget properties. Now when you create a new widget, you add custom properties to the widget by clicking **Edit Custom Properties** in the Properties pane.



This opens a new Custom Properties dialog where you can create properties and group them into sections.



Additionally, you can let contributors add a widget to site pages by selecting `Available to Contributors` in the Properties pane or in the Widgets view on the Overview tab. This setting controls whether the widget appears in [the contributor's Page Elements pane](#).



**Note:** You must ensure the site page is based on a page template that has at least one editable panel. Otherwise, contributors can't add widgets to the page.

But that's not all! To let contributors update the widget's appearance using the new Branding Editor, you can [add branding properties](#) to the widget by clicking **Edit Branding Properties** in the Properties pane.

## Custom Property Types

As part of the Spring '14 widget improvements and the new site custom properties and branding features, we've added several new custom property types.

Available for purchase in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available (with limitations) in: **Developer** Edition

The new property types are available when designers or site administrators create site branding properties, site custom properties, widget branding properties, and widget custom properties.

Property Type	Description
Text	Lets users enter a text value.
Checkbox	Lets users set a true (selected) or false (deselected) value.
Color	Lets users specify a color, either by selecting one from the color picker or by entering a hexadecimal value, such as #333333.
Image	Lets users specify an image, either by browsing to a site image, uploading a new image, or entering the URL to an image.
HTML	Lets users enter an HTML value.
Units	Lets users enter a measurement, such as pixels, percentage, or em—for example, 5px.
Picklist	<p>Lets users select a value from a list you define.</p> <p>To add items to the picklist, create a comma-delimited list of options, where each option has a label and a value—for example, <code>Label 1:Value 1, Label 2:Value 2</code>. If you don't add a value for an option, the label is used as the value by default.</p> <p>To define a default picklist selection, use the format <code>label:value:default</code>—for example, <code>Small:S:default, Large:L</code>.</p>
Font	Lets users select a font.

## Page Data Connections

Page data connections make it easy for site administrators and designers to create a detail page for a single record when working with Salesforce objects.

Available for purchase in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available (with limitations) in: **Developer** Edition

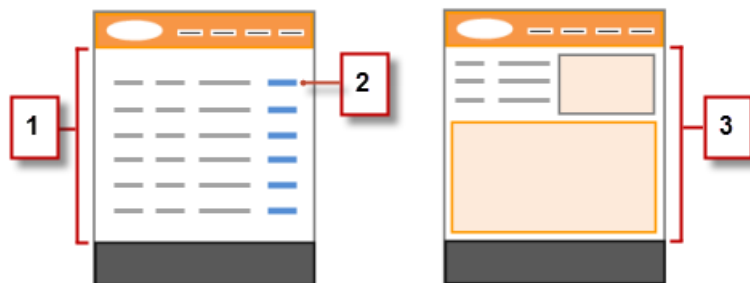
When combined with repeater elements, custom code, or content blocks, page data connections let you connect to standard and custom objects, retrieve a specific record, and dynamically display the record on a site page. And when you update data in an object, the changes are reflected automatically on the live site—no site updates required.

When the page is open, you can create a page data connection by clicking **Edit Connection** in the Page Data Connection section of the Properties pane.



For example, let's say you want to list all of your company's accounts on a site page called Accounts. When a user clicks a **View Details** link, you want to open a site page called Account Detail to display information for the selected account.

In this case, you could add a data repeater to the Accounts site page to retrieve a list of records from the Account object (1). Using a data element, you could create a **View Details** link (2) that, when clicked, uses a URL query string to pass the `Account ID` field as a unique identifier to the Account Detail page. As the Account Details page loads, the page data connection uses the unique identifier value to dynamically return only that record's details (3).



With page data connections, you can use expressions to access the returned data anywhere on the page, including the page's properties. For example, let's say you want to use the account name as the title of the Account Detail page. In this case, you would simply enter `{!Name}` in the `Title` field on the Properties pane. When the page loads, it retrieves the account name for that particular record and displays it in the browser's title bar.

## Enhancements to the Contributor's Site.com Studio View

We've introduced some significant improvements to Site.com Studio for contributors. Check out this overview to see how the updates affect you, whether you're a contributor, designer, or site administrator.

Available for purchase in: **Enterprise**, **Performance**, and **Unlimited** Editions

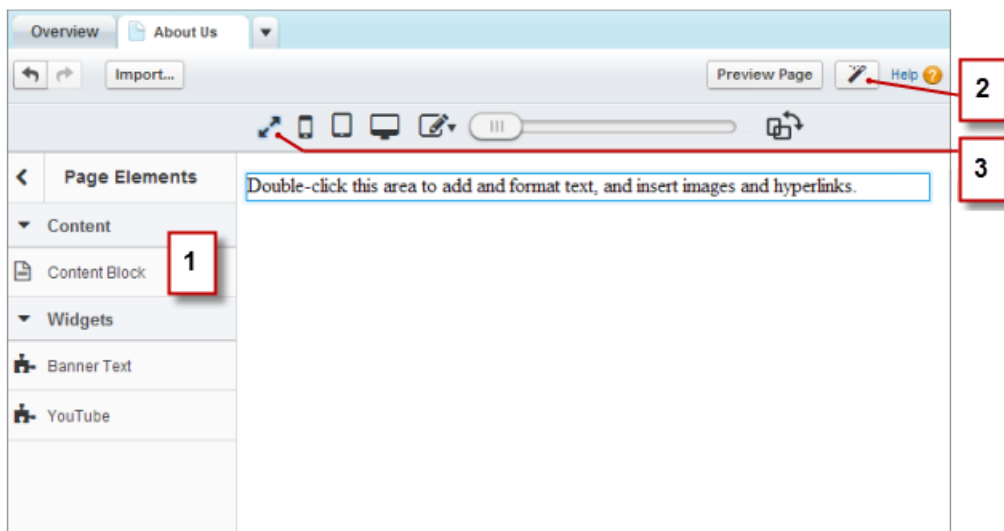
Available (with limitations) in: **Developer** Edition

## Enhancements for Contributors





On the Overview tab of Site.com Studio, contributors can now:

- Rename, duplicate, and delete pages.
- Delete and replace assets.
- Add, edit, and delete site map links.
- Move pages in the site map.
- Create and delete folders, and move pages and assets into folders.

We've also updated the contributor's page editing view.



Contributors can:

- Use the Page Elements pane (1) to [add content blocks and widgets](#) (if available) to the page.
- Use the Branding Editor (2) to update the appearance of the page.
- Use the Fluid option  (3) to reset the page's width and height to 100% after previewing how the page looks on smart phones , tablets , or computer screens .

## Enhancements for Designers and Site Administrators

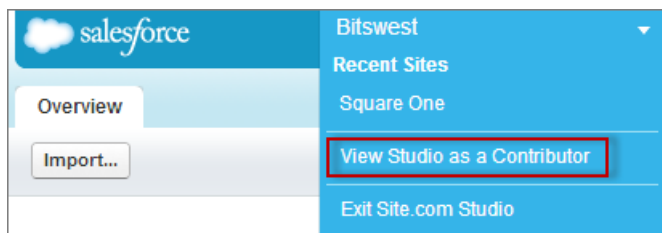
Designers and site administrators can now:

- [Let contributors add widgets](#) to template-based pages that have editable panels.



**Note:** Unlike widgets, which you must explicitly make available to contributors, by default contributors can now add content blocks to any editable panels in template-based pages. Keep this in mind if you have existing page templates that have editable panels.

- [Define branding properties](#) to let contributors change the appearance of pages and widgets.
- View Site.com Studio as your contributors see it to ensure that you set up the view correctly. Click **View Studio as a Contributor** in the site's pull-down menu. To exit, click **Return to My Studio View**.

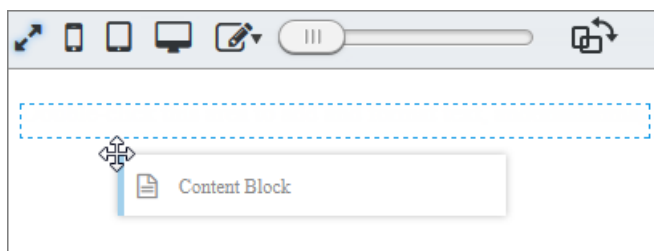


## Adding Page Elements as a Contributor

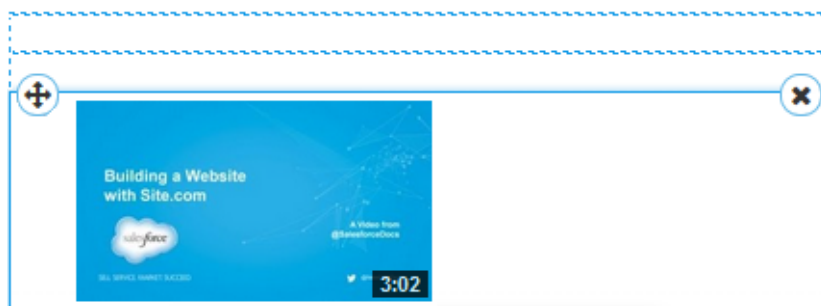
As a contributor, you can now add page elements to any editable areas of a page.


Page elements are the building blocks of site pages. Content blocks contain the text of your website pages and can house images and hyperlinks. Widgets are custom page elements that are created by your designer or site administrator. If you can't see widgets, they're not available to you.

- To add a page element to an open page, drag the element from the Page Elements pane to an editable area. When you drag a page element to an editable page area, the area is highlighted with a blue border. If you can't see a blue border, the page doesn't have any editable areas.



- To move a page element on the page, drag the page element to another editable area.



- To delete a page element, click .

After you add a content block to a page, double-click the content block to edit it.

When you add a widget to the page, you might need to specify widget properties in a dialog box. To dismiss the dialog box, click another area of the screen. Your changes are automatically saved. For more information about a widget's properties, contact your designer or site administrator.

## Live Mode Updates for Site Administrators and Designers

We've made some updates to live mode. Live mode lets site administrators and designers preview how pages and templates appear on devices such as cell phones and tablets.

Available for purchase in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available (with limitations) in: **Developer** Edition


As a site administrator or designer, you can no longer edit content blocks inline when viewing pages or widgets in live mode. To edit the page's content, return to design mode. Contributors can still use the inline editor to edit content blocks.

When the page is open in live mode, the Fluid option  lets you set the page's width and height to 100%.

## Exporting Assets Separately

Designers and site administrators can now export assets separately from all the other site components. You can export assets together or individually.

When you export all assets, the assets are exported to a zipped file that is named after the site name—for example, `sitename-Assets.zip`.

Export your assets from the Overview tab by clicking  > **Export Site Assets**.

One example you when you might need to export assets separately occurs when deploying a site from sandbox to production by using the Metadata API.

There is a file size limitation when using the Metadata API. The assets in the `.site` file can't be larger than 40 MB. The site gets created, but the assets show in the new site as broken. To fix the assets, export the assets from the sandbox environment separately and then import them into your new site.

## Clickjack Protection

Clickjacking is a type of attack that tries to trick a user into clicking something, maybe a button or link, because they perceive they are clicking something safe. Instead, the button or link performs malicious actions on your site leading to data intrusion, unauthorized emails, changed credentials, or other site-specific actions.

Hidden iframes that load your site's pages can be placed maliciously by an unrelated page that entices the user to click a button or link that appears below the hidden iframe. With clickjack protection, you can configure whether your browser allows frames or iframes over your site pages. The default clickjack level for Site.com is set to Allow framing by the same origin only.

You can set the clickjack protection for a site to one of these levels:

- Allow framing by any page (no protection)
- Allow framing by the same origin only (recommended)
- Don't allow framing by any page (most protection)



**Note:** Same-origin framing allows the site's page to be framed only by pages on the same domain name and protocol security.

Clickjack protection won't be automatically enabled for sites created prior to the Spring '14 release. To manage clickjack protection in your site:

1. On the Overview tab, click **Site Configuration**.
2. Click **Edit**.
3. Select the desired level of clickjack protection.

**Note:**

Salesforce Communities have two clickjack protection parts—one for the Force.com Communities site which is set from the Force.com site detail page and another for the Site.com Communities site which is set from the Site.com configuration page. It's recommended that both are set to the same value.

## Changes to the Company Community Permission Set License

The Company Community Add-on permission set license has been renamed to Company Community for Force.com. This permission set license now also allows read and create access on cases.

Available for an additional cost in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

To purchase one or more Company Community for Force.com permission set licenses, contact salesforce.com Customer Support. See “Assigning Permission Set Licenses” in the Salesforce Help for more information.

# Force.com Customization

Use point-and-click tools to expand your Salesforce organization: enhance your objects, data, and fields, customize your organization's look and feel, enhance your business processes, and create websites and apps. Customization also includes administration and security tools.

## **Data Import Wizard—Generally Available**

The Data Import Wizard provides a unified interface that lets you import data for a number of standard Salesforce objects, including accounts, contacts, leads, and solutions. The wizard also lets you import data for custom objects.

## **Feed-Based Page Layouts Now Available**

Make it easier for your users to work with account, contact, lead, opportunity, and custom object records by creating feed-based layouts, which include two separate views: one for the record's feed and one for its details. You can create feed-based layouts for account, contact, lead, opportunity, and custom objects.

## **Launch Flows from Workflow Rules—Pilot**

Spring '14 introduces a new workflow action called a *flow trigger*, which launches a flow when the workflow rule criteria are met.

## **General Administration**

Administration helps you manage your organization to suit your business needs.

## **Data**

The Force.com platform makes it easy for you to import your data and track its history.

## **Business Logic and Process Automation**

Workflow, Approvals, and Visual Workflow provide point-and-click tools for automating and simplifying complex business processes.

## **Security**

Use security to protect both your data and applications.

## **Sharing**

Sharing improves your control over who sees what.

## **Globalization**

Globalization tools help administrators manage resources that vary from country to country, such as multilanguage, multicurrency, and translated content.

## **Additional Customization**

Even small customization enhancements can make Salesforce easier to use.

# Data Import Wizard—Generally Available

The Data Import Wizard provides a unified interface that lets you import data for a number of standard Salesforce objects, including accounts, contacts, leads, and solutions. The wizard also lets you import data for custom objects.

Available in: All Editions except Database.com
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You don't have to pick and choose between different wizards in Setup anymore. Now you can do it all in one place!



**Note:** The separate import wizards for accounts, contacts, leads, solutions, and custom objects are still available. Their functionality hasn't changed. To see a list of differences between the old and new wizards, review the [import wizards comparison table](#).

The new Data Import Wizard has a streamlined user interface that makes uploading data files and mapping data fields easier than ever. Choose the type of object data you want to import (accounts and contacts, leads, solutions, or custom), choose a source file for your data, map the fields that need to be mapped, and start your import.


To start using the new wizard, from Setup click **Data Management > Data Import Wizard**.



## Feed-Based Page Layouts Now Available

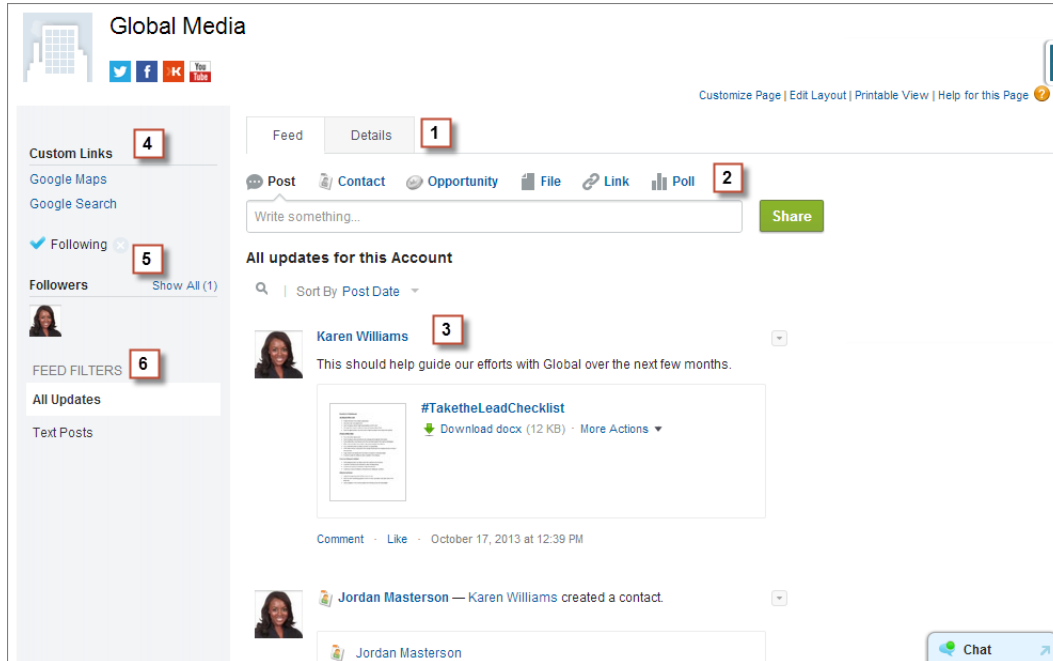
Make it easier for your users to work with account, contact, lead, opportunity, and custom object records by creating feed-based layouts, which include two separate views: one for the record's feed and one for its details. You can create feed-based layouts for account, contact, lead, opportunity, and custom objects.

Feed-based layouts offer a more streamlined way of working with records, and don't require users to scroll through information they're not interested in to find what they're looking for. Users can easily switch back and forth between the feed view, which includes the publisher and important events on the record, shown in chronological order, and the details view, which shows in-depth information about the record, including related lists.

The feed view in these layouts includes:

1. Tabs or, if you're working in the Salesforce console, toggle buttons (  ) to switch between the feed view and the detail view.

2. The publisher, which might include actions that let you do things like create related records or log calls, depending on how your administrator has set up your organization.
3. The record feed, which shows activity on the record, such as comments others have made about it.
4. Any custom buttons and links your administrator has added.
5. A follow button (  ) or following indicator (  ) and a list of people who follow the record. Depending on how your administrator has set up the page, these might appear on the left side or on the right side.
6. Feed filters, which let you choose which information from the feed you see. Depending on how your administrator has set up the page, the filters might appear on the left side of the page, in the center, or on the right.



Detail views show in-depth information about the record, including related lists.

The screenshot displays a Salesforce account page for 'Global Media'. The layout is feed-based, featuring a sidebar on the left with 'Custom Links' (Google Maps, Google Search), 'Following' status, and 'Followers' list. The main content area has tabs for 'Feed' and 'Details'. The 'Details' tab is active, showing 'Account Detail' with fields for Account Name, Parent Account, Billing Address, Phone, and Website. Below this is a 'Custom Links' section with Google Maps and Google Search links. Further down is an 'Open Activities' table with columns for Action, Subject, Name, Related To, Task, Due Date, Status, Priority, and Assigned To. The bottom section is 'Contacts' with a table listing contacts like Jon Ames, Jordan Masterson, and Geoff Minor.

### Create Feed-Based Page Layouts

Feed-based layouts offer a more streamlined view of account, contact, lead, opportunity, and custom object records.

## Create Feed-Based Page Layouts

Feed-based layouts offer a more streamlined view of account, contact, lead, opportunity, and custom object records.

1. Be sure feed tracking is enabled for the object on which you want to create a feed-based layout.
2. Create a new page layout and select **Feed-Based Layout**.



**Note:** Only new page layouts can be feed-based; you can't change an existing standard layout to a feed-based layout.

3. Click **Edit** next to your layout and use the enhanced page layout editor to configure it.

You can't configure feed-based layouts with the original page layout editor.

4. On the main page layout editor page, customize the publisher to include the actions you want to make available to users, and add any custom buttons or links.
5. Click **Feed View** in the page layout editor header to customize what appears on the feed page.

You can:

- Add custom components, which are Visualforce pages with functionality you define.
- Choose where on the page custom buttons and links and standard components like the Follow button and followers list appear.
- Hide the standard sidebar.
- Choose which feed filters are available, and where they appear.

6. Assign the page layout to user profiles.

# Launch Flows from Workflow Rules—Pilot

Spring '14 introduces a new workflow action called a *flow trigger*, which launches a flow when the workflow rule criteria are met.

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

User Permissions Needed	
To open, edit, or create a flow in the Cloud Flow Designer:	“View Setup and Configuration”
To activate, deactivate, or delete a flow, or to edit flow properties:	“View Setup and Configuration”
To create or change workflow rules and actions:	“Customize Application”

A *trigger-ready flow* is a flow that can be launched from a flow trigger workflow action. Because trigger-ready flows must be able to run in bulk and without user interaction, they can't contain Step, Screen, or Apex Plug-in elements in any flow version.



**Note:** Flow trigger workflow actions and trigger-ready flows are currently available through a pilot program. For information on enabling this feature in your organization, contact salesforce.com.

With flow triggers, you can automate complex business processes—create flows to perform logic, and have events trigger the flows via workflow rules—without writing code. For example, suppose you have a flow that looks up and assigns the relevant entitlement for a case. You can create a flow trigger to launch the flow whenever a case is created, so that all new cases are automatically set with a default entitlement.

Complete the following high-level tasks to launch flows from workflow rules. Details are available in the Salesforce Help.

1. Create and activate the trigger-ready flow.
2. Create the workflow rule.
3. Create the flow trigger workflow action.

Make sure you select the same object for the workflow rule and the flow trigger.

4. Associate the flow trigger to the workflow rule.
5. Activate the workflow rule.

Flow triggers have special behaviors and limitations. See “Flow Trigger Considerations—Pilot” in the Salesforce Help.

## General Administration

Administration helps you manage your organization to suit your business needs.

### Mass Assign Permission Sets

Now you can assign multiple users and revoke multiple user assignments from a permission set.

### Lookup Filter Enhancements

Lookup filters are now supported on many more objects.

### Field Sets Are Generally Available

Field sets are generally available.

**TEXT() Function Picklist Support Expanded**

**Page Layout Assignments for Permission Set Licenses**

With the Spring '14 release, some permission set licenses provide object permissions, such as “Read” access to cases. To support this change, we also allow you to assign page layouts to users who received object permissions through a permission set license.

**Enhanced User Interface for Permission Set License Assignment**

To make it easier for you to determine which permission set licenses to assign to your users, the Permission Set License Assignments page was redesigned.

**Hide Standard and Custom Apps from the App Launcher**

Use the App Menu settings to control whether users see only connected apps in their App Launcher.

**Non-Monthly Usage-based Entitlements**

Usage-based entitlements are no longer limited to monthly resources. The Usage-based Entitlements related list now includes columns for “Resource ID” and “Frequency,” and the “Monthly Allowance” column is now “Allowance.”

Mass Assign Permission Sets

Now you can assign multiple users and revoke multiple user assignments from a permission set.

**Assign a Permission Set to Multiple Users**

From any permission set page, you can assign the permission set to one or more users.

**Remove User Assignments from a Permission Set**

From any permission set page, you can remove the permission set assignment from one or more users.

**Assigned Users Page Removed from Permission Sets**

With the addition of the **Manage Assignments** button on permission set pages, the **Assigned Users** button and page has been removed. To view the users that are assigned to a permission set, click **Manage Assignments**.

Assign a Permission Set to Multiple Users

From any permission set page, you can assign the permission set to one or more users.

Available in: **Enterprise, Performance, Unlimited, Developer, and Database.com** Editions

User Permissions Needed	
To assign a permission set to users:	“Manage Users”

1. From Setup, click **Manage Users > Permission Sets**.
2. Select a permission set.
3. In the permission set toolbar, click **Manage Assignments**.
4. Click **Add Assignments**.  
If any users are selected, this button isn’t available.
5. Select the users to assign to this permission set.

You can assign up to 1000 users at a time.



**Tip:** Use the selected list view, select another list view, or to narrow the list of users using a different filter criteria, create a new list view.

6. Click **Assign**.
7. Review the messages on the Assignment Summary page. If any users weren't assigned, the Message column lists the reasons.
8. To return to a list of all users assigned to the permission set, click **Done**.

## Remove User Assignments from a Permission Set

From any permission set page, you can remove the permission set assignment from one or more users.

Available in: <b>Enterprise, Performance, Unlimited, Developer, and Database.com</b> Editions
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User Permissions Needed	
To remove permission set assignments:	"Manage Users"

1. From Setup, click **Manage Users > Permission Sets**.
2. Select a permission set.
3. In the permission set toolbar, click **Manage Assignments**.
4. Select the users to remove from this permission set.  
You can remove up to 1000 users at a time.
5. Click **Remove Assignments**.  
This button is only available when one or more users are selected.
6. To return to a list of all users assigned to the permission set, click **Done**.

## Assigned Users Page Removed from Permission Sets

With the addition of the **Manage Assignments** button on permission set pages, the **Assigned Users** button and page has been removed. To view the users that are assigned to a permission set, click **Manage Assignments**.

## Lookup Filter Enhancements

Lookup filters are now supported on many more objects.

We added support for lookup filters on relationship fields that point to the following objects: Campaigns, Cases, Contracts, Ideas, Leads, Opportunities, Products, and Social Personas. We also added a Related Lookup Filters node to all newly supported objects in Setup.



**Note:** Some standard lookup fields may not support lookup filters, even if the objects are generally supported.

In addition, we've enhanced the process for creating lookup filters. Validation for field type compatibility used to happen only upon saving a lookup filter. Salesforce now validates field type compatibility in real time, filtering the available field results based on the type of field that you've already entered. For example, when creating a lookup filter, if you choose a field with a

Date field type in the first column, then set the Value/Field column to `Field`, only fields of Date-compatible field types are available when you search for fields in the fourth column.

Lastly, both custom fields and standard fields can now have lookup filters that are deployable through the Metadata API.

## Field Sets Are Generally Available

Field sets are generally available.

A field set is a grouping of fields. For example, you could have a field set that contains fields describing a user's first name, middle name, last name, and business title. When a field set is added to a Visualforce page, developers can loop over its fields and render them. If the page is added to a managed package, administrators can add, remove, or reorder fields in a field set to modify the fields presented on the Visualforce page without modifying any code. The same Visualforce page can present different sets of information, depending on which fields a subscriber prefers to keep.

As an administrator, you can create or edit field sets for your organization, or edit any installed field set. Field sets are available on all standard objects that support custom fields, and any organization that supports creating Visualforce pages.

## TEXT() Function Picklist Support Expanded

The `TEXT()` formula function now converts picklist values to text in approval rules, approval step rules, workflow rules, auto-response rules, escalation rules, assignment rules, and custom buttons and links.

## Page Layout Assignments for Permission Set Licenses

With the Spring '14 release, some permission set licenses provide object permissions, such as “Read” access to cases. To support this change, we also allow you to assign page layouts to users who received object permissions through a permission set license.

Available in: **Enterprise, Performance, Unlimited, Developer, and Database.com** Editions



**Note:** While page layouts and tab settings can be assigned through profiles, when you assign users a permission set license, the related record types, user permissions, and object permissions must be assigned through a permission set.

For example: Company A has several users with Force.com user licenses who need access to orders. Since profiles are based on specific user licenses, these users' profiles don't have the option to assign page layouts for most standard objects. Once Company A is provisioned Orders Platform permission set licenses—which provide object permissions for orders, contracts, price books, and products to those Force.com users—the organization's administrator can assign page layouts for those objects to Force.com profiles. Users with that profile won't actually see records for those objects until they are assigned the Orders Platform permission set license and a permission set with the appropriate object permissions.

## Enhanced User Interface for Permission Set License Assignment

To make it easier for you to determine which permission set licenses to assign to your users, the Permission Set License Assignments page was redesigned.

The availability of each permission set license depends on the edition requirements for permission sets and the related feature.

We made these changes to the page.

- Permission Set License information is organized into a table.

- The Description column provides the business context for each permission set license.
- The Permissions Included column identifies which user and object permissions are available to users with the permission set license.

To access the Permission Set License Assignments page, from Setup click **Manage Users > Users**, click a user’s name, and in the Permission Set License Assignments related list click **Edit**.

Here’s how the Permission Set License Assignments page has changed.

Permission Set License Assignments

Help for this Page

Jane Smith

Save

Cancel

Some permissions can only be granted to users who have a specific permission set license. Once you assign a permission set license, you must assign the related permission to the user. [Learn More](#)

Company Community for Force.com

☐

Required to assign the following permission:  
- Allow View Knowledge

Identity Connect

☐

Required to assign the following permission:  
- Use Identity Connect

Save

Cancel

Figure 9: In Winter '14

Permission Set License Assignments

Help for this Page

Jane Smith

Save

Cancel

Some permissions can only be granted to users who have a specific permission set license. Once you assign a permission set license, you must assign the related permission to the user. [Learn More](#)

Permission Set License	Enabled	Description	Permissions Included
Company Community for Force.com	<input type="checkbox"/>	Company Community permission set license for existing Force.com users	User Permissions <ul style="list-style-type: none"><li>Allow View Knowledge</li></ul> Object Permissions <ul style="list-style-type: none"><li>Cases: Read, Create</li></ul>
Identity Connect	<input type="checkbox"/>	Enables user provisioning and single sign-on integration with directory services like Microsoft Active Directory when the Salesforce Identity Connect utility has been configured for the user's org.	User Permissions <ul style="list-style-type: none"><li>Use Identity Connect</li></ul>

Save

Cancel

Figure 10: In Spring '14

## Hide Standard and Custom Apps from the App Launcher

Use the App Menu settings to control whether users see only connected apps in their App Launcher.

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

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



Administrators of organizations with the Identity license enabled can select a new **Hide all standard and custom apps in the App Launcher** option to remove the logos for standard and custom apps from the App Launcher. When selected, this option presents only the approved connected apps in the App Launcher. This reduces the number of logos presented to the users of the App Launcher, so they can quickly identify individual connected apps when many are displayed.

From Setup, do one of the following:

- Click **Create > Apps** and then click **Reorder**.
- Click **Manage Apps > App Menu**.

Then select or deselect **Hide all standard and custom apps in the App Launcher**.

## Non-Monthly Usage-based Entitlements

Usage-based entitlements are no longer limited to monthly resources. The Usage-based Entitlements related list now includes columns for “Resource ID” and “Frequency,” and the “Monthly Allowance” column is now “Allowance.”

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

- Resource ID differentiates rows for the same Resource.
- Frequency indicates whether a resource is refreshed on a monthly basis (Monthly) or not (Once). Rather than refreshing at the end of each month, resources with a Frequency of Once are available until the allowance is used or the contract end date. To replenish the resource, you can purchase additional allowance.

To see your organization’s usage-based entitlements, from Setup click **Company Profile > Company Information**.

For example, let’s say Company A purchases 2,000 records for Data.com list users with a contract ending on May 15. This resource has a “Once” frequency, so that company’s list users can add or export up to 2,000 records until that date. If the organization reaches that limit before May 15, the Data.com list users won’t be able to add or export additional records. To unblock users, Company A can purchase additional allowance for that resource.

## Data

The Force.com platform makes it easy for you to import your data and track its history.

**Field History Data Retention—Pilot**

## Field History Data Retention—Pilot

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com** Editions

In Winter ’14, salesforce.com offered a pilot feature for Field History data retention. The pilot continues for Spring ’14.

The Field History data retention pilot lets you specify date ranges for retaining field history. The pilot supports standard field data in these Salesforce objects:

- Accounts
- Contacts
- Leads

- Opportunities
- Cases

The feature is only available through the Salesforce Enterprise and Tooling APIs.

To learn more about the pilot, see the [Field History Retention Implementation Guide](#).

For more information about joining the pilot, contact your account team or Customer Support.

## Business Logic and Process Automation

Workflow, Approvals, and Visual Workflow provide point-and-click tools for automating and simplifying complex business processes.

### ***SOject Variables—Pilot***

An sObject variable represents a record for a specified object within a flow. SOject variables in a flow are currently available through the “Launch Flows from Workflow Rules” pilot program.

### ***Collections—Pilot***

You can now group together sObject values for processing as a unit. Use a variable of type `sObject collection` to store the values. Collections are currently available through the “Launch Flows from Workflow Rules” pilot program.

### ***Loops—Pilot***

Use a Loop element to cycle through every item in a collection. Loops are currently available through the “Launch Flows from Workflow Rules” pilot program.

### ***DateTime Data Types in Flows***

Flows now support `DateTime` as a data type.

### ***Automatic Picklist Values***

The Cloud Flow Designer shows you the choices available when choosing a value for a picklist sObject field.

### ***Improved Logging for Running Flows***

Improved log messages for flow interviews make debugging easier.

### ***Debug Logs for Flow Triggers—Pilot***

Debug logs are available for events that are related to the execution of flow trigger workflow actions.

### ***Daily Limit for Workflow Emails in Free and Trial Organizations***

The daily limit for emails that are sent from email alert actions was changed for free and trial organizations.

### ***Enhanced User Search in Approval Processes for Initial Submitters in Large Organizations***

The user search where you specify initial submitters of an approval process was enhanced for organizations with more than 2,000,000 users.

## SOject Variables—Pilot

An sObject variable represents a record for a specified object within a flow. SOject variables in a flow are currently available through the “Launch Flows from Workflow Rules” pilot program.

Available in: <b>Enterprise, Performance, Unlimited, and Developer</b> Editions
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**Note:** sObject variables in a flow are currently available through the “Launch Flows from Workflow Rules” pilot program. For information on enabling this feature in your organization, contact salesforce.com.

Use an sObject variable as a container in the flow to store, update, and reference field values for a record. sObject variable-specific elements are available for interacting with the Salesforce database:

- Fast Create element—Create a new Salesforce record using all the fields of an sObject variable.
- Fast Update element—Update an existing Salesforce record using all the fields of an sObject variable.
- Fast Lookup element—Use filters to look up an existing Salesforce record, and query its fields to populate an sObject variable.
- Fast Delete element—Use the ID in an sObject variable to identify which record to delete in the Salesforce database.

The main difference between the existing Record Create/Lookup/Update/Delete elements and the new Fast Create/Lookup/Update/Delete elements is how they reference values within the flow. A *Record* element uses regular variables and other flow resources and typically accesses one record at a time, while a *Fast* element uses an sObject variable to access one record or an sObject collection to access multiple records.

For example, suppose that you want your flow to have the shipping address information for one or more customer accounts.

- If you want to store the shipping address information within the context of account records, use a Fast Lookup element. You can choose to save the specified fields of one record in an sObject variable, or of multiple records in an sObject collection.
- If you want to store the shipping address information in regular variables or other flow resources, such as screen fields, use a Record Lookup element.

When creating a flow, you can check whether an sObject variable contains a value before using it.

- sObject variables default to `null` when they’re created. This lets you use a Decision element to make sure an sObject variable has a value before you use it, for example.
- You can use them with the `is null` operator in Decision elements and in update, delete, and lookup elements for interacting with the Salesforce database.
- The new `was set` operator lets you use a Decision element to determine whether an sObject variable field was ever set, even if set to `null`. You can’t use `was set` with an sObject variable that is set to `null` because you can’t access any fields in an unassigned sObject.

There are limitations when using sObject variables in this pilot release:

- Flows that contain sObject variables can only be run from a flow trigger workflow action. All other run methods won’t work, including Visualforce pages, custom buttons, and the Run button in the Cloud Flow Designer. This means that to test such a flow, you also have to:
  - ◇ Activate the flow.
  - ◇ Create a workflow rule with a flow trigger.
  - ◇ Create or update a relevant record to meet the workflow rule criteria.
- [Improved debugging logs](#) on page 210 are now available to help you test your flow.

## Collections—Pilot

You can now group together sObject values for processing as a unit. Use a variable of type `sObject collection` to store the values. Collections are currently available through the “Launch Flows from Workflow Rules” pilot program.

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



**Note:** Collections are currently available through the “Launch Flows from Workflow Rules” pilot program. For information on enabling this feature in your organization, contact [salesforce.com](https://salesforce.com).

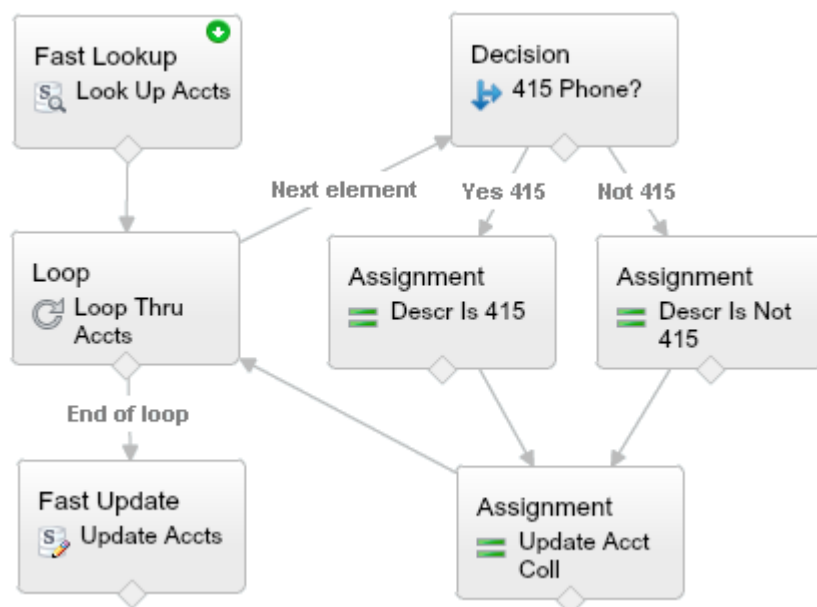
A collection is an ordered group of related items. An individual item in a collection is similar to an sObject variable, and contains fields with values. To see how this works, imagine looking up some Account records in your organization. You create a collection of type Account to store the query results, and your query returns three records, so your collection contains three items. The first item in the collection contains the field values from the first Account record returned, the second item contains the second Account record’s values, and so on. In addition, if your query was just for the Description and Phone fields of an Account, each item in the collection will contain only the Description and Phone field values. The values of other fields in an account sObject are not copied into the collection, with one exception: the Id field. The Id field is always queried by default.

You can use a loop element to examine every item in the collection. To continue the example, you could loop through the collection and check every Account item in the collection to see if the Phone field value is in the 415 area code and if so, perform an action.

Following the previous example, let’s use a collection named `acctCollForLookup` to contain the three Account sObject values our lookup returned. The items in the collection contain the Description and Phone field values. We also have an Account sObject variable named `acctLoopVar` that contains the values for each Account item in the collection as we loop through the collection. Using a Decision element in the loop, we check each collection item to see if Phone contains 415, and set the Description appropriately. Then we copy the updated `acctLoopVar` item into a new collection named `acctCollForUpdate`.

You can’t update an existing collection; you can only add or remove items from the collection. This is because a loop variable, like `acctLoopVar`, is a copy of a collection item’s values. Changing a value in `acctLoopVar` doesn’t change an item’s value in the collection. Instead, create a new collection and add the contents of `acctLoopVar` to that collection in the loop. When the loop finishes we update the records from the new collection.

Here’s what the example flow looks like in the Cloud Flow Designer.



Collections support the **contains** operator in Decision elements, to determine if a collection contains a specific sObject value. The type of the sObject values in the collection must be the same as the type of the sObject value or values you’re comparing against, and the types and values of all fields of an sObject item in the collection must match those of the sObject values you’re comparing against for **contains** to evaluate to `True`.

The comparison operators **equals** and **not equal** can be used with collections, as can the **isNull** operator. You can also use the **add** operator to add an sObject variable's field values to a new item at the end of a collection.

Flows that contain collection variables can only be run from a flow trigger workflow action. All other run methods won't work, including Visualforce pages, custom buttons, and the Run button in the Cloud Flow Designer. This means that to test such a flow, you also have to:

- Activate the flow.
- Create a workflow rule with a flow trigger.
- Create or update a relevant record to meet the workflow rule criteria.

## Loops—Pilot

Use a Loop element to cycle through every item in a collection. Loops are currently available through the “Launch Flows from Workflow Rules” pilot program.

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

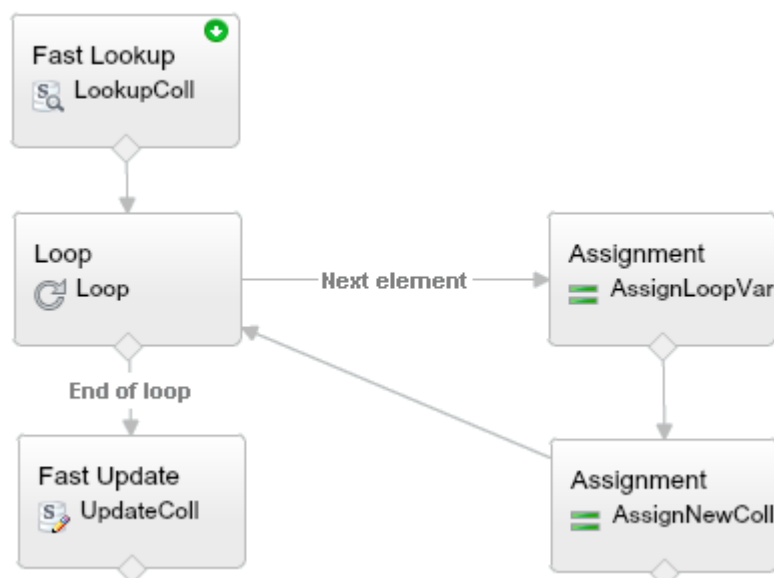


**Note:** Loops are currently available through the “Launch Flows from Workflow Rules” pilot program. For information on enabling this feature in your organization, contact [salesforce.com](https://salesforce.com).

You can use a loop to examine every item in a collection. A collection is a list of items that contain values from sObjects. For example, you could loop through a collection of values from several Opportunity sObject fields. Each item in the collection could include values for the AccountId, Amount, and CloseDate fields. In a loop you can check every item in the collection to see if the Amount value is greater than 10,000 and if so, use a Decision element to take the correct action.

A loop uses a loop variable to contain the values for each item in the collection as we loop through the collection. In the earlier example, the loop variable would contain the Opportunity AccountId, Amount, and CloseDate values at each iteration. The loop variable must be of the same type of sObject as the collection. For example, if your collection contains values from an Account sObject, your loop variable must also be of type Account.

A loop provides connectors for the next item in the collection and for where to go when there are no more items to process. You can also control whether the loop iterates through the collection in first-to-last order, or last-to-first order.



## DateTime Data Types in Flows

Flows now support DateTime as a data type.

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

You can use a DateTime value everywhere that a Date value is valid. The format for DateTime values is MM/DD/YYYY HH:SS followed by AM or PM. In the Cloud Flow Designer, DateTime values are displayed in the time zone of the user's locale, not the time zone of the organization's locale.

## Automatic Picklist Values

The Cloud Flow Designer shows you the choices available when choosing a value for a picklist sObject field.

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

Values for picklist fields in sObjects are now automatically available when making assignments and when selecting a value to compare against. For example, if you wanted to check the Account.Type in a Decision element, the possible values for the Type picklist are shown.

Create an outcome. You can then select it when you draw a connector out from this decision.

Name \* Item Found

Unique Name \* Item\_Found i

Resource	Operator	Value
{!CurrentAccount.Type}	equals	Enter value or select resource

Add Condition | All conditions must be true (AND)

OK Cancel

**PICKLIST VALUES**

- Prospect
- Customer - Direct
- Customer - Channel
- Channel Partner / Reseller
- Installation Partner**

## Improved Logging for Running Flows

Improved log messages for flow interviews make debugging easier.

New debugging messages are available while running flows.

- Flow elements—Debug log messages for starting and stopping flow element execution, with single element details or bulk details for multiple interviews executing in the same element, and several new error debug messages.
- Flow interviews—Begin, end, and error messages.
- Flow assignments—Details for each assignment performed.

- Subflow elements—Details about executing subflow elements.

To help you to trace what occurs when running flows, the following events are available in the **Workflow** category of debug logs.

Event Name	Fields or Information Logged with Event	Level Logged
FLOW_CREATE_INTERVIEW_BEGIN	ID of the organization, ID of flow definition, flow version ID	INFO and above
FLOW_CREATE_INTERVIEW_END	ID of the interview, name of the flow	INFO and above
FLOW_CREATE_INTERVIEW_ERROR	Detailed flow error message, ID of the organization, ID of flow definition, flow version ID	ERROR and above
FLOW_START_INTERVIEWS_BEGIN	Number of interviews being executed	INFO and above
FLOW_START_INTERVIEWS_END	Number of interviews being executed	INFO and above
FLOW_START_INTERVIEWS_ERROR	Detailed flow error message, ID of the interview, name of the flow	ERROR and above
FLOW_START_INTERVIEW_BEGIN	ID of the interview, name of the flow	INFO and above
FLOW_START_INTERVIEW_END	ID of the interview, name of the flow	INFO and above
FLOW_ELEMENT_BEGIN	ID of the interview, type of the element, name of the element	FINE and above
FLOW_ELEMENT_END	ID of the interview, type of the element, name of the element	FINE and above
FLOW_BULK_ELEMENT_BEGIN	ID of the interview, type of the element	FINE and above
FLOW_BULK_ELEMENT_END	ID of the interview, type of the element, name of the element, number of records	FINE and above
FLOW_BULK_ELEMENT_DETAIL	ID of the interview, type of the element, name of the element, number of records, execution time	FINER and above
FLOW_ASSIGNMENT_DETAIL	ID of the interview, the variable being assigned to, the operator used, property or value being assigned	FINER and above
FLOW_SUBFLOW_DETAIL	ID of the interview, name of the flow, ID of the definition, flow version ID	FINER and above
FLOW_RULE_DETAIL	ID of the interview, name of the rule, result	FINER and above
FLOW_VALUE_ASSIGNMENT	ID of the interview, the assignment key, property or value being assigned	FINER and above
FLOW_ELEMENT_FAULT (Fault path taken)	Detailed flow error message, type of the element, name of the element	WARNING and above
FLOW_ELEMENT_FAULT (Element deferred)	Detailed flow error message, type of the element, name of the element	FINER and above
FLOW_ELEMENT_ERROR	Detailed flow error message, type of the element, name of the element	ERROR and above

Use these debug logs in combination with the [debug logs for flow triggers](#) to evaluate end-to-end tests and troubleshoot any issues that occur.

## Debug Logs for Flow Triggers—Pilot

Debug logs are available for events that are related to the execution of flow trigger workflow actions.

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



**Note:** Flow trigger workflow actions are currently available through a pilot program. For information on enabling this feature in your organization, contact [salesforce.com](mailto:salesforce.com).

To help you to trace what occurs when workflow rules launch flows, the following events are available in the **Workflow** category of debug logs.

Event Name	Fields or Information Logged with Event	Level Logged
WF_FLOW_ACTION_BEGIN	ID of flow trigger	INFO and above
WF_FLOW_ACTION_DETAIL	ID of flow trigger, object type and ID of record whose creation or update caused the workflow rule to fire, name and ID of workflow rule, names and values of flow variables or sObject variables	FINE and above
WF_FLOW_ACTION_END	ID of flow trigger	INFO and above
WF_FLOW_ACTION_ERROR	ID of flow trigger, ID of flow definition, ID of flow version, flow error message	ERROR and above
WF_FLOW_ACTION_ERROR_DETAIL	Detailed flow error message	ERROR and above

Use these debug logs in combination with the [debug logs for running flows](#) to evaluate end-to-end tests of flow triggers and troubleshoot any issues that occur.

For example, the following debug log messages show that the flow trigger passes the value 120 into the flow variable aNumber. However, the flow attempts to use that variable value to update the latitude of a geolocation field in a Salesforce record. Because latitude values can't be greater than 90, the flow fails and causes the flow trigger to fail.

```

17:24:44.159 (159592728)|WF_FLOW_ACTION_BEGIN|09Lxx000000000Q
17:24:44.159 (159678205)|WF_FLOW_ACTION_DETAIL|09Lxx000000000Q|[Case: 00001181
500xx000000YlW5]|Id=09Lxx000000000Q|CurrentRule:Update Case Descr and Geo Loc
(Id=01Qxx00000002nya)
17:24:44.159
(159954536)|FLOW_CREATE_INTERVIEW_BEGIN|00Dxx0000001gEH|300xx00000002c3|301xx000000000w
17:24:44.163
(163216500)|FLOW_CREATE_INTERVIEW_END|8611d1def534ea1be05e0815a14229f0c8ce-7fa8|Update Case
Description With Parameters
17:24:44.166 (166545217)|WF_FLOW_ACTION_DETAIL|Param Name: CaseObject; Param Value: {!Case},
Parsed Param Value: {Entity type: Case, Id:500xx000000YlW5}|Param Name: aNumber; Param
Value: 120, Parsed Param Value: 120.0|Param Name: inputText; Param Value: A value, Parsed
Param Value: A value
17:24:44.166 (166612224)|FLOW_START_INTERVIEWS_BEGIN|1
17:24:44.170
(170527591)|FLOW_START_INTERVIEW_BEGIN|8611d1def534ea1be05e0815a14229f0c8ce-7fa8|Update
Case Description With Parameters
17:24:44.195 (195125713)|FLOW_ELEMENT_FAULT|Element
deferred|FlowRecordUpdate|Update_Case_Description
17:24:44.195

```



```
(195269670)|FLOW_START_INTERVIEW_END|8611d1def534ealbe05e0815a14229f0c8ce-7fa8|Update Case
Description With Parameters
17:24:44.817 (817822287)|FLOW_ELEMENT_ERROR|UPSERT --- UPSERT FAILED --- ERRORS :
(NUMBER_OUTSIDE_VALID_RANGE) MyGeoLocationField (Latitude): value outside of valid range
on numeric field: 56000.0 --- for SFDC record with ID : null,
|FlowRecordUpdate|Update Case Description
17:24:44.913 (913026203)|FLOW_START_INTERVIEWS_END|1
17:24:44.913 (913134206)|WF_FLOW_ACTION_ERROR|09Lxx000000000Q|300xx00000002c3|Error executing
flowUpdate_Case_Description_With_Parameters, FlowDefId: 300xx000000002c3, FlowVersionId:
301xx000000000w
17:24:44.913 (913188338)|WF_FLOW_ACTION_ERROR_DETAIL|An unhandled fault has occurred in
this flow
An unhandled fault has occurred while processing the flow. Please contact your system
administrator for more information.
17:24:44.913 (913287121)|WF_FLOW_ACTION_END|09Lxx000000000Q
```

## Daily Limit for Workflow Emails in Free and Trial Organizations

The daily limit for emails that are sent from email alert actions was changed for free and trial organizations.

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

For Developer Edition organizations and those evaluating Salesforce during a trial period, email alert actions in workflow rules and approval processes can now send a maximum of 15 emails per day per standard Salesforce user license.

## Enhanced User Search in Approval Processes for Initial Submitters in Large Organizations

The user search where you specify initial submitters of an approval process was enhanced for organizations with more than 2,000,000 users.

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

Searches that are too broad to perform well now quickly result in an error message that instructs you to refine the search criteria. Previously, the search functionality timed out or required a long time to populate the list of available submitters.

Also, in organizations with more than 2,000,000 users, the search behavior was changed to improve performance—from finding users whose names *contain* the entered text to finding users whose names *start with* the entered text. The order of the first name and last name that you enter doesn't matter, because both versions of the name are searched.

For example, if you enter Bob Jo and click **Find**, the system searches for “Bob Jo...” and “Jo Bob...” The resulting list of available submitters includes names such as “Bob Jones” and “Jo Bobby” but doesn't include names such as “Bobby Jones” or “Joan Bob.”

## Security

Use security to protect both your data and applications.

### Obscure Secret Answer for Password Resets

You can hide your answer to a password reset question.

### **Multiple Username Login Hints**

Salesforce's login page remembers usernames from past logins, across multiple organizations or custom domains.

### **Specify the Username Login Hint**

You can specify a `login_hint` for the username to the authorization endpoint.

### **Custom Domain (My Domain) Link Added to the Salesforce Login Page**

The login page has a link users can click to specify a subdomain for logging in.

### **Identity URL Response Includes More Information**

Identity URLs can now return additional address and contact information about a user, as well as whether or not the app of the requestor is installed.

### **New UserInfo Endpoint for OpenID Connect Compliance**

The UserInfo endpoint is a RESTful API that can be used to query (with a valid access token) for information about the user associated with the access token in the standard OpenID Connect format.

### **New Access Token Scopes**

Connected apps and third-party apps can include new scopes when requesting access to Salesforce user information.

### **Send Access Tokens in HTTP Headers for OpenID Connect Auth. Providers**

Configure Salesforce to provide OpenID Connect Auth. providers with access tokens as an HTTP header, instead of appended to a query string.

### **OpenID Connect ID Token and Public Keys**

Verify the signature of an ID token using the public keys published by Salesforce.

### **Delegated Administrators Can Edit the Federation ID Field**

Delegated Administrators can now edit the Federation ID field in a user's detail page, in the Single Sign On Information section.

### **Upload Your Own Logo for Connected Apps**

You can use your own logo image for any connected app.

### **Connected Apps UI Additions and Label Updates**

The connected apps user interface has changes for clarity, consistency, and better usability.

### **Connected Apps Accessible from the Salesforce1 Navigation Menu**

Now you can add connected apps to the Salesforce1 navigation menu.

### **View and Manage User Sessions**

Now you can easily view user sessions and, if necessary for security or other reasons, end sessions from the same page.

### **Default Session Settings Protect Your Organization**

Take advantage of new default session security settings to protect your organization.

### **Define Default Scopes for Authentication Providers**

When setting up an Authentication Provider in your Salesforce organization, you can define scopes to send to the authentication endpoint. These override the hard-coded defaults for the provider type.

### **Specify Authorize and Token Endpoint URLs for Salesforce Auth. Providers**

When setting up a new Salesforce Auth. Provider, you can edit the authorization and token endpoint values to direct requests to custom domains and sandboxes.

### **Reset Password Link Expires after 24 Hours**

The link in an email response to a user requesting a password change expires in 24 hours, or after the link is used.

### **Repeat Uploading a CA-Signed Certificate**

Upload an already uploaded CA-signed certificate again without repeating completed steps.

### **Identity License Users Get AppExchange Access**

Identity license users can now access any AppExchange app.

### **OAuth-Only Flow for Auth. Providers**

Provide authentication providers with an OAuth-Only URL to get an access token or refresh token for an authenticated user.

### **Encryption for SAML Assertions**

Set encryption types for SAML assertions when Salesforce is the identity provider for connected apps, or when Salesforce is the service provider for inbound encrypted assertions.

### **Provide Client Assertion Values for OpenID Connect OAuth Flows**

For automated OAuth 2.0 exchanges, you can specify a client assertion value instead of using the generated consumer secret.

### **Configure File Upload and Download Security Settings**

For security reasons, your organization may want to configure the way some file types are handled during upload and download.

### **Reuse Connected App Names**

Names of deleted connected apps can now be reused if the deleted connected app is created using the Spring '14 release.

### **The System Administrator Profile Automatically Gets the App Launcher**

Administrators with the System Administrator profile have access to the App Launcher without requesting permission from Salesforce.

## **Obscure Secret Answer for Password Resets**

You can hide your answer to a password reset question.

Available in: **All** Editions

When you answer a security question, for example when resetting your password, the answer is normally shown in plain text. Answers to security questions can now be hidden as you type. From Setup, click **Security Controls** > **Password Policies** and select **Obscure Secret Answer for Password Resets** to enable this feature.



**Note:** If your organization uses the Microsoft Input Method Editor (IME) with the input mode set to Hiragana, when you type ASCII characters they're converted into Japanese characters in normal text fields. However, the IME does not work properly in fields with obscured text. If your organization's users cannot properly enter their passwords or other values after enabling this feature, disable the feature.

## **Multiple Username Login Hints**

Salesforce's login page remembers usernames from past logins, across multiple organizations or custom domains.

Available in: **All** Editions

When users who have logged into multiple Salesforce organizations and selected `Remember User Name` on the login page, return to their login page (including any community or My Domain login page), they can select a past, successful username to log in with. This feature helps users keep track of their multiple accounts and makes it easier for users to switch from one organization to another. Active sessions for multiple organizations do not require the users to log in again; they can simply select the username to switch to the other organization. Otherwise, the password field appears for the user to log in.

This feature extends the existing caching and password autocomplete feature, and is enabled by default. Administrators can change the setting for an organization. From Setup click **Security Controls** > **Session Settings**, and select `Enable caching and password autocomplete on login page`.

This feature isn't available for Internet Explorer versions earlier than 10.0.



**Note:** This feature won't be available until March 2014.

## Specify the Username Login Hint

You can specify a `login_hint` for the username to the authorization endpoint.

Available in: **All Editions**

Starting an OAuth 2.0 flow with a valid username in the `login_hint` parameter propagates the value to the login page username field. The following example places `username@company.com` in the user name field.

```
https://login.salesforce.com/services/oauth2/authorize
?response_type=token&MyClientID&redirect_uri=https://login.salesforce.com/services/oauth2/success
&login_hint=username@company.com
```

If you already have a session in the browser, then the `login_hint` parameter has no effect, and you see the approval page as the user that's already logged in. The value of `login_hint` must be a valid user name in the form of `a@b.c`.

You can also specify a username login hint as a URL parameter. The following example also places `username@company.com` in the user name field.

```
https://login.salesforce.com/?login_hint=username@company.com
```



**Note:** This feature will not be available until March 2014.

## Custom Domain (My Domain) Link Added to the Salesforce Login Page

The login page has a link users can click to specify a subdomain for logging in.

Available in: **Performance, Unlimited, Enterprise, Developer, Professional, and Group Editions.**

If the administrator created a custom domain for the organization using My Domain, users can click the **Log in to a custom domain** link to provide the existing domain name and log in. A custom domain is in the form

`https://universalcontainers.my.salesforce.com` where `universalcontainers` is a name selected by the

administrator. The administrator should provide the correct domain name and a specific login page for the organization's users. If those users are directed to the `login.salesforce.com` page, they can use the **Log in to a custom domain** link to log in.

This link isn't available for Internet Explorer versions earlier than 10.0.

## Identity URL Response Includes More Information

Identity URLs can now return additional address and contact information about a user, as well as whether or not the app of the requestor is installed.

Third-party apps, such as connected apps, can now get more information from the Identity URL for a user, and can verify that the app is installed for that user.

- `email_verified`—Indicates whether the organization has email verification enabled (`true`), or not (`false`)
- `first_name`—The first name of the user
- `last_name`—The last name of the user
- `timezone`—The time zone in the user's settings
- `addr_street`—The street specified in the address of the user's settings
- `addr_city`—The city specified in the address of the user's settings
- `addr_state`—The state specified in the address of the user's settings
- `addr_country`—The country specified in the address of the user's settings
- `addr_zip`—The zip or postal code specified in the address of the user's settings
- `mobile_phone`—The mobile phone number in the user's settings
- `mobile_phone_verified`—The user confirmed this is a valid mobile phone number
- `is_app_installed`—The value is `true` when the connected app is installed in the org of the current user and the access token for the user was created using an OAuth flow. If the connected app is not installed, the property does not exist (instead of being `false`). When parsing the response, check both for the existence and value of this property.

## New UserInfo Endpoint for OpenID Connect Compliance

The UserInfo endpoint is a RESTful API that can be used to query (with a valid access token) for information about the user associated with the access token in the standard OpenID Connect format.

Available in: <b>All Editions</b>
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User Permissions Needed	
To manage, create, edit, and delete OAuth applications:	"Manage Connected Apps"

Salesforce returns basic personalization information about the user, as well as important endpoints that the client can talk to, such as photos for the user, and API endpoints it can access. This endpoint provides access to information for the current user, only, and not for other users in the same organization.

The format of the URL is: `https://login.salesforce.com/services/oauth2/userinfo`.



**Note:** For a sandbox, `login.salesforce.com` is replaced with `test.salesforce.com`.

The URL must always be HTTPS.

## UserInfo Endpoint Parameters

The following parameters can be used with the access token and UserInfo endpoint. The access token can be used in an authorization request header or in a request with the `oauth_token` parameter.

Parameter	Description
Access token	See “Using the Access Token” in the online Help.
Format	<p>This parameter is optional. Specify the format of the returned output. Valid values are:</p> <ul style="list-style-type: none"> <li><code>urlencoded</code></li> <li><code>json</code></li> <li><code>xml</code></li> </ul> <p>Instead of using the <code>format</code> parameter, the client can also specify the returned format in an accept-request header using one of the following:</p> <ul style="list-style-type: none"> <li><code>Accept: application/json</code></li> <li><code>Accept: application/xml</code></li> <li><code>Accept: application/x-www-form-urlencoded</code></li> </ul> <p>Note the following:</p> <ul style="list-style-type: none"> <li>Wildcard accept headers are allowed. <code>*/*</code> is accepted and returns JSON.</li> <li>A list of values is also accepted and is checked left-to-right. For example: <code>application/xml,application/json,application/html,*/*</code> returns XML.</li> <li>The <code>format</code> parameter takes precedence over the accept request header.</li> </ul>
Version	This parameter is optional. Specify a SOAP API version number, or the literal string, <code>latest</code> . If this value isn’t specified, the returned API URLs contains the literal value <code>{version}</code> , in place of the version number, for the client to do string replacement. If the value is specified as <code>latest</code> , the most recent API version is used.
PrettyPrint	This parameter is optional, and is only accepted in a header, not as a URL parameter. Specify the output to be better formatted. For example, use the following in a header: <code>X-PrettyPrint:1</code> . If this value isn’t specified, the returned XML or JSON is optimized for size rather than readability.
Callback	<p>This parameter is optional. Specify a valid JavaScript function name. This parameter is only used when the format is specified as JSON. The output is wrapped in this function name (JSONP.) For example, if a request to <code>https://server/id/orgid/userid/</code> returns <code>{"foo": "bar"}</code>, a request to <code>https://server/id/orgid/userid/?callback=baz</code> returns <code>baz ({ "foo": "bar" }) ;</code>.</p>

## UserInfo Endpoint Response

After making a valid request, a **302 redirect** to an instance endpoint is returned. That subsequent request returns the information in JSON format, by default, or whatever is specified in the Format parameter.

The response includes values listed in the [OpenID Connect Basic Client Profile](#), as well as the Salesforce user ID, organization ID, and related URLs for profile, feed, etc.

The following is a response in JSON format:

```
{
  "sub": "http://login.salesforce.com/id/00Dx000.../005x000...",
  "user_id": "005x000...",
  "organization_id": "00Dx000...",
  "preferred_username": "user1@1135222488950007.com",
  "nickname": "user1.3860098879512678E12",
}
```

```

"name":"na1 LastName",
"email":"user1@1135222488950007.com",
"email_verified":true,"given_name":"na1","family_name":"LastName",
"zoneinfo":"America/Los_Angeles",
"photos":{"picture":"http://na1.salesforce.com/profilephoto/005/F","thumbnail":"http://na1.salesforce.com/profilephoto/005/T"},
"profile":"http://na1.salesforce.com/005x000...",
"picture":"http://na1.salesforce.com/profilephoto/005/F",
"address":{"country":"us"},
"urls":{"enterprise":"http://na1.salesforce.com/services/Soap/c/{version}/00Dx00...",
"
"partner":"http://na1.salesforce.com/services/Soap/u/{version}/00Dx00...",
"rest":"http://na1.salesforce.com/services/data/v{version}/",
"subjects":"http://na1.salesforce.com/services/data/v{version}/subjects/",
"search":"http://na1.salesforce.com/services/data/v{version}/search/",
"query":"http://na1.salesforce.com/services/data/v{version}/query/",
"recent":"http://na1.salesforce.com/services/data/v{version}/recent/",
"profile":"http://na1.salesforce.com/005x000...",
"feeds":"http://na1.salesforce.com/services/data/v{version}/chatter/feeds",
"groups":"http://na1.salesforce.com/services/data/v{version}/chatter/groups",
"users":"http://na1.salesforce.com/services/data/v{version}/chatter/users",
"feed_items":"http://na1.salesforce.com/services/data/v{version}/chatter/feed-items",
"active":true,"user_type":"STANDARD","language":"en_US","locale":"en_US","utcOffset":-2880000,"updated_at":"2013-12-02T18:46:42.000+0000"}

```

The following is a response in XML format:

```

<?xml version="1.0" encoding="UTF-8"?>
<user>
<sub>http://login.salesforce.com/id/00Dx000.../005x000...</sub>
<user_id>005x000...</user_id>
<organization_id>00Dx000...</organization_id>
<preferred_username>user1@1135222488950007.com</preferred_username>
<nickname>user1.3860098879512678E12</nickname>
<name>user1 LastName</name>
<email>user1@1135222488950007.com</email>
<email_verified>true</email_verified>
<given_name>user1</given_name>
<family_name>LastName</family_name>
<zoneinfo>America/Los_Angeles</zoneinfo>
<photos>
<picture>http://na1.salesforce.com/profilephoto/005/F</picture>
<thumbnail>http://na1.salesforce.com/profilephoto/005/T</thumbnail></photos>
<profile>http://na1.salesforce.com/005x000...</profile>
<picture>http://na1.salesforce.com/profilephoto/005/F</picture>
<address>
<country>us</country>
</address>
<urls>
<enterprise>http://na1.salesforce.com/services/Soap/c/{version}/00Dx0000002rIh1</enterprise>
<metadata>http://na1.salesforce.com/services/Soap/m/{version}/00Dx0000002rIh1</metadata>
<partner>http://na1.salesforce.com/services/Soap/u/{version}/00Dx0000002rIh1</partner>
<rest>http://na1.salesforce.com/services/data/v{version}/</rest>
<subjects>http://na1.salesforce.com/services/data/v{version}/subjects/</subjects>
<search>http://na1.salesforce.com/services/data/v{version}/search/</search>
<query>http://na1.salesforce.com/services/data/v{version}/query/</query>
<recent>http://na1.salesforce.com/services/data/v{version}/recent/</recent>
<profile>http://na1.salesforce.com/005x000...</profile>
<feeds>http://na1.salesforce.com/services/data/v{version}/chatter/feeds</feeds>
<groups>http://na1.salesforce.com/services/data/v{version}/chatter/groups</groups>
<users>http://na1.salesforce.com/services/data/v{version}/chatter/users</users>
<feed_items>http://na1.salesforce.com/services/data/v{version}/chatter/feed-items</feed_items>
</urls>
<active>true</active>
<user_type>STANDARD</user_type>
<language>en_US</language>
<locale>en_US</locale>
<utcOffset>-2880000</utcOffset>
<updated_at>2013-12-02T18:46:42.000Z</updated_at>
</user>

```



The following are possible responses from Salesforce to an invalid request.

Request Problem	Error Code
HTTP	403 (forbidden) — HTTPS_Required
Missing access token	403 (forbidden) — Missing_OAuth_Token
Invalid access token	403 (forbidden) — Bad_OAuth_Token
Users in a different organization	403 (forbidden) — Wrong_Org
Invalid or bad user or organization ID	404 (not found) — Bad_Id
Deactivated user or inactive organization	404 (not found) — Inactive
User lacks proper access to organization or information	404 (not found) — No_Access
Request to the endpoint of a site	404 (not found) — No_Site_Endpoint
Invalid version	406 (not acceptable) — Invalid_Version
Invalid callback	406 (not acceptable) — Invalid_Callback

## New Access Token Scopes

Connected apps and third-party apps can include new scopes when requesting access to Salesforce user information.

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

User Permissions Needed	
To view the settings:	“View Setup and Configuration”
To edit the settings:	“Customize Application”

Scopes control the data applications can access. Scopes are defined when you create a connected app or when third-party applications, such as Facebook, request access tokens using an OAuth flow. The new values are `profile`, `email`, `address`, `phone`, `openid`, and `offline_access`.

- `profile`, `email`, `address`, or `phone`— Each of these scopes allow access to the identity URL service. You can request `profile`, `email`, `address`, or `phone`, individually to get the same result as using `id`; they are all synonymous.
- `openid`— Allows access to the current, logged in user’s unique identifier for OpenID Connect apps.

The `openid` scope can be used in the OAuth 2.0 user-agent flow and the OAuth 2.0 Web server authentication flow to get back a signed ID token conforming to the [OpenID Connect specifications](#) in addition to the access token. For more information about getting and verifying the ID token, see [OpenID Connect ID Token and Public Keys](#) on page 219.

- `offline_access`— Allows a refresh token to be returned if you are eligible to receive one. This lets the app interact with the user’s data while the user is offline, and is synonymous with requesting `refresh_token`.



**Note:** These new values will not be available until March 2014.



## Send Access Tokens in HTTP Headers for OpenID Connect Auth. Providers

Configure Salesforce to provide OpenID Connect Auth. providers with access tokens as an HTTP header, instead of appended to a query string.

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

User Permissions Needed	
To view the settings:	“View Setup and Configuration”
To edit the settings:	“Customize Application”
	AND
	“Manage Auth. Providers”

For new and existing Auth. Providers, specify how you want Salesforce to provide access tokens.

1. From Setup, click **Security Controls > Auth. Providers**.
2. Click **New** to set up a new authentication provider or click **Edit** next to an existing one.
3. Fill in the appropriate field values and select **Send access token in header**.

## OpenID Connect ID Token and Public Keys

Verify the signature of an ID token using the public keys published by Salesforce.

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

Salesforce can respond to an OAuth request with an ID token, conforming to the [OpenID Connect specifications](#). Both the OAuth 2.0 user-agent flow and the OAuth 2.0 Web server authentication flow can request a signed ID token if the scope parameter in the request includes `openid`. The returned token is a JSON Web Token (JWT).

- The user-agent authentication flow must include the `response_type` parameter with the value `token id_token`, the `openid` scope, and the `nonce` parameter.
- The Web server authentication flow must include the `response_type` parameter with the value `code` and the `openid` scope. The `nonce` parameter is optional for the Web server authentication flow.

The following is an example request for an ID token using the user-agent authentication flow.

```
https://login.salesforce.com/services/oauth2/authorize?response_type=token+id_token
&redirect_uri=https://login.salesforce.com/services/oauth2/success
&client_id=3MVG91KcPoNINVBIPJjdwlJ9LLJbP_pqwoJYyuisjQhr_LLurNDv7AgQvDTZwCoZuD_
3Oxug0sU3_WrBPd_Ax6Mcnlg5HSnLGQ&scope=openid&nonce=somevalue
```

Use the published public keys to verify the signature in the response is a valid Salesforce signature.

1. Go to `https://login.salesforce.com/id/keys`.

The response includes JSON formatted information about the public keys used for signing.

2. Use the key with the correct `kid` value, which specifies the release version, to validate the signature.

## Delegated Administrators Can Edit the Federation ID Field

Delegated Administrators can now edit the Federation ID field in a user's detail page, in the Single Sign On Information section.

Available in: **Enterprise, Performance, Unlimited, Developer, and Database.com** Editions

User Permissions Needed	
To delegate administration:	"Customize Application"
To be a delegated administrator:	"View Setup and Configuration"

Previously, only administrators and users with the "Manage Users" permission could edit the Federation ID for users they manage. Now, administrators can assign other users as delegated administrators to help implement single sign-on features, including adding or editing the Federation ID for individual users. This is particularly useful when administrators set up and maintain single sign-on features as a team. For more information, see [Delegating Administrative Duties](#) and [Configuring SAML Settings for Single Sign-On](#) in the online help.

## Upload Your Own Logo for Connected Apps

You can use your own logo image for any connected app.

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

User Permissions Needed	
To read:	"Customize Application"
To create, update, or delete:	"Customize Application" AND either "Modify All Data" OR "Manage Connected Apps"
To update all fields except Profiles, Permission Sets, and Service Provider SAML Attributes:	"Customize Application"
To update Profiles, Permission Sets, and Service Provider SAML Attributes:	"Customize Application" AND "Modify All Data"
To uninstall:	"Download AppExchange Packages"

When you're creating or editing connected apps, you have several ways to add a custom logo.

- Upload your own logo image by clicking **Upload logo image**. Select an image from your local file system that meets the file requirements (125 pixels high or 200 pixels wide, maximum, and in the GIF, JPG, or PNG file format with a 100 KB maximum file size) for the logo. When your upload is successful, the URL to the logo appears in the Logo Image URL field. Otherwise, make sure the logo meets the size requirements.

- Select a logo from the samples provided by clicking **Choose one of our sample logos**. The logos available include ones for Salesforce apps, third-party apps, and standards bodies. Click the logo you want, and then copy and paste the displayed URL into the `Logo Image URL` field.
- Use a logo hosted publicly on Salesforce servers by uploading an image that meets the file requirements (125 pixels high or 200 pixels wide, maximum, and in the GIF, JPG, or PNG file format with a 100 KB maximum file size) as a document using the Documents tab. Then, view the image to get the URL, and enter the URL into the `Logo Image URL` field.

## Connected Apps UI Additions and Label Updates

The connected apps user interface has changes for clarity, consistency, and better usability.

The connected apps user interface updates include the following.

- New Actions column in the list of connected apps.  
From Setup, click **Create > Apps**. The list of connected apps includes an Actions column for shortcuts to **Edit** or **Manage** individual connected apps.
- New Manage button on individual connected app pages.  
From Setup, click **Create > Apps**. Click the name of an existing connected app to see the app's setup settings. From that page, you can select **Manage** to see the usage settings.
- The IP Restrictions field has been renamed IP Relaxation.  
From Setup, click **Manage > Connected Apps**. Click **Edit** to change an existing app's usage settings. The IP Relaxation setting enforces or bypasses the organization's IP restrictions when a user tries to use the current connected app.
- The Require Users to Log In option has been renamed Expire Refresh Tokens.  
From Setup, click **Manage > Connected Apps**. Click **Edit** to change an existing app's usage settings. The Expire Refresh Tokens setting controls how often a user needs to re-authenticate for the current connected app.
- The IP Ranges related list has been renamed Trusted IP Range for OAuth Web server flow.  
From Setup, click **Manage > Connected Apps**. Click the name of an existing connected app to see the detail page that includes the Trusted IP Range for OAuth Web server flow. This setting applies to OAuth web server flow authentication only, and shows the allowed web server IP range. Use this value to bypass the organization's IP restriction policy for the current connected app.

## Connected Apps Accessible from the Salesforce1 Navigation Menu

Now you can add connected apps to the Salesforce1 navigation menu.

Connected Apps can be created in: <b>Group, Professional, Enterprise, Performance, Unlimited, and Developer</b> Editions
Connected Apps can be installed in: <b>All</b> Editions

User Permissions Needed	
To read:	“Customize Application”
To create, update, or delete:	“Customize Application” AND either “Modify All Data” OR “Manage Connected Apps”
To update all fields except Profiles, Permission Sets, and Service Provider SAML Attributes:	“Customize Application”
To update Profiles, Permission Sets, and Service Provider SAML Attributes:	“Customize Application” AND “Modify All Data”
To uninstall:	“Download AppExchange Packages”

If your organization uses Salesforce1, you can expose connected apps in the navigation menu to save time for your users accessing apps on mobile devices.

To display your app in the navigation menu:

1. In Salesforce, from Setup, click **Create > Apps**.
2. In the Connected Apps related list, click the app you want to make available in the navigation pane and click **Edit**.
3. Specify a mobile start URL.
4. Click **Save**.
5. From Setup, click **Manage Apps > Connected Apps**.
6. In the Connected Apps related list, click the app you want to make available in the navigation pane and click **Edit**.
7. Specify a mobile start URL.
8. Click **Save**.

Your app appears as a selection in the navigation menu for users to access.

## View and Manage User Sessions

Now you can easily view user sessions and, if necessary for security or other reasons, end sessions from the same page.

Available in: **All Editions**

User Permissions Needed	
To view the settings:	“View Setup and Configuration”
To edit the settings:	“View All Data”

The User Session Information page allows you to view active sessions, view session details for an organization, and create different views of the data. You can also view details about a user associated with a specific session, and end suspicious sessions by selecting the checkbox for one or more sessions and clicking **Remove**. When a user's session is removed, the user must log in again to the organization. Non-administrators can see their own session information while administrators can view all user sessions for an organization. To access the page from Setup, click **Security Controls > Session Management**.

To access the page from Setup, click **Security Controls > Session Management**. Once on the page, you can view existing user session details, including the user associated with the session and the session type. To end a session, select the checkbox for one or more sessions and click **Remove**.

## Default Session Settings Protect Your Organization

Take advantage of new default session security settings to protect your organization.

Available in: **Personal, Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com** Editions

User Permissions Needed	
To set session security:	"Customize Application"

For improved security, some options on the Session Settings page that administrators could previously disable are now enabled by default and no longer editable from the Session Settings page.

- **Require secure connections (HTTPS):** Ensures that SSL is used to access Salesforce.
- **Enable SMS-based identity confirmation:** Enables users to receive a one-time PIN delivered via SMS. Once enabled, administrators or users must verify their mobile phone number before taking advantage of this feature.
- **Enable clickjack protection for non-setup Salesforce pages:** Protects against clickjack attacks on non-setup Salesforce pages. Clickjacking is also known as a user interface redress attack. Setup pages already include protection against clickjack attacks.
- **Enable CSRF protection on GET requests on non-setup pages:** Protects against Cross Site Request Forgery (CSRF) attacks by modifying non-setup pages to include a random string of characters in the URL parameters or as a hidden form field.
- **Enable CSRF protection on POST requests on non-setup pages:** Protects against CSRF attacks by modifying non-setup pages to include a random string of characters in the URL parameters or as a hidden form field.

To disable these options, contact [salesforce.com](https://salesforce.com).

## Define Default Scopes for Authentication Providers

When setting up an Authentication Provider in your Salesforce organization, you can define scopes to send to the authentication endpoint. These override the hard-coded defaults for the provider type.

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

User Permissions Needed	
To view the settings:	"View Setup and Configuration"
To edit the settings:	"Customize Application"
	AND
	"Manage Auth. Providers"

The default scopes vary depending on the third party, but usually do not allow access to much more than basic user information. Every provider type (Open ID Connect, Facebook, Salesforce, and others), has a set of default scopes it sends along with the request to the authorization endpoint. For example, Salesforce's default scope is `id`.

1. From Setup, click **Security Controls > Auth. Providers**

## 2. Specify the Provider Type.

At this time, setting default scopes is supported for Facebook, Salesforce, and OpenID Connect providers.

## 3. The available Auth. Provider fields display, including the new `Default Scopes` field. Enter the values for the new Authentication Provider. For more information about each field, see “About External Authentication Providers” in the online Help.

# Specify Authorize and Token Endpoint URLs for Salesforce Auth. Providers

When setting up a new Salesforce Auth. Provider, you can edit the authorization and token endpoint values to direct requests to custom domains and sandboxes.

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

User Permissions Needed	
To view the settings:	“View Setup and Configuration”
To edit the settings:	“Customize Application”
	AND
	“Manage Auth. Providers”

Previously, only OpenID Connect Auth. Providers could direct authorization and token requests to specific URLs. Now, you can edit the `Authorize Endpoint URL` and `Token Endpoint URL` values for Salesforce Auth. Providers. This is useful when trying to get authorization or tokens from a Salesforce domain, such as a custom domain or sandbox.

For the `Authorize Endpoint URL`, the host name can include a sandbox or custom domain name (created using My Domain), but the URL must end in `.salesforce.com`, and the path must end in `/services/oauth2/authorize`. For example `https://test.salesforce.com/services/oauth2/authorize`.

For the `Token Endpoint URL`, the host name can include a sandbox or custom domain name (created using My Domain), but the URL must end in `.salesforce.com`, and the path must end in `/services/oauth2/token`. For example `https://test.salesforce.com/services/oauth2/token`.

# Reset Password Link Expires after 24 Hours

The link in an email response to a user requesting a password change expires in 24 hours, or after the link is used.

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com** Editions

When users lose their passwords, they can click the **Forgot your password?** link on a failed login page to receive a new password via email. They must correctly answer a previously defined security question before they can reset their password and log in. You can customize part of the page where the user answers the security question with additional information about where to go to for help.



**Note:** If the user has not defined a security question, or fails to answer correctly when trying to login, the password is not reset.

The generated link in the email to reset a password expires after 24 hours, and there is a maximum of five requests to change a password in a twenty-four hour period. Administrators can reset a password as often as needed.

## Repeat Uploading a CA-Signed Certificate

Upload an already uploaded CA-signed certificate again without repeating completed steps.

Available in: <b>All</b> Editions
-----------------------------------

User Permissions Needed	
To create, edit, and manage certificates:	“Customize Application”

If you upload a CA-signed certificate and forget to upload complete certificate information, you can now upload it again to finish the process. This saves you time because you no longer need to start over with a new key and certificate. When you upload again, published site domains are automatically republished if they have at least one auto-publish site. Additionally, the expiration date of the certificate record is updated to the expiration date of the loaded certificate.

To work with Salesforce certificates and keys, from Setup, click **Security Controls > Certificate and Key Management**.

## Identity License Users Get AppExchange Access

Identity license users can now access any AppExchange app.

Identity license users were only allowed to use private AppExchange apps as connected apps. Now, these users have the ability to download and install AppExchange apps, as needed.

## OAuth-Only Flow for Auth. Providers

Provide authentication providers with an OAuth-Only URL to get an access token or refresh token for an authenticated user.

Available in: <b>Professional, Enterprise, Performance, Unlimited, and Developer</b> Editions
---

User Permissions Needed	
To view the settings:	“View Setup and Configuration”
To edit the settings:	“Customize Application”
	AND
	“Manage Auth. Providers”

After you set up an Auth. Provider, Salesforce generates several client configuration URLs to help with authentication flows, such as a `Single Sign-On Initialization URL` or a `Callback URL`.

The client configuration URLs support additional request parameters that enable you to direct users to log into specific sites, obtain customized permissions from the third party, or go to a specific location after authenticating.

Now, Salesforce also generates an `OAuth-Only Initialization URL` to get an access token or refresh token for the user (available for Facebook, OpenID Connect, and Salesforce authentication providers). Users must authenticate with Salesforce for the third-party service to get a token; this flow does not provide single sign-on functionality.

1. From Setup, click **Security Controls > Auth. Providers**.
2. Click the name or an existing Auth. Provider, or click **New** to set up a new one.

The `OAuth-Only Initialization URL` is listed in the Client Configuration section of the Auth. Provider detail page.

## Encryption for SAML Assertions

Set encryption types for SAML assertions when Salesforce is the identity provider for connected apps, or when Salesforce is the service provider for inbound encrypted assertions.

Connected Apps can be created in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions  
 Connected Apps can be installed in: **All** Editions

User Permissions Needed	
To read:	“Customize Application”
To create, update, or delete:	“Customize Application” AND either “Modify All Data” OR “Manage Connected Apps”
To update all fields except Profiles, Permission Sets, and Service Provider SAML Attributes:	“Customize Application”
To update Profiles, Permission Sets, and Service Provider SAML Attributes:	“Customize Application” AND “Modify All Data”
To uninstall:	“Download AppExchange Packages”

When Salesforce is the identity provider for a connected app, you can specify an encryption type in the SAML configuration settings for that app. Assertions to the service provider are encrypted according to those settings, and the service provider can detect the encryption method in the SAML assertion for decryption.

1. From Setup, click **Create > Apps**.
2. Click **New** to set up a new connected app or click **Edit** next to an existing connected app.
3. In the Web App Settings section, select **Enable SAML**.
4. After entering the correct SAML field values, select **Encrypt SAML Response** to upload your signing certificate and select an encryption type.

Valid encryption algorithm values are `AES-128` (128-bit key), `AES-256` (256-bit key), and `Triple-DES` (Triple Data Encryption Algorithm).

When Salesforce is the service provider for inbound SAML assertions, you can pick a saved certificate to decrypt inbound assertions from third party identity providers.





**Note:** This option is only available if you've clicked **Enable Multiple Configs** on the **Single Sign-On Settings** page.

1. In **Security Controls > Certificate and Key Management**, upload the certificate provided by your identity provider.
2. In **Security Controls > Single Sign-On Settings**, add a new SAML configuration, and specify the provided certificate in the `Assertion Decryption Certificate` field.

## Provide Client Assertion Values for OpenID Connect OAuth Flows

For automated OAuth 2.0 exchanges, you can specify a client assertion value instead of using the generated consumer secret.

Available in: **All Editions**

### User Permissions Needed

To manage, create, edit, and delete OAuth applications: "Manage Connected Apps"

When setting up automated OAuth 2.0 apps for the web server or refresh token flows, you might not have access to the generated consumer secret value. Instead of passing in `client_secret` you can choose to provide a `client_assertion` and `client_assertion_type`. If a `client_secret` parameter is not provided, Salesforce checks for the `client_assertion` and `client_assertion_type` automatically. The value of `client_assertion` must be a typical JWT bearer token, signed with the private key associated with the OAuth consumer's uploaded certificate. Only the RS256 algorithm is currently supported. For more information on using `client_assertion` see the [OpenID Connect specifications](#) for the `private_key_jwt` client authentication method.

## Configure File Upload and Download Security Settings

For security reasons, your organization may want to configure the way some file types are handled during upload and download.

Available in: **All Editions except Database.com**

### User Permissions Needed

To configure file upload and download settings: "Customize Application"

To manage file upload and download settings:

1. From Setup, click **Security Controls > File Upload and Download Security**.



**Note:** The File Upload and Download Security page replaces another security settings page: HTML Documents and Attachments Settings.

2. Click **Edit**.
3. To prevent users from uploading files that may pose a security risk, select **Don't allow HTML uploads as attachment or document records**.

This security setting, if enabled, blocks users from uploading files with these extensions: `.html`, `.htt`, `.mht`, `.svg`, and `.thtml`.



**Warning:** Keep the following in mind when selecting `Don't allow HTML uploads as attachment or document records`:

- Do not enable this setting if your organization uses the partner portal to give your partner users access to Salesforce.
- HTML attachments are not permitted on solutions, regardless of whether this security setting is enabled. In addition, this setting does not affect attachments on email templates; HTML attachments on email templates are always permitted.
- After this setting is enabled, previously-uploaded HTML documents and attachments are unaffected. However, when users attempt to view an HTML attachment or document, their browser first prompts them to open the file in the browser, save it to their computer, or cancel the action.

4. Set download behavior for each file type.

- Download (recommended)—The file, regardless of file type, is always downloaded.
- Execute in Browser—The file is displayed and executed automatically when accessed in a browser or through an HTTP request.
- Hybrid—Attachments and document records execute in the browser. Salesforce CRM Content files and Chatter files are downloaded.

5. Click **Save**.

## Reuse Connected App Names

Names of deleted connected apps can now be reused if the deleted connected app is created using the Spring '14 release.

Connected Apps can be created in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions  
 Connected Apps can be installed in: **All** Editions

User Permissions Needed	
To read:	"Customize Application"
To create, update, or delete:	"Customize Application" AND either "Modify All Data" OR "Manage Connected Apps"
To update all fields except Profiles, Permission Sets, and Service Provider SAML Attributes:	"Customize Application"
To update Profiles, Permission Sets, and Service Provider SAML Attributes:	"Customize Application" AND "Modify All Data"
To uninstall:	"Download AppExchange Packages"

Starting with Spring '14, you can reuse names from deleted connected apps. This lets you replace existing connected apps without having to change the app name, which can be confusing to users.



**Note:** The name must be unique for the current connected apps in your organization. You can reuse the name of a deleted connected app if the connected app was created using the Spring '14 release or later. You cannot reuse the name of a deleted connected app if the connected app was created using an earlier release.

## The System Administrator Profile Automatically Gets the App Launcher

Administrators with the System Administrator profile have access to the App Launcher without requesting permission from Salesforce.

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

System administrators using the System Administrator profile in an edition that supports the App Launcher will see the App Launcher in their drop-down app menu without any setup required, even for organizations created in earlier releases. This does not apply to Administrators using profiles cloned from the System Administrator profile.

For more information, see “Using the App Launcher” in the online help, or the [Salesforce Identity Implementation Guide](#).

## Sharing

Sharing improves your control over who sees what.

### Sharing Sets

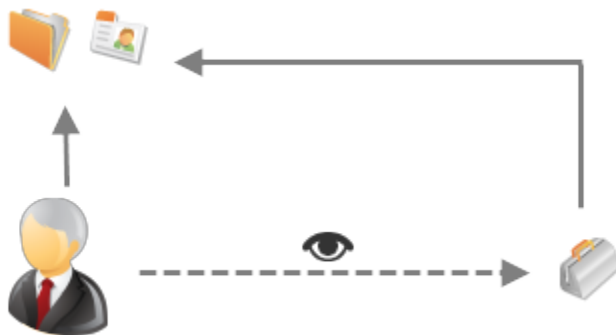
Grant portal or community users access to records that are associated with their accounts or contacts using sharing sets, based on their user profiles.

## Sharing Sets

Grant portal or community users access to records that are associated with their accounts or contacts using sharing sets, based on their user profiles.

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

Previously, a sharing set granted access to any record that has a lookup field to an account or contact that matches the user’s account or contact. With Spring ’14, you can also determine how access is granted using an access mapping in the sharing set, which supports indirect lookups from the user and target record to the account or contact. You can determine the objects to use in the access mapping, and they must both either point to an account or contact.



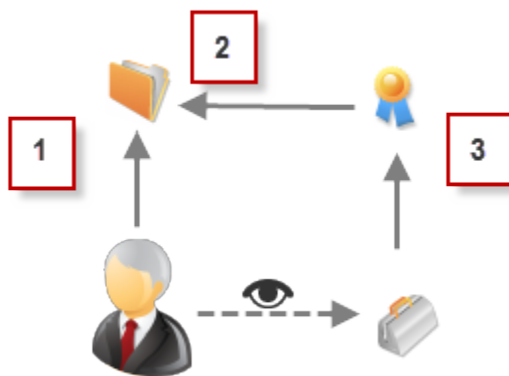
For example, you might want to use a sharing set if you would like to:

- Grant users access to all cases related to their account or contact record.
- Grant users access to all cases related to a parent account or contact that is identified on the user's account or contact record.

You can use sharing sets to grant access to accounts, contacts, cases, service contracts, users, and custom objects. Sharing sets can be used with these user profiles:

- Authenticated Website
- Customer Community User
- Customer Community Login User
- High Volume Customer Portal
- High Volume Portal
- Overage Authenticated Website User
- Overage High Volume Customer Portal User

The following example shows an access mapping on a sharing set, which grants portal or community users access to all cases associated with the entitlements on their account, even if they are not directly associated with the case.



1. Account lookup on portal or community user
2. Related account on entitlement
3. Entitlement lookup on case



**Note:** Portal or community users gain access to all order entitlements and order items under an account to which they have access. To share records owned by high-volume portal users, use a share group instead.

### **Grant High-Volume Portal or Community Users Access to Records**

Grant access to records using sharing sets.

### **Grant High-Volume Portal or Community Users Access to User Records**

Grant users access to other users using sharing sets.

## **Grant High-Volume Portal or Community Users Access to Records**

Grant access to records using sharing sets.

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

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



**Note:** Customer Portals aren't available for new organizations. Existing organizations continue to have access to Customer Portals and can transition to Communities. Contact your Salesforce Account Executive for more information.

1. For Customer Portals: From Setup, click **Customize** > **Customer Portal** > **Settings**.  
For Communities: From Setup, click **Customize** > **Communities** > **Settings**.
2. In the Sharing Sets 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, fill in the **Label** and **Sharing Set Name** fields. **Label** is the sharing set label as it appears on the user interface. **Sharing Set Name** is the unique name used by the API.
4. Enter a description.
5. Select the profiles of the users to whom you want to provide access.
6. Select the objects you want to grant access to.
7. 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.
8. Grant access based on an account or contact lookup:
  - Select a value in the User drop-down list to determine the account or contact lookup on the user.
  - Select the a value in the Target Object field to determine the account or contact lookup on the target object.

For example, to grant users access to all cases associated with the entitlements on their account, as shown in the previous topic, select `Account` and `Entitlement.Account` respectively.



**Note:** Both selected fields must point to either an account or contact. `Account` and `Entitlement.Account` both point to an account.

9. 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.)
10. Click **Update**, then click **Save**.

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

## Grant High-Volume Portal or Community Users Access to User Records

Grant users access to other users using sharing sets.

Available in: <b>Enterprise</b> , <b>Performance</b> , <b>Unlimited</b> , and <b>Developer</b> Editions
---

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



**Note:** Customer Portals aren't available for new organizations. Existing organizations continue to have access to Customer Portals and can transition to Communities. Contact your Salesforce Account Executive for more information.

To grant access to selected users in the same portal or community, you would typically create a sharing set if you deselected the `Portal User Visibility` or `Community User Visibility` checkbox on the Sharing Settings page.

1. For Customer Portals: From Setup, click **Customize** > **Customer Portal** > **Settings**.  
For Communities: From Setup, click **Customize** > **Communities** > **Settings**.
2. In the Sharing Sets 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, fill in the **Label** and **Sharing Set Name** fields. **Label** is the sharing set label as it appears on the user interface. **Sharing Set Name** is the unique name used by the API.
4. Enter a description.
5. Select the profiles of the users to whom you want to provide access.
6. Select the User object.  
Target users can be other high-volume portal or community users, or internal users.
7. 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.
8. Grant access based on an account or contact lookup:
  - Select a value in the User drop-down list to determine the account or contact that's related to the user, either by a direct lookup or indirect lookup via an intermediate object.
  - Select a value in the Target User drop-down list to determine the account or contact that's related to the target user, either by a direct lookup or indirect lookup via an intermediate object.

For example, to grant access to target users associated with another account identified on the user's account record, select `Account.Parent` and `Account` respectively.

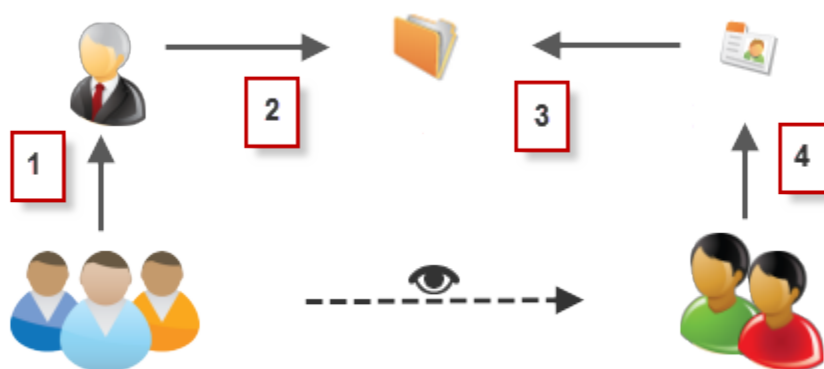


**Note:** Both selected fields must point to either an account or contact. For example, `Account.Parent` and `Contact.Account` both point to an account.

9. 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.)
10. Click **Update**, then click **Save**.

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

The following example grants your portal users access to users whose contacts are related to the accounts identified on the portal users' managers records. In other words, the account field on the portal user's manager record must match the account field identified on the target user's contact record.



1. Manager lookup on portal user
2. Account lookup on manager

- 3. Account lookup on contact
- 4. Contact lookup on target user

In this example, to grant access to the target users, you would select `Manager.Account` and `Contact.Account` in the User and Target User drop-down list respectively.

## Globalization

Globalization tools help administrators manage resources that vary from country to country, such as multilanguage, multicurrency, and translated content.

### Better Automatic Hyperlinks for URLs in Text Area Fields

Text area and long text area fields provide automatic hyperlinks for URLs in the field. The URL pattern matching is improved, and more valid URLs are recognized.

## Better Automatic Hyperlinks for URLs in Text Area Fields

Text area and long text area fields provide automatic hyperlinks for URLs in the field. The URL pattern matching is improved, and more valid URLs are recognized.

The improved recognition primarily affects country-specific domains that take the form of `abc.<valid_top_level_domain>.<valid_country_code>`, with or without a “www.” prefix. For example, previously `www.vic.gov.au` wasn’t recognized as a URL, and wasn’t automatically hyperlinked. Beginning with Spring ’14 these URLs should be recognized and have hyperlinks added automatically.

## Additional Customization

Even small customization enhancements can make Salesforce easier to use.

### User List View: Is Frozen Field

In user list views, `Is Frozen` is now included in the filter criteria, so you can create a list of frozen user accounts.

### My External Authentication Settings Page Location Changed

If you use the improved Setup user interface, the My External Authentication Settings page has moved from the Desktop Add-Ons section to the Personal section. If you use the original Setup user interface, the location hasn’t changed.

### Components Category in the Page Layout Editor

In the enhanced page layout editor, the palette now includes the Components category.

## User List View: Is Frozen Field

In user list views, `Is Frozen` is now included in the filter criteria, so you can create a list of frozen user accounts.

Available in: All editions	
User Permissions Needed	
To view frozen user accounts:	“Manage Users”

To create a user list view that includes all frozen user accounts:

1. From Setup, click **Manage Users > Users**.
2. Next to the View drop-down, click **Create New View**.
3. Enter the view and unique names.
4. In the Specify Filter Criteria section, set Field to `Is Frozen`, Operator to `equals`, and Value to `True`.
5. Specify the fields to display and visibility settings.
6. Click **Save**.

## My External Authentication Settings Page Location Changed

If you use the improved Setup user interface, the My External Authentication Settings page has moved from the Desktop Add-Ons section to the Personal section. If you use the original Setup user interface, the location hasn't changed.

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

To access this page in its new location, at the top of any Salesforce page, click the down arrow next to your name and select **My Settings**. Then from the left pane, select **Personal > My External Authentication Settings**.

## Components Category in the Page Layout Editor

In the enhanced page layout editor, the palette now includes the Components category.

You can only add components to the Mobile Cards section of a page layout. Items in the Mobile Cards section appear only in Salesforce1, not in the full Salesforce site. The Components category appears only if the object whose page layout you're editing supports one or more components.

For example, the Twitter component is supported on only contact, account, and lead page layouts. For more information, see [Access Twitter Profiles, Profile Images, and Tweets for Accounts, Contacts, and Leads](#)



# Force.com Development

Extend existing applications and develop new ones using the Salesforce programming and markup languages Apex and Visualforce. Use APIs and developer tools to build and deploy apps; use packaging tools to create apps for resale.

## **Allocate API Limit App Quotas—Pilot**

Allocate quotas for various API limits to individual connected apps. App quotas for API limits enable you to reserve API capacity for mission-critical connected apps or set a ceiling for API usage of non-critical connected apps.

## **Address and Geolocation Compound Fields in the SOAP and REST APIs—Beta**

Address and geolocation compound fields are available in the SOAP and REST APIs in API version 30.0 and later.

## **Sandbox**

Use sandboxes to develop, test, and simulate deployment of your customization.

## **New User Interface for Monitoring Deployments**

The page for monitoring deployments has been redesigned and now provides real-time and in-depth statistics of Metadata API-based deployments. You can use this page to track the progress of deployments and troubleshoot failures.

## **Change Sets and Deployment**

Administrators and developers now have new ways to use change sets and external tools for deployments.

## **Developer Console**

Use new features of Developer Console to more easily manage code in your organization.

## **Visualforce**

Visualforce enhancements in Spring '14 are focused on improving the experience of developing apps that combine Visualforce and JavaScript, including Salesforce1 and other mobile apps, along with some additional development improvements and other changes.

## **Force.com Canvas**

Force.com Canvas enables you to easily integrate a third-party application in Salesforce. Force.com Canvas is a set of tools and JavaScript APIs that you can use to expose an application as a canvas app. This means you can take your new or existing applications and make them available to your users as part of their Salesforce experience.

## **Apex Code**

Using syntax that looks like Java and acts like database stored procedures, Apex enables developers to add business logic to most system events, including button clicks, related record updates, and Visualforce pages. Apex code execution can be initiated by Web service requests and from triggers on objects.

## **API**

Use the API to create applications that integrate with Salesforce.

## **ISVforce**

Winter '14 includes features that make it easier for partners to upgrade managed packages and collect usage metrics data from customers.

## Allocate API Limit App Quotas—Pilot

Allocate quotas for various API limits to individual connected apps. App quotas for API limits enable you to reserve API capacity for mission-critical connected apps or set a ceiling for API usage of non-critical connected apps.



**Note:** This feature is currently available through a pilot program. For information on enabling it for your organization, contact [salesforce.com](https://salesforce.com).

### UI Access

To allocate a quota for an API limit for a connected app, navigate to **Manage Apps > Limit Allocation Per App**. You can set app quotas for these limits:

- Total API requests per 24-hour period
- Number of Bulk API batches per 24-hour period
- Number of Streaming API events per 24-hour period
- Number of generic streaming events per 24-hour period



**Note:** Generic streaming is currently available through a pilot program. For information on enabling generic streaming for your organization, contact [salesforce.com](https://salesforce.com).

### API Access

To access connected app API quotas using Force.com APIs, use the `LimitAllocationPerApp` object.

The SOAP API `LimitInfoHeader` header includes limit quota information, if there is any, for the currently connected app. This example includes the limit quota for a `sample-connected-app` connected app.

```
<limitInfo>
  <appName>sample-connected-app</appName>
  <current>20</current>
  <limit>250</limit>
  <type>API REQUESTS PER APP</type>
</limitInfo>
```

The REST API Limit Info Header header includes limit quota information, if there is any, for the currently connected app. This example includes the limit quota for a `sample-connected-app` connected app.

```
Sforce-Limit-Info: api-usage=25/5000; per-app-api-usage=17/250 (appName=sample-connected-app)
```

## Address and Geolocation Compound Fields in the SOAP and REST APIs—Beta

Address and geolocation compound fields are available in the SOAP and REST APIs in API version 30.0 and later.



**Note:** This release contains a beta version of compound fields that is production quality but has [known limitations](#). You can provide feedback and suggestions for compound fields, especially compound address fields, on the [IdeaExchange](#).

Compound fields group together multiple elements of primitive data types, such as numbers or strings, to represent complex data types, such as a location or an address. Compound fields are an abstraction that can simplify application code that handles the values, leading to more concise, understandable code.

Compound fields are accessible as a single, structured field, or as individual component fields. The values contained within the compound field and the values in individual fields both map to the same underlying data stored in Salesforce; they always have identical values. Code that references individual component fields is unaffected by the new compound fields.

Compound fields are read-only. Changes are performed by writing to the individual component fields. This maintains a single, consistent method for performing updates, and avoids the possibility of conflicts. For example, if both the `BillingAddress` compound field and `BillingCity` individual component field were updated in the same API call, it would be unclear which value should be saved.

Compound fields are available only through the SOAP and REST APIs. There's no support for using compound fields in reports, workflow, or any other part of the Salesforce web app.

For the SOAP API, compound fields are described in both the Enterprise and Partner WSDLs. Update your WSDL to access the new compound data types.

### **Geolocation Compound Fields**

Geolocation fields are accessible in the SOAP and REST APIs as a structured “compound” data type, as well as individual latitude and longitude elements.

### **Standard Address Compound Fields**

Standard addresses—addresses built into standard objects in Salesforce—are accessible in the SOAP and REST APIs as a structured “compound” data type, as well as individual address elements.

### **Compound Field Considerations and Limitations**

Address and geolocation compound fields are convenient, and result in more concise, clear code. However, there are a number of things you should consider when using them in your apps.

## **Geolocation Compound Fields**

Geolocation fields are accessible in the SOAP and REST APIs as a structured “compound” data type, as well as individual latitude and longitude elements.

Geolocation fields are created as a single field in Salesforce, containing both latitude and longitude values. When retrieving geolocation values using the SOAP or REST APIs, prior to API 30.0, the two values needed to be retrieved individually, as though they were two separate fields. In API 30.0 and later, geolocation fields are available as a compound field, a structured data type that combines both values.

This improvement changes two aspects of working with geolocation fields when accessing them via the SOAP and REST APIs.

- **SQL**. `SELECT` clauses can reference geolocation fields directly, instead of separating their latitude and longitude components.

#### **◇ API 29.0 and earlier:**

```
SELECT location__latitude__s, location__longitude__s
FROM Warehouse__c
```

### ◇ API 30.0 and later:

```
SELECT location__c
FROM Warehouse__c
```

- Compound geolocation field values are returned as a structured data type. Code that works with compound geolocation fields needs to reference the individual components of the returned value. See the sample code below.

The individual components of geolocation fields continue to be available, and existing code is unaffected by this change.



#### Note:

- There are a number of considerations when working with compound geolocation fields. See [Compound Field Considerations and Limitations](#) on page 243.
- Although geolocation fields appear as a single field in the user interface, they count as *three* custom fields towards your organization's limits: one for latitude, one for longitude, and one for internal use. This is unchanged from prior releases.

## Retrieve a Geolocation Field Using the REST API

The following Visualforce page uses JavaScript to connect to the Salesforce REST API and retrieve and display the locations of nearby warehouses.

```
<apex:page standardController="Warehouse__c">

<!-- Modified from sample code published on DeveloperForce:
      Calling the Force.com REST API from Visualforce Pages, Revisited
      http://blogs.developerforce.com/developer-relations/?p=14534 -->

<apex:includeScript
  value="https://ajax.aspnetcdn.com/ajax/jquery/jquery-1.7.2.min.js"/>
<script>
  jQuery(document).ready(function($) {
    // Pull a few Warehouse records via the REST API,
    // including the Location__c geolocation field
    $.ajax('/services/data/v30.0/query?q=' +
      'SELECT+Name,+Location__c+FROM+Warehouse__c+LIMIT+10',
      {
        beforeSend: function(xhr) {
          // Set the OAuth header from the session ID
          xhr.setRequestHeader(
            'Authorization', 'Bearer {!$Api.Session_ID}');
        },
        success: function(response) {
          // Append each warehouse name and location to the HTML list
          $.each(response.records, function(index, record) {
            $('#warehousesList').append(
              '<li>' +
                record.Name + ' -- (' +

                // Access the individual components of a geolocation
                // compound field using dot notation
                record.Location__c.latitude + ', ' +
                record.Location__c.longitude + ') ' +

              '</li>');
          });
        },
        error: function(jqXHR, textStatus, errorThrown) {
          // Uh oh, something went wrong...
          alert(jqXHR.status + ': ' + errorThrown);
        }
      })
  })
</script>
```

```

    }
  });
});
</script>

<h1>Retrieve Warehouses and Locations via REST API</h1>

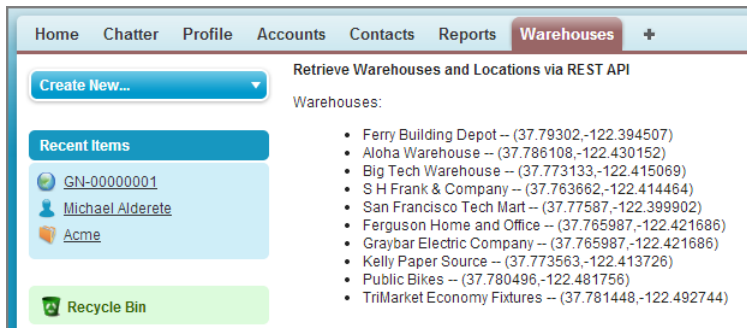
<p>Warehouses:</p>

<ul id="warehousesList">
</ul>

</apex:page>

```

The page simply displays the locations as numeric latitude and longitude values.



This sample is deliberately simple, to make it clear how to access geolocation compound field values. You can easily add a bit more JavaScript and place the warehouses on a map, using your favorite mapping service's JavaScript API.

## Other Changes to Geolocation Fields

Geolocation fields are compound fields that combine latitude and longitude values to describe a specific point on Earth. Null values are valid only if *both* latitude and longitude are null.

Records that have invalid geolocation field values, that is, geolocations where either latitude or longitude is null, but not both, are treated as though both values are null when used in `SOQL WHERE DISTANCE ()` and `ORDER BY` clauses. In other words, as though the field has not been set.

When a compound geolocation field is used in a `SELECT` clause, invalid geolocation values return null. For example:

```
SELECT Name, location__c from Warehouse__c LIMIT 5
```

The values returned from an API call might look something like these values.

Name	location__c
Ferry Building Depot	<i>null</i>
Aloha Warehouse	(37.786108,-122.430152)
Big Tech Warehouse	<i>null</i>
S H Frank & Company	<i>null</i>
San Francisco Tech Mart	(37.77587,-122.399902)

These results include three null geolocation values. It's not possible to tell which values are genuinely null, and which are invalid data.

When the individual field components of that same geolocation field are used in a `SELECT` clause, the saved values are returned as before. In other words, non-null values will be returned as that value, and null values return as null. For example:

```
SELECT Name, location__latitude__s, location__longitude__s from Warehouse__c LIMIT 5
```

In this example, the results might look like these values.

Name	location__latitude__s	location__longitude__s
Ferry Building Depot	<i>null</i>	-122.394507
Aloha Warehouse	37.786108	-122.430152
Big Tech Warehouse	<i>null</i>	<i>null</i>
S H Frank & Company	37.763662	<i>null</i>
San Francisco Tech Mart	37.77587	-122.399902

In these results, only one geolocation field is genuinely null. The other two, with partial nulls, are invalid.



**Note:** The behavior of geolocation individual element values in SOQL `SELECT` statements is unchanged from previous releases. The example here is simply intended to contrast with the behavior of the new compound version of geolocation fields.

## Standard Address Compound Fields

Standard addresses—addresses built into standard objects in Salesforce—are accessible in the SOAP and REST APIs as a structured “compound” data type, as well as individual address elements.

Address fields have long been a part of Salesforce, provided on many standard objects, such as Account, Contact, Quote, and User. Addresses are available as individual fields on the object, consisting of:

- City
- Country
- CountryCode (when state and country picklists are enabled)
- Latitude (beta)
- Longitude (beta)
- PostalCode
- State
- StateCode (when state and country picklists are enabled)
- Street

Some objects provide fields for multiple addresses. For example, Account provides for four different addresses. In this case, address field names are prefixed with the type of address, for example, **BillingCity**, **MailingState**, and so on.

### New Compound Address Fields

In API 30.0 and later, every standard address is available in the SOAP and REST APIs as a compound field, a structured data type that combines all of the above fields. The new compound standard addresses are the following.

- Account.BillingAddress
- Account.ShippingAddress
- Account.PersonMailingAddress
- AccountCleanInfo.Address
- Contact.MailingAddress
- Contact.OtherAddress
- ContactCleanInfo.Address
- Contract.BillingAddress
- Contract.ShippingAddress
- DandBCompany.Address
- DandBCompany.MailingAddress
- Lead.Address
- LeadCleanInfo.Address
- Organization.Address
- Quote.BillingAddress
- Quote.ShippingAddress
- Quote.QuoteToAddress
- Quote.AdditionalAddress
- ServiceContract.BillingAddress
- ServiceContract.ShipingAddress
- User.Address
- UserProfile.Address

The new compound fields are only accessible using the SOAP and REST APIs. See [Compound Field Considerations and Limitations](#) on page 243 for additional details of the restrictions this imposes.

## Retrieving Compound Addresses

Using the new compound fields can simplify code that works with addresses, especially for SOQL queries. SOQL `SELECT` clauses can reference addresses directly, instead of all of the individual component fields.

- **API 29.0 and earlier:**

```
SELECT Name, BillingStreet, BillingCity, BillingState, BillingPostalCode,
       BillingCountry, BillingLatitude, BillingLongitude
FROM Account
```

- **API 30.0 and later:**

```
SELECT Name, BillingAddress
FROM Account
```

Compound address field values are returned as a structured data type. Code that works with compound address fields needs to reference the individual components of the returned value. See the code sample below.

The individual component fields of addresses, listed above, continue to be available, and existing code is unaffected by the new compound version of addresses.

## Retrieve a Standard Address Compound Field with the SOAP API

The following Java method uses the Salesforce SOAP API to retrieve and display the Mailing Address for a list of contacts.

```
// Modified version of code in the SOAP API QuickStart
private void querySample() {
```

```
String soqlQuery = "SELECT FirstName, LastName, MailingAddress FROM Contact";
try {
    QueryResult qr = connection.query(soqlQuery);
    boolean done = false;

    if (qr.getSize() > 0) {
        System.out.println("\nLogged-in user can see "
            + qr.getRecords().length + " contact records.");

        while (!done) {
            System.out.println("");
            SObject[] records = qr.getRecords();
            for (int i = 0; i < records.length; ++i) {
                Contact con = (Contact) records[i];
                String fName = con.getFirstName();
                String lName = con.getLastName();

                // Access the compound address field MailingAddress
                Address addr = (Address) con.getMailingAddress();
                String streetAddr = "";
                if (null != addr) streetAddr = addr.getStreet();

                if (fName == null) {
                    System.out.println("Contact " + (i + 1) + ": " + lName +
                        " -- " + streetAddr);
                } else {
                    System.out.println("Contact " + (i + 1) + ": " + fName +
                        " " + lName +
                        " -- " + streetAddr);
                }
            }

            if (qr.isDone()) {
                done = true;
            } else {
                qr = connection.queryMore(qr.getQueryLocator());
            }
        }
    } else {
        System.out.println("No records found.");
    }
} catch (ConnectionException ce) {
    ce.printStackTrace();
}
}
```

## Using Compound Address Fields as Locations

Compound address fields include a geolocation field, and can be used as locations in **SOQL** **WHERE** and **ORDER BY** clauses. For example, here's a **SOQL** query to retrieve the ten accounts closest to San Francisco.

```
SELECT Id, Name, BillingAddress
FROM Account
WHERE DISTANCE(BillingAddress, GEOLOCATION(37.775,-122.418), "mi") < 20
ORDER BY DISTANCE(BillingAddress, GEOLOCATION(37.775,-122.418), "mi")
LIMIT 10
```



### Note:

- The geolocation component of address fields isn't set automatically. You need to use a geocoding service to set these values before you can use address fields as locatable values. Search the AppExchange for "[geocode](#)" to find a number of possible solutions.
- Address fields are only supported by **DISTANCE()** in **SOQL**. **DISTANCE()** calculation for address fields isn't supported in formula fields, Apex, or any other calculations.



## Compound Field Considerations and Limitations

Address and geolocation compound fields are convenient, and result in more concise, clear code. However, there are a number of things you should consider when using them in your apps.

Both address and geolocation compound fields have the following limitations.

- Compound fields are read-only. Use the individual field components to update field values.
- Compound fields are accessible only through the SOAP and REST APIs. The compound versions of fields aren't accessible anywhere in the Salesforce user interface.
- Compound fields can't be used in Apex, because there is no Apex data type for compound fields. Use the individual field components to access or update field values.
- Compound fields can't be used in Visualforce, for example, in an `<apex:outputField>`. Use the individual field components to access or update field values.
- Compound fields aren't searchable. For proximity searches, use a `WHERE DISTANCE ( field, GEOLOCATION ( lat, long ), "units" ) < desiredProximity` clause. For text string matches—for example, matching a city or postal code—search the individual fields.
- Compound fields can't be imported or exported. Use the individual field components to load or export values.

Address compound fields have the following limitations.

- Compound address fields are only available for standard addresses, that is, those address fields that exist as a basic part of the standard objects included in Salesforce. You can't create custom compound address fields.
- The geolocation component of address fields isn't set automatically. You need to use a geocoding service to set these values before you can use address fields as locatable values. Search the AppExchange for “[geocode](#)” to find a number of possible solutions.
- Address fields are only supported by `DISTANCE ()` in SOQL. `DISTANCE ()` calculation for address fields isn't supported in formula fields, Apex, or any other calculations. (`DISTANCE ()` calculation in formula fields *is* supported for geolocation fields.)
- Address compound fields can't take advantage of custom indexing on the geolocation element of the field. If you have more than 250,000 records, be aware of the performance implications of performing `WHERE DISTANCE ()` and `ORDER BY DISTANCE ()` operations on address fields. You can work around this limitation by adding an extra custom geolocation field, and indexing on that field instead.

## Sandbox

Use sandboxes to develop, test, and simulate deployment of your customization.

### Partial Data Sandboxes

Salesforce introduces a new sandbox type: Partial Data Sandboxes

## Partial Data Sandboxes

Salesforce introduces a new sandbox type: Partial Data Sandboxes

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

Partial Data sandboxes include all of your organization’s metadata and add a selected amount of your production organization's data that you define using a sandbox template. A Partial Data sandbox is a Developer sandbox plus the data you define in a sandbox template. It includes the reports, dashboards, price books, products, apps, and customizations under Setup (including *all* of your metadata). Additionally, as defined by your sandbox template, Partial Data sandboxes can include your organization's standard and custom object records, documents, and attachments up to 5 GB of data and a maximum of 10,000 records per selected object. A Partial Data sandbox is smaller than a Full sandbox and has a shorter refresh interval. You can refresh a Partial Data sandbox every 5 days.

## New User Interface for Monitoring Deployments

The page for monitoring deployments has been redesigned and now provides real-time and in-depth statistics of Metadata API-based deployments. You can use this page to track the progress of deployments and troubleshoot failures.

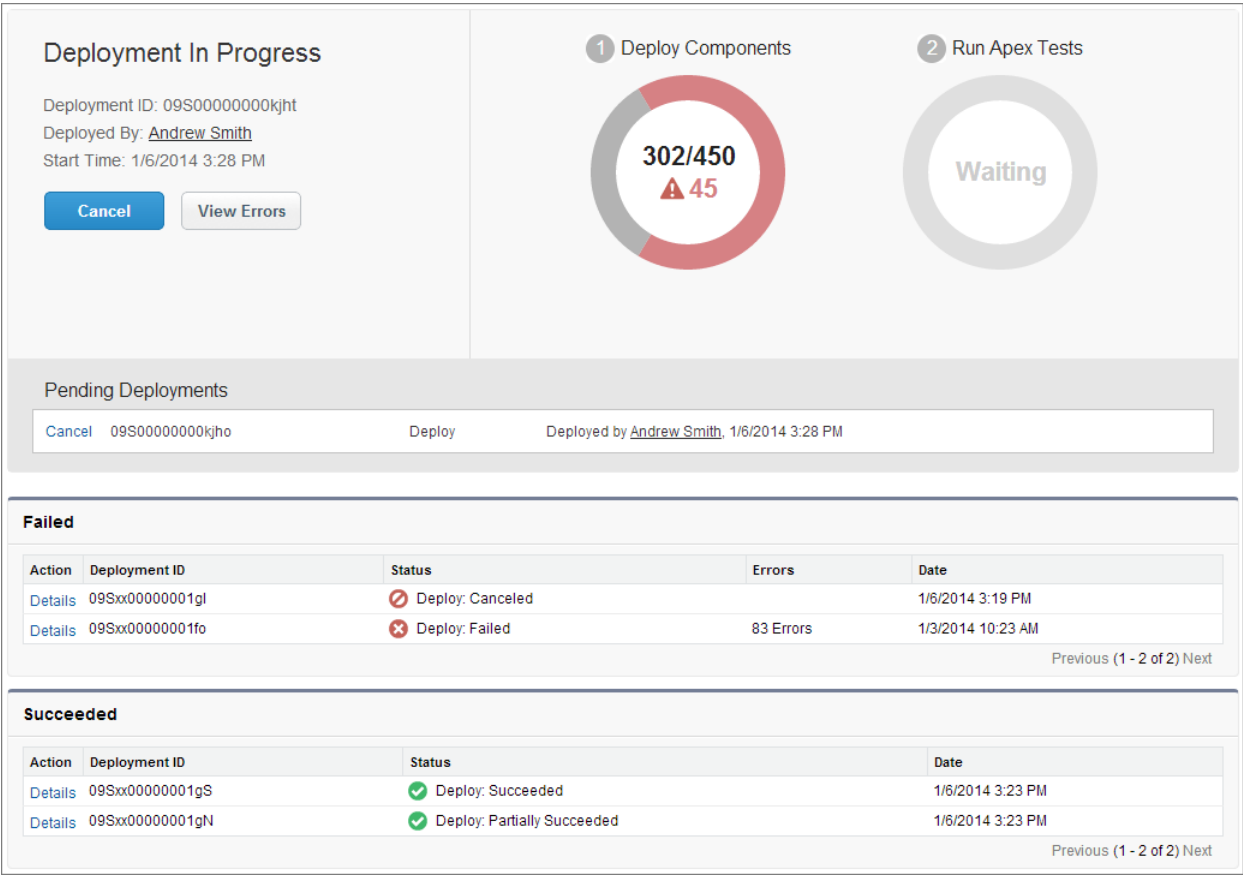
Available in: **Enterprise, Performance, Unlimited, Developer, and Database.com** Editions

User Permissions Needed	
To view metadata deployments:	“Modify All Data”

The revamped Deployment Status page shows real-time statistics of the currently running deployment via charts. In addition, this page lists queued deployments waiting for execution and deployments that have completed in the last 30 days. Using this page, you can troubleshoot problems for a failed deployment by inspecting the returned errors and test failures, or you can find out about a long-running Apex test, among other things.

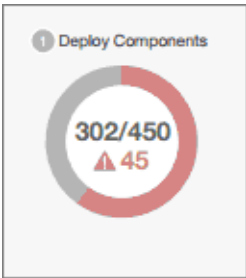
To access this page, from Setup, click **Deployment Status** or **Deploy > Deployment Status**. This page lists the status of deployments started only with the Metadata API `deploy()` call, which includes deployments started from Force.com IDE and Force.com Migration Tool. This page doesn’t include change sets. All deployments are categorized in separate sections depending on their status.

The following image shows deployments in various stages on the Deployment Status page.

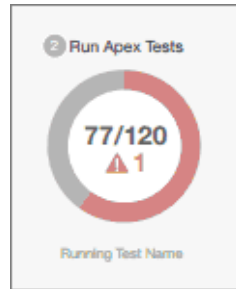


In-Progress and Queued Deployments

When running a deployment, the Deployment Status page shows you the real-time progress of your current deployment. This page contains charts that provide a visual representation of the overall deployment progress. The first chart shows how many components have already been deployed out of the total and includes the number of components with errors. For example, the following chart indicates that 302 components were processed successfully out of 450 and there were 45 components with errors.



After all components have been deployed without errors, Apex tests will start executing, if required or enabled. A second chart shows how many Apex tests have run out of the total number of tests and the number of errors returned. In addition, the chart shows the name of the currently running test. For example, in the following chart, 77 tests have completed execution out of a total of 120, and 1 test failed.



The following information is displayed for the current deployment.

Column	Description
Deployment ID	A unique identifier used to track the deployment. This value is returned by the Metadata API <code>deploy()</code> call.
Deployed By	The name of the user performing the deployment.
Start Time	The date and time when the deployment actually started, not the time the request was queued. This value is the time the deployment <code>Status</code> is set to <code>In Progress</code> .

If the current deployment has errors, you can view these errors before the deployment finishes by clicking **View Errors**.

### Long-Running Apex Tests

If required or enabled, Apex tests run as part of a deployment after all components have been deployed. Apex tests that take a long time to execute delay the entire deployment. Such long-running tests are flagged for the currently running deployment. These tests should be improved to make them more efficient and speed up future deployments.

### Pending Deployments

You can initiate multiple deployments. Only one deployment can run at a time. The other deployments will remain in the queue waiting to be executed after the current deployment finishes. Queued deployments are listed under Pending Deployments in the order they will be executed.

### Deployment Validations

A deployment validation is a deployment that is used only to check the validity of the deployed files and is rolled back. A validation doesn't save any deployed components or change the organization in any way. You can determine whether a deployment is a validation only (Validate) or an actual deployment (Deploy) by inspecting the information for pending deployments or the `Status` column of deployments in the Failed and Succeeded sections.

### Canceling a Deployment

You can cancel a deployment while it's in progress or in the queue by clicking **Cancel** next to the deployment. The deployment then has the status `Cancel Requested` until the deployment is completely canceled. A canceled deployment is listed in the Failed section.

### Completed Deployments

Deployments that have finished are listed either in the Failed or Succeeded sections depending on their status.

Deployments that have finished but failed, and deployments that were canceled are listed in the Failed section. No changes were committed to the organization for these deployments because files were missing, components had errors, tests failed, or the deployment was canceled.

Deployments that have completed successfully or have partially succeeded are listed in the Succeeded section. Only deployments to a non-production organization can partially succeed. These are deployments that have the `rollbackOnError` field set to `false` in the deployment options and have errors in a subset of components. In a partially succeeded deployment, the failed components aren't committed and the remaining components are committed to the organization.

To get more details about a deployment, click **Details** next to a deployment. Use the information on the Deployment Detail page to view the errors and troubleshoot problems for a failed or partially succeeded deployment. All error messages that occurred during the deployment are listed, including errors for Apex tests with stack trace information. For a successful deployment, the Deployment Detail page contains final information, such as how many components were deployed, how many Apex tests were run and code coverage, if any.

### Deployment Status

The **Status** column for completed deployments in the Failed and Succeeded sections lists the type and status of a deployment and has two parts:

- The prefix indicates whether the deployment is a validation only (Validate:) or an actual deployment (Deploy:).
- The second part of the status value contains the status of the deployment: Failed or Canceled for failed deployments, Succeeded for succeeded deployments, or Partially Succeeded for partially succeeded deployments.

## Change Sets and Deployment

Administrators and developers now have new ways to use change sets and external tools for deployments.

Available in **Enterprise**, **Performance**, **Unlimited**, and **Database.com** Editions

If you're using the Force.com Migration Tool or Force.com IDE, also see the changes in the [Metadata Types and Fields](#) on page 309.

The components available for a change set vary by edition. The following components are now available for change sets.

### Sharing Sets

Sharing sets are now included in change sets. For more information, see [Sharing Sets](#).

### Site.com

You can quickly deploy Site.com and Site.com Communities sites using change sets. For more information, see [Deploying Sites with the Metadata API](#)

## Developer Console

Use new features of Developer Console to more easily manage code in your organization.

Available in: **Performance**, **Unlimited**, **Developer**, **Enterprise**, and **Database.com** Editions

### [Search and Replace](#)

Access basic search and replace functionality in the Developer Console using standard keyboard shortcuts.

### [Update API Version](#)

Change the API version of an entity from the Developer Console Source Code Editor.

### [Open Full Screen Editor](#)

Toggle full screen editing from the Developer Console Source Code Editor (if available) by clicking F11.

### [Choose Source Code Editor Theme and Font Size](#)

Set the font size and display theme for the Developer Console Source Code Editor in your preferences.

### [Clear Test and Code Coverage Results](#)

Context Menus

Access basic functions from context menus by right-clicking in the Developer Console.

Visualforce View State Tab Available for ISVs Logging In via the Subscriber Support Console

App publishers who use the License Management App (LMA) to log in to subscriber organizations to support and troubleshoot their packages can use the View State tab to debug their Visualforce pages in the Developer Console.

Visualforce Development Mode Footer Disabled in Preview Windows

The Visualforce Development Mode footer isn't available in Visualforce page preview windows launched from the Developer Console.

Search and Replace

Access basic search and replace functionality in the Developer Console using standard keyboard shortcuts.

Use the following keyboard shortcuts to search and replace within the current view:

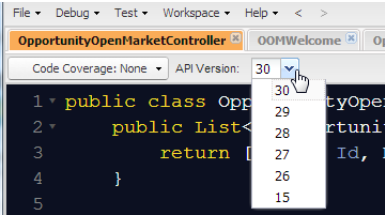
Function	Shortcut
Search	CTRL+F
Find next	CTRL+G
Find previous	CTRL+SHIFT+G
Replace	CTRL+SHIFT+F
Replace all	CTRL+SHIFT+R

To search files that are not open in the current view, click **File > Search in Files** or press CTRL+SHIFT+H.

Update API Version

Change the API version of an entity from the Developer Console Source Code Editor.

The **API Version** list includes the five most recent versions plus the current version of the entity (if it is not already in the list).



Open Full Screen Editor

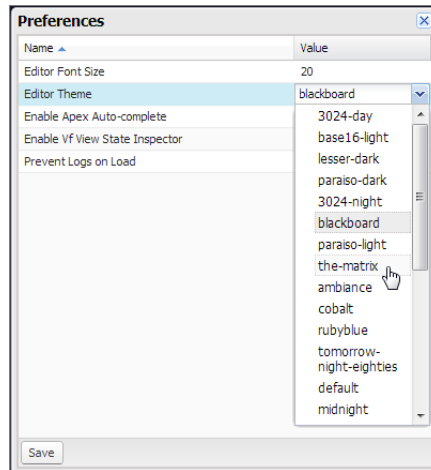
Toggle full screen editing from the Developer Console Source Code Editor (if available) by clicking F11.

To open the full screen editor, make sure the cursor is in the Source Code Editor, and click F11. Toggle between full screen editing and the Source Code Editor using F11, or exit the full screen view by clicking Esc.

## Choose Source Code Editor Theme and Font Size

Set the font size and display theme for the Developer Console Source Code Editor in your preferences.

Click **Help** > **Preferences** to access the Preferences dialog. Select an Editor Theme to preview it in the editor. Click **Save** to update your settings and close the window.



## Clear Test and Code Coverage Results

Refresh test and code coverage results in the Developer Console by clicking **Test** > **Clear Test Data**.

## Context Menus

Access basic functions from context menus by right-clicking in the Developer Console.

- Right-click an open tab to access save options for the associated entity.
- Right-click a log in the Logs tab to open or download the log.

## Visualforce View State Tab Available for ISVs Logging In via the Subscriber Support Console

App publishers who use the License Management App (LMA) to log in to subscriber organizations to support and troubleshoot their packages can use the View State tab to debug their Visualforce pages in the Developer Console.

Previously, when logged in to subscriber organizations, app publishers were able to debug Apex code using the tools in the Developer Console, such as debug logs, heap dumps, and so on. They were also able to view Visualforce code, but were slightly limited in their debugging by not being able to use the View State tab. This limitation has been removed.

## Visualforce Development Mode Footer Disabled in Preview Windows

The Visualforce Development Mode footer isn't available in Visualforce page preview windows launched from the Developer Console.

Removing the Development Mode footer from Visualforce page preview windows allows the page to render exactly the same as it does for your users. Make changes to the Visualforce code in the Developer Console. When you save your changes, the page automatically reloads, performing the same function as the Development Mode footer, with all of the extra features of the Developer Console.

The Development Mode footer, if enabled in your preferences, remains available in Visualforce pages launched using the **Preview** button in **Setup > Develop > Pages**, or accessed directly by their URL, for example, `https://<salesforce_instance>/apex/myTestPage`.

## Visualforce

Visualforce enhancements in Spring '14 are focused on improving the experience of developing apps that combine Visualforce and JavaScript, including Salesforce1 and other mobile apps, along with some additional development improvements and other changes.

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

Visualforce is a framework that allows developers to build sophisticated, custom user interfaces that can be hosted natively on the Force.com platform. The Visualforce framework includes a tag-based markup language, similar to HTML, and a set of server-side “standard controllers” that make basic database operations, such as queries and saves, very simple to perform.

For further information on features affected by these enhancements, refer to the *Visualforce Developer's Guide*.

### Visualforce Development

Visualforce improvements make app development easier. These release notes explain the new features in detail, and also provide an extended code sample showing how the different features can be used.

### Additional Visualforce Improvements

Visualforce features a number of other enhancements in this release.

## Visualforce Development

Visualforce improvements make app development easier. These release notes explain the new features in detail, and also provide an extended code sample showing how the different features can be used.

### Visualforce Remote Objects—Pilot

JavaScript remoting is a popular, powerful, and efficient method for building web apps with Visualforce, especially for creating pages for use in Salesforce1, or working with JavaScript libraries like jQuery or AngularJS. Visualforce Remote Objects are proxy objects that allow basic DML operations on sObjects directly from JavaScript. Remote Objects take some of the complexity out of JavaScript remoting, by reducing the need for @RemoteAction methods in an Apex controller or extension. Like JavaScript remoting, Remote Objects calls don't count towards API request limits.

### namespace Attribute Added to <apex:actionFunction>

The namespace attribute lets you specify a JavaScript namespace to add to functions generated by the <apex:actionFunction> component. Use it to avoid JavaScript function name collisions, and to implement organizational coding standards.



## Visualforce Remote Objects—Pilot

JavaScript remoting is a popular, powerful, and efficient method for building web apps with Visualforce, especially for creating pages for use in Salesforce1, or working with JavaScript libraries like jQuery or AngularJS. Visualforce Remote Objects are proxy objects that allow basic DML operations on sObjects directly from JavaScript. Remote Objects take some of the complexity out of JavaScript remoting, by reducing the need for `@RemoteAction` methods in an Apex controller or extension. Like JavaScript remoting, Remote Objects calls don't count towards API request limits.



**Note:** Remote Objects is currently available as a Developer Preview. For information on enabling Remote Objects, contact [salesforce.com](https://salesforce.com).

Using Visualforce Remote Objects consists of two parts:

- Access definitions, written in Visualforce using the new Remote Objects components. These components generate a set of JavaScript proxy objects that you can use in the next step.
- Data access functions, written in JavaScript. These functions use the proxy objects made available by the access definitions to perform create, select, update, and delete operations on your data.

Your page then uses the data access functions to respond to user interaction, including form submissions or controls changes, or in response to timers, or pretty much anything you can write in JavaScript.

### Remote Objects Example

This short example shows the two elements of using Remote Objects. This Visualforce page retrieves a list of 10 warehouse records and displays them on the page, in response to the user clicking the **Retrieve Warehouses** button.

```
<apex:page>

<!-- Remote Objects definition to set accessible sObjects and fields -->
<apex:remoteObjects >
  <apex:remoteObjectModel name="Warehouse__c" jsShorthand="Warehouse" fields="Name,Id">

    <apex:remoteObjectField name="Phone__c" jsShorthand="Phone"/>
  </apex:remoteObjectModel>
</apex:remoteObjects>

<!-- JavaScript to make Remote Objects calls -->
<script>
  fetchWarehouses = function(){
    // Create a new Remote Object
    var wh = new SObjectModel.Warehouse();

    // Use the Remote Object to query for 10 warehouse records
    wh.retrieve({ limit: 10 }, function(err, records){
      if(err) alert(err.message);
      else {
        var ul = document.getElementById("warehousesList");
        records.forEach(function(record) {
          // Build the text for a warehouse line item
          var whText = record.get("Name");
          whText += " -- ";
          whText += record.get("Phone");

          // Add the line item to the warehouses list
          var li = document.createElement("li");
          li.appendChild(document.createTextNode(whText));
          ul.appendChild(li);
        });
      }
    });
  };
};
```

```

</script>

<h1>Retrieve Warehouses via Remote Objects</h1>

<p>Warehouses:</p>

<ul id="warehousesList">
</ul>
<button onclick="fetchWarehouses()">Retrieve Warehouses</button>

</apex:page>

```

Notice something very unusual about this page—there is no controller or controller extension. All of the data access is handled by the Remote Objects components.

The first part of this example is the Remote Objects components that specify which objects and fields to make accessible on the page.

```

<apex:remoteObjects>
  <apex:remoteObjectModel name="Warehouse__c" jsShorthand="Warehouse" fields="Name,Id">
    <apex:remoteObjectField name="Phone__c" jsShorthand="Phone"/>
  </apex:remoteObjectModel>
</apex:remoteObjects>

```

These components generate JavaScript model classes, one per sObject in the access specification, which you use to make data access calls directly from your JavaScript code. Notice the use of the `jsShorthand` attribute, which creates a “mapping” between the full Salesforce API name, and a simpler, shorter name to use in your JavaScript code. Setting `jsShorthand` is essential if you plan to package and distribute your code, because it eliminates the use of your organization’s namespace in the packaged code. Using the shorthand does all the work.

The second part of this example is a JavaScript function that uses the models generated by the access definition components to retrieve a set of records for display on the page.

```

<!-- JavaScript to make Remote Objects calls -->
<script>
  fetchWarehouses = function(){
    // Create a new Remote Object
    var wh = new SObjectModel.Warehouse();

    // Use the Remote Object to query for 10 warehouse records
    wh.retrieve({ limit: 10 }, function(err, records){
      if(err) alert(err.message);
      else {
        var ul = document.getElementById("warehousesList");
        records.forEach(function(record) {
          // Build the text for a warehouse line item
          var whText = record.get("Name");
          whText += " -- ";
          whText += record.get("Phone");

          // Add the line item to the warehouses list
          var li = document.createElement("li");
          li.appendChild(document.createTextNode(whText));
          ul.appendChild(li);
        });
      }
    });
  };
</script>

```

The first line of the function creates a new Warehouse object from the model; notice that the call that creates it uses the `jsShorthand` for the sObject, instead of the full API name of the object. This is a best practice: it decouples your JavaScript code from the specifics of your organization namespace, sObject and field names, and so on. It also makes your code more succinct and clear.

The second line uses the new Warehouse object, `wh`, to perform a query for Warehouse records. The call provides two things as arguments: a simple query specifier, and an anonymous function to handle the results. The function itself is standard JavaScript; it simply iterates over the results, and creates list items to append to the list of warehouses on the page.

Finally, the page body is static HTML.

```
<h1>Retrieve Warehouses via Remote Objects</h1>

<p>Warehouses:</p>

<ul id="warehousesList">
</ul>
<button onclick="fetchWarehouses()">Retrieve Warehouses</button>
```

The empty list serves as an element into which the results can be added. When the page first loads, the list is empty. Clicking the button fires the JavaScript function defined earlier, which performs the query and adds the results.

Finally, compare this sample to the example at the end of [Geolocation Compound Fields](#) on page 237, which does approximately the same thing. This sample uses basic JavaScript only, while the other uses jQuery, which makes for an interesting stylistic contrast. It's also worth noting that, unlike the other sample, this one isn't subject to API call limits.

Although Remote Objects supports only create, select, update, and delete operations, it's quite flexible in how it does so. See "Using Remote Objects in JavaScript" in the *Visualforce Developer's Guide* for much more detail.

### Remote Objects Limitations

Visualforce Remote Objects offer new capabilities, and aren't subject to some resource limits, but come with limitations of their own. As a Pilot feature, Remote Objects is subject to change without providing backward compatibility.

#### <apex:remoteObjects>

Use this component, along with child `<apex:remoteObjectModel>` and `<apex:remoteObjectField>` components, to specify the sObjects and fields to access using Visualforce Remote Objects. These components generate models in JavaScript that you can use for basic create, select, update, and delete operations in your client-side JavaScript code.

#### <apex:remoteObjectModel>

Defines an sObject and its fields to make accessible using Visualforce Remote Objects. This definition can include a shorthand name for the object, which you can use in JavaScript instead of the full API name. This is especially useful if your organization has a namespace or if you're packaging an app, and makes your code more maintainable.

#### <apex:remoteObjectField>

Defines the fields to load for an sObject. Fields defined using this component, instead of the `fields` attribute of `<apex:remoteObjectModel>`, can have a shorthand name, which allows the use of a "nickname" for the field in client-side JavaScript code, instead of the full API name. Use as child of `<apex:remoteObjectModel>`.

## Remote Objects Limitations

Visualforce Remote Objects offer new capabilities, and aren't subject to some resource limits, but come with limitations of their own. As a Pilot feature, Remote Objects is subject to change without providing backward compatibility.

Remote Objects is subject to the following limits:

- 100 maximum rows retrieved in a single request. To display more rows, submit additional requests using the `OFFSET` query parameter.
- Although the `rendered` attribute is available on all three Remote Objects components, it's not meaningful to set it to false. Doing so disables the generation of the JavaScript for Remote Objects, which shouldn't change the output of a well-designed page, but it *will* break functionality that uses that JavaScript. Using `rendered` isn't supported.
- Geolocation fields can't be accessed using Remote Objects.

## <apex:remoteObjects>

Use this component, along with child <apex:remoteObjectModel> and <apex:remoteObjectField> components, to specify the sObjects and fields to access using Visualforce Remote Objects. These components generate models in JavaScript that you can use for basic create, select, update, and delete operations in your client-side JavaScript code.

### Attributes

Attribute Name	Attribute Type	Description	Required?	API Version	Access
id	String	An identifier that allows the component to be referenced by other components in the page.		14.0	global
jsNamespace	String	The JavaScript namespace for the generated models.		30.0	
rendered	Boolean	A Boolean value that specifies whether the component is rendered on the page. If not specified, this value defaults to true.		14.0	global

## <apex:remoteObjectModel>

Defines an sObject and its fields to make accessible using Visualforce Remote Objects. This definition can include a shorthand name for the object, which you can use in JavaScript instead of the full API name. This is especially useful if your organization has a namespace or if you're packaging an app, and makes your code more maintainable.

### Attributes

Attribute Name	Attribute Type	Description	Required?	API Version	Access
fields	String	A list of the object's fields to make accessible. Only these fields are available when existing objects are loaded from the server. The list is a comma-delimited string of the full API names of the fields.		30.0	
id	String	An identifier that allows the component to be referenced by other components in the page.		14.0	global
jsShorthand	String	A shorthand name, or 'nickname', that you can use in your JavaScript code, instead of the full object name.		30.0	
name	String	The API name of the sObject to access. The full API name includes your organization's namespace, if you have one.	Yes	30.0	
rendered	Boolean	A Boolean value that specifies whether the component is rendered on the page. If not specified, this value defaults to true.		14.0	global

**<apex:remoteObjectField>**

Defines the fields to load for an sObject. Fields defined using this component, instead of the `fields` attribute of `<apex:remoteObjectModel>`, can have a shorthand name, which allows the use of a "nickname" for the field in client-side JavaScript code, instead of the full API name. Use as child of `<apex:remoteObjectModel>`.

**Attributes**

Attribute Name	Attribute Type	Description	Required?	API Version	Access
<code>id</code>	String	An identifier that allows the component to be referenced by other components in the page.		14.0	global
<code>jsShorthand</code>	String	The shorthand name, or 'nickname', that you can use in your JavaScript code, instead of the full field name.		30.0	
<code>name</code>	String	The API name of the sObject field.	Yes	30.0	
<code>rendered</code>	Boolean	A Boolean value that specifies whether the component is rendered on the page. If not specified, this value defaults to true.		14.0	global

**namespace Attribute Added to <apex:actionFunction>**

The `namespace` attribute lets you specify a JavaScript namespace to add to functions generated by the `<apex:actionFunction>` component. Use it to avoid JavaScript function name collisions, and to implement organizational coding standards.

The `namespace` attribute must be a simple string, beginning with a letter, and consisting of only letters, numbers, or the underscore (`_`) character. For example, "MyOrg" and "Your\_App\_Name\_v2" are supported as namespaces. If not set, no namespace is added to the JavaScript functions generated by `<apex:actionFunction>`, preserving existing behavior.

Attribute Name	Attribute Type	Description	Required?	Default Value
<code>namespace</code>	String	The namespace to use for the generated JavaScript function.	No	

The `namespace` attribute is available in and compatible with all Visualforce pages.

**Additional Visualforce Improvements**

Visualforce features a number of other enhancements in this release.

***layout Attribute of <apex:component> Supports All API Versions***

Control the enclosing HTML that wraps a custom component with the `layout` attribute. This allows you to create custom components that flow or position themselves correctly within complex page HTML.

***verticalResize Attribute Added to <apex:emailPublisher>***

The `verticalResize` attribute lets you specify whether users can change the height of the Case Feed email publisher.

**Accessibility Improvement for <apex:message>**

The `<apex:message>` component displays messages for a specific other component on the page, such as a warning or error for an `<apex:inputField>` form field. These messages are now properly linked to the component generating the message, by adding an `aria-describedby` attribute to the source component, with the ID of the corresponding `<apex:message>`.

**Changes to title Attribute of <apex:page>**

The `title` attribute of `<apex:page>` lets you specify the contents of the HTML `<title>` element added to the page by Visualforce. Use it to set the window or tab title for the page.

**<analytics:reportChart>—Generally Available**

Use the `<analytics:reportChart>` component to add Salesforce report charts to a Visualforce page. You can filter chart data to show specific results.

**New <liveAgent:clientChatFileTransfer> Component—Pilot**

The `<liveAgent:clientChatFileTransfer>` is a new component for Live Agent that allows chat visitors to upload and transfer files to agents during a chat. This component is available as a pilot feature in Spring '14.

**useMultiline and autoResizeElementId Attributes Added to <liveAgent:clientChatInput>**

The `useMultiline` and `autoResizeElementId` attributes have been added to the `<liveAgent:clientChatInput>` component.

**PageReference URIs Support Anchors**

A `PageReference` is a reference to an instantiation of a page. Among other attributes, `PageReferences` consist of a URL and a set of query parameter names and values. You can construct `PageReference` objects with URIs that include anchors or fragment identifiers, that is, an identifier following a hash symbol (#).

**JavaScript Remoting Requests Default to System Mode (without sharing)**

Like other Apex classes, custom controllers and controller extensions run in system mode. Typically, you want a controller or controller extension to respect a user's organization-wide defaults, role hierarchy, and sharing rules. You can do that by using the `with sharing` keywords in the class definition. This behavior applies to standard Visualforce requests and requests made using JavaScript remoting.

**Checkbox for Adding Visualforce Tabs to Salesforce Classic Renamed**

To clarify the role of the `Mobile Ready` checkbox that exists on Visualforce Tab setup pages, the checkbox has been renamed to `Salesforce Classic Ready`.

**layout Attribute of <apex:component> Supports All API Versions**

Control the enclosing HTML that wraps a custom component with the `layout` attribute. This allows you to create custom components that flow or position themselves correctly within complex page HTML.

The `layout` attribute was originally introduced in and required API 25.0 (or later). It's now available in and compatible with all Visualforce components.

**verticalResize Attribute Added to <apex:emailPublisher>**

The `verticalResize` attribute lets you specify whether users can change the height of the Case Feed email publisher.

Attribute Name	Attribute Type	Description	Required?	Default Value
<code>verticalResize</code>	Boolean	A Boolean value that specifies whether the email publisher allows vertical resizing ( <code>true</code> ) or not ( <code>false</code> ).	No	<code>false</code>

The `verticalResize` attribute is available in API version 30.0.

## Accessibility Improvement for `<apex:message>`

The `<apex:message>` component displays messages for a specific other component on the page, such as a warning or error for an `<apex:inputField>` form field. These messages are now properly linked to the component generating the message, by adding an `aria-describedby` attribute to the source component, with the ID of the corresponding `<apex:message>`.

Existing Visualforce pages that use the `<apex:message>` component generate the new HTML automatically, improving their accessibility without new developer effort.

`<apex:message>` components should look the same when using the default Salesforce styling. Even with custom styling, visual changes should be minimal or nonexistent. In a few cases, you might need to make minor tweaks to your stylesheets if you want to preserve precise formatting.

## Changes to `title` Attribute of `<apex:page>`

The `title` attribute of `<apex:page>` lets you specify the contents of the HTML `<title>` element added to the page by Visualforce. Use it to set the window or tab title for the page.

In previous releases, if the `showHeader` attribute of `<apex:page>` was set to `false`, no `<title>` element would be generated, which wasn't always correct behavior. Beginning in API 30.0, the behavior is changed to be more consistent with people's expectations of what should happen, and also to provide more control when working with HTML5.

In pages set to API 30.0 or later, the `<apex:page>` `title` attribute generates an HTML `<title>` element inside the Visualforce-generated `<head>` element, *if there is one*.

Visualforce generates an HTML `<head>` element unless other attributes of `<apex:page>` are set in such a way that one won't be generated.

Finally, if either `applyHtmlTag` or `applyBodyTag` is `false`, the value of the `title` attribute is ignored. These tags are used to take full control of the HTML generated by the page, and it's assumed that your page contains full and complete HTML markup, including your desired `<title>` element.

The `title` attribute is available in and compatible with all Visualforce pages.

## `<analytics:reportChart>`—Generally Available

Use the `<analytics:reportChart>` component to add Salesforce report charts to a Visualforce page. You can filter chart data to show specific results.

With this release, the `<analytics:reportChart>` component is generally available. `<analytics:reportChart>` is available in API version 29.0 and later.

## New <liveAgent:clientChatFileTransfer> Component—Pilot

The <liveAgent:clientChatFileTransfer> is a new component for Live Agent that allows chat visitors to upload and transfer files to agents during a chat. This component is available as a pilot feature in Spring '14.



**Note:** File transfer in Live Agent is available as a pilot feature in Spring '14. To enable this feature for your organization, contact your salesforce.com representative.

The file transfer component lets agents send a request to upload a file into the chat to a customer they're chatting with. In turn, customers can upload or drag-and-drop a file into their chat window to send to an agent. Add this component to a custom chat window so your customers can share files with agents in real time.

Attribute Name	Attribute Type	Description	Required?	Default Value
fileTransferCanceledLabel	String	Specifies the message that appears in the chat log when the file transfer request is canceled; the default label is "The agent has canceled the file transfer request."		The agent has canceled the file transfer request.
fileTransferCancelFileLabel	String	Specifies the label for the button the customer clicks to cancel the file transfer; the default label is "Cancel."		Cancel
fileTransferDropFileLabel	String	Specifies the label that indicates where the file can be dropped; the default label is "Drop here."		Drop here.
fileTransferFailedLabel	String	Specifies the message that appears in the chat log when the file transfer is unsuccessful; the default label is "Your file upload failed. Please wait for instructions from the agent."		Your file upload failed. Please wait for instructions from the agent.
fileTransferSendFileLabel	String	Specifies the label for the button a customer clicks to upload the file; the default label is "Send File."		Send File
fileTransferSuccessfulLabel	String	Specifies the message that appears in the chat log when the file transfer is successful; the default label is "Your file has been successfully uploaded to the agent."		Your file has been successfully uploaded to the agent.
fileTransferUploadLabel	String	Specifies the label for the link a customer clicks to select a file to upload; the default label is "Upload or drag your file here."		Upload or drag your file here.



Attribute Name	Attribute Type	Description	Required?	Default Value
id	String	An identifier that allows the component to be referenced by other components in the page.		
rendered	Boolean	A Boolean value that specifies whether the component is rendered on the page. If not specified, this value defaults to true.		

The `<liveAgent:clientChatFileTransfer>` component is available in API version 30.0 and later. For information on using this component, see `<liveAgent:clientChatFileTransfer>` in the [Visualforce Developer's Guide](#).

## useMultiline and autoResizeElementId Attributes Added to `<liveAgent:clientChatInput>`

The `useMultiline` and `autoResizeElementId` attributes have been added to the `<liveAgent:clientChatInput>` component.

The `useMultiline` attribute specifies whether a customer chat window supports a multiple-line text input field. Without this attribute, the text input field in the customer's chat window won't expand or allow line breaks, even if the customer's message exceeds one line of text.

The `autoResizeElementId` attribute allows you to dynamically resize the element that contains your live chat transcript when the transcript exceeds a certain length. Without this attribute, the element that contains your live chat transcript remains a fixed size regardless of the length of the live chat transcript.



**Note:** The `useMultiline` attribute must be set to `true` to resize elements with the `autoResizeElementId` attribute.

For information on using these attributes, see `liveAgent:clientChatInput` in the [Visualforce Developer's Guide](#).

## PageReference URIs Support Anchors

A `PageReference` is a reference to an instantiation of a page. Among other attributes, `PageReferences` consist of a URL and a set of query parameter names and values. You can construct `PageReference` objects with URIs that include anchors or fragment identifiers, that is, an identifier following a hash symbol (#).

For example:

```
PageReference p = new PageReference('/home/home.jsp#logTicket');
```

In prior releases, anchors weren't correctly parsed when included in the URI passed to the `PageReference` constructor. For example, the above URI would be parsed as `/home/home.jsp%23logTicket`.

You could generally work around the issue by passing only the base URI, and then using the `setAnchor()` method to add the anchor. Beginning in API 30.0, that's unnecessary, and the above code functions as intended. Code that uses the above work-around continues to function; you can update it, or leave it as is.

**This change is versioned, and you must update your Apex classes to API 30.0 to use the corrected functionality.**

## JavaScript Remoting Requests Default to System Mode (without sharing)

Like other Apex classes, custom controllers and controller extensions run in system mode. Typically, you want a controller or controller extension to respect a user's organization-wide defaults, role hierarchy, and sharing rules. You can do that by using the `with sharing` keywords in the class definition. This behavior applies to standard Visualforce requests and requests made using JavaScript remoting.

In previous releases, if a `@RemoteAction` method was called on a class that didn't explicitly declare `with sharing` or `without sharing`, the method ran as though the class was declared `with sharing`. In other words, the default behavior was different for methods depending on whether they were invoked as part of a standard Visualforce request or a JavaScript remoting request. This wasn't intended behavior.

Beginning with API 30.0, requests execute consistently, regardless of how the class is declared, or how the method is invoked:

- By default, without a sharing declaration, the method operates in system mode, as though the class was declared `without sharing`.
- Methods in classes declared `without sharing` operate in system mode.
- Methods in classes declared `with sharing` respect the user's organization-wide defaults, role hierarchy, and sharing rules.

**This change is versioned. You must update your Apex classes to API 30.0 or later to access the new, correct behavior.**



**Note:** If a controller extension extends a standard controller, the logic from the standard controller doesn't execute in system mode. Instead, it executes in user mode, in which the permissions, field-level security, and sharing rules of the current user apply.

For information, see "Using the `with sharing` or `without sharing` Keywords" in the [Force.com Apex Code Developer's Guide](#).

## Checkbox for Adding Visualforce Tabs to Salesforce Classic Renamed

To clarify the role of the `Mobile Ready` checkbox that exists on Visualforce Tab setup pages, the checkbox has been renamed to `Salesforce Classic Ready`.

This checkbox displays on the Setup pages that you access by clicking **Create > Tabs**, then selecting **New** or **Edit** in the Visualforce Tabs related list. Selecting the checkbox indicates that the Visualforce page associated with the tab will display and function properly in the Salesforce Classic mobile app and adds the tab to the list of available tabs for your Salesforce Classic mobile configurations.

This checkbox has no effect on the use of Visualforce tabs or pages in the Salesforce1 app. To make Visualforce tabs and pages available in Salesforce1, see [Enable Visualforce Pages for Use in the Salesforce1 App](#).

## Force.com Canvas

Force.com Canvas enables you to easily integrate a third-party application in Salesforce. Force.com Canvas is a set of tools and JavaScript APIs that you can use to expose an application as a canvas app. This means you can take your new or existing applications and make them available to your users as part of their Salesforce experience.

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

**Group** and **Professional** editions can only use the OAuth access method unless profiles, page layouts, and the API have been enabled.

User Permissions Needed	
To create canvas apps and view them in the Canvas App Previewer:	“Customize Application”
	AND
	“Modify All Data”

This version of the Force.com Canvas SDK is 30.0.

For more information, see the Force.com Canvas Developer’s Guide.

### **Canvas Apps in the Publisher and the Feed—Generally Available**

Now generally available: Expose your canvas apps as publisher actions and as feed items.

#### **Canvas Apps Accessible from the Salesforce1 Navigation Menu**

If your organization uses Salesforce1, you can now expose a canvas app in the navigation menu to save time for your users accessing apps on mobile devices.

#### **Hide Publisher Header and Share Button**

Make your Force.com Canvas app appear in the publisher just the way you want by removing the publisher header and the **Share** button.

#### **Using Events Between a Canvas App and a Visualforce Page**

Use events such as `publish` between canvas apps and a Visualforce page.

#### **Debugging in a Canvas App**

Use your browser console to debug canvas issues.

## **Canvas Apps in the Publisher and the Feed—Generally Available**

Now generally available: Expose your canvas apps as publisher actions and as feed items.

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

**Group** and **Professional** editions can only use the OAuth access method unless profiles, page layouts, and the API have been enabled.

Now you can extend the standard publisher and feed to include content from your Web applications. Give users the ability to quickly take action through the native publisher, and have that action happen in your application through the Salesforce user interface.

### **Canvas Apps in the Publisher**

Force.com Canvas enables you to expose your canvas apps as publisher actions. The publisher allows users access to the most common actions in your organization. You can expand the publisher to include a canvas app so that users can leverage the common custom actions of a canvas app. These actions can then integrate with the feed and create a feed post specific to the

action that was performed. This graphic shows an example of the canvas custom action in the publisher and the canvas app in the publisher pane.

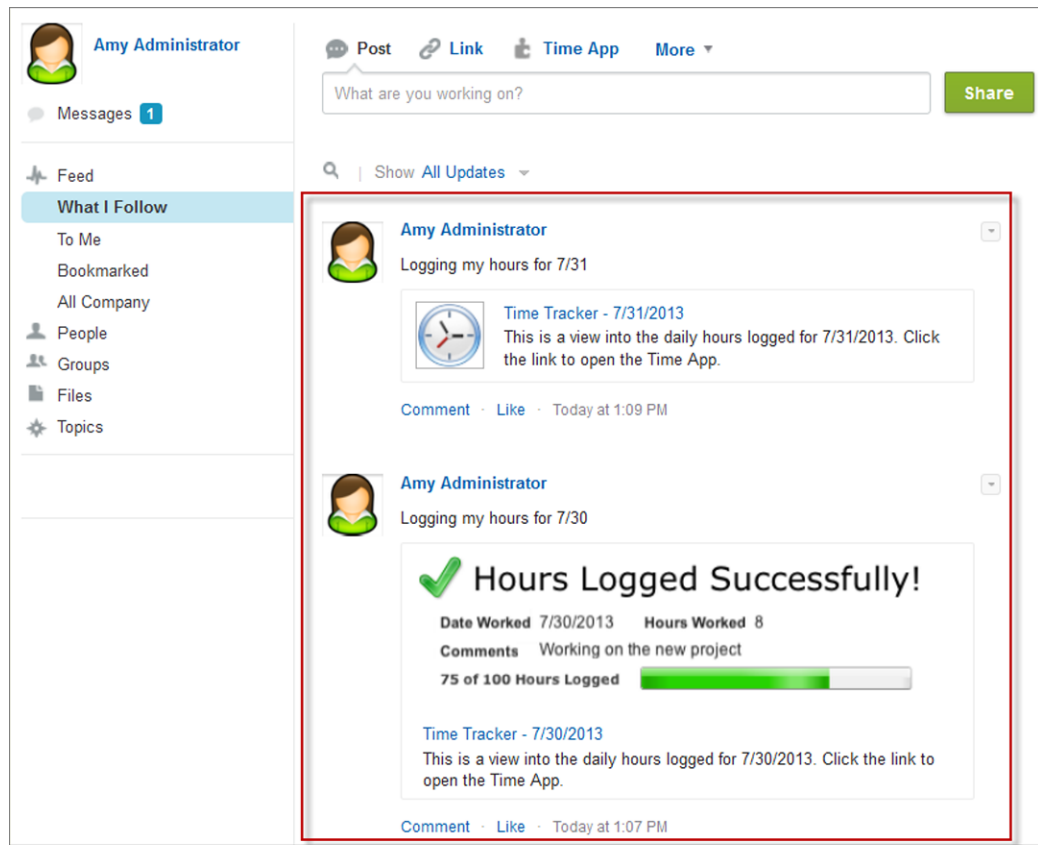
The screenshot displays a Salesforce publisher pane with a top navigation bar containing 'Post', 'Link', 'Time App' (highlighted with a red box), and 'More'. Below the navigation bar, the text 'Logging my hours for 7/30' is visible. The main content area features a clock icon and the title 'Log your Hours'. It includes two input fields: 'Date Worked' with the value '7/30/2013' and 'Hours Worked' with the value '8'. A 'Comments' section contains the text 'Working on the new project'. At the bottom, there is a dropdown menu set to 'To My Followers' and a green 'Share' button.

Users can still access the canvas app in the standard way for full functionality; but the canvas app in the publisher provides quick access to the most common functions of your app. A user can select the publisher action and create a Chatter feed item that can be a text post, a link post, or even a canvas post. Force.com Canvas custom actions in the publisher are also available to users in Salesforce1.

## Canvas Apps in the Feed

Force.com Canvas enables you to expose your canvas apps as feed items. The feed gives users information about what's happening inside of Salesforce and information about records and groups they're following.

This graphic shows an example of canvas app in the feed where the first feed item is collapsed and the second feed item shows the full app.



The feed item could display actions depending on the current user. The canvas app could then post a feed item to the user's manager, and the manager could approve or deny the hours logged. Since the content is served from the canvas app, the developer has full control over the behavior.

## Canvas Apps Accessible from the Salesforce1 Navigation Menu

If your organization uses Salesforce1, you can now expose a canvas app in the navigation menu to save time for your users accessing apps on mobile devices.

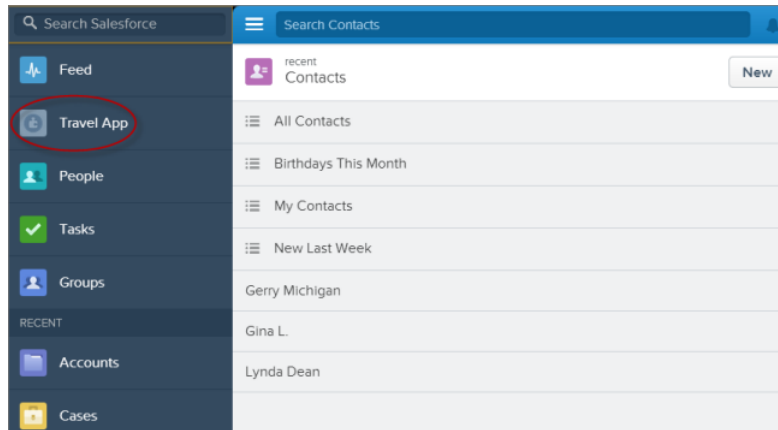
Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions.

**Group** and **Professional** editions can only use the OAuth access method unless profiles, page layouts, and the API have been enabled.

To display your app in the navigation menu:

1. In Salesforce, from Setup, click **Create > Apps**.
2. In the Connected Apps related list, click the app you want to make available in the navigation menu and click **Edit**.
3. In the Canvas App Settings section, in the **Locations** field, select **Mobile Nav** and click **Add**.
4. Click **Save**.
5. For the canvas app to appear in the navigation menu you must add it to the mobile navigation. From Setup, click **Mobile Administration > Mobile Navigation**.
6. From the available menu items, select your app and click **Add**.
7. Click **Save**.

Your app appears as a selection in the navigation menu for users to access.



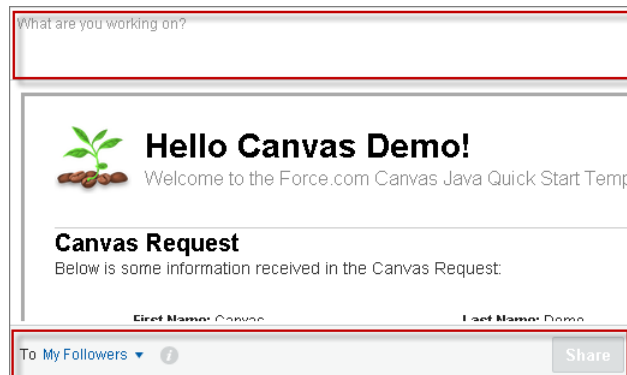
## Hide Publisher Header and Share Button

Make your Force.com Canvas app appear in the publisher just the way you want by removing the publisher header and the **Share** button.

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

**Group** and **Professional** editions can only use the OAuth access method unless profiles, page layouts, and the API have been enabled.

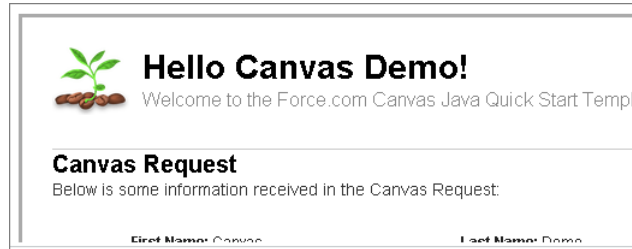
When creating a Force.com Canvas app, you now have the option of hiding the header and the **Share** button in the publisher from your users for your canvas app.



This can be helpful if you want to use your own structure for containing the canvas app in the publisher. To hide the header and the **Share** button:

1. From Setup, click **Create > Apps**.
2. In the Connected Apps related list, click **New** or select an app to edit. Fill out the fields for your canvas app.
3. In the Canvas App Settings section, in the **Locations** field, select **Publisher**. You must select this location for your canvas app to appear in the publisher.
4. To hide the publisher header, which contains the "What are you working on?" text, select **Hide Publisher Header**. This hides the header in both the full Salesforce site and in Salesforce1.
5. To hide the publisher **Share** button from users in both the full Salesforce site and in Salesforce1, select **Hide Publisher Share Button**. This checkbox is enabled only if **Hide Publisher Header** has been selected.

Here's an app without the header and footer:



## Using Events Between a Canvas App and a Visualforce Page

Use events such as `publish` between canvas apps and a Visualforce page.

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

**Group** and **Professional** editions can only use the OAuth access method unless profiles, page layouts, and the API have been enabled.

Force.com Canvas provides methods that you can use to publish and subscribe to events between your canvas app and the parent Visualforce page. This process includes publishing events from your Visualforce page, listening for events on your Visualforce page, unsubscribing from events on your Visualforce page, and resizing the Visualforce page that contains the canvas app.

You can access these methods in your Visualforce page by using the new `Controller.js` library.

Method	Signature	Description
<code>publish</code>	<code>publish(String name, Object payload [, String[] target])</code>	Used to publish an event that the canvas app subscribes to. The <code>target</code> parameter is optional. It can contain a single canvas app name or an array of canvas app names.
<code>resize</code>	<code>resize(String height, String width, String target)</code>	Used by a Visualforce page to resize a canvas app <code>iFrame</code> .
<code>subscribe</code>	<code>subscribe(Subscriber event)</code>	Used by a Visualforce page to subscribe to events that the canvas app might publish.
<code>unsubscribe</code>	<code>unsubscribe(Unsubscriber event)</code>	Used by a Visualforce page to unsubscribe to parent events that the canvas app might publish.

## Debugging in a Canvas App

Use your browser console to debug canvas issues.

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

**Group** and **Professional** editions can only use the OAuth access method unless profiles, page layouts, and the API have been enabled.

When using the Force.com Canvas SDK, you can enable debug mode to make troubleshooting easier.

1. With your canvas app open in your browser, open the console.
2. Type `Sfdc.canvas.console.enable()` ; and press return.
3. Refresh your browser.

Use data from this screen to debug canvas-related problems.

## Apex Code

Using syntax that looks like Java and acts like database stored procedures, Apex enables developers to add business logic to most system events, including button clicks, related record updates, and Visualforce pages. Apex code execution can be initiated by Web service requests and from triggers on objects.

Available in: <b>Performance, Unlimited, Developer, Enterprise, and Database.com</b> Editions
---

Apex includes the following enhancements. For detailed information on these enhancements, refer to the [Force.com Apex Code Developer's Guide](#).

### ***New and Changed Classes, Methods, and Interfaces***

These classes, methods, and interfaces are new or have changed in this release.

#### ***Chatter in Apex***

To create custom Chatter experiences in Salesforce, use Chatter in Apex.

#### ***Increased Query Timeout in Batch Start Method***

The query timeout in the batch Apex `start` method has been increased to 10 minutes.

#### ***New Independent Auto-Number Sequence Test Option***

A new option has been added to ensure that auto-number fields in your organization's records don't have gaps due to test records created in Apex tests.

## New and Changed Classes, Methods, and Interfaces

These classes, methods, and interfaces are new or have changed in this release.

#### ***New AuthToken Instance Method***

#### ***Changes to Methods in the Sites Class***

#### ***MilestoneTriggerTimeCalculator Interface***

#### ***getInteractionQueries() and getLimitInteractionQueries() Limits Methods Removed***

#### ***New EncodingUtil Method***

#### ***New String Methods***

## New AuthToken Instance Method

This new instance method has been added to the `AuthToken` class.



***refreshAccessToken(String, String, String)***

Returns a map from the third-party identifier containing a refreshed access token for the currently logged-in Salesforce user.

**refreshAccessToken(String, String, String)**

Returns a map from the third-party identifier containing a refreshed access token for the currently logged-in Salesforce user.

**Signature**

```
public Map<String, String> refreshAccessToken(String authProviderId, String providerName,
String oldAccessToken)
```

**Parameters**

***authProviderId***

Type: String

***providerName***

Type: String

***oldAccessToken***

Type: String

**Return Value**

Type: Map<String, String>

**Usage**

This method works when using Salesforce or an OpenID Connect provider, but not when using Facebook or Janrain. The returned map contains `AccessToken` and `RefreshError` keys. Evaluate the keys in the response to check if the request was successful. For a successful request, the `RefreshError` value is `null`, and `AccessToken` is a token value. For an unsuccessful request, the `RefreshError` value is an error message, and the `AccessToken` value is `null`.

When successful, this method updates the token stored in the database, which you can get using

```
Auth.AuthToken.getAccessToken().
```

**Example**

```
String accessToken = Auth.AuthToken.getAccessToken('0SOD000000000De', 'Open ID connect');
Map<String, String> responseMap = Auth.AuthToken.refreshAccessToken('0SOD000000000De', 'Open
ID connect', accessToken);
```

A successful request includes the access token in the response.

```
(RefreshError, null) (AccessToken, 00DD00000007BhE!AQkAQFzj...)
```

**Changes to Methods in the Sites Class**

Calls to several methods have changed. Calls in API version 30.0 and later will add at least one DML statement and record to the current transaction's count of DML statements and records. Calls to these methods prior to API version 30.0 commit the transaction, making it impossible to roll back to a save point before the call.

This change affects the following methods:

- `changePassword`
- `createPersonAccountPortalUser`
- `createPortalUser`
- `forgotPassword`
- `login`
- `setPortalUserAsAuthProvider`

## MilestoneTriggerTimeCalculator Interface

The `Support.MilestoneTriggerTimeCalculator` interface calculates the time trigger for a milestone.

Implement the `Support.MilestoneTriggerTimeCalculator` interface to calculate a dynamic time trigger for a milestone based on the milestone type, the properties of the case, and case-related objects. To implement the `Support.MilestoneTriggerTimeCalculator` interface, you must first declare a class with the `implements` keyword as follows:

```
global class Employee implements Support.MilestoneTriggerTimeCalculator {
```

The class for the `Support.MilestoneTriggerTimeCalculator` must implement the `calculateMilestoneTriggerTime(String, String)` method, which must be declared as `global` or `public`. The implementation of this method accepts the `caseId` and `milestoneTypeId` String parameters and returns an Integer value for the calculated milestone trigger time.

This sample class demonstrates the implementation of the `Support.MilestoneTriggerTimeCalculator` interface. In this sample, the case's priority and the milestone `m1` determine that the time trigger is 18 minutes.

```
global class myMilestoneTimeCalculator implements Support.MilestoneTriggerTimeCalculator {
    global Integer calculateMilestoneTriggerTime(String caseId, String milestoneTypeId) {
        Case c = [SELECT Priority FROM Case WHERE Id=:caseId];
        MilestoneType mt = [SELECT Name FROM MilestoneType WHERE Id=:milestoneTypeId];
        if (c.Priority != null && c.Priority.equals('High')) {
            if (mt.Name != null && mt.Name.equals('m1')) { return 7; }
            else { return 5; }
        }
        else {
            return 18;
        }
    }
}
```

This test class can be used to test the implementation of `Support.MilestoneTriggerTimeCalculator`.

```
@isTest
private class MilestoneTimeCalculatorTest {
    static testMethod void testMilestoneTimeCalculator() {

        // Select an existing milestone type to test with
        MilestoneType[] mtLst = [SELECT Id, Name FROM MilestoneType LIMIT 1];
        if(mtLst.size() == 0) { return; }
        MilestoneType mt = mtLst[0];

        // Create case data.
        // Typically, the milestone type is related to the case,
        // but for simplicity, the case is created separately for this test.
        Case c = new Case(priority = 'High');
        insert c;

        myMilestoneTimeCalculator calculator = new myMilestoneTimeCalculator();
```

```

        Integer actualTriggerTime = calculator.calculateMilestoneTriggerTime(c.Id, mt.Id);

        if(mt.name != null && mt.Name.equals('m1')) {
            System.assertEquals(actualTriggerTime, 7);
        }
        else {
            System.assertEquals(actualTriggerTime, 5);
        }

        c.priority = 'Low';
        update c;
        actualTriggerTime = calculator.calculateMilestoneTriggerTime(c.Id, mt.Id);
        System.assertEquals(actualTriggerTime, 18);
    }
}

```

## getInteractionQueries() and getLimitInteractionQueries() Limits Methods Removed

These methods were added as part of a pilot release for Fast Create/Lookup/Update/Delete elements in Visual Workflow, because Visual Workflow used different limits for queries than Apex. Visual Workflow now has the same query limits as Apex, so these methods are no longer needed and have been removed.

## New EncodingUtil Method

This new static method has been added to the `EncodingUtil` class.

### ***convertFromHex(String)***

Converts the specified hexadecimal (base 16) string to a Blob value and returns this Blob value.

### **convertFromHex(String)**

Converts the specified hexadecimal (base 16) string to a Blob value and returns this Blob value.

#### **Signature**

```
public static Blob convertToHex(String inputString)
```

#### **Parameters**

##### ***inputString***

Type: String

The hexadecimal string to convert. The string can contain only valid hexadecimal characters (0-9, a-f, A-F) and must have an even number of characters.

#### **Return Value**

Type: Blob

#### **Usage**

Each byte in the Blob is constructed from two hexadecimal characters in the input string.

The `convertFromHex` method throws the following exceptions.

- `NullPointerException` — the *inputString* is null.
- `InvalidParameterValueException` — the *inputString* contains invalid hexadecimal characters or doesn't contain an even number of characters.

### Example

```
Blob blobValue = EncodingUtil.convertFromHex('4A4B4C');  
System.assertEquals('JKL', blobValue.toString());
```

## New String Methods

These new instance methods have been added to the `String` class.

### `escapeJava()`

Returns a `String` whose characters are escaped using Java String rules. Characters escaped include quotes and control characters, such as tab, backslash, and carriage return characters.

### `escapeUnicode()`

Returns a `String` whose Unicode characters are escaped to a Unicode escape sequence.

### `unescapeJava()`

Returns a `String` whose Java literals are unescaped. Literals unescaped include escape sequences for quotes (`\"`) and control characters, such as tab (`\\t`), and carriage return (`\\n`).

### `unescapeUnicode()`

Returns a `String` whose escaped Unicode characters are unescaped.

## `escapeJava()`

Returns a `String` whose characters are escaped using Java String rules. Characters escaped include quotes and control characters, such as tab, backslash, and carriage return characters.

### Signature

```
public String escapeJava()
```

### Return Value

Type: `String`

The escaped string.

### Example

```
// Input string contains quotation marks  
String s = 'Company: "Salesforce.com"';  
String escapedStr = s.escapeJava();  
// Output string has the quotes escaped  
System.assertEquals('Company: \\"Salesforce.com\\"', escapedStr);
```

## `escapeUnicode()`

Returns a `String` whose Unicode characters are escaped to a Unicode escape sequence.

**Signature**

```
public String escapeUnicode()
```

**Return Value**

Type: String

The escaped string.

**Example**

```
String s = 'De onde você é?';  
String escapedStr = s.escapeUnicode();  
System.assertEquals('De onde voc\\u00EA \\u00E9?', escapedStr);
```

**unescapeJava()**

Returns a String whose Java literals are unescaped. Literals unescaped include escape sequences for quotes (\\") and control characters, such as tab (\\t), and carriage return (\\n).

**Signature**

```
public String unescapeJava()
```

**Return Value**

Type: String

The unescaped string.

**Example**

```
String s = 'Company: \\\"Salesforce.com\\\"';  
String unescapedStr = s.unescapeJava();  
System.assertEquals('Company: \"Salesforce.com\"', unescapedStr);
```

**unescapeUnicode()**

Returns a String whose escaped Unicode characters are unescaped.

**Signature**

```
public String unescapeUnicode()
```

**Return Value**

Type: String

The unescaped string.

**Example**

```
String s = 'De onde voc\\u00EA \\u00E9?';  
String unescapedStr = s.unescapeUnicode();  
System.assertEquals('De onde você é?', unescapedStr);
```

## Chatter in Apex

To create custom Chatter experiences in Salesforce, use Chatter in Apex.

Many Chatter REST API resource actions are exposed as static methods on Apex classes in the `ConnectApi` namespace. These methods use other `ConnectApi` classes to input and return information. The `ConnectApi` namespace is referred to as *Chatter in Apex*.

In Apex, it is possible to access some Chatter data using SOQL queries and objects. However, `ConnectApi` classes expose Chatter data in a much simpler way. Data is localized and structured for display. For example, instead of making many calls to access and assemble a feed, you can do it with a single call.



**Note:** To integrate mobile apps, intranet sites, and third party Web applications with Chatter, use [Chatter REST API](#).

[New and Changed Chatter in Apex Classes](#)

[New and Changed Chatter in Apex Output Classes](#)

[New and Changed Chatter in Apex Enums](#)

## New and Changed Chatter in Apex Classes

### Get a directory of feeds

A new `ConnectApi.ChatterFeeds.getFeedDirectory` method returns a directory of all feeds available to the logged-in user.

### Get a directory of filter feeds

A new `ConnectApi.ChatterFeeds.getFilterFeedDirectory` method returns a directory of filter feeds for the logged-in user. A filter feed is the news feed filtered to include feed items whose parent is a specified object type, for example Account or Contact.

### Get a feed that includes only feed items updated since the last call

You may want to get only feed items that have been updated since the last call to get feed items.

The `ConnectApi.FeedItemPage` output class has a new `updatesToken` property. A feed item is considered to be updated if it was created since the last feed request, or if `sort=LastModifiedDateDesc` and a comment was added to the feed item since the last feed request. Adding likes and topics doesn't update a feed item.

To get a value for the `updatesToken` property, call a `getFeedItemsFromFeed` or `getFeedItemsFromFilterFeed` method and pass one of these supported feed types:

- Company
- Files
- Filter
- Groups
- News
- People
- Record

To get the updated feed items, call one of these new methods and pass the `updatesToken` token in the `updatedSince` parameter:

- `ConnectApi.ChatterFeeds.getFeedItemsFromFilterFeedUpdatedSince(String communityId, String subjectId, String keyPrefix, Integer recentCommentCount, ConnectApi.FeedDensity`

- density, String pageParam, Integer pageSize, String updatedSince)—Returns the specified page of feed items for the specified user and the specified key prefix. Includes only feed items that have been updated since the time specified in the *updatedSince* parameter.
- `ConnectApi.ChatterFeeds.getFeedItemsUpdatedSince(String communityId, ConnectApi.FeedType feedType, Integer recentCommentCount, ConnectApi.FeedDensity density, String pageParam, Integer pageSize, String updatedSince)`—Returns the specified page of feed items for the Company feed type. Includes only feed items that have been updated since the time specified in the *updatedSince* parameter. Each feed item contains no more than the specified number of comments.
  - `ConnectApi.ChatterFeeds.getFeedItemsUpdatedSince(String communityId, ConnectApi.FeedType feedType, String subjectId, Integer recentCommentCount, ConnectApi.FeedDensity density, String pageParam, Integer pageSize, String updatedSince)`—Returns the specified page of feed items for the Files, Groups, News, People, and Record feed types. Includes only feed items that have been updated since the time specified in the *updatedSince* parameter. Each feed item contains no more than the specified number of comments.
  - `getFeedItemsUpdatedSince(String communityId, ConnectApi.FeedType feedType, String subjectId, Integer recentCommentCount, ConnectApi.FeedDensity density, String pageParam, Integer pageSize, String updatedSince, Boolean showInternalOnly)`—Returns the specified page of feed items for the Record feed type. Includes only feed items that have been updated since the time specified in the *updatedSince* parameter. Specify whether to return feed items posted by internal (non-community) users only.

These methods are not permitted to access organization data in tests. To test code that calls these methods, use special test methods that register outputs to be returned in a test context. The test method names prepend `setTest` to the regular method names, for example, `setTestSearchFeedItemsInFeed`. Each new method has a new test method with a matching signature (combination of arguments).

### Get a feed that shows feed items posted by internal users only

If Salesforce Communities is enabled, you may want to get feed items that have been posted by internal (non-community) users only. Pass `true` for the `showInternalOnly` parameter and `ConnectApi.FeedType.Record` for the `feedType` parameter to any of these new methods:

- `getFeedItemsFromFeed(String communityId, ConnectApi.FeedType feedType, String subjectId, Integer recentCommentCount, ConnectApi.FeedDensity density, String pageParam, Integer pageSize, ConnectApi.FeedSortOrder sortParam, Boolean showInternalOnly)`—Returns the feed items on the specified page for the specified user, for the specified feed type in the specified order. Each feed item includes no more than the specified number of comments. Specify whether to return feed items posted by internal (non-community) users only.
- `getFeedItemsUpdatedSince(String communityId, ConnectApi.FeedType feedType, String subjectId, Integer recentCommentCount, ConnectApi.FeedDensity density, String pageParam, Integer pageSize, String updatedSince, Boolean showInternalOnly)`—Returns the specified page of feed items for the Record feed type. Includes only feed items that have been updated since the time specified in the *updatedSince* parameter. Specify whether to return feed items posted by internal (non-community) users only.
- `searchFeedItemsInFeed(String communityId, ConnectApi.FeedType feedType, String subjectId, Integer recentCommentCount, ConnectApi.FeedDensity density, String pageParam, Integer pageSize, ConnectApi.FeedSortOrder sortParam, String q, Boolean showInternalOnly)`—Searches the feed items for a specified feed type and context user, and returns a specified page and page size in a specified sort order. Each feed item includes no more than the specified number of comments. Specify whether to return feed items posted by internal (non-community) users only.

These methods are not permitted to access organization data in tests. To test code that calls these methods, use special test methods that register outputs to be returned in a test context. The test method names prepend `setTest` to the regular method names, for example, `setTestSearchFeedItemsInFeed`. Each new method has a new test method with a matching signature (combination of arguments).

## Moderate communities

The `ConnectApi.CommunityModeration` class has these new static methods:

- `addFlagToComment(String CommunityId, String CommentId, ConnectApi.CommunityFlagVisibility visibility)`—Add a moderation flag with specified visibility to a comment.
- `addFlagToFeedItem(String CommunityId, String FeedItemId, ConnectApi.CommunityFlagVisibility visibility)`—Add a moderation flag with specified visibility to a feed item.
- `getFlagsOnComment(String CommunityId, String CommentId, ConnectApi.CommunityFlagVisibility visibility)`—Get moderation flags with specified visibility added to a comment.
- `getFlagsOnFeedItem(String CommunityId, String FeedItemId, ConnectApi.CommunityFlagVisibility visibility)`—Get moderation flags with specified visibility added to a feed item.

## Use Chatter Messages in Communities

The `ConnectApi.ChatterMessages` class has these new static methods that support Communities:

- `getConversation(String, String)`—Returns a conversation the context user has access to across their available communities.
- `getConversation(String, String, String, Integer)`—Returns a conversation from a specific page with a specific number of results the context user has access to across their available communities.
- `getConversations(String)`—Returns the most recent conversations the context user has access to across their available communities.
- `getConversations(String, String, Integer)`—Returns a specific page of conversations with a specific number of results the context user has access to across their available communities.
- `getMessage(String, String)`—Returns a message the context user has access to across their available communities.
- `getMessages(String)`—Returns a list of the most recent messages the logged-in user has access to across their available communities.
- `getMessages(String, String, Integer)`—Returns the specified page of messages with the specified number of results the logged-in user has access to across their available communities.
- `getUnreadCount(String)`—Returns the number of conversations the context user has marked unread across their available communities. If the number is less than 50, it will return the exact unreadCount, and `hasMore = false`. If the context user has more than 50, `unreadCount = 50` and `hasMore = true`.
- `markConversationRead(String, String, Boolean)`—Marks a conversation as read or unread for the context user across their available communities.
- `replyToMessage(String, String, String)`—Adds the specified text as a response to a previous message the context user has access to across their available communities.
- `searchConversation(String, String, String)`—Returns the conversation the context user has access to with a page of messages that matches any of the specified search across their available communities.
- `searchConversation(String, String, String, Integer, String)`—Returns the conversation the context user has access to with a page of messages that matches any of the specified search across their available communities.
- `searchConversations(String, String)`—Returns a page of conversations the context user has access to where member names and messages in the conversations match any of the specified search criteria across their available communities.
- `searchConversations(String, String, Integer, String)`—Returns a specific page of conversations with the specified number of results the context user has access to where member names and messages in the conversations match any of the specified search criteria across their available communities.
- `searchMessages(String, String)`—Returns a page of messages the context user has access to that matches any of the specified criteria across their available communities.



- `searchMessages(String, String, Integer, String)`—Returns a specific page of messages with the specified number of results the context user has access to that matches any of the specified criteria across their available communities.
- `sendMessage(String, String, String)`—Sends the specified text to the indicated recipients across their available communities.

### Get recently viewed records

To get a list of records recently viewed by the context user, use two new `ConnectApi.RecordDetails.getRecentRecords` methods. Both methods return a `RecordSummaryList` object.

- `getRecentRecords(String communityId, String userId)`—Returns an object that contains a list populated by objects that contain summary information about a record recently used by the context user.
- `getRecentRecords(String communityId, String userId, Integer size)`—Returns an object that contains a list populated by a specified number of objects. Each object contains summary information about a record recently used by the context user.

### Get a record view

A new `ConnectApi.RecordDetails.getRecordView` method returns a `RecordView` object, which contains a combined view of layout information (metadata) and data for the specified record. Make one method call to get enough information to display a record.

This method is available in Unlimited, Enterprise, and Developer editions.

This method uses a whitelist to determine whether to return information about a record. If the object type in the `recordId` argument is not in the whitelist, the call returns the error "`ConnectApi.ConnectApiException: Object type not supported`". These are the supported objects:

Object Type	Available
Custom objects	30.0
Account	30.0
Campaign	30.0
Case	30.0
CollaborationGroup	30.0
Contact	30.0
ContentDocument	30.0
ContentVersion	30.0
Contract	30.0
Dashboard	30.0
Event	30.0
Lead	30.0
LiveChatTranscript	30.0
Opportunity	30.0
OpportunityLineItem	30.0
Product	30.0
ServiceContract	30.0

Object Type	Available
Solution	30.0
Task	30.0
User	30.0

### Use topics on records

If your administrator enables topics for objects, these static methods in the `ConnectApi.Topics` class support topics on records of that object type.

- `assignTopic(String, String, String)`—Assigns the specified topic to the specified record.
- `assignTopicByName(String, String, String)`—Assigns the specified topic to the specified record.
- `getTopics(String, String)`—Returns the first page of topics assigned to the specified record.
- `getTopicSuggestions(String, String, Integer)`—Returns suggested topics for the specified record.
- `getTopicSuggestions(String, String)`—Returns suggested topics for the specified record.
- `unassignTopic(String, String, String)`—Removes the specified topic from the specified record.

### Search for a group in My Groups

Call `ConnectApi.ChatterUsers.searchUserGroups` to search for a group that the context user belongs to.

## New and Changed Chatter in Apex Output Classes

### `ConnectApi.ActorWithId`

This class has one new property, `recordViewUrl`. The URL of the Chatter REST API record view resource for this record, or `null` if this record does not have a record view layout, or if “Connect Records API” is not enabled for this organization, or if the record type isn’t supported.

### `ConnectApi.ApprovalAttachment`

This class has one new property, `processInstanceStepId`, which identifies a step in the approval process.

### `ConnectApi.ChatterGroup`

This class has one new property, `additionalLabel`, which is an additional label for the group, for example, “Archived,” “Private,” or “Private with Customers.” If there isn’t an additional label, the value is `null`.

The `emailToChatterAddress` property is no longer reserved for future use. This property specifies a group’s email address for posting to the group by email. This property returns `null` if Chatter emails and posting to Chatter by email aren’t both enabled in your organization.

### `ConnectApi.Community`

This output class has these new properties:

- `allowMembersToFlag`—Specifies whether members of the community can flag content.
- `knowledgeableEnabled`—Specifies whether knowledgeable people and endorsements are available for topics (`true`), or not (`false`).
- `privateMessagesEnabled`—Specifies whether members of a community can send private messages to each other (`true`) or not (`false`).
- `siteUrl`—The site URL for the community, which is the custom domain plus a URL prefix.

### `ConnectApi.ContentAttachment`

This output class has these new properties:

- `renditionUrl240By180`—URL to the 240 x 180 rendition resource for the file.

- `renditionUrl1720By480`—URL to the 720 x 480 rendition resource for the file.
- `textPreview`—Text preview of the file if available, `null` otherwise.
- `thumb120By90RenditionStatus`—Specifies the rendering status of the 120 x 90 preview image of the file. One of these values:
  - ◊ `Processing`—Image is being rendered.
  - ◊ `Failed`—Rendering process failed.
  - ◊ `Success`—Rendering process was successful.
  - ◊ `Na`—Rendering is not available for this image.
- `thumb240By180RenditionStatus`—Specifies the rendering status of the 240 x 180 preview image of the file. One of these values:
  - ◊ `Processing`—Image is being rendered.
  - ◊ `Failed`—Rendering process failed.
  - ◊ `Success`—Rendering process was successful.
  - ◊ `Na`—Rendering is not available for this image.
- `thumb720By480RenditionStatus`—Specifies the rendering status of the 720 x 480 preview image of the file. One of these values:
  - ◊ `Processing`—Image is being rendered.
  - ◊ `Failed`—Rendering process failed.
  - ◊ `Success`—Rendering process was successful.
  - ◊ `Na`—Rendering is not available for this image.

The `hasImagePreview` property is no longer supported.

The `isInMyFileSync` property is no longer reserved for future use, but it is currently available through a pilot program. This property is `true` if the file is included in the user's Salesforce Files folder, and is synced between that folder and Chatter; `false` otherwise.

### **ConnectApi.Features**

This output class has a new `storeDataOnDevicesEnabled` property that indicates whether the Salesforce1 downloadable apps can use secure, persistent storage on mobile devices to cache data.

### **ConnectApi.FeedDirectory**

A directory of feeds and favorites.

This new class has these properties:

- `favorites`—A list of feed favorites.
- `feeds`—A list of `ConnectApi.FeedDirectoryItem` objects.

### **ConnectApi.FeedDirectoryItem**

The definition of a feed.

This new class has these properties:

- `feedItemsUrl`—Chatter REST API resource URL for the feed items of a specific feed.
- `feedType`—The feed type. One of these values:
  - ◊ `Bookmarks`—Contains all feed items saved as bookmarks by the logged-in user.
  - ◊ `Company`—Contains all feed items except feed items of type `TrackedChange`. To see the feed item, the user must have sharing access to its parent.
  - ◊ `Files`—Contains all feed items that contain files posted by people or groups that the logged-in user follows.

- ◊ **Filter**—Contains the news feed filtered to contain feed items whose parent is a specified object type.
  - ◊ **Groups**—Contains all feed items from all groups the logged-in user either owns or is a member of.
  - ◊ **Moderation**—Contains all feed items that have been flagged for moderation. The Communities Moderation feed is available only to users with “Moderate Community Feeds” permissions.
  - ◊ **News**—Contains all updates for people the logged-in user follows, groups the user is a member of, files and records the user is following, all updates for records whose parent is the logged-in user, and every feed item and comment that mentions the logged-in user or that mentions a group the logged-in user is a member of.
  - ◊ **People**—Contains all feed items posted by all people the logged-in user follows.
  - ◊ **Record**—Contains all feed items whose parent is a specified record, which could be a group, user, object, file, or any other standard or custom object. When the record is a group, the feed also contains feed items that mention the group.
  - ◊ **To**—Contains all feed items with mentions of the logged-in user, feed items the logged-in user commented on, and feed items created by the logged-in user that are commented on.
  - ◊ **Topics**—Contains all feed items that include the specified topic.
  - ◊ **UserProfile**—Contains feed items created when a user changes records that can be tracked in a feed, feed items whose parent is the user, and feed items that @mention the user. This feed is different than the news feed, which returns more feed items, including group updates.
- **feedUrl**—Chatter REST API resource URL for a specific feed.
  - **keyPrefix**—For filter feeds, this value is the key prefix associated with the entity type used to filter this feed. All feed items in this feed have a parent whose entity type matches this key prefix value. For non-filter feeds, this value is `null`. A *key prefix* is the first three characters of a record ID, which specifies the entity type.
  - **label**—Localized label of the feed.

#### **ConnectApi.FeedItemPage**

This output class has these new properties:

- **updatesToken**—Token to use in an `updatedSince` parameter, or `null` if not available.
- **updatesUrl**—A Chatter REST API resource with a query string containing the value of the `updatesToken` property. The resource returns the feed items that have been updated since the last request. Property is `null` if not available.

#### **ConnectApi.File**

This output class has a new `textPreview` property, which is a text preview of the file, if available. Otherwise, the value is `null`.

The `isInMyFileSync` property is no longer reserved for future use, but it is currently available through a pilot program. This property is `true` if the file is included in the user’s Salesforce Files folder, and is synced between that folder and Chatter; `false` otherwise.

#### **ConnectApi.MentionCompletion**

This output class has a new `userType` property. If the record represented by this completion is a user, this value is the user type associated with that user; otherwise the value is `null`. The property contains one of these values:

- **ChatterGuest**—User is a Chatter customer in an external group
- **ChatterOnly**—User is a Chatter Free customer
- **Guest**—Unauthenticated users
- **Internal**—User is a standard organization member
- **Portal**—User is a Customer Portal User, a communities user, and so on.
- **System**—User is Chatter Expert or a system user
- **Undefined**—User is a user type that is a custom object.

**ConnectApi.PhoneNumber**

This output class has a new `label` property, which is a localized string indicating the phone type: Fax, Mobile, or Work.

This output class has a new `phoneType` property, which is the phone type. It can be one of these values: Fax, Mobile, or Work. These values are not localized.



**Important:** The `type` property is no longer available as of API version 30.0. Use the `phoneType` property instead.

**ConnectApi.RecordSummaryList**

A collection of any record in the organization including custom objects, returning only basic details.

This new class has these properties:

- `records`—A list of records.
- `url`—The URL to this list of records.

**ConnectApi.TimeZone**

The user's time zone as selected in My Settings in Salesforce. This value does not reflect a device's current location.

This new class has these properties:

- `gmtOffset`—Signed offset, in hours, from GMT
- `name`—Display name of this time zone

**ConnectApi.TopicEndorsement**

This new output class represents one user endorsing another user on a single topic. It has these properties:

- `endorsee`—User being endorsed.
- `endorsementId`—ID of the endorsement record.
- `endorser`—User performing the endorsement.
- `topic`—Topic the user is being endorsed for.
- `url`—URL to the resource for the endorsement record.

**ConnectApi.TopicEndorsementCollection**

This new output class is a collection of `ConnectApi.TopicEndorsement` output classes. It has these properties:

- `currentPageUrl`—Chatter REST API URL identifying the current page.
- `topicEndorsements`—List of topic endorsements
- `nextPageUrl`—Chatter REST API URL identifying the next page or `null` if there isn't a next page.
- `previousPageUrl`—Chatter REST API URL identifying the previous page or `null` if there isn't a previous page.

**ConnectApi.User**

This class has one new property, `additionalLabel`, which is an additional label for the user, for example, "Customer," "Partner," or "Acme Corporation." If there isn't an additional label, the value is `null`.

**ConnectApi.UserSettings**

This output class has a new `timeZone` property, which contains a `ConnectApi.TimeZone` object.

These properties are no longer reserved for future use, but they are currently available through a pilot program:

- `fileSyncStorageLimit`—Maximum storage for synced files, in megabytes (MB).
- `hasFileSync`—User has "Sync Files" permission.

**ConnectApi.Zone**

This output class has a new `url` property, which is the URL of the zone.

## New and Changed Chatter in Apex Enums

**ConnectApi.CommunityFlagVisibility**

Specifies the visibility behavior of a flag for various user types.

- **ModeratorsOnly**—The flag is visible only to users with moderation permissions on the flagged item.
- **SelfAndModerators**—The flag is visible to the creator of the flag and to users with moderation permissions on the flagged item.

**ConnectApi.FeedType**

This enum has a new value, `Filter`, which is the news feed filtered to contain feed items whose parent is a specific object type.

## Increased Query Timeout in Batch Start Method

The query timeout in the batch `start` method has been increased to 10 minutes.

The `start` method is called at the beginning of a batch Apex job.

## New Independent Auto-Number Sequence Test Option

A new option has been added to ensure that auto-number fields in your organization's records don't have gaps due to test records created in Apex tests.

This option isolates the auto-number sequence used in Apex tests from the sequence used in your organization. As a result, the creation of test data in Apex tests doesn't cause the sequence of auto-number fields to be higher for new non-test records in your organization.

If this option isn't enabled, there will be gaps in the auto-number field whenever Apex tests create test records with auto-number fields. For example, if `Account` has an auto-number field, and there are 50 account records in your organization, the field value of the last created account can be `N-0050`. After running an Apex test that creates five test accounts, this causes the auto-number sequence to be increased by five even though these test records aren't committed to the database and are rolled back. Next time you create a non-test account record, its auto-number field value will be `N-0056` instead of `N-0051`, hence, the gap in the sequence. If you enable this option before running an Apex test that creates test data, the auto-number sequence is preserved and the next non-test record will have a contiguous auto-number value of `N-0051`.

You can enable this option from Setup by clicking **Develop > Apex Test Execution > Options...**, selecting **Independent Auto-Number Sequence**, and clicking **OK**.

Note that gaps in the auto-number sequence can still occur in other situations, for example, when triggers that attempt to insert new records fail to execute and records are rolled back. In this case, gaps can't be completely avoided because, in the same transaction, some records can be successfully inserted while others are rolled back.

## API

Use the API to create applications that integrate with Salesforce.

## Objects

API objects represent database information for your organization. For example, the central object in the Salesforce data model represents accounts—companies and organizations involved with your business, such as customers, partners, and competitors.

### SOQL

Use the Salesforce Object Query Language (SOQL) to construct query strings used in Salesforce APIs.

### SOSL

Use the Salesforce Object Search Language (SOSL) to perform text searches using Salesforce APIs.

### REST API

Use REST API to create Salesforce applications that can create, retrieve, update or delete records, using any development environment that supports REST and Web services.

### SOAP API

Use SOAP API to create Salesforce applications that can create, retrieve, update or delete records, using any development environment that supports Web services.

### Chatter REST API

Use Chatter REST API to integrate Chatter into a variety of applications, such as mobile applications, intranet sites, and third-party Web applications.

### Data.com API

Use the Data.com APIs for access to the most up-to-date Data.com records. You can search, match, and purchase company and contact records.

### Bulk API

Use Bulk API to efficiently load and retrieve your organization's Salesforce data.

### Streaming API

Use Streaming API to receive notifications for changes to Salesforce data that match a data query you define, in a secure and scalable way.

### Tooling API

Use Tooling API to build custom development tools for Salesforce applications.

### Metadata API

Use the Metadata API to manage customization information, such as custom object definitions and page layouts, for your organization.

### Place Order API

New in version 30.0, the Place Order REST API lets you integrate Salesforce order data into your apps programmatically. For example, you can use the REST-based API to integrate Salesforce with a third-party shopping cart. The API has several resources that let you create a combination of contracts, orders, and order products in one call.

## Objects

API objects represent database information for your organization. For example, the central object in the Salesforce data model represents accounts—companies and organizations involved with your business, such as customers, partners, and competitors.

### **New Objects**

These objects are new in API version 30.0.

### **Changed Objects**

These objects have changed in API version 30.0.

## **New Objects**

These objects are new in API version 30.0.

### **Announcement**

Represents a Chatter group announcement.

### **ForecastingType**

Represents a forecast type.

### **LimitAllocationPerApp**

Represents a connected app quota for an API limit. This is a pilot feature.

### **NetworkActivityAudit**

Represents an audit trail of moderation actions in Communities.

### **NetworkModeration**

Represents a flag on an item in a community.

### **OwnedContentDocument**

Represents a file owned by a user.

### **ProfileSkill**

Represents a profile skill, which describes a user's professional knowledge. This is a global record for the organization, and users are associated through the ProfileSkillUser object.

### **ProfileSkillEndorsement**

Represents a detail relationship of ProfileSkillUser. An endorsement of a profile skill shows approval and support of another user's publicly declared skill.

### **ProfileSkillEndorsementHistory**

Represents the history of changes to the fields of a ProfileSkillEndorsement.

### **ProfileSkillFeed**

Represents a single feed item in the feed displayed on the detail page for a profile skill.

### **ProfileSkillHistory**

Represents the history of changes to the fields of a ProfileSkill.

### **ProfileSkillShare**

Represents a sharing entry on a ProfileSkill.

### **ProfileSkillUser**

Represents a detail relationship of User. The object connects profile skills with users.



**ProfileSkillUserHistory**

Represents the history of changes to the fields of a ProfileSkillUser.

## Changed Objects

These objects have changed in API version 30.0.

**Changed Objects That Affect Earlier API Versions**

These objects have changed in API version 30.0 and affect earlier API versions.

**AccountTerritoryAssignmentRuleItem**

The AccountTerritoryAssignmentRuleItem object can now be created or deleted if the BooleanFilter field on its corresponding AccountTerritoryAssignmentRule object is a null value.

**CollaborationGroup, CollaborationGroupFeed, CollaborationGroupMember, and CollaborationGroupMemberRequest**

- The labels (different from the object name) for these objects no longer include Chatter. For example, the object label for the CollaborationGroup object is now Group instead of the earlier label, Chatter Group.
- CollaborationGroup and CollaborationGroupMember are now layoutable, so you can use the describeLayout () call to retrieve layout information for both objects.

**PermissionSet and Profile**

The following user permissions, which were previously available only in the Salesforce user interface, are now available in the API.

- PermissionsAllowEmailIC
- PermissionsAssignTopics
- PermissionsChatterInternalUser
- PermissionsChatterInviteExternalUsers
- PermissionsChatterOwnGroups
- PermissionsContentAdministrator
- PermissionsContentHubUser
- PermissionsCreateTopics
- PermissionsCreateWorkspaces
- PermissionsDeleteTopics
- PermissionsEditTopics
- PermissionsEnforceMutualAuthentication
- PermissionsForceTwoFactor
- PermissionsHasFileSync
- PermissionsIdentityEnabled
- PermissionsIsSsoEnabled
- PermissionsManageContentPermissions
- PermissionsManageContentProperties
- PermissionsManageContentTypes
- PermissionsManageNetworks
- PermissionsManageRealm
- PermissionsModerateChatter
- PermissionsModerateNetworkFeeds
- PermissionsModerateNetworkFiles
- PermissionsTwoFactorApi

- `PermissionsViewContent`
- `PermissionsViewGlobalHeader`



**Note:** Availability of specific permissions depends on the organization edition and user licenses.

### Question

The `SelectBestAnswerById` field can now be updated using the API.

### RecentlyViewed

The `RecentlyViewed` object has the following new field: `NetworkId`.

### Changed Objects

These objects have changed in API version 30.0.

#### Account

The `Account` object has the following new field: `PhotoUrl`.

The `Account` object has the following new read-only compound address fields available in the SOAP and REST APIs:

- `BillingAddress`
- `ShippingAddress`
- `PersonMailingAddress`

See [Address and Geolocation Compound Fields in the SOAP and REST APIs—Beta](#) on page 236 for additional details about compound address fields.

#### AccountCleanInfo

The `AccountCleanInfo` object has a new read-only compound address field available in the SOAP and REST APIs: `Address`. See [Address and Geolocation Compound Fields in the SOAP and REST APIs—Beta](#) on page 236 for additional details about compound address fields.

#### ActivityHistory

`ActivityHistory` has the following new read-only fields: `PrimaryWhoId` and `PrimaryAccountId`. These fields contain the `WhoId` and `AccountId` values from an activity record. If your organization uses Shared Activities, when you query activities on a lead, a contact, or an account, the values in the `WhoId` and `AccountId` fields match the fields in that object and not necessarily the fields in the activity record itself. If you query an entity other than a lead or a contact, the `WhoId` field is `null`.

#### AppMenuItem

The `AppMenuItem` object has these new fields:

- `CanvasAccessMethod`
- `CanvasEnabled`
- `CanvasReferenceId`
- `CanvasSelectedLocations`
- `CanvasUrl`

#### AttachedContentDocument

The `AttachedContentDocument` object has these new fields: `ContentSize` and `FileType`.

The following objects no longer have a parent-to-child relationship with `AttachedContentDocument`:

- `ContractLineItem`
- `EmailMessage`

- EmailTemplate
- LiveChatTranscript

### BusinessHours

The BusinessHours object has the following new field: BusinessHoursId.

### CaseMilestone

The CaseMilestone object has the following new field: BusinessHoursId.

### CombinedAttachment

The CombinedAttachment object has these new fields: ContentSize and FileType.

### Contact

The Contact object has the following new field: PhotoUrl.

The Contact object has the following new read-only compound address fields available in the SOAP and REST APIs:

- MailingAddress
- OtherAddress

See [Address and Geolocation Compound Fields in the SOAP and REST APIs—Beta](#) on page 236 for additional details about compound address fields.

### ContactCleanInfo

The ContactCleanInfo object has a new read-only compound address field available in the SOAP and REST APIs: Address. See [Address and Geolocation Compound Fields in the SOAP and REST APIs—Beta](#) on page 236 for additional details about compound address fields.

### Contract

The Contract object has the following new read-only compound address fields available in the SOAP and REST APIs:

- BillingAddress
- ShippingAddress

See [Address and Geolocation Compound Fields in the SOAP and REST APIs—Beta](#) on page 236 for additional details about compound address fields.

### ContractLineItem

The ContractLineItem object no longer has a parent-to-child relationship with AttachedContentDocument.

### CustomBrand

The parent entity of this object can now be either a network or an organization.

If the parentId references a network ID, the branding applies to that network (community) only. If the parentId references an organization ID, the branding applies to the organization when it is accessed through Salesforce1. Label is Branded Entity ID.

### CustomBrandAsset

A CustomBrandAsset can now apply to either a community or an organization using Salesforce1.

The AssetCategory field has the following new values:

- LargeLogoImageId—Only used for Salesforce1. The logo that appears on the splash page when you start Salesforce1. Label is Large logo image.
- SmallLogoImageId—Only used for Salesforce1. The logo that appears on the publisher in Salesforce1. Label is Small logo image.

This field also has the following changed values:

- `MotifZeronaryColor`—The background color for the header. Label is `Zeronary motif color`.  
If this `CustomBrandAsset` is for a network, this is the header color for the network. If it is for an organization, this is the header color when users access Salesforce1.
- `MotifQuaternaryColor`—If this `CustomBrandAsset` is for a network, this is the background color for network pages. If it is for an organization, this is the background color for the Salesforce1 splash page. Label is `Quaternary motif color`.
- `LoginLogoImageId`—The logo that appears on the community login page for external users. In Salesforce1, this logo also appears on the community splash page. Label is `Logo image displayed on the login page`.

### DandBCompany

The `DandBCompany` object has the following new read-only compound address fields available in the SOAP and REST APIs:

- `Address`
- `MailingAddress`

See [Address and Geolocation Compound Fields in the SOAP and REST APIs—Beta](#) on page 236 for additional details about compound address fields.

### EmailMessage

The `EmailMessage` object no longer has a parent-to-child relationship with `AttachedContentDocument`.

### EmailTemplate

The `EmailTemplate` object no longer has a parent-to-child relationship with `AttachedContentDocument`.

### ForecastingAdjustment

The `ForecastingAdjustment` object has the following new field: `ForecastingTypeID`. This field is writable and required for inserts. It is not writable for updates.

### ForecastingFact

The `ForecastingFact` object has the following new read-only field: `ForecastingTypeID`.

### ForecastingItem

The `ForecastingItem` object has the following new read-only field: `ForecastingTypeID`.

### ForecastingQuota

The `ForecastingQuota` object has the following new read/write field: `ForecastingTypeID`. This field is writable and required for inserts. It is not writable for updates.

### Lead

The `Lead` object has the following new field: `PhotoUrl`.

The `Lead` object has a new read-only compound address field available in the SOAP and REST APIs: `Address`. See [Address and Geolocation Compound Fields in the SOAP and REST APIs—Beta](#) on page 236 for additional details about compound address fields.

### LeadCleanInfo

The `LeadCleanInfo` object has a new read-only compound address field available in the SOAP and REST APIs: `Address`. See [Address and Geolocation Compound Fields in the SOAP and REST APIs—Beta](#) on page 236 for additional details about compound address fields.

### LiveChatButton

The `LiveChatButton` object has the following new fields: `NumberOfReroutingAttempts` and `OptionsHasRerouteDeclinedRequest`.

### LiveChatTranscript

The LiveChatTranscript object has the following new fields: Abandoned, ChatDuration, MaxResponseTimeOperator, MaxResponseTimeVisitor, and WaitTime.

The LiveChatTranscript object no longer has a parent-to-child relationship with AttachedContentDocument.

### Network

The Network object has these new fields: OptionsKnowledgeableEnabled and OptionsPrivateMessagesEnabled.

### NetworkMember

The NetworkMember object has these new fields: PreferencesDisableMessageEmail and PreferencesDisableEndorsementEmail.

### OpenActivity

OpenActivity has the following new read-only fields: PrimaryWhoId and PrimaryAccountId. These fields contain the WhoId and AccountId values from an activity record. If your organization uses Shared Activities, when you query activities on a lead, a contact, or an account, the values in the WhoId and AccountId fields match the fields in that object and not necessarily the fields in the activity record itself. If you query an entity other than a lead or a contact, the WhoId field is null.

### Organization

The Organization object has a new read-only compound address field available in the SOAP and REST APIs: Address. See [Address and Geolocation Compound Fields in the SOAP and REST APIs—Beta](#) on page 236 for additional details about compound address fields.

### PermissionSetLicense

The PermissionSetLicense object has two new fields.

- DeveloperName
- Language

### Quote

The Quote object has the following new read-only compound address fields available in the SOAP and REST APIs:

- BillingAddress
- ShippingAddress
- QuoteToAddress
- AdditionalAddress

See [Address and Geolocation Compound Fields in the SOAP and REST APIs—Beta](#) on page 236 for additional details about compound address fields.

### QuoteLineItem

The QuoteLineItem object has the following new field: Product2Id.

### ServiceContract

The ServiceContract object has the following new read-only compound address fields available in the SOAP and REST APIs:

- BillingAddress
- ShippingAddress

See [Address and Geolocation Compound Fields in the SOAP and REST APIs—Beta](#) on page 236 for additional details about compound address fields.

## Site

The Site object has the following new fields:

- `ClickjackProtectionLevel`
- `GuestUserId`

## SlaProcess

The SlaProcess object has the following new field: `BusinessHoursId`.

## Solution

The label for the `IsPublished` field on the Solution object was renamed to `Public`.

## Task

Added a field, `RecurrenceRegeneratedType`, that represents what triggers a repeating task to repeat. Add this field to a page layout together with the `RecurrenceInterval` field, which determines the number of days between the trigger (due date or close date) and the due date of the next repeating task. The `RecurrenceRegeneratedType` field has the following picklist values:

- **None:** The task doesn't repeat.
- **After due date:** The next repeating task will be due the specified number of days after the current task's due date.
- **After date completed:** The next repeating task will be due the specified number of days after the current task is closed.
- **(Task closed):** This task, now closed, was opened as part of a repeating series. You can use this field to distinguish repeating tasks from other types of tasks for tracking purposes.

## Topic

The Topic object represents topics on records in addition to topics on posts.

## TopicAssignment

The TopicAssignment object represents topics assigned to records in addition to topics assigned to posts. Administrators must enable topics for objects before users can add topics to records of that object type.

## User

The User object has these new fields: `IsBadged` and `UserPreferencesDisableEndorsementEmail`.

The `FederationIdentifier` field has been assigned the `idLookup` property, and can be used as an External ID for `upsert()` operations. This is particularly useful when you have implemented single sign-on using delegated authentication, and you need to bulk edit, or add, user accounts to synchronize them with your user database.

The User object has a new read-only compound address field available in the SOAP and REST APIs: `Address`. See [Address and Geolocation Compound Fields in the SOAP and REST APIs—Beta](#) on page 236 for additional details about compound address fields.

## UserPreference

The Preference field has the new picklist values `Visualforce` `Viewstate` `Inspector` and `Forecasting Displayed Type`.

## UserProfile

The UserProfile object has a new `UserPreferencesDisableEndorsementEmail` field.

The UserProfile object has a new read-only compound address field available in the SOAP and REST APIs: `Address`. See [Address and Geolocation Compound Fields in the SOAP and REST APIs—Beta](#) on page 236 for additional details about compound address fields.

**UserRecordAccess**

The UserRecordAccess object is now exposed as a foreign key on the record. You can't filter by or provide the `UserId` or `RecordId` fields when using this object as a lookup or foreign key. The following query returns the records to which a running user has read access.

```
SELECT Id, Name, UserRecordAccess.HasReadAccess FROM Account
```

## SOQL

Use the Salesforce Object Query Language (SOQL) to construct query strings used in Salesforce APIs.

For a full description of the SOQL query syntax, see the [Force.com SOQL and SOSL Reference](#).

**SELECT Support for Compound Standard Address and Geolocation Fields**

SOAP and REST API SOQL queries support compound standard address and geolocation fields in the `SELECT` clause. For example:

```
SELECT location__c
FROM Warehouse__c
```

See [Address and Geolocation Compound Fields in the SOAP and REST APIs—Beta](#) on page 236 for complete details.

**WHERE DISTANCE () and ORDER BY DISTANCE () Support for Compound Standard Address Fields**

SOAP and REST API SOQL queries support compound standard address fields in the `WHERE` and `ORDER BY` clauses when used with the `DISTANCE ()` operator. For example:

```
SELECT Id, Name, BillingAddress
FROM Account
WHERE DISTANCE(BillingAddress, GEOLOCATION(37.775,-122.418), "mi") < 20
ORDER BY DISTANCE(BillingAddress, GEOLOCATION(37.775,-122.418), "mi")
LIMIT 10
```

See [Address and Geolocation Compound Fields in the SOAP and REST APIs—Beta](#) on page 236 for complete details.

## SOSL

Use the Salesforce Object Search Language (SOSL) to perform text searches using Salesforce APIs.

**Paging Using the OFFSET Clause**

Use `OFFSET` to specify the starting row offset into the result set returned by your query. Using `OFFSET` is helpful for paging into large result sets, in scenarios where you need to quickly jump to a particular subset of the entire results. For example, the following SOSL query returns a result set that skips the first 100 rows of the full query results:

```
FIND {test} RETURNING Merchandise__c(Name LIMIT 50 OFFSET 100)
```

## REST API

Use REST API to create Salesforce applications that can create, retrieve, update or delete records, using any development environment that supports REST and Web services.

## New Resources

### Process Approvals

Returns a list of all approval processes. Can also be used to submit a particular record if that entity supports an approval process and one has already been defined. Records can be approved and rejected if the current user is an assigned approver.

### Process Rules

Returns a list of all workflow rules. If a rule has actions, the actions will be listed under the rule. Can also be used to trigger all workflow rules that are associated with a specified record. The actions for a rule are only fired if the rule's criteria is met.

### Search Suggested Article Title Matches

Returns a list of Salesforce Knowledge articles whose titles match the user's search query string. Provides a shortcut to navigate directly to likely relevant articles, before the user performs a search.

### Search Suggested Queries



**Note:** This REST feature is currently available through a pilot program and is available in all Development Edition organizations. For information on enabling it for your organization, contact [salesforce.com](https://salesforce.com).

Returns a list of suggested searches based on the user's query string text matching searches that other users have performed in Salesforce Knowledge. Provides a way to improve search effectiveness, before the user performs a search.

### SObject Approval Layouts

Returns a list of approval layouts for a specified object.

### SObject Suggested Articles for Case

Returns a list of suggested Salesforce Knowledge articles for a case.

## Changed Resources

### Limits Resource—Pilot



**Note:** This REST feature is currently available through a pilot program and is available in all Development Edition organizations. For information on enabling it for your organization, contact [salesforce.com](https://salesforce.com).

The resource also returns these limits:

- Daily number of single emails sent to external email addresses using Apex or Force.com APIs
- Daily number of mass emails sent to external email addresses using Apex or Force.com APIs

The resource also returns these limits if the API user has the “Manage Users” permission.

- Data storage (MB)
- File storage (MB)

### Query Resource Feedback Parameter — Pilot



**Note:** Using `explain` with the REST API query resource is a pilot feature. There is no support associated with this pilot feature. For more information, contact [salesforce.com](https://salesforce.com), inc.

The Query resource has a new `explain` parameter that's used to return query performance feedback without executing the query. Here's an example REST API request for getting performance feedback for a query that uses `Merchandise__c`:

```
/services/data/v30.0/query?explain=SELECT+Name+FROM+Merchandise__c+WHERE+CreatedDate+=+TODAY+AND+Price__c>+10.0
```



Here are example results from this query, that indicate there are two possible plans. This first plan uses the CreatedDate index field to improve the performance, while the second plan scans all records without using an index. The first plan will be used if the query is executed.

```
{
  "plans" : [ {
    "cardinality" : 1,
    "fields" : [ "CreatedDate" ],
    "leadingOperationType" : "Index",
    "relativeCost" : 0.0,
    "subjectCardinality" : 3,
    "subjectType" : "Merchandise__c"
  }, {
    "cardinality" : 1,
    "fields" : [ ],
    "leadingOperationType" : "TableScan",
    "relativeCost" : 0.65,
    "subjectCardinality" : 3,
    "subjectType" : "Merchandise__c"
  } ]
}
```

## SOAP API

Use SOAP API to create Salesforce applications that can create, retrieve, update or delete records, using any development environment that supports Web services.

### New Calls

These calls are new in API version 30.0.

#### **describeApprovalLayout()**

Retrieves metadata about approval layouts for the specified object type.

### Changed Calls

These calls have been changed in API version 30.0.

#### **DescribeAppMenu()**

If you're accessing the API using a custom community URL, the `describeAppMenu()` call retrieves the tab set associated with the community.

#### **DescribeQuickActionResult()**

Returns an array of `DescribeQuickActionResult` objects. Each object represents a publisher quick action for a specified object. The name of the `sourceObjectType` field, which denotes the object used for the action, was changed to `contextObjectType`.

#### **Login()**

The `organizationID` is no longer required when logging into a community as a Partner Community or partner portal user.

#### **performQuickActions()**

If you're accessing the API using a custom community URL and you use the `performQuickActions()` call to create a group, the group will only be available within that community.

## Chatter REST API

Use Chatter REST API to integrate Chatter into a variety of applications, such as mobile applications, intranet sites, and third-party Web applications.

To integrate mobile apps, intranet sites, and third party Web applications with Chatter, use Chatter REST API.



**Note:** To create custom Chatter experiences in Salesforce, use [Chatter in Apex](#).

### [New and Changed Resources](#)

### [New and Changed Request Bodies](#)

### [New and Changed Response Bodies](#)

## New and Changed Resources

### Work with files and folders

Chatter REST API for Salesforce Files Sync is available through a pilot program in version 30.0. To use Chatter REST API to work with files and folders, use these new and updated resources:

- File Information (`/chatter/files/fileId`) can now be used to move a file to a different folder. These request parameters for POST are no longer reserved for future use:
  - ◇ `isDataSync`—The request is automatically generated by an automated client.
  - ◇ `isInMyFileSync`—true if the file is included in the user's Salesforce Files folder, and is synced between that folder and Chatter; false otherwise.

These request parameters for PATCH are no longer reserved for future use:

- ◇ `isInMyFileSync`—true if the file is included in the user's Salesforce Files folder, and is synced between that folder and Chatter; false otherwise.
- ◇ `parentFolderId`—ID of the containing folder.
- Folder Information (`/chatter/folders/folderId`) is a new resource. Use this resource to get information about a folder, modify, or delete a folder.
- Folder Contents (`/chatter/folders/folderId/items`) is a new resource. Use this resource to get information about the contents of a folder and to add items to a folder.
- Users Files, General (`/chatter/users/me/files/`) has these request parameters for POST that are no longer reserved for future use:
  - ◇ `isDataSync`—The request is automatically generated by an automated client.
  - ◇ `isInMyFileSync`—true if the file is included in the user's Salesforce Files folder, and is synced between that folder and Chatter; false otherwise.

### Share files with people

To share files with people, you can now make a POST request to the File Shares resource (`/chatter/files/fileId/file-shares`).

Now when making a GET request to the File Shares resource, the first share returned is the organization record share. In communities, the first share returned is the network record share.

### Share a file via link

Use the new File Shares Link resource (`/chatter/files/fileId/file-shares/link`) to create, access, and delete a file's share link.

### Get a feed that includes only feed items updated since the last request

To keep a response size small, you may want to get only feed items that have been updated since the last request to get feed items.

The Feed Item Page response body has a new `updatesUrl` property, which contains a resource with a query string that contains the value of the new `updatesToken` property, which is an opaque token. To get updated feed items, make a request to the `updatesUrl` resource. A feed item is considered to be updated if it was created since the last feed request, or if `sort=LastModifiedDateDesc` and a comment was added to the feed item since the last feed request. Adding likes and topics doesn't update a feed item.

These feeds return a non-null value for the `updatesUrl` property:

- Company—`/chatter/feeds/company/feed-items`
- Files—`/chatter/feeds/files/me/feed-items`
- Filter—`/chatter/feeds/filter/me/filterId/feed-items`
- Groups—`/chatter/feeds/groups/me/feed-items`
- News—`/chatter/feeds/news/me/feed-items`
- People—`/chatter/feeds/people/me/feed-items`
- Record—`/chatter/feeds/record/recordId/feed-items`

### Get feed items posted by internal users only

If Salesforce Communities is enabled, you may want to get feed items that have been posted by internal (non-community) users only. Use the `showInternalOnly` parameter with the Record Feed resource:  
`/chatter/feeds/record/recordId/feed-items?showInternalOnly=true`.

### Search for a group in My Groups

Use the new `q` parameter in a GET request to the User Groups resource (`/chatter/users/me/groups`) to search for a group the logged-in user belongs to. Pass two or more characters in addition to any wildcard characters.

### Search for a record

Use the new Record View Search resource (`/connect/records?q=searchTerm`) to search for a record and get a collection of list views grouped by object type. The response contains data and metadata for each list view so you can make one request to get enough information to display search results.

This resource is available in Unlimited, Enterprise, and Developer editions.

### Get data and layout information about a record

Use the new Record View Information resource (`/connect/records/recordsId`) to get data and layout information (metadata) about the specified record. Returns the metadata defined in the page layout editor. Make one request to get enough information to display a record.

This resource is available in Unlimited, Enterprise, and Developer editions.

This resource uses a whitelist. If the object type requested is not in the whitelist, the request returns a 400 response with an "INVALID\_TYPE" error code. These are the supported objects:

Object Type	Available
Custom objects	30.0
Account	30.0
Campaign	30.0

Object Type	Available
Case	30.0
CollaborationGroup	30.0
Contact	30.0
ContentDocument	30.0
ContentVersion	30.0
Contract	30.0
Dashboard	30.0
Event	30.0
Lead	30.0
LiveChatTranscript	30.0
Opportunity	30.0
OpportunityLineItem	30.0
Product	30.0
ServiceContract	30.0
Solution	30.0
Task	30.0
User	30.0

### Get recently used records

Use the new User Records, Recent resource (`/chatter/users/me/records/recent`) to get information about records recently used by the logged-in user. Optionally specify the number of records to return.

This resource is available in Unlimited, Enterprise, and Developer editions.

This resource uses a whitelist. If the object type requested is not in the whitelist, the request returns a 400 response with an "INVALID\_TYPE" error code. These are the supported objects:

Object Type	Available
Custom objects	30.0
Account	30.0
Campaign	30.0
Case	30.0
CollaborationGroup	30.0
Contact	30.0
ContentDocument	30.0
ContentVersion	30.0
Contract	30.0
Dashboard	30.0

Object Type	Available
Event	30.0
Lead	30.0
LiveChatTranscript	30.0
Opportunity	30.0
OpportunityLineItem	30.0
Product	30.0
ServiceContract	30.0
Solution	30.0
Task	30.0
User	30.0

### Endorse people who are knowledgeable about a topic

Use these new resources:

- Topics, Endorse People (/connect/topics/**topicId**/endorsements) is a collection of endorsements on knowledgeable people for a specific topic. Use this resource to endorse people for the specified topic and to get information about endorsements for a specific topic.
- Topic Endorsements (/connect/topic-endorsements/**endorsementId**) is a topic endorsement created when a user was endorsed for a topic. Use this resource to delete a topic endorsement and to get information about a topic endorsement.

### Discover people who are knowledgeable about a topic

Knowledgeable People is a list of users considered to be knowledgeable about a topic. To use Chatter REST API to access Knowledgeable People, use these new resources:

- Topics, Knowledgeable People List (/connect/topics/**topicId**/knowledgeable-users) is a list of people considered to be knowledgeable about a topic. Use this resource to get a list of knowledgeable people for the specified topic.
- Topics, Opt Outs from Knowledgeable People List (/connect/topics/**topicId**/topic-opt-outs) are topic opt outs. Use this resource to get information about a topic's opt outs and to hide yourself from the list of Knowledgeable People for the specified topic.
- Topics, Opt Out from Knowledgeable People List (/connect/topic-opt-outs/**topicOptOutId**) is a topic opt out. Use this resource to get information about a topic opt out and to show yourself in the Knowledgeable People list after you've hidden yourself.
- Topics a User is Knowledgeable About (/chatter/users/me/knowledgeable-about-topics) is a list of topics that the specified user is knowledgeable about. Use this resource to get a list of topics for the specified user.

### Moderate communities

Use the new Moderation Flags on Files resource

(/connect/communities/**communityId**/chatter/files/**fileId**/moderation-flags) to return the number of times a file has been flagged by community members and to flag files for moderation and delete flags.

Use the new Flagged Files resource (/connect/communities/**communityId**/chatter/files/moderation) to get information about flagged files in a community.

To flag posts, comments, and files for moderation, you can now make POST requests to these Community Moderation resources:

- `/connect/communities/communityId/chatter/feed-items/feedItemId/moderation-flags`
- `/connect/communities/communityId/chatter/comments/commentId/moderation-flags`
- `/connect/communities/communityId/chatter/files/fileId/moderation-flags`

These resources also support a new `visibility` parameter for GET requests that specifies the visibility behavior of a flag for various user types.

### Use Chatter message resources in communities

Chatter messages are now supported in communities. Use these new resources:

- `/connect/communities/communityId/chatter/users/userId/messages`
- `/connect/communities/communityId/chatter/users/userId/messages/messageId`
- `/connect/communities/communityId/chatter/users/userId/conversations/unread-count`
- `/connect/communities/communityId/chatter/users/userId/conversations`
- `/connect/communities/communityId/chatter/users/userId/conversations/conversationId`

### User resource to change conversation status not supported

The User resource `/chatter/users/me/conversations/conversationId/mark-read` is no longer available after version 29.0. Instead, use the resource `/chatter/users/userId/conversations/conversationId` to change conversation status.

### Get information about topics assigned to records

If your administrator enables topics for objects, use the new Topics on Records resource (`/connect/records/recordId/topics`) to get information about topics assigned to the specified record of that object type and to add and remove topics from the specified record of that object type. You can also use the existing Topics Suggestions resource (`/connect/topics/suggestions`) with the `recordId` parameter to get topic suggestions for the specified record of that object type.

## New and Changed Request Bodies

### File Input

Use this existing request body in a Folder Item Input to represent a file in a folder. These properties are no longer reserved for future use, but they are currently available through a pilot program:

- `isInMyFileSync`—`true` if the file is included in the user's Salesforce Files folder, and is synced between that folder and Chatter; `false` otherwise.
- `parentFolderId`—ID of the containing folder.

### File Shares Input

Use this new request body in a POST request to `/chatter/files/fileId/file-shares` to share a file with someone. It has these properties:

- `message`—Private message body that's sent to the recipients.
- `shares`—Collection of Share Input request bodies.

### Folder Input

The Folder Input request body is currently available through a pilot program. Use this new request body in a PATCH request to `/chatter/folders/folderId` to rename a folder or to move a file or folder to a different folder. It has these properties:

- `name`—The name of the folder. Either `path` or `name` is required. If you specify both, `path` is used and `name` is ignored.
- `parentFolderId`—The ID of the parent folder. Either `parentFolderId` or `path` is required. You can't include both.

- `path`—The path of the folder. For example, `my documents/folder`.

### Folder Item Input

The Folder Item Input request body is currently available through a pilot program. Use this new request body in a POST request to `/chatter/folders/folderId/items` to create a folder or add a file to a folder. It has these properties:

- `file`—Contains a File Input request body, which represents a file in a folder.
- `folder`—Contains a Folder Input request body, which represents a folder in a folder.
- `type`—The item type. One of these values:
  - ◊ `File`
  - ◊ `Folder`

### Moderation Flag Input

The Moderation Flag Input has one `visibility` property that specifies the visibility behavior of a flag for various user types.

To flag a post, comment, or file for moderation and set the visibility, use this new request body in a POST request to these resources:

- `/connect/communities/communityId/chatter/feed-items/feedItemId/moderation-flags`
- `/connect/communities/communityId/chatter/comments/commentId/moderation-flags`
- `/connect/communities/communityId/chatter/files/fileId/moderation-flags`

### Share Input

This new request body has these properties:

- `id`—User ID to share a file with.
- `sharingType`—Either `C` for collaborator or `V` for viewer.

### Topic Assignment Input

Use this request body in a POST request to `/connect/records/recordId/topics` to add a topic to the specified record. It has these properties:

- `topicId`—ID of an existing topic. Required for existing topics if the `topicName` property isn't used.
- `topicName`—Name of a new or existing topic. Required for new topics; required for existing topics if the `topicId` property isn't used.

### Topic Endorsement Input

Use the request body in a POST request to `/connect/topics/topicId/endorsements` to endorse a user who's knowledgeable about the specified topic. This new request body has one property, `userId`.

## New and Changed Response Bodies

### Community

This response body has these new properties:

- `allowMembersToFlag`—Specifies whether members of the community can flag content.
- `knowledgeableEnabled`—Specifies whether knowledgeable people and endorsements are available for topics (`true`), or not (`false`).
- `privateMessagesEnabled`—Specifies whether members of a community can send private messages to each other (`true`) or not (`false`).
- `siteUrl`—The site URL for the community, which is the custom domain plus a URL prefix.

## Features

This response body has a new `storeDataOnDevicesEnabled` property that indicates whether the Salesforce1 downloadable apps can use secure, persistent storage on mobile devices to cache data.

## Feed Directory Item

This response body has these new properties:

- `feedType`—The feed type. One of these values:
  - ◊ `Bookmarks`—Contains all feed items saved as bookmarks by the logged-in user.
  - ◊ `Company`—Contains all feed items except feed items of type `TrackedChange`. To see the feed item, the user must have sharing access to its parent.
  - ◊ `Files`—Contains all feed items that contain files posted by people or groups that the logged-in user follows.
  - ◊ `Filter`—Contains the news feed filtered to contain feed items whose parent is a specified object type.
  - ◊ `Groups`—Contains all feed items from all groups the logged-in user either owns or is a member of.
  - ◊ `Moderation`—Contains all feed items that have been flagged for moderation. The Communities Moderation feed is available only to users with “Moderate Community Feeds” permissions.
  - ◊ `News`—Contains all updates for people the logged-in user follows, groups the user is a member of, files and records the user is following, all updates for records whose parent is the logged-in user, and every feed item and comment that mentions the logged-in user or that mentions a group the logged-in user is a member of.
  - ◊ `People`—Contains all feed items posted by all people the logged-in user follows.
  - ◊ `Record`—Contains all feed items whose parent is a specified record, which could be a group, user, object, file, or any other standard or custom object. When the record is a group, the feed also contains feed items that mention the group.
  - ◊ `To`—Contains all feed items with mentions of the logged-in user, feed items the logged-in user commented on, and feed items created by the logged-in user that are commented on.
  - ◊ `Topics`—Contains all feed items that include the specified topic.
  - ◊ `UserProfile`—Contains feed items created when a user changes records that can be tracked in a feed, feed items whose parent is the user, and feed items that @mention the user. This feed is different than the news feed, which returns more feed items, including group updates.
- `keyPrefix`—For filter feeds, this value is the key prefix associated with the entity type used to filter this feed. All feed items in this feed have a parent whose entity type matches this key prefix value. For non-filter feeds, this value is null. A *key prefix* is the first three characters of a record ID, which specifies the entity type.

## Feed Item Attachment: Approval

This response body has a new `processInstanceStepId` property that identifies a step in the approval process.

## Feed Item Attachment: Content

This response body has these new properties:

- `renditionUrl240By180`—URL to the 240 x 180 rendition resource for the file.
- `renditionUrl720By480`—URL to the 720 x 480 rendition resource for the file.
- `textPreview`—Text preview of the file if available, null otherwise.
- `thumb120By90RenditionStatus`—Specifies the rendering status of the 120 x 90 preview image of the file. One of these values:
  - ◊ `Processing`—Image is being rendered.
  - ◊ `Failed`—Rendering process failed.
  - ◊ `Success`—Rendering process was successful.
  - ◊ `Na`—Rendering is not available for this image.
- `thumb240By180RenditionStatus`—Specifies the rendering status of the 240 x 180 preview image of the file. One of these values:



- ◊ Processing—Image is being rendered.
  - ◊ Failed—Rendering process failed.
  - ◊ Success—Rendering process was successful.
  - ◊ Na—Rendering is not available for this image.
- thumb720By480RenditionStatus—Specifies the rendering status of the 720 x 480 preview image of the file. One of these values:
    - ◊ Processing—Image is being rendered.
    - ◊ Failed—Rendering process failed.
    - ◊ Success—Rendering process was successful.
    - ◊ Na—Rendering is not available for this image.

The `hasImagePreview` property is no longer supported.

The `isInMyFileSync` property is no longer reserved for future use, but it is currently available through a pilot program. This property is `true` if the file is included in the user's Salesforce Files folder, and is synced between that folder and Chatter; `false` otherwise.

### Feed Item Page

This response body has these new properties:

- `updatesToken`—Token to use in an `updatedSince` parameter, or `null` if not available.
- `updatesUrl`—A Chatter REST API resource with a query string containing the value of the `updatesToken` property. The resource returns the feed items that have been updated since the last request. Property is `null` if not available.

### File Share Link

This new response body has these properties:

- `fileViewUrl`—URL where the file can be viewed and downloaded.
- `sharingType`—The permission level of sharing. One of these values:
  - ◊ C—Collaborator
  - ◊ I—Sharing permission is determined by location. This generally occurs when the sharing permission is not set on the file, but on the library. This value is also used when the logged-in user is the owner of the file.
  - ◊ N—No access
  - ◊ V—Viewer

### File Share Page

This response body has a new `linkShare` property that is a File Share Link response body.

### File Summary

This response body has these new properties:

- `recordViewUrl`—The URL of the Chatter REST API record view resource for this record, or `null` if this record does not have a record view layout, or if “Connect Records API” is not enabled for this organization, or if the record type isn't supported.
- `textPreview`—A text preview of the file, if available; otherwise, the value is `null`.

These properties are no longer reserved for future use, but they are currently available through a pilot program:

- `isInMyFileSync`—`true` if the file is included in the user's Salesforce Files folder, and is synced between that folder and Chatter; `false` otherwise.
- `parentFolder`—A reference to the parent folder.

## Folder

This new response body describes a folder. It has these properties:

- `createdDate`—An ISO-8601 formatted date string specifying the creation date of the folder.
- `id`—18-character ID of the folder.
- `modifiedDate`—An ISO-8601 formatted date string specifying the last modified date of the folder.
- `motif`—A small, medium, and large icon indicating the record's type. The motif can also contain the record type's base color.
- `mySubscription`—If the logged-in user is following this record, this property contains information about the subscription; otherwise this property is `null`.
- `recordViewUrl`—The URL of the Chatter REST API record view resource for this record, or `null` if this record does not have a record view layout, or if “Connect Records API” is not enabled for this organization, or if the record type isn't supported.
- `parentFolder`—A reference to the parent folder.
- `path`—The path to the folder.
- `type`—`Folder`
- `url`—A Chatter REST API URL to this resource.

## Folder Item

This new response body describes an item (file or folder) in a folder. It has these properties:

- `file`—Contains a File Summary response body.
- `folder`—Contains a Folder response body.
- `type`—Type of item. Valid values are:

- ◊ `File`
- ◊ `Folder`

## Folder Item Page

This new response body is a collection of Folder Item response bodies. It has these properties:

- `currentPageUrl`—Chatter REST API URL identifying the current page.
- `items`—A collection of folder items.
- `nextPageUrl`—Chatter REST API URL identifying the next page or `null` if there isn't a next page.
- `previousPageUrl`—Chatter REST API URL identifying the previous page or `null` if there isn't a previous page.

## Group

This response body has these new properties:

- `additionalLabel`—An additional label for the group, for example, “Archived,” “Private,” or “Private With Customers.” If there isn't an additional label, the value is `null`.
- `recordViewUrl`—The URL of the Chatter REST API record view resource for this record, or `null` if this record does not have a record view layout, or if “Connect Records API” is not enabled for this organization, or if the record type isn't supported.

The `emailToChatterAddress` property is no longer reserved for future use. This property specifies a group's email address for posting to the group by email. This property returns `null` if Chatter emails and posting to Chatter by email aren't both enabled in your organization.

## Group Detail

This response body has these new properties:

- `additionalLabel`—An additional label for the group, for example, “Archived,” “Private,” or “Private With Customers.” If there isn't an additional label, the value is `null`.

- `recordViewUrl`—The URL of the Chatter REST API record view resource for this record, or `null` if this record does not have a record view layout, or if “Connect Records API” is not enabled for this organization, or if the record type isn’t supported.

The `emailToChatterAddress` property is no longer reserved for future use. This property specifies a group’s email address for posting to the group by email. This property returns `null` if Chatter emails and posting to Chatter by email aren’t both enabled in your organization.

### Knowledgeable People

This new response body represents a user that is knowledgeable about a specific topic. It has these properties:

- `isEndorsedByMe`—Specifies if the knowledgeable user is endorsed for the topic by the context user, `true` if so, `false` otherwise.
- `knowledgeableId`—ID of the knowledgeable record.
- `numEndorsements`—Number of endorsements received by the knowledgeable user for the topic.
- `reasons`—Specifies the reasons why the user is considered knowledgeable about the topic. Valid values are:
  - ◊ `Influential`—User was mentioned in posts or in comments on posts with the topic or received likes on comments on posts with the topic.
  - ◊ `Endorsed`—User received endorsement from another user for the topic.
- `user`—User that is knowledgeable about the topic.

### Knowledgeable People Collection

This new response body is a collection of Knowledgeable People responses. It has these properties:

- `currentPageUrl`—Chatter REST API URL identifying the current page.
- `knowledgeableUsers`—Collection of knowledgeable people response bodies.
- `nextPageUrl`—Chatter REST API URL identifying the next page or `null` if there isn’t a next page.
- `previousPageUrl`—Chatter REST API URL identifying the previous page or `null` if there isn’t a previous page.

### List View Record

The list view of a record. List View Record has these properties:

- `fields`—The fields and values for the record displayed in this list. A collection of any of these objects:
  - ◊ Record Field
  - ◊ Record Field: Blank
  - ◊ Record Field: Compound
  - ◊ Record Field: Currency
  - ◊ Record Field: Date
  - ◊ Record Field: Percent
  - ◊ Record Field: Picklist
  - ◊ Record Field: Reference
  - ◊ Record Field: Reference with Date
- `id`—18-character ID of the object
- `motif`—Small, medium, and large icons indicating the object type. The motif can also contain the object’s base color.
- `mySubscription`—If the logged-in user is following this file, this contains information about the subscription; otherwise returns `null`.
- `name`—The localized name of this record.
- `recordViewUrl`—The URL of the Chatter REST API record view resource for this record, or `null` if this record does not have a record view layout, or if “Connect Records API” is not enabled for this organization, or if the record type isn’t supported.

- `type`—A fixed type name for this object. Check this value to determine the shape of a response body.
- `url`—The Chatter REST API URL resource for this object.

### Mention Completion

This response body has a new `userType` property. If the record represented by this completion is a user, this value is the user type associated with that user; otherwise the value is `null`. This property contains one of these values:

- `ChatterGuest`—User is a Chatter customer in an external group
- `ChatterOnly`—User is a Chatter Free customer
- `Guest`—Unauthenticated users
- `Internal`—User is a standard organization member
- `Portal`—User is a Customer Portal User, a communities user, and so on.
- `System`—User is Chatter Expert or a system user
- `Undefined`—User is a user type that is a custom object.

### Phone Number

This response body has a new `label` property, which is a localized string indicating the phone type: Fax, Mobile, or Work.

This response body has a new `phoneType` property, which is the phone type. It can be one of these values: Fax, Mobile, or Work. These values are not localized.



**Important:** The `type` property is no longer available as of API version 30.0. Use the `phoneType` property instead.

### Record Search List View

A list view structure visible after searching for records. Record Search List View has these properties:

- `definition`—Defines the columns available in this list view.
- `foundMoreRecords`—Specifies whether more than `minRecordsFound` records were found for this search (`true`) or not (`false`).
- `minRecordsFound`—The number of records found up to the value specified in the `maxRecordsPerType` parameter of the request. If more than `maxRecordsPerType` records are found, this value is `maxRecordsPerType` and `foundMoreRecords` is `true`.
- `records`—The record data to show in this list view.

### Record Search Results

The results of a record search. Record Search Results has these properties:

- `resultGroups`—A collection of record search list view objects that match the search, grouped by object type.
- `url`—The Chatter REST API URL to this set of search results.

### Record Summary

This response body has a new property, `recordViewUrl`—The URL of the Chatter REST API record view resource for this record, or `null` if this record does not have a record view layout, or if “Connect Records API” is not enabled for this organization, or if the record type isn’t supported.

### Record Summary List

A collection of any record in the organization, including custom objects. This response body contains summary information, not detailed information.

Record Summary List has these properties:

- `records`—A collection of records. The collection can contain any of these response bodies:

- ◊ File Summary
  - ◊ Group
  - ◊ Record Summary
  - ◊ User Summary
- `url`—The URL to this collection of records.

### Time Zone

The user's time zone as selected in My Settings in Salesforce. This value does not reflect a device's current location.

### Topic Endorsement

This new response body represents one user endorsing another user for a single topic. It has these properties:

- `endorsee`—User being endorsed.
- `endorsementId`—ID of the endorsement record.
- `endorser`—User performing the endorsement.
- `topic`—Topic the user is being endorsed for.
- `url`—Chatter REST API resource URL for the endorsement record.

### Topic Endorsement Collection

This new response body is a collection of Topic Endorsement response bodies. It has these properties:

- `currentPageUrl`—Chatter REST API URL identifying the current page.
- `topicEndorsements`—Collection of topic endorsement response bodies.
- `nextPageUrl`—Chatter REST API URL identifying the next page or `null` if there isn't a next page.
- `previousPageUrl`—Chatter REST API URL identifying the previous page or `null` if there isn't a previous page.

### Topic Opt Out

This new response body represents a user opting out of the Knowledgeable People list for a specific topic. It has these properties:

- `id`—ID of the topic opt out record.
- `reason`—The reason the user opted out. The only valid value is `topicInfluenceHide`.
- `topic`—Topic the user opted out of.
- `url`—Chatter REST API resource URL for the topic opt out.
- `user`—User that opted out of the topic.

### Topic Opt Out Collection

This new response body is a collection of Topic Opt Out responses. It has these properties:

- `currentPageUrl`—Chatter REST API URL identifying the current page.
- `topicOptOuts`—Collection of topic opt out response bodies.

### Topics People Are Knowledgeable About

This new response body represents a topic that a specified user is knowledgeable about. It has these properties:

- `isEndorsedByMe`—Specifies if the knowledgeable user is endorsed for the topic by the context user, `true` if so, `false` otherwise.
- `knowledgeableId`—ID of the knowledgeable record.
- `numEndorsements`—Number of endorsements received by the knowledgeable user for the topic.
- `reasons`—Specifies the reasons why the user is considered knowledgeable about the topic. Valid values are:
  - ◊ `Influential`—User was mentioned in posts or in comments on posts with the topic or received likes on comments on posts with the topic.

- ◊ **Endorsed**—User received endorsement from another user for the topic.
- **topic**—Topic that the user is knowledgeable about.

### Topics People Are Knowledgeable About Collection

This new response body is a collection of Topics People Are Knowledgeable About responses. It has these properties:

- **currentPageUrl**—Chatter REST API URL identifying the current page.
- **knowledgeableAboutTopic**—Collection of topics people are knowledgeable about response bodies.
- **nextPageUrl**—Chatter REST API URL identifying the next page or `null` if there isn't a next page.
- **previousPageUrl**—Chatter REST API URL identifying the previous page or `null` if there isn't a previous page.

### User Detail

This response body has these new properties:

- **additionalLabel**—An additional label for the user, for example, “Customer,” “Partner,” or “Acme Corporation.” If the user doesn't have an additional label, the value is `null`.
- **recordViewUrl**—The URL of the Chatter REST API record view resource for this record, or `null` if this record does not have a record view layout, or if “Connect Records API” is not enabled for this organization, or if the record type isn't supported.

### User Settings

This response body has a new **timeZone** property which contains a Time Zone response body.

These properties are no longer reserved for future use, but they are currently available through a pilot program:

- **fileSyncStorageLimit**—Maximum storage for synced files, in megabytes (MB).
- **hasFileSync**—User has “Sync Files” permission.

### User Summary

This response body has these new properties:

- **additionalLabel**—An additional label for the user, for example, “Customer,” “Partner,” or “Acme Corporation.” If the user doesn't have an additional label, the value is `null`.
- **recordViewUrl**—The URL of the Chatter REST API record view resource for this record, or `null` if this record does not have a record view layout, or if “Connect Records API” is not enabled for this organization, or if the record type isn't supported.

### Zone

This response body has a new **url** property that is the Chatter REST API URL for the zone.

## Data.com API

Use the Data.com APIs for access to the most up-to-date Data.com records. You can search, match, and purchase company and contact records.

Available in: **Developer** Edition, **Professional** Edition (add-on), **Enterprise** Edition, and **Unlimited** Edition.

### Data.com APIs

Data.com Search API and Data.com Match API extend the capabilities currently in Data.com Prospector and Data.com Clean.

- Data.com Search API:

A SOQL-based interface that searches the Data.com database for contacts and companies, and returns information based on the criteria you've specified. The API is available to customers who have purchased Data.com Prospector.

- **Data.com Match API:**

A REST-based interface that provides a matching service (or algorithm) to match contact and company information with the latest Data.com data. The Match API is available to customers who have purchased Data.com Full Clean.

## Datacloud Objects

The Datacloud objects are used with SOQL to search for Data.com contact and company records and enable you to purchase Data.com records. Use the following objects to find and purchase Data.com records.

- **DatacloudCompany:**

Use this object to search the Data.com database for companies with the specific criteria you enter. Find company records you are interested in purchasing for your organization.

- **DatacloudContact:**

Search the Data.com database for contacts with the specific criteria you enter. Find contact records you are interested in purchasing for your organization.

◊ **DatacloudSocialHandle**—Is a child object of DatacloudContact. This object is a read-only object. You can't filter or search on this object.

- **DatacloudDandBCompany**—Returns D&B company information for the Data.com APIs. Available for users with a premium license for either Data.com Prospecting or Data.com Clean

- **DatacloudOwnedEntity:** Use this object to track records that are purchased and owned by a specific user.

- **DatacloudPurchaseUsage:** Use this object to track Data.com usage for users.

Datacloud objects are external objects that function differently from standard objects. This table explains some of the differences.

Logical Operator	Datacloud Function
=	<p>The equal sign searches for the exact string enclosed in single quotation marks. For example:</p> <pre>SELECT ContactId, LastName, FirstName, City, CompanyName FROM DatacloudContact WHERE City = 'Albuquerque'</pre>
!=	<p>The not equal sign excludes the exact string enclosed in single quotation marks from the search.</p> <pre>SELECT ContactId, LastName, FirstName, City, CompanyName FROM DatacloudContact WHERE City != 'Albuquerque'</pre>
%	<ul style="list-style-type: none"> <li>• The Datacloud objects recognize only the first wild card.</li> <li>• Wild cards placed after the first wild card are ignored.</li> </ul>
LIKE	<p>When you use the “LIKE” operator with Datacloud objects, a wild card search is implicitly done. The search done with the like operator is a “fuzzy” search. Some common spelling and omissions may still return results, for example searching on “Bob” also returns results for “Robert.”</p>

## Purchasing Data.com Records

Purchase a contact or company record that you want to “own.” When you own a record, you have access to all the information contained in the Data.com database for that record. You can then use that record in your Salesforce organization.

There is a four step process you need to follow to purchase contact or company records from Data.com.

1. Search for the contacts or companies you want to purchase using the Data.com Search API.
2. Create a DatacloudPurchaseUsage entity.
3. Insert the Data.com Ids for the contacts or companies you want to purchase into the DatacloudOwnedEntity. This updates the information in the DatacloudPurchaseUsage entity.
4. Search again to view all the information for the purchased records.

## Administering Data.com API

Here are a few things you need to know about this release of the Data.com API

- Data.com API Call Limits:

The listed information is read only. Use this information to track Data.com API call usage.

Call quotas are enforced at the Salesforce organization level.

- ◇ Total Match Calls — total number of API calls available in a 24 hour rolling call limit period.
- ◇ Remaining Number of Match Calls — the number of API calls still available for use by this API for the 24 hour rolling call limit period.
- ◇ Total Search Calls — total number of API calls available in a 24 hour rolling call limit period.
- ◇ Remaining Number of Search Calls — the number of API calls still available for use by this API for the 24 hour rolling call limit period.

Here is how to calculate your quota:  $1000 \times (\text{number of licenses}) = (\text{API call quota})$ . Call quotas for the Search API are calculated based on the number of Data.com Prospecting licenses. Call quotas for the Match API are calculated based on the number of Data.com Clean licenses.

- Data.com API Administration:

Data.com API functionality is enabled by default. You can disable or enable Data.com API functionality by selecting or deselecting the Enable Data.com API checkbox.

To disable the Data.com APIs follow these steps.

1. From Setup, click **Data.com Administration > API Preferences**.
2. To disable access, deselect the **Allow Data.com API Access**. If access is already disabled, you can enable access by completing the next step.
3. To apply and save your changes, click **Save**.

To enable the Data.com APIs follow these steps.

1. From Setup, click **Data.com Administration > API Preferences**.
2. To enable access, select the **Allow Data.com API Access** checkbox.
3. Select **“I have read and agreed to the aforementioned terms.”** checkbox and click **Confirm**.

### Legal Notice:

Data.com API enables you to customize, build and integrate Data.com Prospecting and Clean functionalities, as the case may be, into your own business processes and workflows. Now that administrators have broader flexibility and discretion on how to process and clean Customer Data as part of these functionalities, it is important to remind you that as noted in your applicable master subscription agreement documentation covering the Data.com Prospecting and Clean functionality, and as further described in the Data.com Security, Privacy and Architecture Documentation accessible via [help.salesforce.com](https://help.salesforce.com), the Customer Data fields which you elect to process and/or clean may be transferred to the Data.com infrastructure for purposes of interoperation. If this broader flexibility poses any additional privacy or data security concerns for your organization, we encourage you to limit the types of Customer Data fields which you



elect to process and clean, or instead opt-out of accessing the Data.com API by unselecting the 'Allow API Access' checkbox.

4. Click **Save** to enable Data.com API access.

- Data.com Credit Reset:

You can reset the developer credits used in your Data.com Developer Sandbox and Data.com Developer Pro Sandbox environments. Developer credits can only be reset in certain sandbox environments and the Developer Edition.

1. From Setup, click **Data.com Administration > Users**.
2. To reset a users credits, click **Reset Credits** in the Developer Usage column for that user.

## Bulk API

Use Bulk API to efficiently load and retrieve your organization's Salesforce data.

You can now submit up to 5,000 batches per rolling 24-hour period. The previous limit was 3,000 batches.

## Streaming API

Use Streaming API to receive notifications for changes to Salesforce data that match a data query you define, in a secure and scalable way.

### Increased Limits

The Streaming API limits have been increased as follows:

Limit	Increased to	From	Edition
Maximum number of topics per organization	100	50	Performance and Unlimited Edition
	50	25	Enterprise Edition
	40	20	All other editions
Maximum number of clients per topic	2,000	100	Performance and Unlimited Edition
	1,000	20	Enterprise Edition
	20	10	All other editions
Maximum number of concurrent clients across all topics	2,000	1,000	Performance and Unlimited Edition
	1,000	500	Enterprise Edition
	20	10	All other editions
Maximum number of events per day (unchanged in Performance, Unlimited Edition, and Enterprise Edition organizations)	50,000	10,000	Professional Edition
	10,000	1,000	Developer Edition

## Tooling API

Use Tooling API to build custom development tools for Salesforce applications.

### ValidationRule

Represents a formula that is used for specifying when a criteria is met. This includes both validation rules and workflow rules. Includes access to the associated ValidationRule object in Salesforce Metadata API.

### WorkflowRule

Represents a workflow rule that is used to fire off a specific workflow action when the specified criteria is met. Creation and modification of workflow rules isn't supported. Includes access to the associated WorkflowRule object in Salesforce Metadata API.

## Metadata API

Use the Metadata API to manage customization information, such as custom object definitions and page layouts, for your organization.

### Metadata API Calls

Metadata API calls were modified or added in version 30.0.

### Metadata Types and Fields

Metadata types and fields were modified or added in version 30.0.

## Metadata API Calls

Metadata API calls were modified or added in version 30.0.

### New Metadata Calls

#### **cancelDeploy()**

Use the `cancelDeploy()` call to cancel a deployment in your organization started by the `deploy()` call, which includes deployments started by the Force.com Migration Tool and the Force.com IDE.

#### **createMetadata()**

Adds one or more new metadata components to your organization synchronously. Represents the synchronous version of the `create()` call.

#### **deleteMetadata()**

Deletes one or more metadata components from your organization synchronously. Represents the synchronous version of the `delete()` call.

#### **readMetadata()**

Returns one or more metadata components from your organization synchronously.

#### **renameMetadata()**

Renames a metadata component in your organization synchronously. Corresponds to the rename functionality of the `update()` call done synchronously.

**updateMetadata()**

Updates one or more metadata components in your organization synchronously. Corresponds to the update functionality of the `update()` call done synchronously.

## Metadata Types and Fields

Metadata types and fields were modified or added in version 30.0.

### Standard Apps Support

You can now deploy and retrieve standard apps using the `CustomApplication` type. If you've made customizations to portions of standard apps, you can now expose and access these customizations. Previously, `CustomApplication` represented only custom apps. Now, `CustomApplication` represents both standard and custom apps.

To retrieve apps in your organization, use the `CustomApplication` type name in the `package.xml` manifest file. You can either retrieve all apps or specify which apps to retrieve in the `types` section of `package.xml`.

To retrieve all apps in your organization—custom and standard apps, specify the wildcard character (`*`), as follows.

```
<types>
  <members>*/members>
  <name>CustomApplication</name>
</types>
```

To retrieve a standard app, add the `standard__` prefix to the app name. For example, to retrieve the Chatter standard app, specify `standard__Chatter`.

```
<types>
  <members>standard__Chatter</members>
  <name>CustomApplication</name>
</types>
```

The following is a definition of a standard app (Chatter):

```
<?xml version="1.0" encoding="UTF-8"?>
<CustomApplication xmlns="http://soap.sforce.com/2006/04/metadata">
  <defaultLandingTab>standard-home</defaultLandingTab>
  <label>Collaboration</label>
  <tab>standard-Chatter</tab>
  <tab>standard-UserProfile</tab>
  <tab>standard-OtherUserProfile</tab>
  <tab>standard-CollaborationGroup</tab>
  <tab>standard-File</tab>
</CustomApplication>
```

### New Metadata Types

#### AppMenu

Represents the Force.com app menu or the Salesforce1 navigation menu.

#### OrderSettings

Represents order settings.

#### SharingSet

Represents a sharing set. A sharing set defines an access mapping that grants portal or community users access to objects that are associated with their accounts or contacts.

## SiteDotCom

Represents a site for deployment. It extends the `MetadataWithContent` type and inherits its `fullName` and `content` fields.

## WorkflowFlowAction

Represents a flow trigger, which is a workflow action that launches a flow.

Flow trigger workflow actions are currently available through a pilot program. For information on enabling this feature in your organization, contact [salesforce.com](https://salesforce.com).

## Updated Metadata Types and Fields

These metadata fields have been added or changed in API version 30.0.

### AuthProvider

The following fields have been added:

#### `idTokenIssuer`

Only available if `providerType` is `OpenIdConnect`. This value identifies the source of the authentication token in the form `https://URI`. Used only with OpenID Connect authentication providers. If provided, Salesforce validates the returned `id_token` value. The OpenID Connect specification requires an `id_token` value to be returned with the `access_token` value. Available in API version 30.0 and later.

#### `sendAccessTokenInHeader`

Required only if `providerType` is `OpenIdConnect`. When `true`, the access token is sent to the `userInfoUrl` in a header instead of a query string. Used only with OpenID Connect authentication providers. Available in API version 30.0 and later.

#### `sendClientCredentialsInHeader`

Required only if `providerType` is `OpenIdConnect`. When `true`, the client credentials are sent in a header, instead of a query string, to the `tokenUrl`. The credentials are in the standard OpenID Connect Basic Credentials header form, which is `Basic <token>`, where `<token>` is the base64-encoded string `"clientkey:clientsecret"`. Used only with OpenID Connect authentication providers. Available in API version 30.0 and later.

## ConnectedApp

### `options`

If you use Force.com Canvas, this field indicates if you want to hide the **Share** button and header in the publisher for your canvas app. Valid values are:

- `HideShare`—The **Share** button is hidden in the publisher for the related canvas app.
- `HideHeader`—The header is hidden in the publisher for the related canvas app.

In the `ConnectedAppOAuthConfig` subtype, the `scopes` field has new enumeration values.



**Note:** The new values `Address`, `Email`, `OfflineAccess`, `OpenID`, `Phone`, and `Profile` will not be available until March 2014.

When *deploying* metadata, the values (all of them, including the legacy ones) are:

### `Address`

Allows access to the logged-in user's street address (the same behavior as deploying `Basic`).

**Api**

Allows access to the logged-in user's account over the APIs.

**Basic**

Allows access to your identity URL service (the same behavior as deploying Address, Email, Phone, and Profile).

**Chatter**

Allows access to only the Chatter REST API resources.

**CustomApplications**

Provides access to custom applications, such as those using Visualforce.

**Email**

Allows access to the logged-in user's email address (the same behavior as deploying Basic).

**Full**

Allows access to all data accessible by the logged-in user.

**OfflineAccess**

Allows the app to interact with the user's data while the user is offline, and get a refresh token (the same behavior as deploying RefreshToken).

**OpenID**

Allows access to the logged-in user's unique identifier for OpenID Connect apps.

**Phone**

Allows access to the logged-in user's unique identifier for OpenID Connect apps (the same behavior as deploying Basic).

**Profile**

Allows access to the logged-in user's profile (the same behavior as deploying Basic).

**RefreshToken**

Allows a refresh token to be returned if you're eligible to receive one (the same behavior as deploying OfflineAccess).

**Web**

Allows the ability to use the `access_token` on the Web. This also includes `visualforce`, allowing access to Visualforce pages.

When *retrieving* metadata, valid values are:

**Api**

Allows access to the logged-in user's account over the APIs.

**Basic**

Allows access to your identity URL service, and includes Address, Email, Phone, and Profile.

**Chatter**

Allows access to only the Chatter REST API resources.

**CustomApplications**

Provides access to custom applications, such as those using Visualforce.

**Full**

Allows access to all data accessible by the logged-in user.

**OpenID**

Allows access to the logged-in user's unique identifier for OpenID Connect apps.

**RefreshToken**

Allows a refresh token to be returned if you are eligible to receive one, and is synonymous with allowing `OfflineAccess`.

**Web**

Allows the ability to use the `access_token` on the Web. This also includes `visualforce`, allowing access to Visualforce pages.

In the `ConnectedAppSamlConfig` subtype, the following field has been added:

**encryptionCertificate**

The name of the certificate to use for encrypting SAML assertions to the service provider. This certificate is saved in the organization's Certificate and Key Management list.

**encryptionType**

When Salesforce is the identity provider, the SAML configuration can specify the encryption method used for encrypting SAML assertions to the service provider. The service provider detects the encryption method in the SAML assertion for decryption. Valid values are:

- `AES_128`—128-bit key.
- `AES_256`—256-bit key.
- `Triple_Des`—Triple Data Encryption Algorithm.

**CustomApplication**

The following field has been added:

**enableMultiMonitorComponents**

Indicates if a Salesforce console app has multi-monitor components enabled, which let users move portions of a console from their browsers to locations on their screens. This field is required if `isServiceCloudConsole` is `true`.

**CustomField**

The following field has been added:

**lookupFilter**

Represents the metadata associated with a lookup filter. Use this metadata type to create, update, or delete lookup filter definitions. Replaces the `NamedFilter` component, which has been removed. The filter now appears in its source field instead of in the target object. Both custom fields and standard fields can now have lookup filters deployable through the Metadata API.

The following field has changed:

**trackHistory**

Now available for standard objects (picklist and lookup fields only), as well as custom objects.

Indicates whether history tracking is enabled for the field (`true`) or not (`false`).

**CustomObject**

The following field has changed:

**enableHistory**

Now available for standard objects, as well as custom objects.

Indicates whether the object is enabled for audit history (`true`) or not (`false`).

**sharingModel**

This field is no longer read-only. You can now set a value for this field to update the organization-wide default for internal users.

For activity objects, the organization-wide default can be retrieved, but is currently read-only.

The following field has been removed:

**namedFilter**

The metadata associated with a lookup filter is now represented by the `lookupFilter` field in the `CustomField` component.

**CustomObjectTranslation**

The following field has been added to the `CustomFieldTranslation` subtype:

**lookupFilter**

Represents the translation metadata associated with a lookup filter.

The following field has been removed:

**namedFilters**

The translation metadata associated with a lookup filter is now represented by the `lookupFilter` field.

**CustomSite**

The following field has been added:

**clickjackProtectionLevel**

Required. Sets the clickjack protection level. The options are:

- `AllowAllFraming` — Allow framing by any page (no protection)
- `SameOriginOnly` — Allow framing by the same origin only (recommended)
- `NoFraming` — Don't allow framing by any page (most protection)

**DeployMessage**

The following fields have been added:

**componentType**

The metadata type of the component in this deployment.

**createdDate**

The date and time when the component was created as a result of this deployment.

**DeployResult**

The following fields have been added:

**canceledBy**

The ID of the user who canceled the deployment.

**canceledByName**

The full name of the user who canceled the deployment.

**createdBy**

The ID of the user who created the deployment.

**createdByName**

The full name of the user who created the deployment.

**runTestsEnabled**

Indicates whether Apex tests were run as part of this deployment (`true`) or not (`false`). Tests are either automatically run as part of a deployment or can be set to run in `DeployOptions` for the `deploy()` call.

**Flow**

The following field has been added:

**loops**

An array of nodes for iterating through collections.

**FlowCondition**

The following operator has been added to the `FlowComparisonOperator` enumeration::

**wasSet**

Used to check that the item being compared against was previously set to a value or `null`.

**FlowElementReferenceOrValue**

The following field has been added:

**dateTime**

Used to specify a `dateTime` value.

**FlowRecordLookup**

The following field has been added:

**assignNullValuesIfNoRecordFound**

Specifies that all values will be set to `null` if the record is not found.

**FlowVariable**

The following value has been added to the `FlowDataType` enumeration:

**DateTime**

A timestamp value for the flow variable.

**ForecastingSettings**

The following subtype has been removed:

**DataSourceSettings**

The data sources available in Forecasts. Choices include quantity, revenue, or both.

The following subtype has been added:

**ForecastingTypeSettings**

Represents the Forecasts settings for an individual forecast type. Some fields that were previously children of the `ForecastingSettings` type are now children of the new `ForecastingTypeSettings` subtype. These include:

- `adjustmentSettings`
- `forecastRangeSettings`
- `opportunityListFieldsSelectedSettings`



- `quotasSettings`



**Warning:** Omitting a forecast type field from the XML can deactivate that forecast type: if the forecast type was available in the release specified by the XML package version, that forecast type is deactivated and its quota and adjustment data are deleted.

The following field has been added to the `ForecastingTypeSettings` subtype:

**active**

Boolean. Indicates whether the forecast type is active in the organization.

The following field has been added to the `ForecastingTypeSettings` subtype:

**name**

String. This field indicates the name of the forecast type being configured in the `forecastingTypeSettings`. Valid values include:

- `OpportunityRevenue : Opportunities - Revenue`
- `OpportunityQuantity : Opportunities - Quantity`
- `OpportunitySplitRevenue : Opportunity Revenue Splits - Revenue`
- `OpportunityLineItemRevenue : Product Families - Revenue`
- `OpportunityLineItemQuantity : Product Families - Quantity`

The following fields have been moved from the `ForecastingSettings` type to the `ForecastingTypeSettings` subtype:

- `adjustmentsSettings`—This field enables or disables the Forecasts adjustments option in Forecasts. All forecast types must contain the same `adjustmentSettings` value. Setting this field to false deletes all adjustment data.
- `forecastRangeSettings`—The default periods and range selections in Forecasts. All forecast types must contain the same `forecastRangeSettings` values.
- `opportunityListFieldsSelectedSettings`—The fields selected to appear in the opportunity pane of the forecast page for the forecast type. `Opportunity Name` is required. You can select up to 15 fields.
- `quotasSettings`—This field enables or disables the Show Quotas option in Forecasts. All forecast types must contain the same `quotasSettings` value. Setting this field to false hides quotas from the Forecasts tab, but does not delete any quota data.

## Layout

The following fields have been added:

**component**

Reference to a component in the Mobile Cards section of a page layout.

**feedLayout**

Represents the values that define the feed view of a feed-based page layout. Feed-based layouts are available on Account, Case, Contact, Lead, Opportunity, and custom objects. They include a feed view and a detail view. This field is of type `FeedLayout`.

In the `PrimaryTabComponents` subtype, the following field and subtype have been added:

**containers**

Represents a location and style in which to display more than one custom console component on the sidebars of the Salesforce console. You can specify up to five components for each of the four locations (left, right, top, and bottom).

**SidebarComponent**

Represents a specific custom console component to display in a container that hosts multiple components in one of the sidebars of the Salesforce console. You can specify up to five components for each of the four container locations (left, right, top, and bottom).

In the PrimaryTabComponents subtype, the following field has been removed:

**component**

Represents a custom console component (Visualforce page or lookup field; Force.com Canvas apps not available) on a section of a page layout. Custom console components only display in the Salesforce console. This field was replaced by `containers`.

In the SubtabComponents subtype, the following field has been added:

**containers**

Represents a location and style in which to display more than one custom console component on the sidebars of the Salesforce console. You can specify up to five components for each of the four locations (left, right, top, and bottom).

In the SubtabComponents subtype, the following field has been removed:

**component**

Represents a custom console component (Visualforce page or lookup field; Force.com Canvas apps not available) on a section of a page layout. Custom console components only display in the Salesforce console. This field was replaced by `containers`.

**LiveChatButton**

The following fields have been added:

**numberOfReroutingAttempts**

Specifies the number of times a chat request can be rerouted to available agents if all agents reject the chat request.

**optionsCustomRoutingIsEnabled**

Indicates whether custom routing is enabled for incoming chat requests (`true`) or not (`false`).

**optionHasRerouteDeclinedRequest**

Indicates whether a chat request, which has been rejected by all available agents, should be rerouted to available agents again (`true`) or not (`false`).

**optionsIsAutoAccept**

Indicates whether a chat request should be automatically accepted by the agent it's assigned to (`true`) or not (`false`). For chat buttons and automated chat invitations with `routingType` set to `MostAvailable` or `LeastActive`.

**PermissionSet**

The following fields have changed:

**applicationVisibilities**

Standard as well as custom apps are now supported. (In API version 29.0, only custom apps are supported.)

**fieldPermissions**

`fieldPermissions` for required fields can no longer be retrieved or deployed.

**Profile**

The following fields have been added:

**custom**

Indicates whether the profile is a custom (`true`) or standard (`false`) profile.

**description**

The profile description. Limit: 255 characters.

The following fields have changed:

**applicationVisibilities**

Standard as well as custom apps are now supported. (In API version 29.0 and earlier, only custom apps are supported.)

**fieldPermissions**

`fieldPermissions` for required fields can no longer be retrieved or deployed.

When deploying a new custom field, the default values for the `editable` and `readable` fields are `false`. To override the default values, include field permissions for the new field in your profiles.

**Report**

The following fields have been added to the `ReportGrouping` subtype:

**aggregateType**

The type of aggregate value to sort by. Valid values are:

- `Sum`
- `Average`
- `Maximum`
- `Minimum`
- `RowCount`

**sortByName**

Specifies the API name of the column, aggregate or custom summary field used to order the grouping.

**sortType**

Indicates if the grouping is sorted by a column, aggregate or custom summary field. Valid values are:

- `Column`
- `Aggregate`
- `CustomSummaryFormula`

**EntitlementProcess**

The following field has been added:

**businessHours**

The business hours that apply to the entitlement process.

**EntitlementProcessMilestoneItem**

The following fields have been added:

**businessHours**

The business hours that apply to the milestone.

**minutesCustomClass**

The name of the Apex class that is used to calculate the trigger time.

**NamedFilter**

This component has been removed. The metadata associated with a lookup filter is now represented by the `lookupFilter` field in the `CustomField` component. The filter now appears in its source field instead of in the target object.

**Network**

The following field has been added:

**picassoSite**

Name of the Site.com site linked to the community.

**SamlSsoConfig**

The following field has been added:

**decryptionCertificate**

The name of the certificate to use for decrypting incoming SAML assertions. This certificate is saved in the organization's Certificate and Key Management list.

**SecuritySettings**

The following field has been added to the PasswordPolicies subtype:

**obscureSecretAnswer**

Hides the secret answer associated with a password (`true`) or not (`false`).



**Note:** If your organization uses the Microsoft Input Method Editor (IME) with the input mode set to Hiragana, when you type ASCII characters they're converted into Japanese characters in normal text fields. However, the IME does not work properly in fields with obscured text. If your organization's users cannot properly enter their passwords or other values after enabling this feature, disable the feature.

**Workflow**

The following field has been added:

**flowActions**

An array of flow triggers for the object associated with the workflow.

Flow trigger workflow actions are currently available through a pilot program. For information on enabling this feature in your organization, contact [salesforce.com](mailto:salesforce.com).

**WorkflowActionType**

This enumeration field has the following new value:

**FlowAction**

Specifies that the referenced workflow action is a flow trigger.

Flow trigger workflow actions are currently available through a pilot program. For information on enabling this feature in your organization, contact [salesforce.com](mailto:salesforce.com).

## Place Order API

New in version 30.0, the Place Order REST API lets you integrate Salesforce order data into your apps programmatically. For example, you can use the REST-based API to integrate Salesforce with a third-party shopping cart. The API has several resources that let you create a combination of contracts, orders, and order products in one call.

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions with API and Orders enabled

Orders must be enabled before your organization can use this API. To enable orders, from Setup, click **Customize > Orders > Settings**, and select `Enable Orders`.

For more information, see [Place Order REST API—Generally Available](#) in the Sales section.

## ISVforce

Winter '14 includes features that make it easier for partners to upgrade managed packages and collect usage metrics data from customers.

### [Deleting Components in Managed Packages](#)

#### [Usage Metrics—Pilot](#)

#### [Orders Available to Force.com Users](#)

With the Orders Platform permission set license, available to only OEM partners, administrators can now give users with Force.com user licenses access to contracts, price books, products, and orders.

## Deleting Components in Managed Packages

Available in: **Developer** Edition



**Note:** This feature is available to eligible salesforce.com partners. For more information on the Partner Program, including eligibility requirements, please visit [www.salesforce.com/partners](http://www.salesforce.com/partners).

Starting Spring '14, ISVs can delete the following types of components when updating a previously released managed package.

- Custom Buttons or Links
- Custom Fields
- Custom Objects
- Custom Tabs
- Field Sets
- Record Types
- Validation Rules

The deletion of these components was not supported previously, to avoid the risk of data loss or integration failures in subscriber organizations. However, the number of such components in a complex package can grow very large over multiple release cycles. The ability to delete managed components can be very useful in such cases. It gives ISVs greater flexibility in maintaining and upgrading their apps.

Deleting any component will permanently delete any data that exists in that component, delete tracked history data, and change any integrations that rely on the component, such as assignment or escalation rules. Also, once you delete a component in a managed package, you can't restore it or create another component with the same name.

No data or metadata is ever deleted in a subscriber organization without specific action by the customer. Subscribers who upgrade to the new package version will still have the deleted components available in their organization. They're displayed in the Unused Components section of the Package Details page. This ensures subscribers have the opportunity to export data and modify custom integrations involving those components, before explicitly deleting them. For example, before deleting custom objects or fields, customers can preserve a record of their data by going to Setup and clicking **Data Management > Data Export**.



**Note:** It's your responsibility to educate your customers about the potential impact from any components you delete. You should list all custom components you've deleted and notify customers of any actions they need to take, in the Release Notes for your upgraded package.

The following restrictions apply when deleting managed components.

- A component of any type is not deletable if it's referenced by any other metadata, such as workflow rules, validation rules, or Apex classes.
- A custom object is not deletable if it includes any of the following: Apex Sharing Reason, Apex Sharing Recalculation, Related Lookup Filter, Compact Layout, or Action.
- Deleting a custom field that is referenced by a custom report type in the same package is not recommended, as that will lead to an error when installing the upgraded package.

You can delete managed components, both declaratively, from the user interface, and programmatically, using the Metadata API. In the latter case, specify the components you want to delete in a `destructiveChanges.xml` manifest file and then use the standard `deploy()` call. The process is identical to that for deleting components that aren't managed. For more information, see the [Metadata API Developer's Guide](#).

## Usage Metrics—Pilot



**Note:** This feature is currently available through a pilot program. For information on enabling it for your organization, please contact [salesforce.com](mailto:salesforce.com).

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

In Spring '14, you can collect detailed usage metrics from each organization in which your managed package is installed. By analyzing this information, you can gain valuable insights into the utilization and performance of your app across your entire customer base. For example, you can identify:

- The features most and least used — this can help you prioritize your development efforts when planning the next version of your app.
- The customers using your app most intensively — these are your most valuable customers.
- The customers whose usage of your app is minimal or declining — these are the customers most at risk of attrition.

You can collect the following daily metrics on two types of components in a managed package.

- **Custom objects** — the total number of records stored per organization in each custom object. This enables you to track how the usage of that custom object is growing with time in any subscriber organization, which is a reliable indicator of how much it's being utilized
- **Visualforce pages** — the number of times per organization each Visualforce page was accessed, the number of unique users who accessed it, and the average loading time (in milliseconds). By comparing the metrics for different Visualforce pages, you can determine the relative popularity of different parts of your app in a specific customer organization, as well as trends across all customers.

The custom objects data is a snapshot that reflects the state of the organization at the time the database was sampled, while the Visualforce data covers usage over a 24-hour period.

The usage metrics data for all production organizations in a given instance is merged and written into a text file, in a specified format, once a day. Currently, no data is collected on packages installed in sandbox organizations.

This feature is intended for API access only. You must write a custom process to collect the metrics data from the reporting organization, and export it to a system of your choice for analysis. This gives you the maximum flexibility to monitor and analyze the usage trends most relevant for your app.

Your customers' consent is not required for usage data to be collected, and there's no way for them to opt out. This ensures you receive complete data for your entire customer base. Allowing some users to be excluded would skew the results, making the data less useful.



**Note:** If any of your customers have concerns about privacy, reassure them any data collected is limited to usage statistics. No customer data is ever exposed to the ISV under any circumstances. This is consistent with salesforce.com's emphasis on trust as a core value.

### [Setting up Usage Metrics](#)

### [Accessing Usage Metrics Data](#)

### [The MetricsDataFile Object](#)

## Setting up Usage Metrics

To set up Usage Metrics for any package, two organizations have special importance.

- **Release organization** — the Development Edition organization used to upload the package.
- **Reporting organization** — the organization to which the usage data is delivered, on a daily basis.

The release organization and reporting organization must be members of the same Environment Hub. This is a security feature, to ensure usage data is only delivered to an organization controlled by the developer of the package.

To set up Usage Metrics for a package:

1. Set up Environment Hub, if you haven't already done so. For instructions on setting up Environment Hub and connecting organizations to it, refer to the [ISVforce Guide](#).
2. Connect the release organization to the Environment Hub.
3. Connect the reporting organization to the Environment Hub.
4. Contact salesforce.com to activate this feature. You'll need to provide the namespace prefix of the package.

Once the feature is activated, you'll receive a confirmation email. Starting then, usage data will automatically be collected from all organizations in which your package is installed, and delivered to the reporting organization on a daily basis.

## Accessing Usage Metrics Data

The usage data for a package is stored in `MetricsDataFile` records in your reporting organization. Once you activate the Usage Metrics feature, one new record is created for all custom objects and one for all Visualforce pages, per Salesforce instance per day.



**Note:** To see the number of Salesforce instances currently in use, visit [trust.salesforce.com](https://trust.salesforce.com).

The usage data for each day and instance is stored as a text file, encoded in Base 64, in the `MetricsDataFile` field of the record. Other fields in the record identify these properties.

- Namespace prefix of the package
- Salesforce instance
- Start time and date of data collection

- End time and date of data collection
- Size of the data file in bytes
- Type of data, which is either `CustomObject` or `Visualforce`

In a record for custom objects, each row of the text file contains usage data in the following order.

- Organization ID
- Organization name
- Organization edition
- Organization status
- Name of the custom object
- Number of records of the custom object on the specified day

The custom object count is a snapshot captured once each day. Here's a section of a sample data file for custom objects. It shows there were 3500 and 1500 records in the Alpha and Beta custom objects, respectively, in the specified customer organization on the specified day.

```
"00Dxx0000001gbk","org1","Enterprise Edition","TRIAL","Alpha", "3500"
"00Dxx0000001gbk","org1","Enterprise Edition","TRIAL","Beta", "1500"
```

In a record for Visualforce pages, each row of the text file contains usage data in the following order.

- Organization ID
- Organization name
- Organization edition
- Organization status
- Name of the Visualforce page
- Number of times the page was accessed
- Number of unique users who accessed the page
- Average loading time of the page, in milliseconds

The Visualforce counts for each organization measure the number of times the page was viewed in the duration between the start and end times. Here's a section of a sample data file for Visualforce pages.

```
"00Dxx0000001gbk","org1","Enterprise Edition","TRIAL","/apex/gml2__f1","1","1","66.0"
"00Dxx0000001gbk","org1","Enterprise Edition","TRIAL","/apex/gml2__f2","1","1","128.0"
"00Dxx0000001gbk","org1","Enterprise Edition","TRIAL","/apex/gml2__f3","1","1","107.0"
"00Dxx0000001gbf","org1","Enterprise Edition","TRIAL","/apex/gml2__f1","5","1","73.6"
"00Dxx0000001gbf","org1","Enterprise Edition","TRIAL","/apex/gml2__f2","1","1","72.0"
"00Dxx0000001gbf","org1","Enterprise Edition","TRIAL","/apex/gml2__f3","7","1","50.8"
```

You must write a custom process to query the reporting organization to collect the metrics data, and export it to a system of your choice for analysis. This gives you the maximum flexibility to monitor and analyze the usage trends most relevant for your app.

## The MetricsDataFile Object

This object represents a data file containing usage metrics on all installations of a managed package in a specified Salesforce instance. It's available in API version 30.0 and later.

### Supported Calls

`query()`, `delete()`



**Fields**

Field Name	Details
MetricsDataFile	<b>Type</b> base64 <b>Properties</b> Filter, Query, Sort <b>Description</b> A text file containing the usage data encoded in Base 64.
MetricsDataFileContentType	<b>Type</b> string <b>Properties</b> Filter, Query, Sort <b>Description</b> The format of the data file. Currently, the only allowed value is <code>text/csv</code> .
MetricsDataFileLength	<b>Type</b> int <b>Properties</b> Filter, Query, Sort <b>Description</b> The size of the data file in bytes.
MetricsEndDate	<b>Type</b> dateTime <b>Properties</b> Filter, Query, Sort <b>Description</b> The end time and date for the data collection.
MetricsStartDate	<b>Type</b> dateTime <b>Properties</b> Filter, Query, Sort <b>Description</b> The start time and date for the data collection.
MetricsType	<b>Type</b> picklist <b>Properties</b> Filter, Query, Sort

Field Name	Details
	<b>Description</b> The type of data being collected. The possible values are <code>CustomObject</code> and <code>Visualforce</code> .
NamespacePrefix	<b>Type</b> string <b>Properties</b> Filter, Query, Sort <b>Description</b> The namespace prefix of the package for which data is being collected.
SendingInstance	<b>Type</b> string <b>Properties</b> Filter, Query, Sort <b>Description</b> The server instance from which this data was collected, for example, “na8.”

### Usage

Use this object to access customer usage metrics for a managed package. Each record contains one day’s data, on either custom objects or Visualforce pages, for all organizations in a Salesforce instance that have the package installed. The following data is collected each day.

- **Custom objects** — the number of records stored in each custom object.
- **Visualforce pages** — the number of times each Visualforce page was accessed, the number of unique users who accessed it, and the average loading time (in milliseconds).

The custom objects data is a snapshot that reflects the state of the organization at the time the database was sampled, while the Visualforce data covers usage over a 24-hour period.

The usage metrics data for all production organizations in a given instance is merged and written into a text file, in a specified format, once a day. If an instance doesn’t have any organizations with the package installed or any organizations that accessed Visualforce pages in the package, a blank record is created for that day, with `MetricsDataFileLength` set to zero.

For more details on this object, see the [SOAP API Developer’s Guide](#).

## Orders Available to Force.com Users

With the Orders Platform permission set license, available to only OEM partners, administrators can now give users with Force.com user licenses access to contracts, price books, products, and orders.

Available in: <b>Professional, Enterprise, Performance, Unlimited, and Developer</b> Editions
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You assign permission set licenses to users to incrementally add features that aren’t part of their user licenses.

Once users have been granted Orders Platform permission set licenses, their administrator can assign them:

- “Read,” “Create,” “Edit,” and “Delete” on contracts, price books, products, and orders
- “Activate Contracts”
- “Delete Activated Contracts”
- “Activate Orders”
- “Edit Activated Orders”
- “Create Reduction Orders”

New Developer Edition organizations get two Orders Platform permission set licenses by default. To get Orders Platform permission set licenses for your organization, contact [salesforce.com Partner Support](#).

## Other salesforce.com Products

We've enhanced these other Salesforce products: desk.com, Heroku, Salesforce Marketing Cloud, and Work.com.

### **desk.com**

Desk.com is an all-in-one customer support app for small businesses and growing teams.

For information on new features, go to the [Desk.com Product Updates Blog](#).

### **Heroku**

Heroku is a cloud-based application platform for building and deploying web apps.

For information on new features, go to the [Heroku Changelog](#).

### **Salesforce Marketing Cloud**

Salesforce Marketing Cloud is a unified social marketing suite that allows companies to listen to and engage customers, publish content, optimize social advertising, measure campaigns, and integrate social insights with customer data.

For information on new features, go to the [Salesforce Marketing Cloud Facebook page](#).

### **Work.com**

Work.com is a social performance-management tool that helps managers and teams learn faster and perform better.

For information on new features, read the [Work.com Release Notes](#).