



Salesforce.com: Winter '14

# Salesforce.com Winter '14 Release Notes



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# Welcome to Winter '14

Sell, service, market, and innovate like never before with Winter '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 Winter '14.
- [Release demos](#) – Get quick video overviews of what's coming this release.

Welcome to Winter '14!

[About the Release Notes](#)

[HTML Release Notes—Beta](#)

[Your Feedback Matters](#)

[You Asked for It!](#)

[Change Log](#)

## About the Release Notes

For every new major enhancement, the release notes provide:

- A brief, high-level description of the functionality
- Implementation tips to help you get started with setup and administration
- Best practices to help you maximize the benefit
- Complete end-to-end instructions

Smaller changes to existing features are also described, so that you can plan for the new release. Unlike a traditional release notes document that includes only a simple list of enhancements, these release notes give you everything you need to get up and running with the new features and enhancements in the latest release.

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

## HTML Release Notes—Beta

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

The HTML release notes is currently available as a beta feature. How can we make it 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. "Beta" applies to the HTML delivery format only, and not the content.

## Your Feedback Matters

We know how important the Release Notes, online help, and documentation are to your company's success with Salesforce. 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 online 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!
- IdeaExchange—We're listening to your ideas too. Winter '14 includes some of your top ideas. Visit [IdeaExchange](#) for a complete list of ideas coming in Winter '14.

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 the [IdeaExchange](#).

Here's what you asked for	Here's what we delivered!
<b>General Enhancements</b>	
<a href="#">Search More Fields in Enhanced Lookups</a>	<a href="#">More Search Options in Enhanced Lookups</a>
<b>Chatter</b>	
<a href="#">Make Chatter Groups Inactive/Archive</a>	<a href="#">Archived Groups in Chatter</a>
<a href="#">Chatter Mention Utilization for Chatter Groups</a>	<a href="#">@mention Chatter Groups</a>
<a href="#">Merge and/or Rename Chatter Topics</a>	<a href="#">Topics with the Same Name Merged</a>
<a href="#">Modify the 1000 Character limit for a Chatter Comment</a>	<a href="#">Increased Post and Comment Size</a>
<a href="#">Add Thumbnail Preview of Link Post</a>	<a href="#">New Preview Links</a>
<b>Mobile</b>	
<a href="#">Administration for Mobile Devices</a>	<a href="#">SalesforceA</a>
<a href="#">"Mark Complete" Button on Tasks</a>	<a href="#">Salesforce1 Features</a>
<a href="#">Quick Close of Tasks</a>	
<a href="#">Show Task Status</a>	
<a href="#">Delegated Tasks Visibility</a>	<a href="#">Salesforce1 Features</a>
<a href="#">Show Company Name on Task List</a>	<a href="#">Salesforce1 Features</a>
<a href="#">Task Sorting on Mobile Devices</a>	<a href="#">Salesforce1 Features</a>
<b>Sales</b>	
<a href="#">Service Cloud Console available in the Sales Cloud</a>	<a href="#">Introducing the Salesforce Console for Sales</a>
<a href="#">Opportunity Splitting and Forecasting</a>	<a href="#">See Opportunity Splits in Sales Forecasts</a>
<a href="#">Link Price Book to Account or Customer</a>	<a href="#">Creating Lookup Relationships</a>



Here's what you asked for	Here's what we delivered!
Support for Microsoft Exchange Online with Salesforce for Outlook	Support for Microsoft® Exchange Online
Include send and add option for new emails	Send and Add Emails
Add events to Salesforce records	Add Events to Salesforce Records with Event Association
Ability to Hide 'View Account Hierarchy' link	Hiding the Account Hierarchy Link
<b>Service</b>	
Customers have read-only access to Salesforce Knowledge regardless of license	Salesforce Knowledge Access for Internal Users
Make Salesforce Knowledge article types more like other objects (partially)	More Custom Fields for Article Types
Improve Salesforce Knowledge page layout editor	
Add lookup relationships to Salesforce Knowledge	
Live Agent Supervisor Column Filtering	Customize Supervisor Settings
Allow Dynamic Variables in Chat Greetings	Merge Fields Available for Custom Agent Name and Auto Greetings
CTI Integration Lookup	Lookup Components for the Salesforce Console
<b>Analytics</b>	
Opportunity Field History report	Historical Trend Reporting
Opportunity History with Products Report	
Execute Report via API	Analytics API
Ability to Hide the Role Hierarchy in Reports	Show or Hide Role Hierarchy in Reports
Make Folders pane expandable on Reports tab	Resize the Reports and Dashboards Folder List
<b>Force.com</b>	
Search for Users in the User/Setup Screen	Search in Setup—Beta
Workflow Rules for the User object	Workflow for the User Object—Beta
Allow Approval Comment merge fields to be used in all approval related emails	Approval Comment Merge Fields are Available in All Approvals-Related Email Alerts
Sharing Model for User Object	User Sharing—Generally Available
Triggers on Chatter Topic Assignments	Triggers for Topic and TopicAssignment
Increase script statement limit per record in triggers	Statement Limit Elimination
CronTrigger Name field needs to be exposed	Scheduled Job Name and Type Available in Queries
Support HTML5 Custom Data Attributes in Visualforce	Additional Components with Support for Pass-Through HTML Attributes

# Change Log

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

Date	Salesforce Feature	Description of Change
November 17, 2013	<a href="#">Salesforce1</a>	We're pleased to announce the general availability of the Salesforce1 app, the new and improved Salesforce mobile experience.
November 17, 2013	<a href="#">SalesforceA</a>	Added topics about the new SalesforceA app.
November 17, 2013	<a href="#">Salesforce Touch is Upgrading to Salesforce1</a>	Added information about the upgrade of Salesforce Touch to the improved Salesforce1 experience.
November 17, 2013	<a href="#">Chatter Mobile</a>	Added information about the upgrade of the Chatter Mobile for iPhone and iPad and Chatter Mobile for Android apps to the improved Salesforce1 experience. Chatter Mobile for BlackBerry remains unchanged.
November 17, 2013	<a href="#">New and Changed Objects</a>	Added the <code>UserPreferencesHideS1BrowserUI</code> field to the User object.
November 6, 2013	<a href="#">View Agents' Chat Capacity in Chat Transfer Menu</a>	Deleted this section of the release notes, as this feature is not available in this release.
November 6, 2013	<a href="#">Mention Suggestions Include Members and Groups Across Communities</a>	In organizations using Salesforce Communities, the list of mention suggestions now includes all matches for people and groups across communities.
November 6, 2013	<a href="#">Introducing Performance Edition</a>	Clarified that existing Unlimited Edition customers can continue to purchase new licenses.
November 6, 2013	<a href="#">Chatter REST API Resources</a>	Added that the File Information, Batch resource ( <code>/chatter/files/batch/<b>fileIds</b></code> ) supports the DELETE HTTP method. Make a DELETE request to this resource to delete a list of files. This method was incorrectly omitted from the documentation.
October 30, 2013	<a href="#">Flexible API Limits—Pilot</a>	The Streaming API is now included in Flexible API Limits—Pilot.
October 30, 2013	<a href="#">Default Publisher Actions Now Available</a>	Clarified which organizations default actions are available in.
October 30, 2013	<a href="#">Mobile Smart Actions Now Available</a>	Clarified which organizations mobile smart actions are available in.
October 30, 2013	<a href="#">Changed Relationship Name for Notes and Attachments Related List</a>	Added information about a change to the relationship name for displaying the Notes and Attachments related list.
October 30, 2013	<a href="#">Approvals in the Salesforce1 Apps</a>	Added support for approvals in Salesforce1.
October 30, 2013	<a href="#">New and Changed Objects</a>	Added the <code>PreferencesS1BrowserEnabled</code> field to the Organization object.
October 30, 2013	<a href="#">SOAP API</a>	Added <code>Update</code> to the supported types in the <code>type</code> field for <code>DescribeAvailableQuickActionResult</code> and <code>DescribeQuickActionResult</code> .
October 30, 2013	<a href="#">Metadata API</a>	Added <code>Update</code> to the valid values for the <code>standardLabel</code> and <code>type</code> fields in the <code>QuickAction</code> type.

Date	Salesforce Feature	Description of Change
October 30, 2013	<a href="#">Apex Code</a>	<p>Added <code>QuickAction.DescribeQuickActionDefaultValueClass</code> and instance methods.</p> <p>Added the <code>getDefaultValues</code> method to the <code>QuickAction.DescribeQuickActionResult</code> class.</p> <p>Added <code>describeAvailableQuickActions</code> and <code>describeQuickActions</code> methods to the <code>QuickAction</code> class.</p>
October 23, 2013	<a href="#">Updated User Interface for Questions</a>	Added clarity about the user interface changes in Chatter Answers.
October 23, 2013	<a href="#">Mobile Smart Actions Now Available</a>	Removed reference to New Groups action being part of the mobile smart actions bundle on global layouts. This action is not included as a mobile smart action in Winter '14.
October 23, 2013	<a href="#">New Publisher Action Types</a>	Added information about update actions, a new type of publisher action.
October 23, 2013	<a href="#">Contact Visibility under Shared Accounts</a>	Added a note that the change has no impact on the user interface.
October 23, 2013	<a href="#">Outbound Single Email Limit</a>	Added information about the new outbound single email limit.
October 23, 2013	<a href="#">Chatter REST API Resources</a>	Clarified that PATCH is newly supported in API version 29.0. To make a PATCH request to update a group member's role, pass only the new <code>role</code> parameter or the new <code>role</code> property of the Group Member Input request body. Don't pass <code>userId</code> as was previously stated.
October 23, 2013	<a href="#">Chatter REST API Response Bodies Chatter in Apex Output Classes</a>	Added new <code>renditionUrl240By180</code> and <code>renditionUrl720By480</code> properties to the File Summary response body and the <code>ConnectApi.File</code> output class.
October 16, 2013	<a href="#">Introducing Performance Edition</a>	Added information about Performance Edition Limited for customers in Japan, Singapore, and South Korea.
October 16, 2013	<a href="#">User Object Save Behavior and Error Changes</a>	Removed incorrect information about the save order and concurrent modification of User records.
October 9, 2013	<a href="#">Analytics API</a>	Added link to Analytics API Developer Guide.
October 9, 2013	<a href="#">New Company Community Permission Set License</a>	Added information about the new Company Community Add-on permission set license.
October 9, 2013	<a href="#">Lookup and Master-Detail Fields Supported for Predefined Field Values in Publisher Actions</a>	Support for predefined field values in publisher actions is now available for lookup and master-detail fields.
October 2, 2013	<a href="#">Support for Microsoft® Exchange Online</a>	Added support for using Microsoft Exchange Online with Salesforce for Outlook.
October 2, 2013	<a href="#">New Preview Links</a>	Removed <code>xStranormal.com</code> from the list of supported preview links. The web site is no longer in business.
September 17, 2013	<a href="#">Help and Training</a>	Added the Help and Training section, which lists videos and documents that are new or updated for Winter '14.
September 17, 2013	<a href="#">Archived Chatter Groups</a>	Restructured the section for clarity and added more information about preparedness for the archived groups feature.

Date	Salesforce Feature	Description of Change
September 17, 2013	<a href="#">Chatter REST API</a> <a href="#">Chatter in Apex</a>	The Motif response body has a new <code>color</code> property which contains the hex value of the record type's base color. Use this value behind the motif icons.  <code>ConnectApi.Motif</code> has a new <code>color</code> property which contains the hex value of the record type's base color. Use this value behind the motif icons.
September 17, 2013	<a href="#">Flexible API Limits—Pilot</a>	The Bulk API is now included in Flexible API Limits—Pilot.
September 17, 2013	<a href="#">Code Coverage Information in the Developer Console Only</a>	Added information about the code coverage-related features removed from Setup.
September 17, 2013	<a href="#">App Launcher for Identity License Users</a>	Added information about the new App Launcher for Identity license users.
September 10, 2013	<a href="#">SOAP API Updated Calls</a>	Added information on <code>colors</code> field for <code>DescribeQuickActionResult</code> and <code>DescribeQuickActionResultItemResult</code> .
September 10, 2013	<a href="#">Streaming API Filtered Subscriptions</a>	Corrected the documentation to reflect that filtered subscriptions are now available for all API versions.
September 4, 2013	<a href="#">Live Agent Pre-Chat API: Generally Available</a>	Added information about the new Live Agent Pre-Chat API methods available for developers.
September 4, 2013	<a href="#">Live Agent REST API: Generally Available</a>	Added information about the new Live Agent REST API resources available for developers.
September 4, 2013	<a href="#">HTML Release Notes—Beta</a>	Added an announcement about the new option of viewing the release notes in HTML format. The HTML version of the release notes will be available on September 6 or 7, depending on your time zone.
September 4, 2013	<a href="#">Add Visualforce Pages to Case Detail Pages in Case Feed</a>	Visualforce pages are now supported on case detail pages for Case Feed users.
September 4, 2013	<a href="#">Default Publisher Actions Now Available</a>	Removed reference to New Groups default action on global layouts. This default action is not included in Winter '14.
September 4, 2013	<a href="#">New Supported Objects for PushTopic Queries — Pilot</a>	Added information about new objects supported by Streaming API PushTopic queries (Pilot).
September 4, 2013	<a href="#">New Publisher JavaScript API Events Let Custom Salesforce Console Components Interact with Case Feed</a>	Added information about new events that allow custom console components to interact with Case Feed.
September 4, 2013	<a href="#">Record Updates in All Company Feed</a>	The All Company feed in Chatter doesn't include system-generated record updates that don't have likes or comments.
September 4, 2013	Retirement of Support for the Salesforce CTI Toolkit	Removed this section for an announcement at a later date.
September 4, 2013	<a href="#">Compact Layout Overview</a>	Added information about Compact Layouts in Salesforce1. Additional compact layout entries in the REST API, SOAP API, Metadata API, and ISVForce sections.
September 4, 2013	<a href="#">Historical Trend Reporting</a>	Corrected the list of available field types for historical trending.

Date	Salesforce Feature	Description of Change
August 28, 2013	<a href="#">Metadata API</a>	Corrected the list of values for <code>standardLabel</code> as well as <code>type</code> in <code>QuickAction</code> .
August 28, 2013	<a href="#">New and Updated Calls</a>	Corrected the list of supported types for <code>DescribeAvailableQuickActionResult</code> as well as <code>DescribeQuickActionResult</code> .
August 28, 2013	<a href="#">Data.com Prospector: Simplified Definition of "Inactive" for Account Records</a>	Clarified how Data.com defines inactive account records.
August 28, 2013	<a href="#">Relocated Feed Search</a>	The feed search icon moved and is now located on the left side of the feed, below the publisher.
August 28, 2013	<a href="#">Automatic Installation of Salesforce Apps</a>	Corrected dates for the start of automatic Salesforce app installation.
August 28, 2013	<a href="#">New Company Community License</a>	Added content about the new Company Community user license.

# Feature Summary and User Impact

Winter '14 has features that immediately affect all users after the release. You may want to communicate these changes to your users beforehand so they are prepared. Other features require direct action by an administrator before users can benefit from the new functionality.

When will you start seeing Winter '14 changes on your instance? The best way to find out is to check the Major Release Schedule section of the Salesforce trust site at [trust.salesforce.com/trust/maintenance/](http://trust.salesforce.com/trust/maintenance/).

These release notes describe the new and modified features available in this release. For visibility into known salesforce.com issues, please refer to the [Known Issues Site](#).

This table summarizes the Winter '14 features and their impact on users. Review the feature details for the applicable Salesforce editions.

## 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.
Browsers	✓			
Introducing Performance Edition				✓
Updates to Translated Terminology	✓			
Internationalized Domain Name Support	✓			
<b>Search</b>				
More Search Options in Enhanced Lookups	✓			

## 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 Salesforce1</a>	✓			
<a href="#">Salesforce1 Features</a>	✓			
<a href="#">Set Up Your Organization to Use Salesforce1</a>			✓	
<a href="#">Salesforce1 Differences from the Full Salesforce Site</a>			✓	
<a href="#">Salesforce1 Platform Overview</a>			✓	
<b>SalesforceA</b>				
<a href="#">SalesforceA</a>			✓	
<b>Salesforce Touch</b>				
<a href="#">Salesforce Touch is Upgrading to Salesforce1</a>			✓	
<b>Chatter Mobile for BlackBerry</b>				
<a href="#">Chatter Mobile for BlackBerry is Now a Connected App</a>			✓	
<b>Salesforce Classic</b>				
<a href="#">Salesforce Mobile Rebranded to Salesforce Classic</a>		✓		
<b>Additional Mobile Support</b>				
<a href="#">Mobile Packaging</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>Groups</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.
Archived Chatter Groups	✓			
Using Publisher Actions in Chatter Groups	✓			
@mention Chatter Groups	✓			
Using Email to Post to Chatter Groups — Pilot				✓
<b>Profiles</b>				
New Chatter Profile Page (Profile Tabs)	✓			
Enabling Customization of Chatter User Profile Pages		✓		
Introducing Subtab Apps (Apps on Profile)		✓		
<b>Files</b>				
Salesforce Files—Pilot				✓
<b>Publisher Actions</b>				
Default Publisher Actions Now Available		✓		
Mobile Smart Actions Now Available		✓		
Publisher Actions Available in Groups and on Topic Pages	✓			
New Publisher Action Types		✓		
Lookup and Master-Detail Fields Supported for Predefined Field Values in Publisher Actions		✓		
Rich Text Area Fields Supported in Publisher Actions		✓		
<b>Topics</b>				
Feed Tracking Automatically Enabled for Topics (available within 24 hours after the Winter '14 release)		✓		
Following Topics (available within 24 hours after the Winter '14 release)	✓			
New Topics User Permissions (available within 24 hours after the Winter '14 release)			✓	



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.
Editing Topic Names	✓			
Topics with the Same Name Merged (available within 24 hours after the Winter '14 release)	✓			
<b>Feeds</b>				
Chatter Thanks			✓	
Increased Post and Comment Size	✓			
Combined Filter and Sort Options	✓			
New Preview Links	✓			
Relocated Feed Search	✓			
Record Updates in All Company Feed	✓			
<b>Chatter and Email</b>				
Redesigned Email Notifications	✓			
<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.
Communities Moderation			✓	
Default Profile for Communities Self-Registration		✓		
Sharing Groups for High-Volume Community Users			✓	
Offline Communities No Longer Show Up in The Community Drop-Down Menu	✓			

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.
View Global Header Permission Is No Longer On By Default	✓			
Maximum Number of Communities Listed in Setup		✓		
Case Visibility in Communities	✓			
Improved Communities API Support	✓			
Use Site.com Pages Instead of Standard Tabs	✓			
Use Salesforce Header and Footer on Site.com Pages	✓			
Adding Site.com Pages as Tabs in Your Community	✓			
New Communities Widgets	✓			

## 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>Salesforce Console</b>				
Introducing the Salesforce Console for Sales				✓
<b>Opportunities and Collaborative Forecasting</b>				
See Opportunity Splits in Sales Forecasts			✓	
Integrate Product Families in Forecasts			✓	
<b>Price Books</b>				
Creating Lookup Relationships			✓	
Customizing Search Layouts			✓	
<b>Salesforce for Outlook</b>				
Send and Add Emails	✓			

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.
Add Events to Salesforce Records with Event Association	✓			
View and Work with More Salesforce Records	✓			
<b>Social Accounts and Contacts</b>				
Contact, Account, and Lead Profile Image Visibility	✓			
Social Network Fields Available on List Views	✓			
<b>Accounts</b>				
Hiding the Account Hierarchy Link		✓		
<b>Email Templates</b>				
Email Template Access	✓			
<b>Partner Portal</b>				
Removed <b>Change My Password</b> Button For Partner Users with Single Sign-On	✓			
Change in Behavior For The Username Field On Partner Users	✓			
<b>Salesforce to Salesforce</b>				
Improved Security For Salesforce to Salesforce	✓			

## 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>				
Get to Salesforce Records Directly from Data.com Search Results	✓			
Expanded Definition of What's Considered a Duplicate Record	✓			

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.
Increased Export Limit	✓			
Simplified Definition of “Inactive” for Account Records	✓			
Data.com Licenses & Limits Page Rebranded with Data.com Prospector Name	✓			
Additional Enhancements	✓			
<b>Clean</b>				
Clean Info Objects		✓		
Clean Info Custom Report Types			✓	
Record Cleaning from List Views	✓			
Reporting an Account, Contact, or Lead as Inactive or Active to Data.com	✓			
Flagging an Account, Contact, or Lead Field Value as Wrong or Right to Data.com	✓			
Additional Enhancements	✓			
<b>Social Key</b>				
Social Key is Now Generally Available			✓	

## 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>				
Case Feed Automatically Enabled in New Organizations	✓			
New Publisher JavaScript API Events Let Custom Salesforce Console Components Interact with Case Feed			✓	

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.
Add Visualforce Pages to Case Detail Pages in Case Feed			✓	
Updated Look for Feed Items in Case Feed	✓			
Combined Filter and Sort Options in Case Feed	✓			
New Labels for Portal-Related Buttons in Case Feed	✓			
<b>Chatter Answers</b>				
Activity History			✓	
Rich Text and Images in Chatter Answers Replies		✓		
Updated User Interface for Questions			✓	
Reply to Questions with Email			✓	
Update Needed for Notification URLs When Enabling My Domain			✓	
Customize Chatter Answers with Visualforce Components		✓		
Customize the Account Creation Experience for Chatter Answers Portal Users	✓			
Build the Chatter Answers Search into Your Applications	✓			
Customize Component Events with the Chatter Answers JavaScript API—Pilot			✓	
<b>Entitlement Management</b>				
Create More Flexible Entitlement Processes with Recurring Milestones		✓		
Entitlement Versioning—Generally Available		✓		
Monitor Case Activity with Milestone Feed Items		✓		
View Milestones on the Case Feed Page with the Milestone Tracker		✓		

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.
Show the Time Since a Milestone Target Was Violated		✓		
Change the Account Associated with an Entitlement	✓			
<b>Ideas</b>				
Activity History			✓	
“Like” Comments	✓			
Set a Profile Type for Your Ideas Users		✓		
<b>Knowledge</b>				
Salesforce Knowledge Access for Internal Users		✓		
Knowledge One with Federated Search	✓			
More Custom Fields for Article Types	✓			
Search Articles to Create Smart Article Links	✓			
Chatter Feed Available on Article Toolbar	✓			
Topics on Salesforce Knowledge Articles—Pilot				✓
Metadata API Support for Article Approval Actions	✓			
Play Videos from Any Provider with a Custom Visualforce Page			✓	
<b>Live Agent</b>				
Automated Chat Invitations—Generally Available			✓	
Customize Supervisor Settings	✓			
Merge Fields Available for Custom Agent Name and Auto Greetings	✓			
Customize Agent Names	✓			
Create, Delete, and Edit Live Agent Session Records	✓			

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.
Critical Wait Alerts for Unanswered Chats	✓			
Filter Agents by Button and Status in the Supervisor Panel	✓			
Enable Live Agent's Pre-Chat API	✓			
Chat Tab Alerts for Waiting and Ended Chats	✓			
Preview Chat Requests and Transfers	✓			
Updated Look for the Chat Request List	✓			
Updated Look for the Agent Chat Window	✓			
Setup Label Changed from "Agent Configurations" to "Live Agent Configurations"	✓			
Live Agent API Versions	✓			
Access Your Live Agent API Endpoint	✓			
Live Agent Deployment API: New Methods	✓			
Live Agent Pre-Chat API: Generally Available			✓	
Live Agent REST API: Generally Available	✓			
<b>Open CTI</b>				
Force.com Canvas for Open CTI			✓	
New Open CTI Method: <code>notifyInitializationComplete()</code>			✓	
<b>Salesforce Console</b>				
Service Cloud Console Name Change	✓			
Salesforce Console Supports Microsoft® Internet Explorer 10®	✓			
Lookup Components for the Salesforce Console		✓		
Home Tab for the Salesforce 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.
Most Recent Items		✓		
Keyboard Shortcuts Panel	✓			
Force.com Canvas for the Salesforce Console			✓	
Salesforce Console Integration Toolkit: New Methods			✓	
<b>Customer Portal</b>				
Removed Change My Password Button For Customer Users with Single Sign-On	✓			
Change in Behavior For The Username Field On Customer Users	✓			

## 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.
Historical Trend Reporting			✓	
Embedded Analytics (available within 24 hours after the Winter '14 release)	✓			
Analytics API (available within 24 hours after the Winter '14 release)		✓		
Show or Hide Role Hierarchy in Reports	✓			
Report Types Support for User Sharing	✓			
Analytics Folder Sharing is On By Default	✓			
Restrict List View Creation	✓			
Resize the Reports and Dashboards Folder List	✓			
Report Charts from Page Layouts in the Metadata 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.
Format of Report Object in the SOAP API		✓		

## 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.
Multilingual Site Support—Generally Available	✓			
Custom Properties for Widgets	✓			
Sandbox Enabled for Site.com	✓			
HTML Import	✓			
New Broken Link Finder	✓			
New Live Mode for Editing Content	✓			
Inline Editor	✓			
Default Doctype Changed to HTML5	✓			
Approval Processes Enabled in Site.com				✓
External Reference Checking Enabled in Site.com	✓			
Additional Updates to Site.com Studio	✓			
Organization ID Required for Domain Names	✓			
New Company Community License				✓
New Company Community Permission Set License				✓

## Force.com Customization

### Data

**Business Logic and Process Automation****Security****Sharing****Critical Updates****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.
SalesforceA Mobile App for Administrators			✓	
Search in Setup—Beta			✓	
Freezing User Accounts		✓		
Permission Set Licenses			✓	
Geolocation Performance Improvements				✓
Rich Text Area Editor Context Menu Changes	✓			

## 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—Beta	✓			
Field History Data Retention				✓

## 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>				
End of Support for the Legacy Desktop Flow Designer		✓		
<b>Workflow</b>				
Workflow for the User Object—Beta		✓		
<b>Approvals</b>				
Approvals in the Salesforce1 Apps		✓		
Approval Comment Merge Fields are Available in All Approvals-Related Email Alerts		✓		
New Limit of 30 Steps per Approval Process		✓		

## 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>Critical Updates</b>				
Clickjack Protection for Non-Setup Salesforce Pages		✓		
<b>Authentication</b>				
Creating Service Providers as SAML-Enabled Connected Apps	✓			
RelayState Parameter Default Changed	✓			
Entire SAML Assertion Now Signed	✓			
Using OpenID Connect Authentication Providers			✓	
Mutual Authentication				✓

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.
Using Frontdoor.jsp to Log Into Salesforce	✓			
<b>Identity</b>				
Identity License			✓	
Identity Connect License			✓	
Automatic Installation of Salesforce Apps	✓			
Custom Attributes for Connected Apps	✓			
Updated Connected Apps OAuth Usage Page	✓			
Add Alternate Identity Providers on Login Page		✓		
<b>Administration</b>				
Visibility and Control for Sessions and Identity Confirmation	✓			
Session-Level Security		✓		
Restricting User Email Domains				✓
Setting Two-Factor Authentication Login Requirements			✓	
Using Time-Based Tokens to Access the API			✓	
Using Time-Based Tokens for Identity Confirmation	✓			
<b>My Domain</b>				
New Location of My Domain in Setup		✓		
Identity Provider Auto-Enabled for New My Domains		✓		
Customizable Branding on Login Page		✓		

## 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.
User Sharing—Generally Available		✓		
New <a href="#">Description</a> Field for Sharing Rules		✓		
Sharing Records with Managers Groups				✓
External Organization-Wide Defaults—Pilot				✓
Parallel Organization-Wide Default Updates—Pilot				✓
Asynchronous Recalculation of Sharing Rules—Pilot				✓
Monitoring Parallel Recalculations		✓		
Contact Visibility under Shared Accounts	✓			

## 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.
Custom State and Country Picklists—Generally Available			✓	
Rename Standard Objects and Fields			✓	

## Critical Updates

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="#">Clickjack Protection for Non-Setup Salesforce Pages</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.
<a href="#">“Chatter Feed” Section of the Page Layout Editor Now “Publisher Actions”</a>	✓			
<a href="#">Email Log Size Limits</a>	✓			
<a href="#">Outbound Single Email Limit</a>	✓			
<a href="#">App Launcher for Identity License Users</a>			✓	

## 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.
<a href="#">“Configuration Only” Sandboxes Renamed to “Developer Pro”</a>		✓		
<a href="#">Sandbox Sizes Increase</a>		✓		
<a href="#">Hyphen Now Required in Sandbox Subdomain Name</a>	✓			

## 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.
<a href="#">Approval Post Templates Available in Change Sets</a>		✓		
<a href="#">Compact Layouts Available in Change Sets</a>		✓		
<a href="#">Flexible Pages Available in Change Sets</a>		✓		
<a href="#">Change Sets Queue and Processing Improvements</a>		✓		
<a href="#">Improvements to Deployment Monitoring</a>		✓		
<a href="#">User Permissions in Profile Settings in Change Sets</a>		✓		

## 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.
Code Search	✓			
Save Order Debug View	✓			
SOSL Search Support and Query History	✓			
Static Resource Editors	✓			
Override Log Levels for a Class or Trigger	✓			
Improved Visualforce Development in the Developer Console			✓	

## 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>HTML5 Development</b>				
New <code>&lt;apex:input&gt;</code> Component		✓		
type Attribute for <code>&lt;apex:input&gt;</code> and <code>&lt;apex:inputField&gt;</code>		✓		
HTML5 <code>&lt;datalist&gt;</code> Element for Input Components		✓		
Additional Components with Support for Pass-Through HTML Attributes		✓		
Accessibility Improvements to Visualforce Components	✓			
Deferred Loading of JavaScript Resources via <code>&lt;apex:includeScript&gt;</code>		✓		
<b>Additional Enhancements</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.
Changed Relationship Name for Notes and Attachments Related List		✓		
Preview Page Button for Visualforce Pages		✓		
Available for Touch Checkbox Renamed		✓		
Improved Visualforce Development in the Developer Console			✓	
registrationClassName Attribute Added to the <chatteranswers:registration> Component	✓			
chatteranswers:allfeeds forceSecureCustomWebAddress Attribute Deprecated	✓			
Server-Side View State—Pilot				✓
SOQL WHERE Clause No Longer Reset In a StandardSetController Initialized with a queryLocator		✓		

## 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 Chatter Feed—Pilot  This feature is visible to all users in new Development Edition organizations. To enable this feature in existing Development Edition organizations or other organizations, contact salesforce.com.				✓
Canvas Apps in the Salesforce1 App—Pilot				✓

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.
This feature is visible to all users in new Development Edition organizations. To enable this feature in existing Development Edition organizations or other organizations, contact salesforce.com.				
API Enabled User Permission No Longer Required	✓			
SDK Object and Field Changes	✓			
Force.com Canvas Support for Streaming API	✓			

## 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.
Statement Limit Elimination		✓		
Scheduled Job Name and Type Available in Queries		✓		
PreviousFireTime Reset for Upgraded Scheduled Apex Jobs		✓		
Triggers for Topic and TopicAssignment		✓		
New Classes, Methods, and Interfaces		✓		
Chatter in Apex		✓		
Updated Errors for Email Messaging Methods		✓		
Different Status Codes Returned by DML Exceptions for the User Object		✓		
Code Coverage Information in the Developer Console Only		✓		

## 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 and Changed Objects	✓			
Flexible API Limits—Pilot				✓
<b>SOQL</b>				
OFFSET Use In Sub-queries – Pilot	✓			
Increased Number of Relationship Fields	✓			
<b>SOSL</b>				
WITH NETWORK Supports Multiple Communities	✓			
<b>REST API</b>				
AppMenu Resource	✓			
FlexiPage Resource	✓			
CompactLayouts Resource	✓			
Get Deleted Objects Resource	✓			
Get Updated Objects Resource	✓			
Limits Resource—Pilot	✓			
This feature is visible to all users in Development Edition organizations. To enable this feature in other organizations, contact salesforce.com.				
Limit Info Header	✓			
QueryAll Resource	✓			
SObject Describe Resource Support for If-Modified-Since Header	✓			
SObject Quick Actions Resource	✓			
Themes Resource	✓			
<b>SOAP API</b>				
New and Updated Calls	✓			
LimitInfoHeader	✓			

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>Streaming API</b>				
Increased Limits for Performance, Unlimited, and Enterprise Edition Organizations	✓			
Filtered Subscriptions	✓			
Support for Delete and Undelete Events	✓			
Generic Streaming — Pilot				✓
New Supported Objects for PushTopic Queries — Pilot	✓			
<b>Additional APIs</b>				
Chatter REST API	✓			
Metadata API	✓			
Bulk API	✓			
Tooling API	✓			
Analytics API (available within 24 hours after the Winter '14 release)	✓			

## 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.
Environment Hub				✓
Signup API Enhancements			✓	
Deleting Components in a Managed Package—Pilot				✓
Flexible Pages Available in Packages		✓		
Compact Layouts Available in Packages		✓		

# General Enhancements

General enhancements affect many users.

## Browsers

### Introducing Performance Edition

Beginning in November 2013, we're offering a new edition that combines CRM and the Force.com platform with Data.com, Work.com, Identity, Live Agent, Salesforce Knowledge, and additional sandbox functionality.

### Updates to Translated Terminology

### More Search Options in Enhanced Lookups

### Internationalized Domain Name Support

You can use email addresses with an Internationalized Domain Name (IDN) in email fields.

## Browsers

Review the supported browsers for this release.

### Salesforce Console Supports Microsoft® Internet Explorer 10®

The Salesforce console is available for use with Microsoft's Internet Explorer® 10 browser.

### Supported Browsers

Learn about the browsers we support for Salesforce.

## Salesforce Console Supports Microsoft® Internet Explorer 10®

The Salesforce console is available for use with Microsoft's Internet Explorer® 10 browser.

## Supported Browsers

Learn about the browsers we support for Salesforce.



**Important:** Beginning Summer '15, we'll discontinue support for Microsoft® Internet Explorer® versions 7 and 8. For these versions, this means that some functions may no longer work after this date. Salesforce.com Customer Support will not investigate issues related to Internet Explorer 7 and 8 after this date.

Browser	Comments
Microsoft® Internet Explorer® versions 7, 8, 9, and 10	<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 and 8 aren't supported for the Developer Console.</li> <li>• Internet Explorer 7 isn't supported for Open CTI.</li> </ul>

Browser	Comments
	<ul style="list-style-type: none"> <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> </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.
Google Chrome Frame™ plug-in for Microsoft® Internet Explorer® 6 and 7	Supported plug-in for Internet Explorer 6 and 7 only. Google Chrome Frame applies updates automatically; Salesforce supports only the most recent version. For configuration recommendations, see "Installing the Google Chrome Frame™ Plug-In for Microsoft® Internet Explorer®" in the Salesforce Help. Chrome Frame plug-in isn't supported for the Salesforce console or Forecasts.
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>

## Recommendations and Requirements for All Browsers

- For all browsers, you must enable JavaScript, cookies, and SSL 3.0.
- Salesforce.com recommends a minimum screen resolution of 1024 x 768 for the best possible user experience. Screen resolutions smaller than 1024 x 768 may not display Salesforce features such as Report Builder and Page Layout Editor properly.
- Some third-party Web browser plug-ins and extensions can interfere with the functionality of Chatter. If you experience malfunctions or inconsistent behavior with Chatter, disable all of the Web browser's plug-ins and extensions and try again.

Certain features in Salesforce—as well as some desktop clients, toolkits, and adapters—have their own browser requirements. For example:

- Internet Explorer is the only supported browser for:
  - ◇ Standard mail merge (We don't support Google Chrome Frame™ plug-in for Internet Explorer because the ActiveX controls required for mail merge are supported in Internet Explorer only.)
  - ◇ Installing Salesforce Classic on a Windows Mobile device
  - ◇ Connect Offline
- Firefox is recommended for the enhanced page layout editor.
- Browser requirements also apply for uploading multiple files on Chatter.

## Discontinued or Limited Browser Support

As of Summer '12, salesforce.com discontinued support for Microsoft® Internet Explorer® 6. Existing features that have previously worked in this browser may continue to work through 2014. Note these support restrictions.

- Internet Explorer 6 isn't supported for:
  - ◇ Chatter
  - ◇ Global search
  - ◇ Answers
  - ◇ Cloud Scheduler
  - ◇ The new user interface theme
  - ◇ Quote Template Editor
  - ◇ Salesforce console
  - ◇ Salesforce Knowledge
  - ◇ Live Agent
  - ◇ Forecasts
  - ◇ Chatter Answers
  - ◇ Enhanced profile user interface
  - ◇ Site.com
  - ◇ Schema Builder
  - ◇ Joined reports
  - ◇ Enhanced dashboard charting options

Internet Explorer 7 isn't supported for Site.com and Chatter Messenger. For systems running Microsoft Windows XP, Internet Explorer versions 7 and 8 with the latest security patches are supported for Chatter Answers.

## Introducing Performance Edition

Beginning in November 2013, we're offering a new edition that combines CRM and the Force.com platform with Data.com, Work.com, Identity, Live Agent, Salesforce Knowledge, and additional sandbox functionality.

Performance Edition is designed for customers that need to drive amazing growth, achieve new levels of customer satisfaction, and maximize sales and service success in the social and mobile world. Performance Edition includes all Unlimited functionality plus clean, targeted lead and customer data from Data.com, coaching and feedback tools from Work.com, trusted identity services from Identity, and more. For customers in Japan, Singapore, and South Korea, we offer Performance Edition Limited, which includes all Performance Edition functionality except Data.com.

As of November 2013, Unlimited Edition is no longer available for purchase. Customers using Unlimited Edition can continue to maintain and renew their edition, purchase additional licenses, or upgrade to Performance Edition.

## Updates to Translated Terminology

We updated some terminology, including tab and field names for our Finnish, Russian, Thai, Traditional Chinese, Czech, Hungarian, Romanian, and Turkish language users. For each term, we provide the English version and the corresponding previous and new translations. You can find the complete list of term changes in knowledge article number [000181874](https://help.salesforce.com/apex/HTViewSolution?urlname=Winter-14-Updates-to-Translated-Terminology&language=en_US) (URL: [https://help.salesforce.com/apex/HTViewSolution?urlname=Winter-14-Updates-to-Translated-Terminology&language=en\\_US](https://help.salesforce.com/apex/HTViewSolution?urlname=Winter-14-Updates-to-Translated-Terminology&language=en_US)) on the salesforce.com Customer Support site.

These terminology changes are available to all organizations. To keep your current tab and field labels, system administrators can change the name back using our rename tabs and labels functionality. For more information, see “Renaming Tab and Field Labels” and “Considerations for Renaming Tab and Field Labels” in the Salesforce Help or contact Customer Support.

For more information about supported languages, see “What languages does Salesforce support?” in the Salesforce Help.

## More Search Options in Enhanced Lookups

When searching for records using enhanced lookups, you have a new option to search more fields. By default, enhanced lookups query a limited set of fields, known as *Name* fields, for each object. If you’re searching for a record that returns a large number of matching records, such as a contact with a widely used name, you can instead query all searchable fields to narrow your results. If available in the enhanced lookup search dialog, select **All Fields** and enter other search terms unique to the record, such as the contact’s email address. This option is currently available for accounts, contacts, and custom objects. It’s not available for the user object.

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

## Internationalized Domain Name Support

You can use email addresses with an Internationalized Domain Name (IDN) in email fields.

Available in: **All** Editions.

Since a large number of mail transport agents (MTAs) are not Unicode-compliant, Salesforce translates IDNs to an ASCII-compatible encoding (ACE) version. This gives MTAs a greater chance of processing email addresses containing an IDN. The email addresses are translated to the ACE version upon sending the email.

### Example email address with an IDN and its ACE

- Email with an IDN: `example@föö.com`
- Translated ACE version: `example@xn--f-1gaa.com`

Depending on the recipient’s email client, they may see the ACE version of the email address rather than the original email address with the IDN. Any custom code that handles email addresses may need modification to support IDNs.



# Mobile

Stay productive on the go with Salesforce mobile apps.

## **Salesforce1**

The Salesforce1 apps let you stay up to date on your most-important records, activities, conversations, and dashboards—from wherever you are.

## **SalesforceA**

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

## **Salesforce Touch is Upgrading to Salesforce1**

Salesforce Touch is upgrading to the new Salesforce1 experience. The new app gives you the same Salesforce Touch features you've come to expect, 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.

## **Chatter Mobile**

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 in the Winter '14 timeframe.

## **Salesforce Mobile Rebranded to Salesforce Classic**

Salesforce Mobile, the original Salesforce CRM mobile app, is now Salesforce Classic for Android™, BlackBerry®, and iPhone® devices.

## **Mobile Packaging**

Mobile Packaging lets you seamlessly define, categorize, and deploy mobile apps to your organization through Connected Apps. Mobile Packaging is currently available through a pilot program.

# Salesforce1

The Salesforce1 apps let you stay up to date on your most-important records, activities, conversations, and dashboards—from wherever you are.

## **Introducing Salesforce1**

The Salesforce1 apps are Salesforce on the go! These enterprise-class mobile apps give 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 apps include 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.

## **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 apps use 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.

### ***Access the Salesforce1 Apps***

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 Salesforce1***

There are several ways that you can customize the Salesforce1 apps 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 apps don't have all of the functionality of the full Salesforce site, and in some cases include features that aren't available in the full site.

### ***Salesforce1 Platform Overview***

There are several Force.com platform changes and enhancements that support Salesforce1 development.

## **Introducing Salesforce1**

The Salesforce1 apps are Salesforce on the go! These enterprise-class mobile apps give 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 apps include 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 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, 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 in-app notifications about approval requests or when someone has mentioned you in Chatter.

**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	✓	✓

Feature	Mobile Browser App	Downloadable Apps for iOS and Android
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 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)	✓	✓
Add new records and update existing records	✓	✓
Use Today (Available on Android phone and iPhone devices only)		✓
Track, close, or reopen tasks	✓	✓
Create and view Salesforce events	✓	✓
View dashboards and dashboard component details	✓	✓
Use Salesforce Files (Requires Chatter)		✓
Launch Salesforce1 from Salesforce email notifications		✓
View Visualforce pages	✓	✓
Access custom and third-party apps from the navigation menu or the publisher	✓	✓
Use app settings		✓

Feature	Mobile Browser App	Downloadable Apps for iOS and Android
Configure connections to multiple instances		✓
Control app access with a security PIN		✓

## 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.

- 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

These user license types aren't supported: all communities and portal users, 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 apps use 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.

Users can view, edit, or create records for these objects.

- Accounts and Person Accounts
- Campaigns
- Cases
- Contacts
- Contracts
- Dashboards (*view only*)
- Leads
- Live Chat Transcripts (*view only*)
- Opportunities
- 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 or iPhone devices, 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 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. Files are searchable in the downloadable apps.

## Access the Salesforce1 Apps

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. You can also view the Salesforce1 help from here. 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 Salesforce1

There are several ways that you can customize the Salesforce1 apps 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 the Salesforce1 apps.
  - ◇ 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**. (See [Enable the Salesforce1 Mobile Browser App](#).)
- Customize how data shows up in the Salesforce1 apps.
  - ◇ 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 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](#).)
  - ◇ Make sure that Visualforce pages are enabled for use in Salesforce1, so they'll display in the apps. 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 Salesforce1 Apps](#).)
  - ◇ 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 Apps](#).)
  - ◇ 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](#).)

## 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: **All** editions except **Database.com**

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 or modify Salesforce1 mobile browser app settings: “Customize Application” “Modify All Data”

1. From Setup, click **Mobile Administration > Salesforce1**.
2. Select **Enable the Salesforce1 mobile 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 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 apps, 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.

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.

In the Mobile Cards section, only Visualforce pages enabled for Salesforce mobile apps will display in Salesforce1. 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.

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

## Enable Visualforce Pages for Use in Salesforce1 Apps

You can use Visualforce to extend the Salesforce1 apps 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:	"Customize Application" "Author Apex"



### Tip:

Before exposing existing Visualforce pages in the Salesforce1 apps, 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 apps.

- 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 `Mobile 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 those 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, Salesforce Touch, 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.
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 the status and due date. 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 Apps

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.

Winter '14 includes mobile smart actions for Salesforce1, which let you make publisher actions available for your mobile users with very little effort. The mobile smart actions provide a set of actions that are added to the Salesforce1 publisher on account, case, contact, lead, and opportunity pages, and on the global publisher layout. They're automatically populated with all of your organization's required fields for the relevant object. Winter '14 also includes several new types of publisher actions that are advantageous on mobile devices.

- 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 Canvas actions let users access Canvas apps directly in the publisher.

See [Publisher Actions](#) and [Mobile Smart Actions Now Available](#) for more details.

In addition to the default actions, you can 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>
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User Permissions Needed	
To customize Salesforce1 navigation:	"Customize Application"

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

Depending on your organization's settings, the Salesforce1 navigation menu can contain:

- Dashboards—Availability depends on edition and user permissions.
- Feed—Displays for organizations that have Chatter enabled.
- Flexible Pages—Custom Salesforce1 app home pages.
- Groups—Displays for organizations that have Chatter enabled. If it's not included as a distinct node in the menu, then it's automatically included in the set of Smart Search Items.
- People—Displays for organizations that have Chatter enabled. If it's not included as a distinct node in the menu, then it's automatically included in the set of Smart Search Items.
- Smart Search Items—Represents a set of recently searched-for objects. Determines the content in the Recent section of the menu. Only searches done in the full Salesforce site influence the objects in this element, and only searchable objects display in the Recent section. If users pin objects on the Search Results screen in the full Salesforce site, those objects will stick to the top of the Recent section.
- Tasks—Lists of a user's open and closed tasks, and tasks that have been delegated.
- Today—An app that helps users plan for and manage their day, by integrating calendar events from their mobile device with their Salesforce tasks, contacts, and person accounts. Available in the Salesforce1 for iPhone and Salesforce1 for Android Phones downloadable apps only.
- Visualforce pages



**Note:** Only Visualforce pages enabled for Salesforce mobile apps can be added to the Salesforce1 navigation menu.

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 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, such as when they receive approval requests or are mentioned.

Two types of notifications can appear to Salesforce1 users.

*In-app notifications* keep users aware of relevant activity while they're using Salesforce1. Users can access their 20 most recent notifications by tapping the  icon.

*Push notifications* are alerts that appear on your mobile device when you're not using the Salesforce1 downloadable app. Push notifications aren't supported in the Salesforce1 mobile browser app. These alerts can consist of text, icons, and sounds, depending on your device type. You can choose whether to receive push notifications; however, you can't enable push notifications if they were disabled by your administrator.



**Note:** Some notifications include text that your users enter in Salesforce. To ensure that sensitive information isn't distributed through a third-party service, push notifications to iOS devices include the user's name only.

For example, an in-app notification might be "Allison Wheeler mentioned you: @John Smith, can you update the Acme account with their new shipping address?" The equivalent push notification for iOS devices would be "Allison Wheeler mentioned you."

Not all notifications can be received as push notifications.

Notification Type	In-App Notification	Push Notification
You received an approval request	✓	✓
Someone mentioned you	✓	✓
Someone posted to your profile	✓	
Someone commented on your post	✓	

## Enable Notifications

Enable all users in your organization to receive Salesforce1 notifications about events in Salesforce, such as when they receive approval requests or are mentioned.

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. Click **Save**.

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 apps don't have all of the functionality of the full Salesforce site, and in some cases include features that aren't available in the full site.

There are differences in these areas:

- [Supported Salesforce data](#)
- [Chatter feeds, groups, and profiles](#)
- [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, contacts, campaigns, cases, groups, and custom objects.
- A few record fields, including:
  - ◇ division fields
  - ◇ rich text area fields
  - ◇ territory management fields
- Links on formula fields.
- The default custom links on a record detail page.
- Salesforce Communities.
- 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 and Contacts

- Social accounts aren't available. However, if an account has been linked to a social network profile, the selected profile image may display when viewing the account in Salesforce1. 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.
- 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 contacts, opportunities, cases, partners, notes and attachments, or account users.
- 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

- Activity logs aren't created when you use the  icon to send emails from the Salesforce1 app.
- Social contacts aren't available. However, if a contact has been linked to a social network profile, the selected profile image may display when viewing the contact in Salesforce1. 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.
- The **Clone**, **Request Update**, **Manage External User**, and **Enable Customer User** button aren't available.
- You can't add opportunities, cases, notes and attachments, or account users on a contact.
- 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. In addition, there are no file thumbnails available in the feed in Salesforce1; instead, you see a file type icon when possible (for example, a PDF attachment will have a special PDF icon).
- Salesforce CRM Content isn't available.

### Leads

- The **Convert**, **Find Duplicates**, and **Unlock Record** buttons aren't available.
- Social leads 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. Because rich text area fields aren't supported in Salesforce1, you're not able to view the Body field in transcript records.

### Opportunities

- The **Competitors**, **Quotes**, and **Opportunity Team** buttons aren'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
  - ◊ Products
  - ◊ 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.

## 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.
- View your followers and the people and records you're following. (This feature is available in the Salesforce1 downloadable app for iOS devices.)
- 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
- Create new groups.
- View lists of group files or post files in a group.
- See group list views until a least one user in your organization visits a group in Salesforce1.
- Invite Chatter customers to join private groups.
- Use group owner and manager functions, including:
  - ◇ Change group settings, information, and access levels
  - ◇ Add or remove members from a group
  - ◇ Archive groups
  - ◇ Activate archived groups
  - ◇ Delete groups

## 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 list views you can access for the object, not just the ones you accessed recently.

## Differences in Creating and Editing Records

There are some differences between the full Salesforce site and the Salesforce1 app when 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.	✓	✓
	Combo boxes, which combine a picklist with a text field, aren’t available. Typically the text field is available but the picklist is not.	✓	✓
	You can’t enter data in rich text area fields.	✓	✓
	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 or related leads or contacts.		✓
	You can’t accept or decline an event you’ve been invited to.		✓
	You can’t use Shared Activities to relate multiple objects to an event.	✓	✓
Leads	When you add a new lead, the <b>Campaign field</b> and the <b>Assign using active assignment rule</b> checkbox aren’t available. You can add values to these fields in the full site.	✓	

Category	Issue	Creating Records	Editing Records
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.	✓	✓
	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 objects to a task.	✓	✓
	You can't create recurring tasks or change the details for recurring tasks.	✓	✓
	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. To reproduce the full site functionality in Salesforce1, use this query:

```
select relation_id from CORE.activity_relation where
master_activity_id in (select master_activity_id from
CORE.activity_relation where child_activity_id='[EVENT_ID]')
```

where *EVENT\_ID* is the child event's ID. This query gets the main event's relations and displays 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
  - ◊ The event title
  - ◊ The start 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.
- 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.
  - ◊ 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 your 20 most recent notifications.
- To ensure that sensitive information isn't distributed through a third-party service, the only customer data included in push notifications to iOS devices is the user's name.
- [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 devices. It's not available 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, 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.

## Salesforce1 Platform Overview

There are several Force.com platform changes and enhancements that support Salesforce1 development.

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

### Visualforce Changes

You can now use Visualforce to extend the Salesforce1 app, letting users access your Visualforce pages from the navigation menu, the publisher, or a record's home page.

When developing Visualforce pages for Salesforce1 users, 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**. For custom Visualforce tabs, enable the `Mobile Ready` checkbox to make that tab available in the Salesforce1 app.

For Winter '14, several updates have been made to make development with Visualforce easier, including improvements for HTML5 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 [Visualforce](#).

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.

## Force.com Canvas Changes

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

In Winter '14, you can expose Force.com Canvas apps as publisher actions, which lets you expose your Canvas apps in the Salesforce1 publisher. Canvas apps can also now be exposed as Chatter feed items, which lets you expose your Canvas apps in Salesforce1 as feed items.



**Note:** Support for Force.com Canvas apps in the publisher and in the Chatter feed is currently available through a pilot program and is available in all new Development Edition organizations. For information on enabling it for your organization, contact [salesforce.com](mailto:salesforce.com).

See [Canvas Apps in the Salesforce1 App—Pilot](#) for more details.

In Winter '14 Force.com Canvas supports Streaming API notifications, which you can use in your Canvas app exposed in Salesforce1. See [Force.com Canvas Support for Streaming API](#).

## Publisher Actions Changes

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`.

## Flexible Pages

In Winter '14, 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?](#) for more details.

In Winter '14, Flexible Pages can be used with change sets and within app packages. See [Flexible Pages Available in Change Sets](#) and [Flexible Pages Available in Packages](#).

## API Changes

The following changes have been made to Force.com APIs to support Salesforce1 development.

## New and Changed Objects

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

In the `Organization` object, the `PreferencesS1BrowserEnabled` field has been added to control access to the Salesforce1 mobile browser app.

In the `User` object, the `UserPreferencesHideS1BrowserUI` field has been added to control user redirection to the Salesforce1 mobile browser app.

## SOAP API

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

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

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

The new `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.

## REST API

The new [AppMenu Resource](#) retrieves metadata about items in the Salesforce1 navigation menu.

The new [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 new [Themes Resource](#) returns information on icons and colors used by themes in the Salesforce1 app.

## Chatter REST API

Chatter REST API now supports Force.com Canvas app feed attachments. You can now post a feed item with a canvas app attachment to the News Feed, Record Feed, and User Profile Feed using new POST parameters for the REST resources for those feeds. New 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`.

## Apex

[Chatter in Apex](#) provides an easy, efficient way to work with Chatter data in Apex.

[New and updated methods and classes](#) are available for working with publisher actions.

## Metadata API

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

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

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


The `QuickAction` type has a new `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).

## What is a Flexible Page?

A Flexible Page is a type of custom layout.

Flexible Pages occupy a middle ground between page layouts and Visualforce pages. Like a page layout, Flexible Pages allow you to add custom items to a page. However, they don't have the same structure as a page layout, and the custom items are all components.

You can use a Flexible Page to create a home page for a third-party app that you can then add directly into the Salesforce1 mobile navigation. This provides your Salesforce users with a mobile home page that lets them quickly access the objects and items that are most important in that app.

You can also assign global publisher actions to a Flexible Page by specifying them in the Flexible Page XML. When users tap  from a Flexible Page, any global actions that you've assigned to it will show up in the publisher.

## About Flexible Pages

A Flexible Page consists of a list of a single region, named "main", containing *ComponentInstances*. A *ComponentInstance* contains a set of properties for an instance of a particular component, such as which component the instance points to, and a set of name/value pairs representing a subset of the component's attributes.

### Available Components

Not every component can be specified in a *ComponentInstance*. Even among those that are allowed, not all of their attributes can be specified. Currently, two components are supported for use in Flexible Pages.

#### **flexipage:filterListCard**

Points to a list view and displays the first few records from that view.

The `flexipage:filterListCard` component supports only:

- Custom Objects
- Account
- Campaign
- Case
- CollaborationGroup
- Contact
- Contract
- Lead
- LiveChatTranscript
- Opportunity

#### **flexipage:recentItems**

A list of most-recently used items which is limited to specific custom objects, based on the properties specified.

### So, what can a Flexible Page contain?

Flexible Pages can include:

- Components that display list views
- Components that display a scoped list of recently used items
- Global Chatter publisher actions

# SalesforceA

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

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

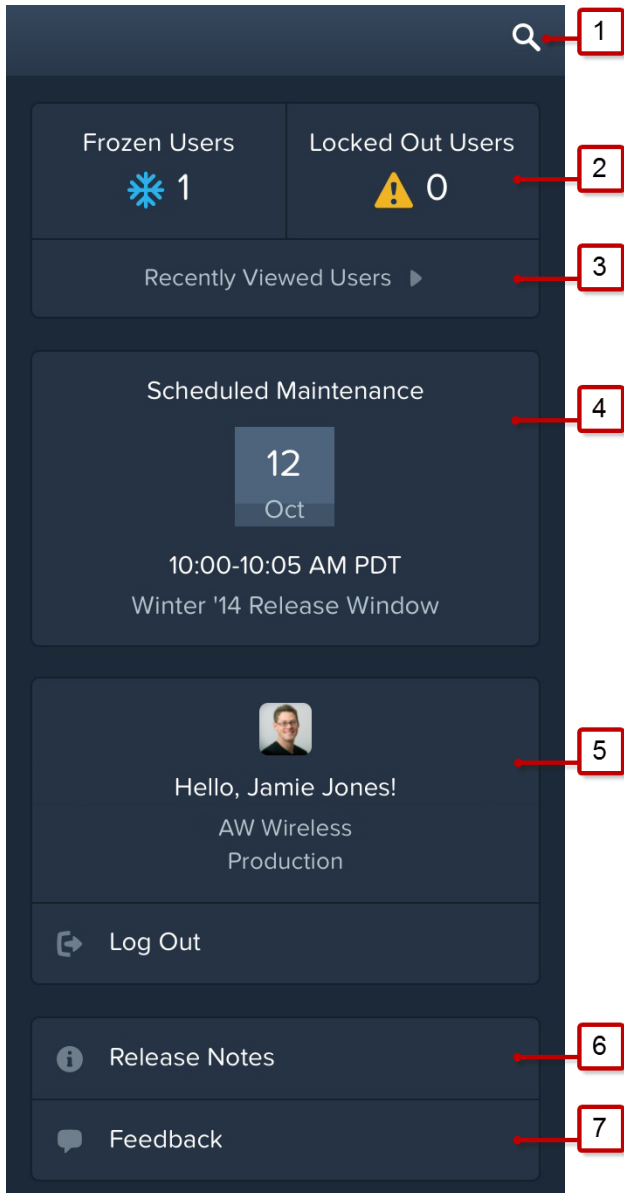
SalesforceA is free and available for:


- Android phone or tablet with OS 2.2 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.

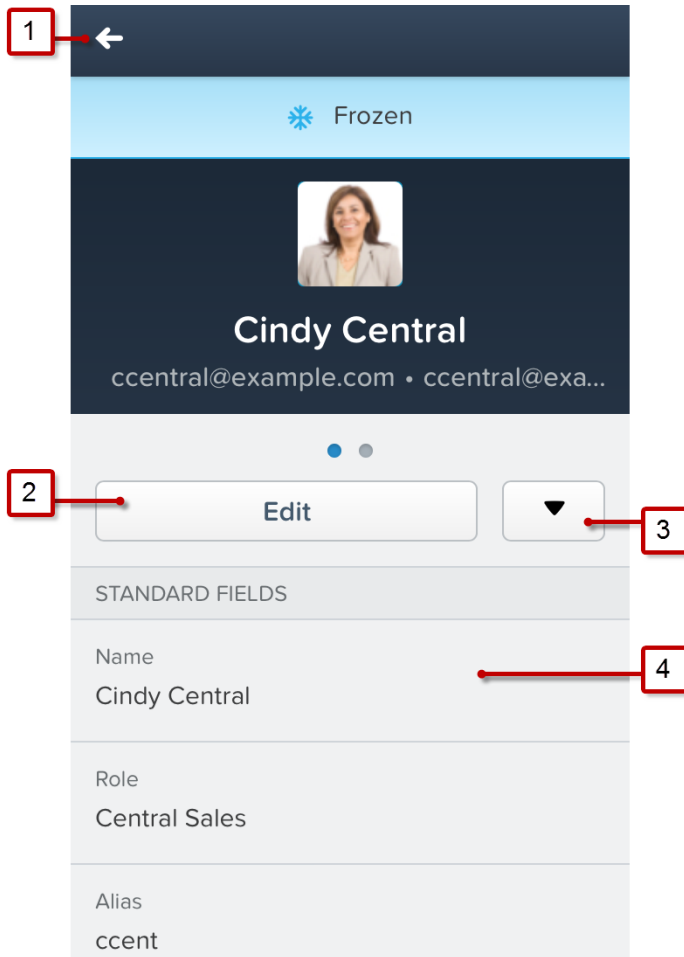
## SalesforceA Navigation Basics

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.

## Salesforce Touch is Upgrading to Salesforce1

Salesforce Touch is upgrading to the new Salesforce1 experience. The new app gives you the same Salesforce Touch features you've come to expect, 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.



**Note:** Salesforce1 will include Salesforce Communities soon. If your organization uses Salesforce Touch to access Communities, the Salesforce Touch mobile browser app will remain available until Salesforce1 supports Communities.

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

The transition to Salesforce1 depends on how your organization uses Salesforce Touch.

- For mobile browser app users, the transition will be seamless. On November 18, 2013, the Salesforce1 mobile browser app will be automatically enabled for your organization and users who log in to Salesforce from a supported mobile browser will automatically redirect to the new Salesforce1 interface.

If you'd like more time to prepare your users for the new mobile experience, you can turn off the Salesforce1 mobile browser app and return to using Salesforce Touch. See [Transition Salesforce Touch Users to the Salesforce1 Mobile Browser App](#) for more details.

- Downloadable app users will receive in-app notifications encouraging them to download and install the Salesforce1 downloadable app.

The upgrade to Salesforce1 completes with the Spring '14 release, at which time the Salesforce Touch interface will be turned off.

## Transition Salesforce Touch Users to the Salesforce1 Mobile Browser App

On November 18, 2013, the Salesforce1 mobile browser app will be automatically enabled for your organization.



**Note:** If your organization uses Salesforce Touch to access Salesforce Communities, you will not be upgraded to Salesforce1 on November 18, 2013. Your Salesforce Touch access will remain unchanged until Communities support is available in the Salesforce1 mobile browser app.

There's a new Salesforce1 setting that controls access to the Salesforce1 mobile browser app for your organization. When this setting is turned on, as it is by default, it:

- Overrides your organization's Salesforce Touch settings, even if the Salesforce Touch mobile browser is currently enabled.
- Replaces the **Touch User** checkbox with the **Salesforce1 User** checkbox on the **My Settings > Personal > Advanced User Details** or **Setup > My Personal Information > Personal Information** page. The **Salesforce1 User** checkbox is turned on for all of your users.

When both the Salesforce1 organization and user settings are turned on, users who log in to Salesforce from a supported mobile browser are automatically redirected to the new Salesforce1 interface—instead of Salesforce Touch.

If you'd prefer more time to transition to the new Salesforce mobile experience, you can [turn off the Salesforce1 mobile browser app](#) to restore your organization's Salesforce Touch settings. Your users can continue to use Salesforce Touch until the Spring '14 release.

Here's a summary of how the Salesforce Touch and Salesforce1 settings interact.

Salesforce Touch Mobile Browser Access	Touch User Setting	Salesforce1 Mobile Browser App Access	Salesforce1 User Setting	Redirection When User Logs in to Salesforce from a Mobile Browser
Enabled or Disabled	On or Off	Enabled	On	Salesforce1
Enabled or Disabled	On or Off	Enabled	Off	Full Salesforce Site
Enabled	On	Disabled	n/a	Salesforce Touch
Enabled	Off	Disabled	n/a	Full Salesforce Site
Disabled	n/a	Disabled	n/a	Full Salesforce Site



**Note:** The Salesforce Touch settings let you specify the device types that are allowed to access the mobile browser app. When the Salesforce1 mobile browser app is enabled, users can access the app from their choice of supported mobile devices, but they must also use a supported mobile browser. Logging in from an unsupported browser redirects to the full Salesforce site instead of the mobile experience.

## Chatter Mobile

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 in the Winter '14 timeframe.

For details about the Salesforce1 app, see [Salesforce1](#).

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.

## 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 Restrictions</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 Restrictions` 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.
  - ◇ `Require Users to Log In` 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.

## Salesforce Mobile Rebranded to Salesforce Classic

Salesforce Mobile, the original Salesforce CRM mobile app, is now Salesforce Classic for Android™, BlackBerry®, and iPhone® devices.

Salesforce Classic continues to help your teams succeed by allowing users to access their latest Salesforce data, whenever and wherever they need it. The Salesforce Classic rebrand may affect your `Mobile User` administrator settings:

### Mobile Lite

The Mobile Lite user permission, which is the free version of Salesforce Classic, is disabled by default. To enable the free version of Salesforce Classic:

1. From Setup, click **Mobile Administration** > **Salesforce Classic** > **Settings**.
2. Click **Edit**.
3. Select `Enable Mobile Lite`.
4. Click **Save**.

### Mobile User Permission for Unlimited Edition

The `Mobile User` checkbox is disabled by default for new Unlimited Edition users.

## Mobile Packaging

Mobile Packaging lets you seamlessly define, categorize, and deploy mobile apps to your organization through Connected Apps. Mobile Packaging is currently available through a pilot program.

For information on enabling Mobile Packaging for your organization, contact [salesforce.com](https://salesforce.com).

# Chatter

Chatter helps everyone in your organization stay connected.

## **Chatter Groups**

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

## **New Chatter Profile Page—Generally Available**

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

## **Salesforce Files—Pilot**

Salesforce Files lets you securely sync files between Chatter and your desktop and some mobile devices.

## **Publisher Actions**

Actions let users do more in Chatter, like create records and log calls directly in the feed.

## **Topics**

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

## **Chatter Feeds**

Chatter Feeds make collaboration easy.

## **Email Notifications**

Chatter works with your email so users can be easily notified about posts.

# Chatter Groups

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

## **Archived Chatter Groups**

Archive Chatter groups with little or no feed activity to drive focus toward the more active groups in your organization.

## **@mention Chatter Groups**

In addition to mentioning individual people, you can now mention groups in your posts and comments.

## **Using Email to Post to Chatter Groups — Pilot**

Group members can post to a Chatter group by sending an email.

# Archived Chatter Groups

Archive Chatter groups with little or no feed activity to drive focus toward the more active groups in your organization.

## **About Archived Groups in Chatter**

Archiving a Chatter group suspends the ability to create new posts or share files with the group, while retaining the group feed and files for future reference. Other group and feed functionality, such as joining or leaving the group, commenting on an existing post, mentioning users, searching feeds, searching via global search, and reporting remains available.

### Preparing for Archived Groups in Chatter

With the introduction of Chatter group archiving, *groups without new feed posts or comments in the last 90 days will be automatically archived on the first Tuesday following the Winter '14 release.* We recommend that administrators plan ahead for archived groups to ensure a smooth transition for their organizations.

### Enabling or Disabling Archiving for Chatter Groups

Archiving is enabled for Chatter groups by default.

### Archiving Chatter Groups

By default, groups are set to archive automatically if there are no new feed posts or comments for 90 consecutive days. Groups are reviewed for feed activity and automatically archived on a weekly basis. Group owners, group managers, and users with the “Modify All Data” permission can manually archive or edit automatic archiving settings for groups.

### Activating Archived Chatter Groups

Group owners, group managers, and users with the “Modify All Data” permission can activate an archived Chatter group from the group detail page.

## About Archived Groups in Chatter

Archiving a Chatter group suspends the ability to create new posts or share files with the group, while retaining the group feed and files for future reference. Other group and feed functionality, such as joining or leaving the group, commenting on an existing post, mentioning users, searching feeds, searching via global search, and reporting remains available.

Available in: <b>Group, Professional, Enterprise, Performance, Unlimited, Contact Manager, and Developer</b> Editions
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By default, groups are set to archive automatically if there are no new feed posts or comments for 90 consecutive days. Groups are reviewed for feed activity and automatically archived on a weekly basis. Group owners, group managers, and users with the “Modify All Data” permission can manually [archive](#) and [activate](#) groups, or enable and disable automatic archiving for a group at any time.

Archiving a group offers several advantages. Archived groups are removed from the Active Groups list on the Groups tab and moved to the My Archived Groups list, allowing users to focus on the more active groups in the organization. Archived groups don’t appear in searches for sharing a file or feed post with a group. With the restriction on new posts in archived groups, feed activity in Chatter is streamlined and focused on active group discussions. Note that you can always search for archived groups and associated content in global search, and that archived groups count toward your group subscription limit.

Groups that have little or no feed activity, but contain useful information that you want to retain, are good candidates for archiving. Some examples include:

- A group created by a sales team while pursuing a deal can be archived after lead conversion, especially if it contains important information about the customer.
- A group for planning a company event can be archived after the event to reuse vendor information and planning discussions.
- A group intended to support a major customer deployment can be archived after issues are ironed out, so that customer support can refer to this information for any future troubleshooting.
- When a legacy group is replaced by a new group that serves the same or broader purpose, the legacy group can be archived to redirect traffic to the new group.
- Team groups can be archived after a team splits or team members leave the company, so that newer team members can refer to the information in the old group.



By contrast, consider turning off automatic archiving for high membership groups that are regularly used to share information or make announcements without a predictable schedule. This will prevent the group from getting archived if there is a gap longer than 90 days in feed activity.

## Preparing for Archived Groups in Chatter

With the introduction of Chatter group archiving, *groups without new feed posts or comments in the last 90 days will be automatically archived on the first Tuesday following the Winter '14 release*. We recommend that administrators plan ahead for archived groups to ensure a smooth transition for their organizations.

- Communicate with group owners and managers in your organization about archiving for Chatter groups.
- Review the groups in your organization along with group owners and managers. Are there groups in your organization that are inactive? Among these, are there groups that you'd like to keep active regardless of feed activity? Creating a new post or commenting on existing posts is one way to prevent them from getting archived for another 90 days.
- [Disable archiving for Chatter groups](#) if you need more time to prepare. *You must do this by or before 8 p.m. Pacific Time on the first Tuesday following the Winter '14 release.*



**Note:** You can always activate groups after they've been archived, either [individually from the group settings page](#) or in bulk using the Salesforce API (by setting IsArchived to false for the CollaborationGroup records in question).

Archiving offers many benefits and we recommend that you re-enable this feature after you've reviewed your organization's groups.

## Enabling or Disabling Archiving for Chatter Groups

Archiving is enabled for Chatter groups by default.

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

User Permissions Needed	
To disable or re-enable archiving for Chatter groups:	"Customize Application"

To disable or re-enable archiving for Chatter groups:

1. From Setup, click **Customize > Chatter > Settings**, then click **Edit**.
2. In Chatter Group Settings, deselect **Allow Group Archiving** to disable archiving for groups, or if applicable, select that option to re-enable this feature.



**Note:** Disabling archiving prevents automatic and manual archiving of groups, but previously archived groups aren't activated. If required, group owners, group managers, or users with the "Modify All Data" permission can activate groups, even if archiving is disabled.

3. Click **Save**.

When this feature is enabled:

- By default, groups are set to archive automatically if there are no new feed posts or comments for 90 consecutive days. Groups are reviewed for feed activity and automatically archived on a weekly basis.
- Group owners and managers can archive, activate, or edit the automatic archiving settings for their groups. Users with the "Modify All Data" permission can perform these activities on any group.

- Archived groups that you own, manage, or belong to display in the My Archived Groups filter on the Groups tab. To find other archived groups in your organization, you can use global search, run a report, or use the Salesforce API. (The `isArchived` field on the `CollaborationGroup` record is set to `true` when a group is archived.)
- Automatic archiving settings can only be updated at the individual group level, on the group settings page. To change the archiving settings for multiple groups at once, use the Salesforce API.

## Archiving Chatter Groups

By default, groups are set to archive automatically if there are no new feed posts or comments for 90 consecutive days. Groups are reviewed for feed activity and automatically archived on a weekly basis. Group owners, group managers, and users with the “Modify All Data” permission can manually archive or edit automatic archiving settings for groups.

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

1. Click **Group Settings** on the group detail page.
2. You can configure archiving for the group in one of two ways:
  - Click **Archive** to archive the group right away.
  - Select **Archive this group if there are no posts or comments for 90 days** and click **Save** to set up automatic archiving.

After you archive a group, the publisher is hidden and members can't create new posts or share files in the group. In addition, archived groups are removed from the Active Groups filter on the Groups tab. Use the **My Archived Groups** filter on the Groups tab to find the archived groups that you own, manage, or belong to. You can also use global search to find archived groups or associated content. Note that archived groups count toward your group membership limit. You can also use global search or run a report to find other archived groups in your organization.



### Note:

- Group members don't receive email notifications when a Chatter group they own, manage, or belong to is archived or activated.
- If your administrator disables archiving for groups, you can't archive groups or edit automatic archiving settings. You can activate archived groups at any time, even if the feature is disabled.

## Activating Archived Chatter Groups

Group owners, group managers, and users with the “Modify All Data” permission can activate an archived Chatter group from the group detail page.

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

1. Navigate to the group you want to activate.
  - Use the **My Archived Groups** filter on the Groups tab to find the archived groups you own, manage, or belong to.
  - To find other archived groups, use global search, run a report, or ask your administrator for help.
2. On the group detail page or on the group settings page, click **Activate**.

The group detail page displays with the publisher enabled so members can create new posts and share files with the group.

**Note:**

- Group members don't receive email notifications when a Chatter group they own, manage, or belong to is archived or activated.
- You can only activate one group at a time. To activate multiple groups at once, use the Salesforce API.

## Using Publisher Actions in Chatter Groups

If your administrator has enabled and configured publisher actions, group members with permissions can create records in the group in addition to creating standard Chatter posts.

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

User Permissions Needed	
To create a record in Chatter groups:	"Create" on the object

All Chatter groups, except customer groups, use the global publisher layout defined for your organization. The publisher in customer groups displays only the standard actions—Post, File, Link, and Poll.

Note the following about records created using the publisher in groups:

- A record created in the group displays as a link in a feed post in the group. A similar record creation feed post also displays in the Chatter feed, the profile feed of the user who created the record, and in the record feed on the record detail page. The feed filter must be set to Show All Updates to view record creation posts.
- The visibility of records created in groups respects user permissions and sharing access rules in your organization. Group members without permissions, such as Chatter Free users, can't see the record or the record feed in any context.
- Group members with permissions can view the record and comment on it from any context (group, owner's profile, record, Chatter).
- The group feed aggregates all the comments on the record creation feed post. These could include comments posted outside the group, by users with permissions to view the record feed.
- Creating a record within a group doesn't create a group-to-record association.



**Note:** The ability to create group-to-record associations, follow record feeds in the group, and extend record sharing access to eligible group members is available through a pilot program. For information on enabling this feature for your organization, contact [salesforce.com](https://salesforce.com).

## @mention Chatter Groups

In addition to mentioning individual people, you can now mention groups in your posts and comments.

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

When writing a post, type @ followed by the first few letters of a group name, then select the group from the list of matches. The list includes all matches for people, including the people you don't follow, public groups, and private groups you're a member of. You can't mention archived groups, customer groups, and private groups you're not a member of.

For groups you mention in a post or comment:

- Your update appears in the group feed and the What I Follow feed for each group member.

- Group members who enabled the Email Every Post preference for the group, receive an email notification.

## Using Email to Post to Chatter Groups — Pilot

Group members can post to a Chatter group by sending an email.

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



**Note:** The ability to post to a Chatter group by email is currently available through a pilot program. For information on enabling this feature for your organization, contact [salesforce.com](https://salesforce.com).

1. Copy the email address of the group you want to post to from the group detail page, below the group description.



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

2. From the email account associated with your Salesforce user profile, create a new email addressed to the group's email address.
3. Type the message you want to post to the group 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 character limit is not included in the post.
- The email's subject field is not included in the post.
- You can only create text posts using email. You can't mention people, attach files, or create polls when posting to the group by email.

## New Chatter Profile Page—Generally Available

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

### ***New Chatter Profile Page (Profile Tabs)***

The new Chatter profile page has all the same features as before, but now also includes profile tabs and an enhanced overall look and feel. With profile tabs, administrators can now easily deploy custom content and apps on profiles. For users, this means a more personalized and immersive experience.

### ***Enabling Customization of Chatter User Profile Pages***

The `Enable Customization of Chatter User Profile Pages` user interface setting enables administrators to customize the tabs on the Chatter user profile page. This includes adding custom tabs or removing default tabs. This feature is automatically enabled in Winter '14. If disabled, users see the Feed and Overview tabs only.

### ***Introducing Subtab Apps (Apps on Profile)***

Users can see different sets of tabs on the profile page depending on their context. Subtab apps are the various sets of tabs available on users' profile pages. By creating custom tabs and displaying them within subtab apps, administrators can display additional content on profile pages.

### Managing Subtab Apps

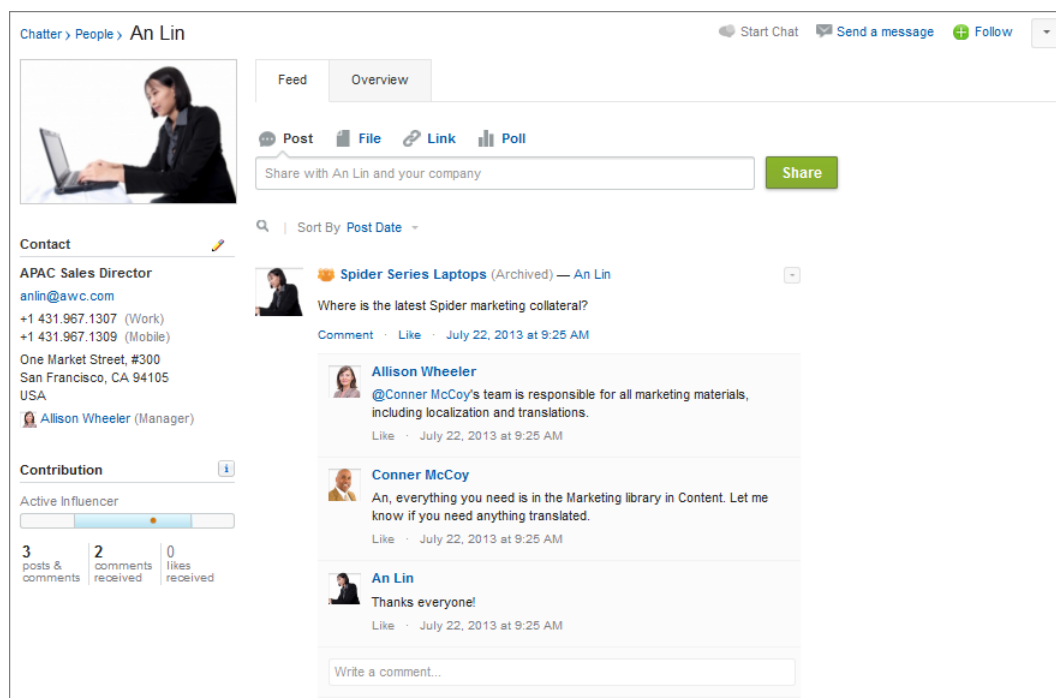
View and customize the subtab apps on users' profile pages.

### Controlling Subtab App Visibility

Once you have configured subtab apps, you can specify which users can see specific tabs on the profile page.

## New Chatter Profile Page (Profile Tabs)

The new Chatter profile page has all the same features as before, but now also includes profile tabs and an enhanced overall look and feel. With profile tabs, administrators can now easily deploy custom content and apps on profiles. For users, this means a more personalized and immersive experience.



User information is now organized in these default tabs.

- Feed tab—This tab displays your Chatter feed.
- Overview tab—This tab displays information about you, such as your groups, followers, recent topics, About Me section, and also your activity in Communities.

Your administrator configures the tabs and may add custom tabs or remove the default tabs. With the addition of custom tabs, your organization can add additional information as content within profile pages.

Other features on the profile page have been reorganized.

- If available to the user, **Help for this Page**, **Edit Profile**, **User Detail**, and **My Settings** are accessible from a drop-down button (▼) in the upper-right corner.
- When viewing someone else's profile, **Send a Message** and **Start Chat** are available at the top of the page.
- **Contact Info** is positioned above **Contribution** in the left column.

## Enabling Customization of Chatter User Profile Pages

The `Enable Customization of Chatter User Profile Pages` user interface setting enables administrators to customize the tabs on the Chatter user profile page. This includes adding custom tabs or removing default tabs. This feature is automatically enabled in Winter '14. If disabled, users see the Feed and Overview tabs only.

1. From Setup, click **Customize > User Interface** at the bottom of the **Customize** menu.
2. Select `Enable Customization of Chatter User Profile Pages`.
3. Click **Save**.

## Introducing Subtab Apps (Apps on Profile)

Users can see different sets of tabs on the profile page depending on their context. Subtab apps are the various sets of tabs available on users' profile pages. By creating custom tabs and displaying them within subtab apps, administrators can display additional content on profile pages.

An *app* is a group of tabs that work as a unit to provide application functionality. Similarly, a *subtab app* is a collection of tabs that appears on the Chatter profile page. A subtab app can include both default and custom tabs.

These default subtab apps determine which tabs display, depending on the user's context.

Subtab App	Displayed to the user when viewing...
Profile (Others)	Another user inside their internal organization
Profile (Self)	Their own profile inside their internal organization
Profile in Communities (Others)	Another user while inside a community. It's shown only if Communities is enabled.
Profile in Communities (Self)	Their own profile inside a community. It's shown only if Communities is enabled.



**Note:** End users can't customize the display of subtab apps. Administrators can hide tabs within subtab apps using the `Tab Hidden` option in Tab Settings. Users can see tabs set to `Default Off` and `Default On`.

## Managing Subtab Apps

View and customize the subtab apps on users' profile pages.

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"

From Setup, click **Create > Apps** to display your organization's subtab apps.

You can do the following:

- To view details for a subtab app, click the name in the **Subtab Apps** section. This displays its properties, such as which tabs are part of the app, including any tabs that are not yet deployed. Click custom tabs in the Included Tabs list to view details.
- To change the properties of a subtab app, click **Edit** to choose the tabs to include in the subtab app, change their display order, and set the `Default Landing Tab`.



**Note:** Administrators can use profile settings to limit users' access to each tab. This allows administrators to make specific tabs available to some users, but not to others.

## Controlling Subtab App Visibility

Once you have configured subtab apps, you can specify which users can see specific tabs on the profile page.

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"

To control the visibility of tabs within a subtab app:

1. From Setup, click **Manage Users > Profiles**.
2. Do one of the following:
  - Original profile user interface—Click **Edit** next to the profile you want to modify and scroll to the Tab Settings section.
  - Enhanced profile user interface—Click the profile you want to modify and click **Object Settings**. Click the object you want to modify and click **Edit**.



**Note:** Chatter External and Chatter Free users typically don't have the permissions needed to view subtab apps, but administrators can give them access.

3. Change the tab settings.  
End users can't customize the display of subtab apps. Administrators can hide tabs within subtab apps using the `Tab Hidden` option in Tab Settings. Users can see tabs set to `Default Off` and `Default On`.
4. (Original profile user interface only) To reset users' tab customizations to the tab visibility settings that you specify, select **Overwrite users' personal tab customizations**.
5. Click **Save**.

## Salesforce Files—Pilot

Salesforce Files lets you securely sync files between Chatter and your desktop and some mobile devices.



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

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.

## Publisher Actions

Actions let users do more in Chatter, like create records and log calls directly in the feed.

### **Default Publisher Actions Now Available**

Default actions are create actions—actions that allow users to create new records—that are automatically set up to make the process of configuring publisher actions much simpler.

### **Mobile Smart Actions Now Available**

Mobile smart actions are sets of actions in the publisher on account, case, contact, lead, and opportunity pages, and on the global publisher layout, in Salesforce1. They're designed to make it possible to get publisher actions for mobile users set up with very little effort.

### **Publisher Actions Available in Groups and on Topic Pages**

Users working in groups and on topic pages can now use any actions you include in the global Chatter layout, making it easier for them to create records and do other tasks in the feed.

### **New Publisher Action Types**

There are two new types of publisher actions: log a call and custom canvas.

### **Lookup and Master-Detail Fields Supported for Predefined Field Values in Publisher Actions**

Setting predefined values on fields you include in publisher action layouts helps ensure consistency and makes it faster and easier to use those actions. You can now predefine values for lookup and master-detail fields.

### **Rich Text Area Fields Supported in Publisher Actions**

You can now add rich text area fields to actions you create for the publisher, giving users the option to format text.

## Default Publisher Actions Now Available

Default actions are create actions—actions that allow users to create new records—that are automatically set up to make the process of configuring publisher actions much simpler.

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

In organizations created after Winter '14, these actions are automatically added to the default global publisher layout and to the default publisher layout on these objects:

- Account
- Case
- Contact
- Lead
- Opportunity



In organizations created before Winter '14, these actions are available in the palette on the page layout editor for these layouts, but they're not automatically added to any publisher layouts.

Here are the actions available on each of these layouts. On organizations where these actions are automatically added to publisher layouts, they appear in the publisher in the order shown. (Italicized actions are standard Chatter actions, not create actions.)

Layout	Default Actions
Global layout (also applies to custom objects)	<ul style="list-style-type: none"> <li><i>Post</i></li> <li><i>File</i></li> <li>New Task</li> <li>New Contact</li> <li>Log a Call (logged calls are saved as completed tasks)</li> <li>New Opportunity</li> <li>New Case</li> <li>New Lead</li> <li><i>Thanks</i></li> <li><i>Link</i></li> <li><i>Poll</i></li> </ul>
Account	<ul style="list-style-type: none"> <li><i>Post</i></li> <li><i>File</i></li> <li>New Task</li> <li>New Contact</li> <li>New Case</li> <li>Log a Call (logged calls are saved as completed tasks)</li> <li>New Note</li> <li>New Opportunity</li> <li><i>Thanks</i></li> <li><i>Link</i></li> <li><i>Poll</i></li> </ul>
Case	<ul style="list-style-type: none"> <li><i>Post</i></li> <li><i>File</i></li> <li>New Child Case</li> <li>Log a Call (logged calls are saved as completed tasks)</li> <li>New Task</li> <li>New Event</li> <li><i>Thanks</i></li> <li><i>Link</i></li> <li><i>Poll</i></li> </ul>
Contact	<ul style="list-style-type: none"> <li><i>Post</i></li> <li><i>File</i></li> <li>New Task</li> <li>Log a Call (logged calls are saved as completed tasks)</li> </ul>

Layout	Default Actions
	<ul style="list-style-type: none"> <li>• New Case</li> <li>• New Note</li> <li>• New Event</li> <li>• <i>Thanks</i></li> <li>• <i>Link</i></li> <li>• <i>Poll</i></li> </ul>
Lead	<ul style="list-style-type: none"> <li>• <i>Post</i></li> <li>• <i>File</i></li> <li>• New Task</li> <li>• Log a Call (logged calls are saved as completed tasks)</li> <li>• New Case</li> <li>• New Note</li> <li>• New Event</li> <li>• <i>Thanks</i></li> <li>• <i>Link</i></li> <li>• <i>Poll</i></li> </ul>
Opportunity	<ul style="list-style-type: none"> <li>• <i>Post</i></li> <li>• <i>File</i></li> <li>• New Task</li> <li>• Log a Call (logged calls are saved as completed tasks)</li> <li>• New Case</li> <li>• New Note</li> <li>• New Event</li> <li>• <i>Thanks</i></li> <li>• <i>Link</i></li> <li>• <i>Poll</i></li> </ul>

Create actions on the global layout are global actions, which means that records created using them aren't associated with any other record. Create actions added to publisher layouts on objects are object-specific; records created using these actions are automatically associated with related records. For example, when a user creates a contact using the New Contact action on the record detail page for the account Acme, Inc., the contact is automatically associated with Acme.

Each default create action has a predefined set of fields. You can change these fields and their order using the action layout editor. You can also change the order in which the actions appear in the publisher, and can remove any unwanted actions, using the page layout editor.

## Mobile Smart Actions Now Available

Mobile smart actions are sets of actions in the publisher on account, case, contact, lead, and opportunity pages, and on the global publisher layout, in Salesforce1. They're designed to make it possible to get publisher actions for mobile users set up with very little effort.

Mobile smart actions appear as a single action element in the page layout editor, but appear in the publisher on Salesforce1 as distinct create actions, which allow users to create records directly in the feed. Here's what the mobile smart action on each supported object expands to include. (The actions appear in the publisher layout in the order shown.)

Layout	Actions Included in Mobile Smart Action Bundle
Global layout (also applies to custom objects)	<ul style="list-style-type: none"> <li>• New Task</li> <li>• New Contact</li> <li>• Log a Call (logged calls are saved as completed tasks)</li> <li>• New Opportunity</li> <li>• New Case</li> <li>• New Lead</li> </ul>
Account	<ul style="list-style-type: none"> <li>• New Task</li> <li>• New Contact</li> <li>• New Case</li> <li>• Log a Call (logged calls are saved as completed tasks)</li> <li>• New Note</li> <li>• New Opportunity</li> </ul>
Case	<ul style="list-style-type: none"> <li>• New Child Case</li> <li>• Log a Call (logged calls are saved as completed tasks)</li> <li>• New Task</li> <li>• New Event</li> </ul>
Contact	<ul style="list-style-type: none"> <li>• New Task</li> <li>• Log a Call (logged calls are saved as completed tasks)</li> <li>• New Case</li> <li>• New Note</li> <li>• New Event</li> </ul>
Lead	<ul style="list-style-type: none"> <li>• New Task</li> <li>• Log a Call (logged calls are saved as completed tasks)</li> <li>• New Case</li> <li>• New Note</li> <li>• New Event</li> </ul>
Opportunity	<ul style="list-style-type: none"> <li>• New Task</li> <li>• Log a Call (logged calls are saved as completed tasks)</li> <li>• New Case</li> <li>• New Note</li> <li>• New Event</li> </ul>

Mobile smart actions are automatically populated with all of your organization's required fields on the relevant object, regardless of how many fields there are. For example, the New Case action in the mobile smart action bundle includes all required case

fields. You can't edit the fields on mobile smart actions; the fields that appear will change only if you change which fields on an object are required.

You also can't change which actions are included as part of a mobile smart actions bundle—removing “New Event” or adding a custom action, for example. To create a more customized set of actions, create the actions you want and add them to the relevant page layouts, and remove the mobile smart actions bundle.

Mobile smart actions appear in different ways for different organizations.

- If your organization existed prior to Winter '14 but didn't have publisher actions enabled when Winter '14 was released, mobile smart actions are automatically added to the publisher on all page layouts for account, case, contact, lead, and opportunity, and to the global publisher layout.
  - ◊ If you enable publisher actions, mobile smart actions are automatically replaced by default actions on each supported object.
- If your organization was created after Winter '14, or was an existing organization that had publisher actions enabled when Winter '14 was released, mobile smart actions are available in the page layout editor for all page layouts on the supported objects, but they're not automatically added to the publisher.



**Note:** Mobile smart actions don't appear in the publisher on any page in the full Salesforce site, regardless of which page layouts you add them to; they appear only to users on Salesforce1. As such, if you have users who access Salesforce on mobile devices more frequently than they access the full site, you may want to create specific page layouts for them and include mobile smart actions only on those layouts.

## Publisher Actions Available in Groups and on Topic Pages

Users working in groups and on topic pages can now use any actions you include in the global Chatter layout, making it easier for them to create records and do other tasks in the feed.

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

When a user creates a record in a group or on a topic page using a create action, a link to the record appears in the feed on the group or topic page, as well as in the main Chatter feed, as the first entry in the feed for the new record, and in the user profile feed of the user who created the record. For records created on topic pages, the topic is added to the resulting feed item automatically.

## New Publisher Action Types

There are two new types of publisher actions: log a call and custom canvas.

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

Custom canvas actions available in: **Professional** (with Force.com Canvas enabled), **Enterprise, Performance, Unlimited, and Developer Editions**

- *Log-a-call actions* let users record the details of phone calls or other customer interactions. These call logs are saved as completed tasks.
- *Update actions* let users make changes to a record from the record's feed.

- *Custom canvas actions* let users access canvas apps directly in the publisher. You can use as a custom action any canvas app that uses Publisher as a location. For example, you might use an expense report app as a custom action to make it easy for salespeople to submit expense reports directly from feeds. A custom action that includes a video conferencing canvas app could help support agents communicate with customers visually for easier troubleshooting of technical issues.



**Note:** Custom canvas actions are currently available through a pilot program. For information on enabling custom canvas actions in your organization, contact salesforce.com.

Log a call actions can be either object-specific or global actions. Custom canvas actions can only be global actions. Update actions can only be object-specific.

For more information, see “Creating Object-Specific Actions,” “Creating Global Actions,” “Creating Custom Actions,” and “Using Canvas Apps as Custom Actions” in the Salesforce Help.

## Lookup and Master-Detail Fields Supported for Predefined Field Values in Publisher Actions

Setting predefined values on fields you include in publisher action layouts helps ensure consistency and makes it faster and easier to use those actions. You can now predefine values for lookup and master-detail fields.

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

For more information on using predefined field values, see “Setting Predefined Field Values for Publisher Actions” and “Notes on Predefined Field Values for Publisher Actions” in the Salesforce Help.

## Rich Text Area Fields Supported in Publisher Actions

You can now add rich text area fields to actions you create for the publisher, giving users the option to format text.

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

For example, if you have a Create Opportunity action, you might add a rich text area field called Detailed Comments to let salespeople write notes that include bulleted lists, bold text, italics, and other formatting.



**Note:** Rich text area fields are supported only when you add them to one-column layouts, or as fields that span both columns in two-column layouts. If you add a rich text area field to only one column in a two-column layout, it appears as a plain text area, as there’s not enough space to display the full rich text editor.

For more information on adding fields—including rich text area fields—to actions, see “Customizing Publisher Actions with the Action Layout Editor” in the Salesforce Help.

## Topics

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

### Feed Tracking Automatically Enabled for Topics

Immediately upon release, administrators can enable feed tracking for topics so users can follow topics. If an administrator doesn't manually enable feed tracking for topics within 24 hours after the release, a script will automatically enable it.

### Following Topics

Follow topics so you can see updates in your Chatter feed.

### New Topics User Permissions

Use the new topics permissions to give users the ability to assign, create, delete, and edit topics.

### Editing Topic Names

You can now change spacing in addition to capitalization in topic names.

### Topics with the Same Name Merged

Within 24 hours after the release, we're automatically merging topics with names that differ only in capitalization and spacing.

## Feed Tracking Automatically Enabled for Topics

Immediately upon release, administrators can enable feed tracking for topics so users can follow topics. If an administrator doesn't manually enable feed tracking for topics within 24 hours after the release, a script will automatically enable it.

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

User Permissions Needed	
To customize fields tracked in feeds:	"Customize Application"
To view the field tracking setup page:	"View Setup and Configuration"

A topic's `Description` field is the only field you can track, and it's tracked by default. Feed tracked changes for topics (changes to a topic's description) appear only on the profile page of the person who made the change, and not on the topic page or in your feed, even if you're following the topic.

1. From Setup, click **Customize > Chatter > Feed Tracking**.
2. Select Topic.
3. Select `Enable Feed Tracking`.

You must have the required user permissions to see this checkbox. To restore the default feed tracking settings for this object, click **Restore Defaults**.

4. Ensure the `Description` field is selected.
5. Click **Save**.

If you disable feed tracking for topics, users can no longer follow new topics, but they continue to follow the ones they followed when feed tracking was enabled. These topics count toward the maximum number of people, topics, and records that they can follow. Use the Chatter REST API to stop following topics after feed tracking has been disabled.

## Following Topics

Follow topics so you can see updates in your Chatter feed.

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

To follow a topic, click **+ Follow** on the:

- Topic detail page
- Topics list

Feed tracked changes for topics (changes to a topic's description) appear only on the profile page of the person who made the change, and not on the topic page or in your feed, even if you're following the topic. You can follow a maximum combined total of 500 people, topics, and records.

To stop following a topic, click **x** next to Following. After you stop following a topic, you don't see future updates to the topic in your Chatter feed.

If your administrator disables feed tracking for topics, you can't follow new topics but you continue to follow the ones you followed when feed tracking was enabled. These topics count toward the maximum number of people, topics, and records that you can follow. To stop following a topic after your administrator disables feed tracking, you must use the Chatter REST API.

## New Topics User Permissions

Use the new topics permissions to give users the ability to assign, create, delete, and edit topics.

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

User Permissions Needed	
To view system permissions:	"View Setup and Configuration"
To edit system permissions:	"Manage Users"

In Winter '14, these new topics user permissions are available.

You can enable user permissions in permission sets and profiles. In permission sets and the enhanced profile user interface, these permissions are listed in the System Permissions page. In the original profile user interface, they are listed under General User Permissions.

### Assign Topics

Assign existing topics to feed items. Remove topics from feed items.

### Create Topics

Create new topics by assigning them to feed items.

### Delete Topics

Delete topics and remove all topic assignments from feed items.

Consider these points when granting delete access:

- Topics are hard deleted. They aren't sent to the Recycle Bin.
- Deleted topics are removed from search results, the topics list, all posts, Recently Talked About topics, Related Topics, and your users' favorites. Deleted topics are removed from Trending Topics after the next calculation.
- Deleted topics are not blacklisted. Users can reintroduce a topic after it's been deleted.

**Edit Topics**

Edit topic names and descriptions.

To use permission sets to grant topics permissions to users:


- 1. From Setup, click **Manage Users > Permission Sets**.
- 2. Click **New** and create permission sets that include the appropriate topics permissions.
- 3. Go to **Manage Users > Users** and assign the permission sets to the appropriate users.

**Editing Topic Names**

You can now change spacing in addition to capitalization in topic names.

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

User Permissions Needed	
To edit topic names:	“Edit Topics”

- On the topic detail page next to Description, click .

**Topics with the Same Name Merged**

Within 24 hours after the release, we’re automatically merging topics with names that differ only in capitalization and spacing.

It can be confusing when the same topic goes by similar but different names, such as San Francisco, sanfrancisco, and SanFrancisco. Existing topics with this type of variation are merged within 24 hours after the release. We choose the topic with the most activity (the highest talking about number), and we merge the other topics’ posts and comments into the chosen topic’s feed. If more than one topic had a description, we concatenate the descriptions. You can always change a topic’s description and the capitalization and spacing of a chosen topic. See [Editing Topic Names](#).

Now when users start typing a topic name that differs only in capitalization or spacing from an existing topic, we only allow them to choose the existing topic, to ensure consistency. And hashtags are now space and capitalization insensitive. Clicking **#sanfrancisco**, **#SanFrancisco**, and **#San Francisco** takes you to the same topic detail page.

**Chatter Feeds**

Chatter Feeds make collaboration easy.

- [Chatter Thanks](#)
- [Increased Post and Comment Size](#)
- [Combined Filter and Sort Options](#)
- [New Preview Links](#)
- [Relocated Feed Search](#)
- [Record Updates in All Company Feed](#)



## Chatter Thanks

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

We've added Thanks to Chatter.

Thanks is a Work.com feature that is now available directly from the Chatter publisher. Use Thanks to recognize your coworkers. You can customize your post with one of twelve badges.

Administrators need to enable Thanks for all organizations.



### Note:

- Work.com is a suite of sales performance management products that enable you to drive performance of your sales organization.
- **Enterprise, Professional, and Unlimited** editions do not have full Chatter Thanks and Badging functionality. This requires a separate Work.com license. The standard Salesforce license for the **Performance Edition** includes a **Perform Work.com** license with full Thanks and Badging functionality.

Examples of actions that require a Work.com license:

- Modify, delete, or add custom badges
- View recognition received by a user with the Recognition tab
- Use Work.com Rewards

## Enabling Chatter Thanks

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

1. In Setup, click **Customize > Work.com > Settings**.
2. Select **Enable** under Thanks Settings and click **Save**.

To disable Work.com features, in Setup, click **Customize > Work.com > Settings** and deselect **Enable**. Users will no longer see the Thanks action in the Chatter publisher. However, they can still see previously created Thanks posts.

## Configuring Thanks in the Chatter Publisher

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

Once Thanks is enabled, administrators can change the position of Thanks in the Chatter publisher or hide visibility for specific profiles.

1. In Setup, click **Customize > Chatter > Settings**.
2. Confirm that Enable Publisher Actions is enabled in the Publisher Actions section.  
If it isn't enabled, select **Enable Publisher Actions** and click **Save**.
3. Click **Setup > Customize > Chatter > Publisher Layouts**.
4. On the Global Publisher Layout page, select **Edit** in the Action column for the Global Publisher Layout.

5. Under Publisher Actions, click the Thanks button and drag it to the desired position.

You can also hide Thanks in the publisher based on user profiles. For more information, search for “Assigning Global Publisher Layouts to User Profiles” in the Salesforce online help.

## Giving Thanks to Your Coworkers

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

Thank someone if they’ve done a great job or recognize someone’s achievement.

1. From the Chatter publisher, click **Thanks**.
2. Type the name of the person you want to thank.

Currently, you can only thank one person at a time, but you can mention other people in your post.

3. Select **Change Badge** to select a different badge for your post or keep the default badge.

You can choose from twelve pre-defined badges. Select the badge image to see more information about the badge.

4. Type a message for the person you’re thanking.
5. Select your audience.
  - **My Followers** to post to all your followers
  - **A Group** to post to a specific group. Search for the group and select the group from the list. When you post to a private group, only the group’s members can see your post.
6. Click **Share**.

Your Thanks post appears in your feed and the feed of the person you’re thanking. If you’re posting to a public group or a record page, the post appears on the group or record feed. If you’re posting to a private group, only members of the private group can see your post.

## Increased Post and Comment Size

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


We’ve increased the length of posts and comments. Instead of 1000 characters, your posts and comments can now be up to 5000 characters long.

## Combined Filter and Sort Options

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

We’ve combined the feed filter and sort options into one drop-down menu. The menu is available on:

- Your Chatter page
- Profile pages
- Group pages
- Record detail pages
- Chatter feed search result pages

Above the feed, click  next to Show and select a filter or sort by option.

Filter or Sort Option	Description
All Updates (Default)	Shows all posts and comments from people and records you follow, posts from groups you're a member of, and all system-generated posts.
Fewer Updates	<ul style="list-style-type: none"> <li>Shows all posts and comments from people and records you follow and groups you're a member of</li> <li>Hides system-generated posts from records that nobody has commented on</li> </ul>
People	Shows only the posts and comments from people you follow.
Groups	Shows only the posts in groups you're a member of.
Files	Shows posts that include: <ul style="list-style-type: none"> <li>Files you follow</li> <li>File posts that someone you follow has commented on</li> </ul>
Post Date	Sorts by most recent posts.
Most Recent Activity	Sorts by posts with the most recent comments, including polls with new comments.

For example, your What I Follow feed shows posts from all people and records you follow, and groups you're a member of. If you select the People filter, your feed only shows posts from people you follow instead of all posts.

## New Preview Links

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


In Winter '14, we've added more previews for linked content:

- [bbc.com](http://bbc.com)
- [bbc.uk.com](http://bbc.uk.com)
- [brightcove.com](http://brightcove.com)
- [ft.com](http://ft.com)
- [gawker.com](http://gawker.com)
- [gizmodo.com](http://gizmodo.com)
- [hulu.com](http://hulu.com)
- [linkedin.com](http://linkedin.com)
- [plus.google.com](http://plus.google.com)
- [theverge.com](http://theverge.com)
- [twitpic.com](http://twitpic.com)
- [twitter.com](http://twitter.com)
- [ustream.tv](http://ustream.tv)
- [vidyard.com](http://vidyard.com)
- [vine.com](http://vine.com)

The previews are powered by Embed.ly, a third-party service, and include thumbnails, descriptions, and video players for links to videos. We don't share any content, user, organization, or account data with Embed.ly. We only share the URLs that are on the domain whitelist. Additionally, all of our URL requests pass through a Salesforce proxy, meaning Embed.ly never receives calls directly from the client and therefore doesn't have information about who's making the URL request.

## Relocated Feed Search

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

We moved the location of the feed search icon (  ). You'll now see the icon on the left side of your feed below the publisher.

You can search for information in feeds on a user's profile, on a record, in groups, and on the Chatter and Home tabs. A contextual feed search is helpful when you want to find something that was once discussed in that specific feed.

## Record Updates in All Company Feed

The All Company feed now only includes system-generated record posts, if they have likes or comments.

For example, if an account manager creates a new account or changes a feed tracked field on an existing account, Salesforce automatically generates an update. This type of post no longer appears in the All Company feed, unless someone liked or commented on the post.

## Email Notifications

Chatter works with your email so users can be easily notified about posts.

### *Redesigned Email Notifications*

Email notifications for posts, comments, and likes feature a new look and updated content.

## Redesigned Email Notifications

Email notifications for posts, comments, and likes feature a new look and updated content.

The design and content changes include:

- A new layout optimized for both desktop and mobile
- A personalized **From** field that names the author of the post, comment, or like
- Footer text that identifies your organization and the type of notification, making it easier to change your email settings
- For like notifications in HTML emails, the email body includes the post or comment that was liked

Other notifications such as group digests and follow notifications haven't changed. Custom branding for Communities is still supported.

# Communities

Communities helps companies share information with their customers and partners.

## **Communities Moderation**

Moderate your communities to encourage the best content and interactions.

## **Default Profile for Communities Self-Registration**

Self-registration allows users to join your community without requiring an administrator's assistance.

## **Sharing Groups for High-Volume Community Users**

Enable sharing settings so that you can easily grant high-volume community users access to the appropriate objects within your communities. Additionally, you can create associated sharing groups, so that internal and external users can access records created by those high-volume community users.

## **Configuring Group Digest Emails in Communities**

## **Offline Communities No Longer Show Up in The Community Drop-Down Menu**

## **View Global Header Permission Is No Longer On By Default**

## **Maximum Number of Communities Listed in Setup**

You can now easily find out how many communities are available in your organization.

## **Mention Suggestions Include Members and Groups Across Communities**

When you're writing a post and mention a person or a group, the list of mention suggestions now includes matches for people and groups across all communities you're a member of.

## **Case Visibility in Communities**

New cases are now visible in communities, regardless of the `New Cases Visible in Portal` setting.

## **Improved Communities API Support**

Winter '14 has improved API support for Communities.

## **Site.com Enhancements for Communities**

Use Site.com to perform advanced customizations on your communities.

# Communities Moderation

Moderate your communities to encourage the best content and interactions.

## **Communities Moderation Overview**

Community moderation allows you to empower members of your community to monitor content and ensure that it is appropriate and relevant.

## **What is a Community Moderator?**

Moderators help ensure the success of your community.

## **Enabling Moderation in Your Community**

Turn on moderation for your community to empower members to flag posts and comments that they deem inappropriate.

### **Assigning a Community Moderator**

Assign one or more people as moderators in your community. Moderators can be either employees from your company or external users who are members of your community.

### **Flagging a Post or Comment in a Community**

If another member of your community posts something inappropriate, you can flag it.

### **Moderating Your Community**

If you are the moderator of a community, you can review a list of posts and comments that members of the community flagged as inappropriate and take action. If you're a group owner or manager, you can view and remove flags on items in your groups.

### **Moderating Community Files**

If you are the moderator of a community, you can delete files that shouldn't be present in the community. Additionally, group owners and managers can delete files in the groups they own and manage.

## **Communities Moderation Overview**

Community moderation allows you to empower members of your community to monitor content and ensure that it is appropriate and relevant.

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

Moderation is crucial for a community to thrive. You need active moderators who are willing to spend time ensuring that the members and content in your community are appropriate and helpful. You also need to empower members to speak up when they view something as inappropriate or offensive.

With Communities Moderation, you can

- Designate specific users as moderators so that they can closely monitor the community
- Allow all members to flag posts and comments that are inappropriate
- Allow moderators to review flagged items and take action, such as deleting a post or comment
- Allow moderators to delete files
- Allow group owners and managers to moderate within their groups

## **What is a Community Moderator?**

Moderators help ensure the success of your community.

In a successful community, members are actively engaged and communicating with others. A community moderator facilitates knowledge sharing within a community to help members benefit and derive value from their participation. The moderator also helps to ensure that all communications and content in the community are appropriate.

The moderator can be an employee from your internal organization or a trusted external member of the community. This person should be accustomed to interfacing with customers, familiar with Salesforce and Chatter capabilities, and can spend time regularly monitoring the community.

A moderator can:


- Manage the list of flagged posts and comments in the community
- Remove flags

- Delete inappropriate posts, comments, and files

A moderator can also help drive the success of a community in many other ways.

- Sharing relevant and useful information in community posts
- Encouraging members to post and comment on each other’s posts
- Setting an example by their activity in the community
- Keeping discussions focused, spam-free, and non-controversial
- Redirecting email conversations to communities when it can benefit other community members
- Establishing the community as a reliable source of information and a forum for transparent discussions

You can choose to designate more than one moderator for a community, especially if the community has a large number of members.

 **Note:** Although they share some similar capabilities, a community moderator is different than a Chatter moderator.

# Enabling Moderation in Your Community

Turn on moderation for your community to empower members to flag posts and comments that they deem inappropriate.

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

User Permissions Needed	
To enable moderation in your community:	“Create and Manage Communities”

Community Moderation must be enabled for your organization before you can allow members to flag content. If you don’t see the option to allow flagged content, contact your administrator.

Once an item is flagged, your community moderator can review it and take action.

1. From Setup, click **Customize > Communities > Manage Communities**.
2. Click **Edit** next to the community in which you want to enable moderation.
3. Click **Members**, then select `Allow members to flag content`.
4. Click **Save**.

With moderation enabled in a community:

- Members can flag posts and comments using the `Flag as inappropriate` option
- Group owners and managers can moderate groups they own or manage
- Users with “Moderate Communities Feeds” can moderate items they have access to in the community using the Flagged feed filter
- Users with “Moderate Communities Files” can delete files they have access to in the community

# Assigning a Community Moderator

Assign one or more people as moderators in your community. Moderators can be either employees from your company or external users who are members of your community.

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

#### User Permissions Needed

To assign permission sets: "Manage Users"

You can assign moderators by creating a permission set that includes one or both of the moderation permissions.

Permission	Description
Moderate Communities Feeds	Review flagged posts and comments and take action, such as removing flags or deleting the post or comment. Sees a Flagged filter and list view that they can use to manage flagged items
Moderate Communities Files	Delete files

You can also add these permissions to a profile. These permissions are valid for all communities the user is a member of, but don't apply in your internal organization.

1. From Setup, click **Manage Users > Permission Sets**, then click **New**.
2. Create a permission set that includes the appropriate permissions.
3. From Setup, click **Manage Users > Users**.
4. Find the user you want to be a community moderator and add the permission set to their Permission Set Assignments related list.

The user can now moderate any items they have access to in all communities they're a member of. Moderators with the "Moderate Communities Feeds" permission can also receive an email notification when a post or comment is flagged by selecting the `Flags an item as inappropriate` email notification.

## Flagging a Post or Comment in a Community

If another member of your community posts something inappropriate, you can flag it.


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


The ability to flag a post or comment as inappropriate shows when `Allow members to flag content` is selected for a community.

Flagged posts and comments are sent to the community moderator for review. Other members in the community can't see your flag.



**Note:** Flagging items on record feeds within the community isn't currently supported.

1. Click  at the top right corner of the post or comment you want to flag to expand the drop-down menu.
2. Click **Flag as inappropriate**.  
The flag icon displays next to the post or comment date.

If you flagged the item by accident or decide you want to remove the flag, simply click , and click **Remove flag**.

You might want to flag a post if:



- A member accidentally posts something company confidential to a public group
- A member posts or comments and uses language you find offensive

## Moderating Your Community

If you are the moderator of a community, you can review a list of posts and comments that members of the community flagged as inappropriate and take action. If you're a group owner or manager, you can view and remove flags on items in your groups.

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

User Permissions Needed	
To view flagged items, remove flags, and delete posts or comments:	"Moderate Communities Feeds"
To delete files:	"Moderate Communities Files"

The Flagged filter shows when `Allow members to flag content` is selected for a community.

Flagged items have a small orange flag next to the post or comment date. The number next to the flag indicates how many people have flagged the item. The moderator can review each item in the list and decide whether to take action.



**Note:** Moderators can only view and act on items they have access to.

1. On the Chatter tab in your community, click the Flagged filter and review the flagged items.
2. Click **Delete** or **Remove Flags**, depending on whether you agree that the post or comment is inappropriate and should be deleted or whether the post or comment was flagged in error.
3. Click **OK**.



**Tip:** If you want to receive an email each time an item in your community is flagged, select the `Flags an item as inappropriate` checkbox on the Chatter Email Notifications page.

## Moderating Community Files

If you are the moderator of a community, you can delete files that shouldn't be present in the community. Additionally, group owners and managers can delete files in the groups they own and manage.

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

User Permissions Needed	
To view flagged items, remove flags, and delete posts or comments:	"Moderate Communities Files"

Moderators can delete files only when `Allow members to flag content` is selected for a community.

Members of your community may post files that aren't appropriate because they contain sensitive information or content that may be offensive. Moderators can delete files in the community that they have access to.

Groups owners and managers can delete files in the groups they own and manage, regardless of whether community moderation is enabled.

1. Within the community, access the files details for the file you want to delete.
2. Click **Delete**.  
The file is permanently deleted from the community.

## Default Profile for Communities Self-Registration

Self-registration allows users to join your community without requiring an administrator's assistance.

You can now select a default profile that is assigned to users who self-register for your community. You can continue to set this value in the `CommunitiesSelfRegController` if desired. If profiles are set in both locations, the value in the `CommunitiesSelfRegController` overrides the default value.

To enable self-registration:

1. From Setup, click **Customize > Communities > Manage Communities**.
2. Click **Edit** next to your community, then click **Login Page**.
3. Select `Allow external users to self-register` to enable self-registration for your community.
4. Optionally, select a profile to assign to users who self-register. If you don't select a value, you must enter one in the `CommunitiesSelfRegController`.



**Note:** You can only select portal profiles that are associated with the community.

If a profile is selected as the default for users who self-register, and you remove it from the community, the `Default profile for users that self register` is automatically reset to `None`.

To complete self-registration setup, you must specify in the default controller which account the self-registration process should assign users to. For more information, see [Getting Started With Salesforce Communities](#).

## Sharing Groups for High-Volume Community Users

Enable sharing settings so that you can easily grant high-volume community users access to the appropriate objects within your communities. Additionally, you can create associated sharing groups, so that internal and external users can access records created by those high-volume community users.

### **Granting High-Volume Community Users Access to Records**

You can create sharing sets to grant high-volume community users access to records.

### **Sharing Records Owned By High-Volume Community Users**

Share groups allow you to share records owned by high-volume community users with internal and external users in your communities.

## Granting High-Volume Community Users Access to Records

You can create sharing sets to grant high-volume community users access to records.

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

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

A sharing set allows high-volume users to access any record that has a lookup field to an account or contact that matches the user's account or contact. Sharing sets apply across all communities a high-volume community user is a member of.

High-volume community users have either the Customer Community or High-Volume Portal User license.

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

The Available Objects list excludes:

- Objects with an organization-wide sharing setting of Public Read/Write
- Custom objects that don't have an account or contact lookup field

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



**Note:** Objects with **Set Up** in the Action column aren't configured for high-volume user access. Until you configure an object, high-volume users have limited or no access to its records.

7. Grant access based on an account or contact lookup:
  - Select `All records where the high-volume community user's account matches to give high-volume community users access to all records associated with their accounts.` For example, choosing this option for cases would give users access to all cases associated with their accounts.
  - Select `Only records where the high-volume community user's contact matches to give high-volume community users access only to the records that are associated with their contacts.` For example, choosing this option for cases would give users access only to the cases that they filed, or cases that were filed on their behalf by a support representative.



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

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

After creating a sharing set, [create share groups](#) to give other users access to records created by high-volume community users.

## Sharing Records Owned By High-Volume Community Users

Share groups allow you to share records owned by high-volume community users with internal and external users in your communities.

Available in: <b>Performance</b> , <b>Unlimited</b> , <b>Developer</b> , and <b>Enterprise</b> Editions
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User Permissions Needed
To share records owned by high-volume community users to “Customize Application” other users:

High-volume users are limited-access users intended for organizations with many thousands to millions of external users. Unlike other external users, high-volume users don’t have roles, which eliminates performance issues associated with role hierarchy calculations. Because high-volume community users are not in the role hierarchy while Salesforce users are, a *share group* allows you to specify the Salesforce other external users who can access records owned by high-volume community users.

Share groups apply across communities.

To set up share groups for your communities:

1. Click **Customize** > **Communities** > **Settings**.
2. In the Sharing Settings for High-Volume Community Users related list, click **Edit** next to an existing sharing set.
3. Click the Share Group Settings tab.
4. Click **Activate** to turn on the share group.

Activating the share group can take a while. An email is sent to you when the process finishes.



**Note:** Deactivating a share group removes *all* other users’ access to records owned by high-volume community users. An email isn’t sent to you when the deactivation process finishes.

5. Click **Edit** to add users to the share group. You can add both internal users from your organization as well as external users from the same parent account as the high-volume user.
  - a. From the *Search* drop-down list, select the type of member to add.
  - b. If you don’t see the member you want to add, enter keywords in the search box and click **Find**.
  - c. Select members from the Available Members box, and click **Add** to add them to the group.
  - d. Click **Save**.

## Configuring Group Digest Emails in Communities

To receive group digest emails, your administrator must enable email notifications for your community.

Use group digests to keep up with activity in your groups. This feature is now available in Communities.

1. Click a group’s name.
2. Click **Email Me...** and choose to receive a daily or weekly digest email or an email every time someone posts.

To stop receiving email for the group, click **Turn Off Group Email**.



**Note:** In Communities, the *Email on Each Post* option is disabled once a group exceeds 10,000 members. All members who had this option selected are automatically switched to *Daily Digests*.

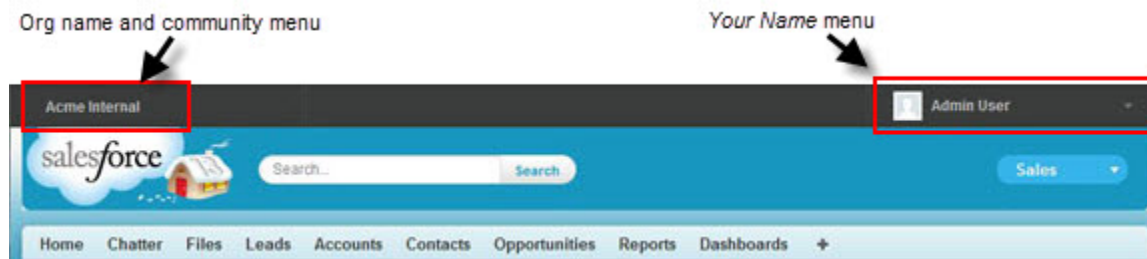
# Offline Communities No Longer Show Up in The Community Drop-Down Menu



Starting in Winter '14, only **Published** communities that you're a member of will show up in the drop-down menu. **Offline** communities won't be listed.

## View Global Header Permission Is No Longer On By Default

Starting in Winter '14, the **View Global Header** permission is now disabled by default for all standard profiles. Previously, this permission was automatically enabled for all profiles in an organizations when Salesforce Communities was enabled. Administrators in organizations already using Salesforce Communities can now manually disable this permission in standard profiles.

When Salesforce Communities is enabled, the global header allows you to easily switch between your communities and your internal organization.



- To access communities from within your organization, click  next to *Organization Name* in the drop-down and select the community you want to switch to. The drop-down shows **Published** communities that you're a member of. If you have the "Create and Manage Communities" permission, you also see **Preview** communities that you're a member of.
- To return to your internal organization, click  next to *Community Name* in the drop-down and select your organization name.

Internal users who aren't members of any community just see the company name. External users see the drop-down menu only if they belong to more than one published community.

The **Your Name** menu on the right side contains links to edit your contact information and log out. For internal users, it also contains a link to Help & Training and may also contain links to Setup and other tools depending on user permissions and enabled features.

You can use permission sets to turn on the global header for the appropriate users.

1. From Setup, click **Manage Users > Permission Sets**.
2. Click **New** and create a permission set that includes the System Permission View Global Header.
3. Go to **Manage Users > Users** and assign the permission set to the appropriate users.

Users with the permission set see the global header at the top of all pages.

## Maximum Number of Communities Listed in Setup

You can now easily find out how many communities are available in your organization.

The number of communities available is based on the number purchased for your organization. To find out that number, go to **Customize > Communities > Manage Communities**. The **Maximum number of active communities** field shows the total number of Published and Preview communities your organization can have. Offline communities don't count against this total.

## Mention Suggestions Include Members and Groups Across Communities

When you're writing a post and mention a person or a group, the list of mention suggestions now includes matches for people and groups across all communities you're a member of.

In previous releases, the list only included matches for people who have sharing access to the record. If you select a person or group from the list of matches who doesn't have sharing access to the post or record, you'll see an error message explaining that the person or group members can't see your post.

## Case Visibility in Communities

New cases are now visible in communities, regardless of the `New Cases Visible in Portal` setting.

Visibility of new cases for partner or customer users is controlled by the `New Cases Visible in Portal` field in an organization's Case Support Settings. Starting in the Winter '14 release, this setting will no longer apply for partner users and customer users in communities. Case visibility in communities will be controlled by sharing rules. This setting will still apply in partner portals and Customer Portals.

## Improved Communities API Support

Winter '14 has improved API support for Communities.

Some of the updates include:

- Access the SOAP or REST API through the community endpoint URL. To do so, you must have an API session. Login is not supported.
- AJAX Toolkit support
- Streaming API support within a community
- Chatter REST API support for Communities Moderation

For information on additional API updates, see [API](#) on page 304.

## Site.com Enhancements for Communities

Use Site.com to perform advanced customizations on your communities.

### ***Use Site.com Pages Instead of Standard Tabs***

You can override the standard tabs in your community and replace them with your Site.com pages.

### ***Use Salesforce Header and Footer on Site.com Pages***

You can choose whether Site.com pages should have the Salesforce header and footer.

Adding Site.com Pages as Tabs in Your Community

Create Site.com pages and include them in your community using web tabs.

New Communities Widgets

Widgets can be used to easily add elements to your Site.com pages.

Use Site.com Pages Instead of Standard Tabs

You can override the standard tabs in your community and replace them with your Site.com pages.

When creating your community, you can select tabs to display or you can choose to use Site.com pages instead. If you choose to use Site.com, you must create pages in your community’s associated Site.com site. When external users log in to this community or internal users access the community using the community drop-down menu, they will be redirected to the Site.com home page in full-screen mode, meaning that your community members won’t see the standard Salesforce header, footer, or tabs.

To use Site.com pages instead of tabs:

- 1. From Setup, click **Customize > Communities > Manage Communities**.
- 2. Click **Edit** next to the community name.
- 3. Click **Tabs & Pages**.
- 4. Select `Use Site.com to create custom community pages`.

All tabs will disappear from your community. You must now go to Site.com and create the pages for your community.

Use Salesforce Header and Footer on Site.com Pages

You can choose whether Site.com pages should have the Salesforce header and footer.

If you want to take advantage of the standard Salesforce layout and tabs functionality in your community, you can enable it in the properties for your Site.com pages. When enabled, you can also select a tab name for your page so that you can expose it in a tab within your community.

When you enable this feature on your page, you will see the standard Salesforce header, footer, and tabs when you publish your Site.com page.

To use the Salesforce header and footer on your page, in the page Properties pane, select `Show Salesforce Header`.

Adding Site.com Pages as Tabs in Your Community

Create Site.com pages and include them in your community using web tabs.

User Permissions Needed	
To build, edit, and manage a community’s custom pages:	“Create and Manage Communities”
	OR
	Site.com Publisher User field enabled on the user detail page
	AND
	Site administrator or designer role assigned at the site level

You can now easily expose Site.com pages in your community. Simply associate the page with a web tab and add the tab to your community.

1. In the Properties pane for your page, select `Show Salesforce Header`.  
Selecting this option ensures that you see tabs in your community.
2. Enter the tab name as it should appear on the tab in your community.  
The web tab you create must have the same name.
3. Determine the correct URL for the page.  
The URL must be in the following format `https://mydomain.force.com/mycommunity/s/<pagename>`, where `pagename` matches the name of your page.
4. From Setup, click **Create > Tabs**.
5. In Web Tabs, click **New** and enter the name of the tab as it appears in the Tab Name field in your page properties.
6. On the Step 3 screen, paste the URL you created in the Button or Link URL text box.
7. Return to the Create Community wizard and add the new tab to your community.

## New Communities Widgets

Widgets can be used to easily add elements to your Site.com pages.

Widgets are page elements that can be reused throughout your community Site.com sites. In Winter ‘14, we’re introducing two out-of-box widgets for community Site.com sites. Use these widgets to add the Chatter News Feed or Group Feed to your Site.com pages. For example, if you add the News Feed widget to your page, the Chatter feed displays when the page is rendered.

### Adding Chatter News or Group Feeds to Community Site.com Pages

Use the Chatter News Feed to display a Chatter feed on your site pages, or display the feeds of a particular group using the Chatter Group Feed.

## Adding Chatter News or Group Feeds to Community Site.com Pages

Use the Chatter News Feed to display a Chatter feed on your site pages, or display the feeds of a particular group using the Chatter Group Feed.

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

User Permissions Needed	
To build, edit, and manage a community’s custom pages:	“Create and Manage Communities”
	OR
	Site.com Publisher User field enabled on the user detail page
	AND
	Site administrator or designer role assigned at the site level

1. Drag the **News Feed** or **Group Feed** from the Widgets section of the Page Elements pane onto the page.



When you add a widget to a page, it creates a copy or *instance* of the widget. You can't edit the content of a widget, but you can edit the properties.

2. If you're adding a group feed, enter the Group ID in the Properties pane.

The Group ID determines which group feed is displayed on your page. You can include more than one group feed on a page if you want to show the feeds for multiple groups.

3. Preview the page to test the feed, or use Live Mode to see how the feed renders in different mobile devices.

Consider the following limitations when using a news or group feed in your community Site.com sites:

- Chatter news and group feeds only appear if a user is logged in to the community. They don't appear to guest users or in anonymous preview mode.
- Chatter news and group feeds may not render appropriately on pages less than 700px wide. We recommend a minimum page width of 700px to view full content. We also recommend using a white background.
- Chatter news and group feeds only inherit some page branding elements.

# Sales

Salesforce is the world's #1 sales and CRM application. Our latest features help your sales reps close bigger deals with even more efficiency.

## *Introducing the Salesforce Console for Sales*

Who has time for clicking around when you're trying to close a deal? The Salesforce Console for Sales gives you easy access to sales intelligence and helps you quickly contact leads, assess companies, and identify key contacts—all in a dashboard-like interface that means more access to contextual data with fewer clicks and less scrolling.

## *Opportunities and Collaborative Forecasting*

Accurately predict outcomes across sales teams and product lines.

## *Price Books*

Price books help you organize product data for records like opportunities, quotes, and contracts.

## *Salesforce for Outlook*

We've taken a great thing and made it even better. By now, we hope you know about the Salesforce Side Panel—a Salesforce for Outlook feature that helps users view and work with Salesforce records directly in Microsoft® Outlook® 2007, 2010, and 2013. We've made important improvements to the side panel that will further increase your users' productivity.

## *Social Accounts and Contacts*

Social Accounts and Contacts provides easy access to social network profiles and other social information for your accounts, contacts, and leads, directly in Salesforce.

## *Additional Sales Cloud Enhancements*

We've made additional enhancements to email templates and accounts.

## *Partner Users*

Partner users can access Salesforce through partner portals or communities you create.

## *Improved Security For Salesforce to Salesforce*

# Introducing the Salesforce Console for Sales

Who has time for clicking around when you're trying to close a deal? The Salesforce Console for Sales gives you easy access to sales intelligence and helps you quickly contact leads, assess companies, and identify key contacts—all in a dashboard-like interface that means more access to contextual data with fewer clicks and less scrolling.

Available in: **Performance** and **Developer** editions

Available in: **Enterprise** and **Unlimited** editions for an additional cost

The Salesforce Console improves on the Agent Console in the Console tab. Previously, the Salesforce Console was available only to Service Cloud users. Now optimized for inside sales, the fully developed Salesforce Console for Sales helps streamline sales and boost productivity by putting the records and features you need most in one place.

- Easily spot important fields on records.
- See records and their related items as tabs on one screen.
- Find helpful information through quick access to sales intelligence.

- Quickly jot notes or log interactions for each record.
- Manage calls using a SoftPhone without leaving critical data behind.

The Salesforce Console helps you meet your business's unique needs with powerful customization options.

- Create custom console components to display critical information or top actions across pages or tabs.
- Develop advanced programmatic features using the Salesforce Console Integration Toolkit API.



**Tip:** Live Agent can't be enabled in a Salesforce Console for Sales unless Service Cloud is enabled for your organization. To use Live Agent in a console, use the [Salesforce Console for Service](#).

The screenshot shows the Salesforce Console for Sales interface. The left sidebar contains a navigation list (1) with 'Leads' selected. Below it is a list of leads (2) with columns for Action, Name, and Company. A lead is selected, and its details are shown in a primary tab (3). The top of the console shows the selected lead's name and title (4). The right side of the console shows the lead's details (5), including a photo, name, title, phone, and email. Below the details is a 'Lead Detail' section (6) with fields for Name, Company, Title, Phone, Email, Days Since Last Activity, Lead Source, and Region. The bottom of the console shows a 'Data.com' section with fields for Clean Status, No. of Employees, Annual Revenue, and D&B Company.

1. Select an object to view in the Salesforce console navigation list. For example, select **Leads** to view leads. The administrator can choose which objects are available.
2. Records are displayed in a list, which you can pin at the left or top of the screen. Select one or more records to display in primary tabs.
3. Selected records appear in primary tabs. You can work with multiple tabs simultaneously.
4. The highlight panel can be configured separately for each object to show key information related to the record in the primary tab.
5. Open more than one subtabs to quickly switch between multiple related records.
6. View and interact with subtab content in the detail area.

### Enabling the Salesforce Console for Sales for Users

Before you can create a console app, Salesforce Console for Sales must be enabled for your org, and the corresponding permission set license and user permission assigned.

### Assigning the Sales Console User Permission Set License

The Salesforce Console for Sales is licensed per-user.

### Enabling the Sales Console User Permission

After users are licensed for the Salesforce Console for Sales, add the `Sales Console` permission to a permission set.

### Creating a Salesforce Console for Sales App

Create a Salesforce Console for Sales as a custom app that users select from the Force.com app menu.

## Enabling the Salesforce Console for Sales for Users

Before you can create a console app, Salesforce Console for Sales must be enabled for your org, and the corresponding permission set license and user permission assigned.

Available in: **Performance** and **Developer** editions  
 Available in: **Enterprise** and **Unlimited** editions for an additional cost

User Permissions Needed	
To assign permission set licenses:	"Manage Users"
To create a Salesforce Console app:	"Customize Application"
	AND
	"Sales Console"

1. Contact salesforce.com to have the Salesforce Console for Sales enabled for your organization.
2. [Assign the Sales Console User permission set license to a user.](#)
3. [Enable the "Sales Console" permission on the permission set.](#)
4. Assign the user to the permission set.  
 Only users with a Sales Console User permission set license can be assigned to permission sets that include the "Sales Console" permission.
5. [Create a Salesforce Console app and make it available in the user's profile.](#)

## Assigning the Sales Console User Permission Set License

The Salesforce Console for Sales is licensed per-user.

User Permissions Needed	
To assign permission set licenses:	"Manage Users"

The Sales Console User permission set license is available in orgs that have the Salesforce Console for Sales. For information about permission set licenses, see [Permission Set Licenses](#) on page 218.

1. From Setup, click **Manage Users > Users**.
2. Click the name of the user to whom you want to assign the permission set license.
3. In the Permission Set License Assignments related list, click **Edit Assignments**.
4. Select the Sales Console User permission set license, and click **Save**.

## Enabling the Sales Console User Permission

After users are licensed for the Salesforce Console for Sales, add the `Sales Console` permission to a permission set.

Available in: **Performance** and **Developer** editions

Available in: **Enterprise** and **Unlimited** editions for an additional cost

User Permissions Needed	
To create permission sets:	"Manage Users"

1. On Setup, go to **Manage Users > Permission Sets**.

2. Create a permission set.

When creating the permission set, select the user license type `None`. (If another license types is selected, you won't be able to add the `Sales Console` user permission for this permission set.)

3. On the Permission Set page, click **App Permissions**.

4. Select the `Sales Console` permission and click **Save**.

## Creating a Salesforce Console for Sales App

Create a Salesforce Console for Sales as a custom app that users select from the Force.com app menu.

Available in: **Performance** and **Developer** editions

Available in: **Enterprise** and **Unlimited** editions for an additional cost

User Permissions Needed	
To create a Salesforce Console for Sales app:	"Customize Application"
	AND
	"Sales Console"

The number of Salesforce Console apps you can create is based on your custom app limits.

1. From Setup, click **Create > Apps**.

2. Click **New**.

3. Select `Console` and click **Next**.

4. Specify a label for the app. The label can have a maximum of 40 characters, including spaces. This label is the app's name in the Force.com app menu.

5. Optionally, enter a description of the app.

6. Click **Next**.

7. Optionally, specify a custom logo for the app. Click **Insert an image** to choose an image file from the document library.

Consider these requirements when choosing a custom app logo from the document library:

- The image must be in GIF or JPEG format and less than 20 KB in size.
- If the image is larger than 300 pixels wide by 55 pixels high, then it will be scaled to fit.

- For the best on-screen display, we recommend you use an image with a transparent background.
- The `Externally Available` checkbox must be selected on the document's properties so that users can view the image.

8. Click **Next**.

9. Select the items to include in the navigation tab. For example, if you want users to choose accounts from the navigation tab, move `Accounts` from `Available Items` to `Selected Items`.

- Click the left and right arrow buttons to add or remove items.
- Click the up and down arrow buttons to define the order in which items display on the navigation tab when it's clicked.



**Note:**

- You can't add the following to the navigation tab: forecasts, ideas, answers, connections, portals, console, activities (tasks and events), or buttons for customizing your organization.
- Tab visibility settings, and the `Overwrite users' personal tab customizations` setting, don't apply to the navigation tab. For example, users can access `Accounts` from the navigation tab even if `Accounts` are `Tab Hidden` on user profiles.

10. Click **Next**.

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

Next to an object, click:

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

12. Click **Next**.

13. Optionally, if Service Cloud has been enabled for your organization, you may enable Live Agent and click **Next**. Organizations without Service Cloud cannot add Live Agent to a Salesforce Console app.

14. Assign the Salesforce Console to user profiles:

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

15. Click **Save**.



**Tip:** You must refresh your browser to see any setup changes to a Salesforce Console.

## Opportunities and Collaborative Forecasting

Accurately predict outcomes across sales teams and product lines.

[See Opportunity Splits in Sales Forecasts](#)

[Integrate Product Families in Forecasts](#)

[Change to Data Sources in Forecast Settings](#)

[Opportunity Splits and Opportunity Product Objects Available in Custom Report Types](#)

### Forecasts 1.0 (Classic) Will Be Retired in Summer '14

## See Opportunity Splits in Sales Forecasts

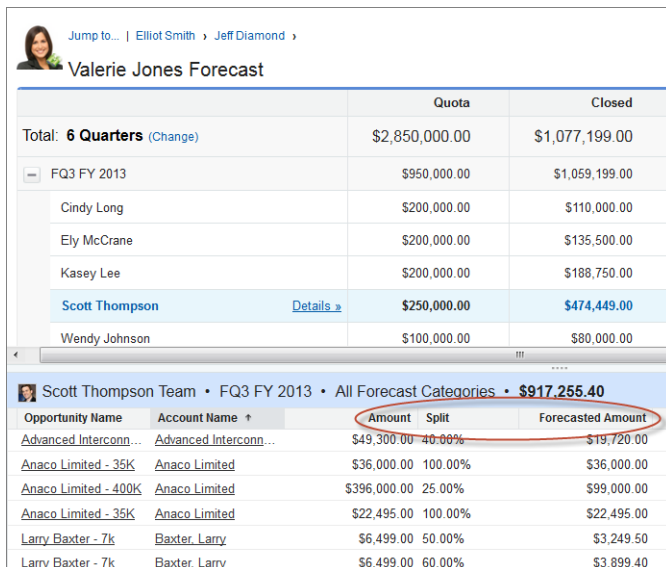
In Summer '13, Salesforce released Opportunity Splits, letting you share sales credit across multiple opportunity team members. In Winter '14, Collaborative Forecasts reflect these splits, giving sales management a more complete view of the business and insight into their team's contribution.

Until now, sales managers saw forecasts only for opportunities their reports directly owned. But when sales reps are part of a larger opportunity team, they can split a percentage of an overall deal. With Collaborative Forecasts, managers see those percentages in forecasts too, getting a clearer prediction of overall performance.

To enable opportunity splits in forecasts:

1. Enable Opportunity Splits and a split type that totals 100%. (Split types that total any percentage don't appear in forecasts. For more information, search for "Enabling Opportunity Splits" in the Salesforce online Help.)
2. From Setup, click **Customize > Forecasts > Settings**.
3. For Data Source, choose Opportunity Splits. With this data source, you can forecast on revenue, but not quantity.

Now, when your users access Forecasts, the forecasted amount and split percentage automatically appear in the opportunity list in the lower half of the page.



	Quota	Closed
Total: <b>6 Quarters</b> (Change)	\$2,850,000.00	\$1,077,199.00
<div> <div></div> <div>FQ3 FY 2013</div> </div>	\$950,000.00	\$1,059,199.00
Cindy Long	\$200,000.00	\$110,000.00
Ely McCrane	\$200,000.00	\$135,500.00
Kasey Lee	\$200,000.00	\$188,750.00
Scott Thompson <a href="#">Details &gt;</a>	\$250,000.00	\$474,449.00
Wendy Johnson	\$100,000.00	\$80,000.00

Scott Thompson Team • FQ3 FY 2013 • All Forecast Categories • <b>\$917,255.40</b>				
Opportunity Name	Account Name	Amount	Split	Forecasted Amount
Advanced Interconn...	Advanced Interconn...	\$49,300.00	40.00%	\$19,720.00
Anaco Limited - 35K	Anaco Limited	\$36,000.00	100.00%	\$36,000.00
Anaco Limited - 400K	Anaco Limited	\$396,000.00	25.00%	\$99,000.00
Anaco Limited - 35K	Anaco Limited	\$22,495.00	100.00%	\$22,495.00
Larry Baxter - 7k	Baxter, Larry	\$6,499.00	50.00%	\$3,249.50
Larry Baxter - 7k	Baxter, Larry	\$6,499.00	60.00%	\$3,899.40



**Note:** This feature is available only in Collaborative Forecasts.

## Integrate Product Families in Forecasts

If your organization groups its products and services into families (like "Hardware" and "Software"), product family forecasts help you better predict revenue and sales reps' quota attainment. With Collaborative Forecasts in Winter '14, sales managers can view the forecast and related opportunities separately for each product family, and they can see individual sales reps' forecasts for each family too.

To enable product family forecasts:

1. From Setup, click **Customize > Forecasts > Settings**.

2. For Data Source, choose Product Family. With this data source, you can forecast on revenue, quantity, or both.

When a sales manager wants to see which product family is bringing in the most revenue, she can expand the forecast for her direct reports to see closed opportunities, committed deals, best case scenarios, and pipeline for each family. Individual opportunity amounts appear in the lower half of the Forecasts page.

With product family forecasts, keep in mind the following.

- Your organization must use Opportunity Products and Product Families.
- The Product Family field should be populated on each product record. If this field is empty, the product appears in a forecast row titled Products Not Categorized.
- Adjustments can be made to individual product family forecasts for a sales rep, but not directly to their total forecast for all product families.

## Change to Data Sources in Forecast Settings

In Summer '13, the Forecast Data Source controlled whether forecasts were based on revenue, quantity, or both. In Winter '14, the Data Source controls whether your forecasts are based on opportunities, opportunity splits, or product families.

To set the Data Source:

- In Setup, click **Customize** > **Forecasts** > **Settings**, and choose an option from the Data Source drop-down menu.

To enable revenue or quantity forecasts, use the Forecast On setting, located immediately beneath the Data Source setting on the Forecast Settings page.

## Opportunity Splits and Opportunity Product Objects Available in Custom Report Types

In Summer '13, when creating a custom report type based on the Forecasting Items object, you could only choose Opportunities as the related object. In Winter '14, you can also choose Opportunity Product or Opportunity Splits as the related object.

## Forecasts 1.0 (Classic) Will Be Retired in Summer '14

With the Summer '14 release, Forecasts 1.0 (Classic) will be officially retired. For more information, please contact 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 Forecasting 1.0 (Classic) is being retired.

## Price Books

Price books help you organize product data for records like opportunities, quotes, and contracts.

### [Creating Lookup Relationships](#)

Price books are now available in lookup relationships on standard and custom objects.



Customizing Search Layouts

You can now customize search layouts for price books to specify which fields your users see in search results, lookup dialogs, lookup phone dialogs, and the Price Books tab.

Creating Lookup Relationships

Price books are now available in lookup relationships on standard and custom objects.

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

User Permissions Needed	
To create or change custom fields:	“Customize Application”

Previously, when creating a custom lookup relationship field on an object, Price Book was not an option.

Now, you can link two objects together using a lookup relationship. For example, your organization may want to associate each account with a specific price book. With a custom field on your account page layout that provides a lookup relationship to a price book, you can create a trigger to automatically populate the price book on opportunities and opportunity products to match the associated account. With this automation, your sales representatives don’t have to remember which price book matches which account when they create an opportunity.

To create a lookup relationship:

1. Navigate to the fields area of the object you want to link to price books.
  - For standard objects, from Setup, click **Customize > Object > Fields**.
  - For custom objects, from Setup, click **Create > Objects** and select the appropriate custom object.
2. In Custom Fields & Relationships, click **New**.
3. Select **Lookup Relationship**, and click **Next**.
4. Select **Price Book**, and then click **Next**.
5. Enter a field label, and press Tab to populate the field name.
6. If you want this field to be required, select the **Required** checkbox.
7. Indicate what Salesforce should do if the price book that an account is linked to is deleted, and click **Next**.
8. In Enterprise, Performance, Unlimited, and Developer Editions, specify the field’s access settings for each profile, and click **Next**.
9. Select the page layouts that you want to display the field, and click **Next**.
10. Optionally, add a custom related list to one or more price book layouts.
  - a. Enter a name for the related list.
  - b. Select each layout you want the related list to display on.
  - c. Click **Save**.

Customizing Search Layouts

You can now customize search layouts for price books to specify which fields your users see in search results, lookup dialogs, lookup phone dialogs, and the Price Books tab.

For example, if you want your users to know whether a price book is active or inactive when selecting one through a lookup dialog, you can add Active to the selected fields.

1. From Setup, click **Customize > Price Books > Search Layouts**.
2. Click **Edit** next to the layout you want to customize.  
You can specify a different set of items to display for each layout.
3. Select fields in Available Fields that you want to display in the layout and click **Add**.  
To select multiple fields, press CTRL and click the individual fields.
4. If there are fields in Selected Fields that you don't want to display, select them and click **Remove**.
5. To reorder the fields, select them and click **Up** or **Down**.

## Salesforce for Outlook

We've taken a great thing and made it even better. By now, we hope you know about the Salesforce Side Panel—a Salesforce for Outlook feature that helps users view and work with Salesforce records directly in Microsoft® Outlook® 2007, 2010, and 2013. We've made important improvements to the side panel that will further increase your users' productivity.

And if you still have folks in your organization using Connect for Outlook, now's a great time to upgrade them to Salesforce for Outlook, because in addition to including Connect for Outlook features your users know, Salesforce for Outlook includes:

- Support for Microsoft Exchange Online—the Microsoft-hosted service that integrates with Office 365™
- The Salesforce Side Panel
- Options to sync only some or all contacts, events, and tasks
- Automatically scheduled sync cycles

Take a look at our latest enhancements to Salesforce for Outlook and the side panel.

### **Support for Microsoft® Exchange Online**

You've been waiting for us to support Exchange Online, and now we do!

### **Send and Add Emails**

We know that users love using the Send and Add feature that's available outside of the side panel. And we know that not having Send and Add available in the side panel was a serious deterrent for users adopting it. But Send and Add in the side panel is here now!

### **Add Events to Salesforce Records with Event Association**

When users select single, non-recurring events in their Outlook calendars, the side panel displays related contacts and leads—the same way it does for emails. Regardless of whether the events are set to sync with Salesforce, if users add Outlook events to Salesforce records, the side panel triggers a sync to Salesforce calendar for the one event.

### **View and Work with More Salesforce Records**

The side panel now displays more contacts and leads for the emails—and now events—that users select in Outlook. Depending on the size of users' Outlook windows and monitors, the side panel displays up to 10 related contacts and leads that fit in the available vertical space. This makes it quicker and easier to add emails and events to more Salesforce records at the same time.

### **Hide and Disable the Salesforce Side Panel**

If any of your users want to temporarily hide and disable the Salesforce Side Panel, they'll do so directly in Outlook.

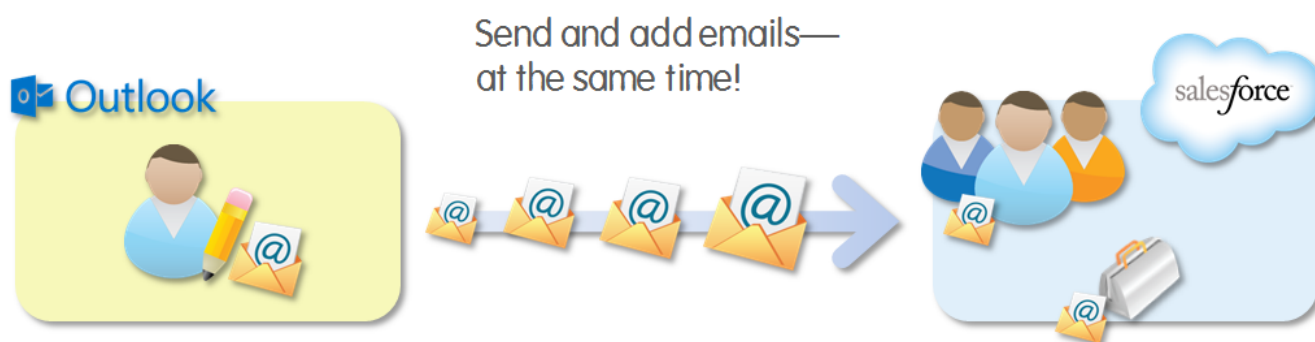
## Support for Microsoft® Exchange Online

You've been waiting for us to support Exchange Online, and now we do!

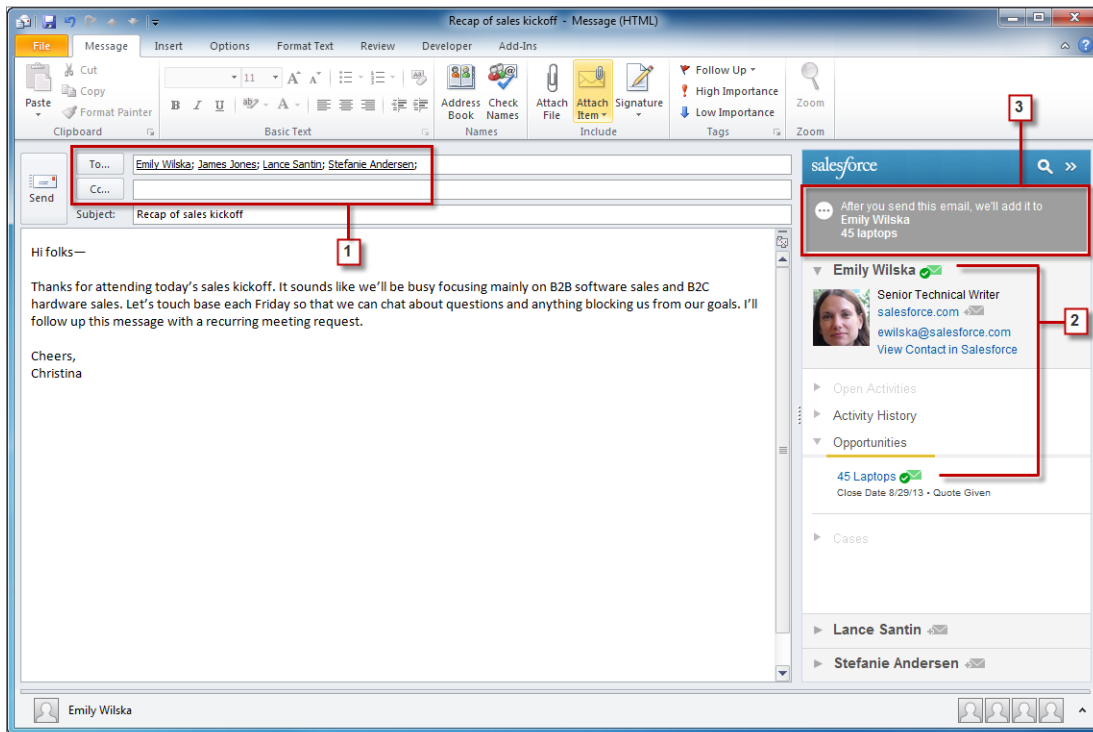
We support using the desktop versions of Microsoft Outlook 2007, 2010, and 2013 with Exchange Online—the Microsoft-hosted service that integrates with Office 365™. Keep in mind that Salesforce for Outlook doesn't support Outlook installed using Click-to-Run (a streaming installer for Microsoft Office).

## Send and Add Emails

We know that users love using the Send and Add feature that's available outside of the side panel. And we know that not having Send and Add available in the side panel was a serious deterrent for users adopting it. But Send and Add in the side panel is here now!



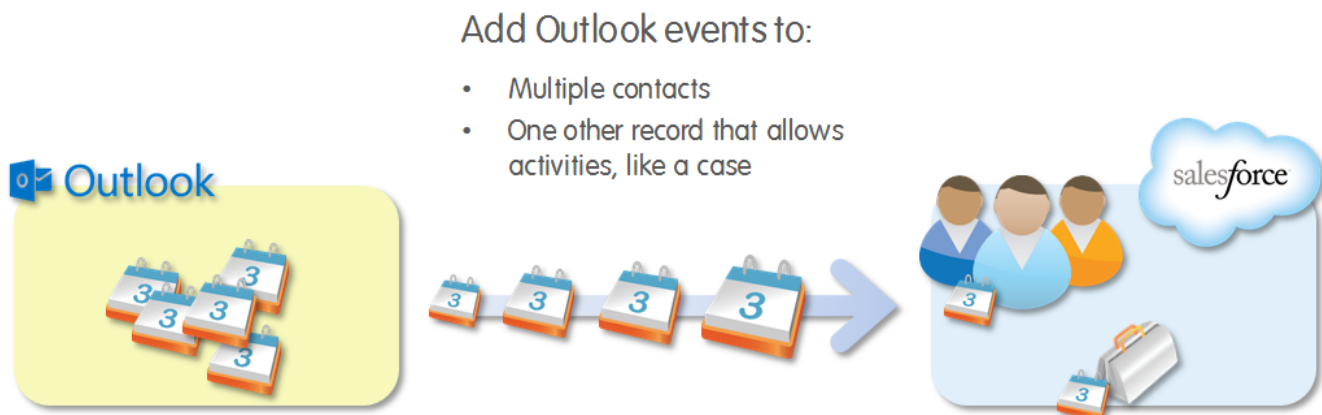
Here's how users can send and add emails at the same time.



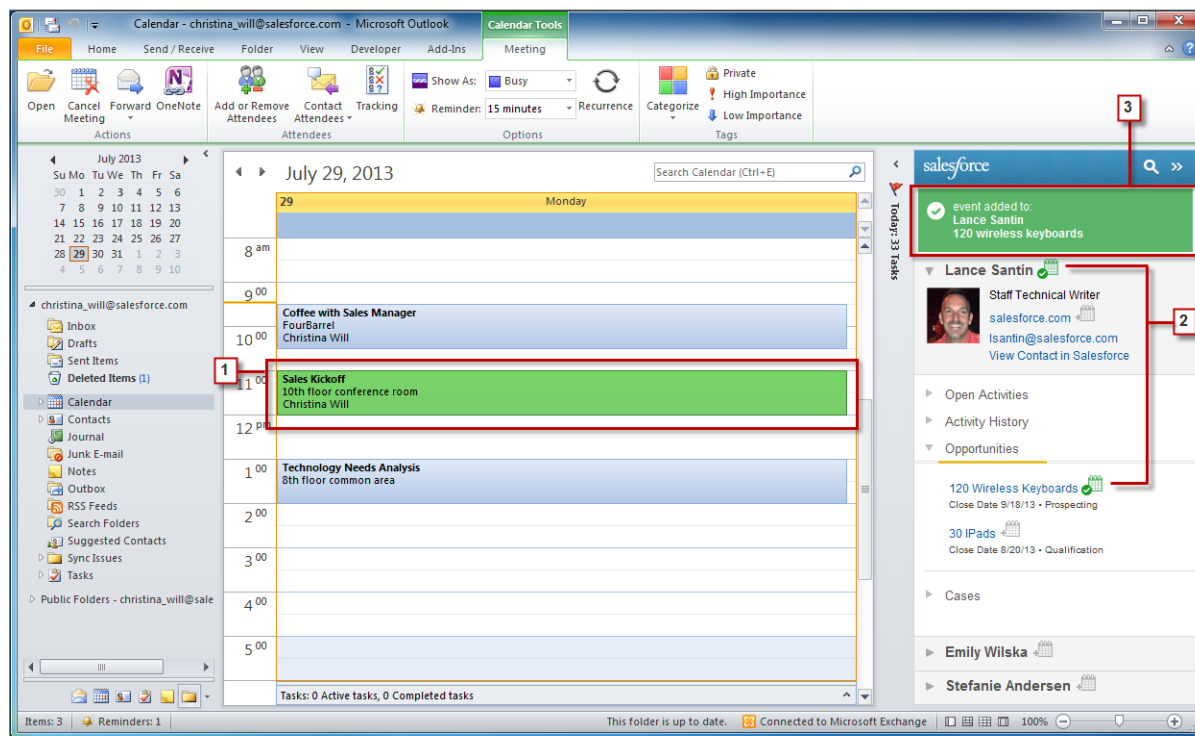
1. Create an Outlook email, and then enter recipients in the **To** field (and if necessary, the **Cc** field). The side panel displays related Salesforce records.
2. Add the email to Salesforce records when you click next to the records of your choice.
3. Keep track of the records to which you're adding the new email. After you send the email, we'll add it to the Salesforce records.


## Add Events to Salesforce Records with Event Association

When users select single, non-recurring events in their Outlook calendars, the side panel displays related contacts and leads—the same way it does for emails. Regardless of whether the events are set to sync with Salesforce, if users add Outlook events to Salesforce records, the side panel triggers a sync to Salesforce calendar for the one event.



Here's how users can add events to Salesforce records.

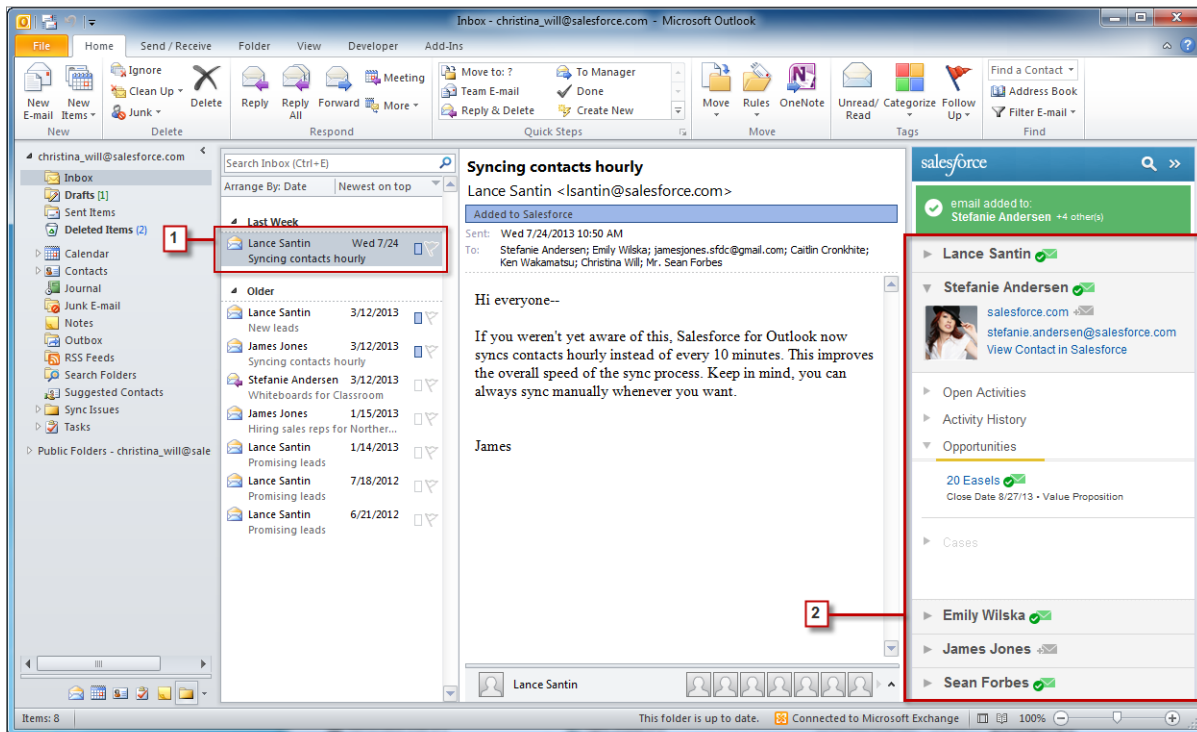


1. In the Outlook calendar, select an event. The side panel displays related Salesforce records.
2. Add the event to Salesforce records when you click  next to the records of your choice.
3. Keep track of the records you've added the event to.

## View and Work with More Salesforce Records

The side panel now displays more contacts and leads for the emails—and now events—that users select in Outlook. Depending on the size of users' Outlook windows and monitors, the side panel displays up to 10 related contacts and leads that fit in the available vertical space. This makes it quicker and easier to add emails and events to more Salesforce records at the same time.

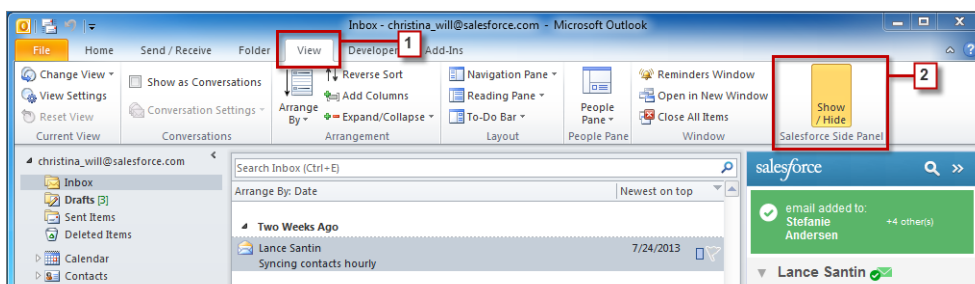
Here's how it works.



1. Select an Outlook email or event. In this example, the email includes seven recipients, five of whom are already in set up as contacts Salesforce.
2. The side panel displays those five contacts.

## Hide and Disable the Salesforce Side Panel

If any of your users want to temporarily hide and disable the Salesforce Side Panel, they'll do so directly in Outlook. Here's how they'll do it in Outlook 2010 and 2013.



1. Select the View tab.
2. Click **Show / Hide**.

For Outlook 2007, users will click **View > Salesforce Side Panel > Show / Hide**.

## Social Accounts and Contacts

Social Accounts and Contacts provides easy access to social network profiles and other social information for your accounts, contacts, and leads, directly in Salesforce.

### Contact, Account, and Lead Profile Image Visibility

Profile images from Facebook or Twitter for contacts, accounts, or leads may be visible even if you are not currently logged in to those services.

### Social Network Fields Available on List Views

Add social network fields to account and contact list views to give users an overall look at which social networks are connected to their records.

## Contact, Account, and Lead Profile Image Visibility

Profile images from Facebook or Twitter for contacts, accounts, or leads may be visible even if you are not currently logged in to those services.

If you have previously logged in to Facebook or Twitter and associated a Facebook or Twitter account with a Salesforce.com contact, account, or lead, the profile image will remain viewable even if you are no longer logged in. You can also view a Facebook or Twitter profile image if it was associated with a contact, account, or lead by another user. This change does not affect profile images from other social networks.

## Social Network Fields Available on List Views

Add social network fields to account and contact list views to give users an overall look at which social networks are connected to their records.

If your organization uses Social Accounts and Contacts, you and your users can add social networks as fields on account and contact list views. The field for a particular social network is available only if you have that social network enabled. The social network fields that are available depend on the object you're creating a list view for.

- Accounts: Twitter and Facebook
- Contacts: LinkedIn®, Twitter, and Facebook
- Leads: none

Action	Name	Account Name	Title	Last Modified Date	LinkedIn	Twitter	Facebook
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	Abbey Vaughn	Salesforce.com, Inc.	Senior Premier Account Specialist	7/23/2013			✓
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	Acker, Rob	Salesforce.com, Inc.	Senior Vice President, Data com Sa...	5/7/2013	✓		
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	Ackerman, Elise	Salesforce.com, Inc.	Senior Writer	7/23/2013	✓		
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	Acton, Karen	Salesforce.com, Inc.	Contractor	7/23/2013	✓		✓
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	Adams, Alexa	Salesforce.com, Inc.	Sales Operations Manager	7/23/2013	✓		
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">+</a>	Benioff, Marc	Salesforce.com, Inc.	Chief Executive Officer and Chairman	5/7/2013	✓	✓	

For more information about list views, see “Creating Custom List Views” in the Salesforce Help.

# Additional Sales Cloud Enhancements

We've made additional enhancements to email templates and accounts.

## [Hiding the Account Hierarchy Link](#)

### [Email Template Access](#)

Users with “Manage Public Template” permission might experience some changes in read/write access to email templates.

## Hiding the Account Hierarchy Link

Business accounts available in: **All Editions except Database.com**

User Permissions Needed	
To change account settings:	“Customize Application”

Want to simplify your view of accounts? Previously, a link to the account hierarchy appeared on the detail page for all business accounts. Now you can hide the **View Hierarchy** link.

Enabling this setting doesn't disable the account hierarchy, just removes the default link from account detail pages. If you hide the default link, you can choose to allow selected users to view the hierarchy by adding a custom link or button. For example, if you want only key managers in your organization to view the account hierarchy, turn off the default account hierarchy link, then add a custom button only to those managers' account detail pages.

When this setting is enabled, all users can see the View Hierarchy link on business account detail pages. When it's disabled, the link is removed.

1. From Setup, click **Customize > Accounts > Settings**.
2. Click **Edit**.
3. Unselect **Show View Hierarchy Link**, then click **Save**.

## Email Template Access

Users with “Manage Public Template” permission might experience some changes in read/write access to email templates.

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

HTML and Visualforce email templates not available in: **Personal Edition**

User Permissions Needed	
To create or change HTML email templates:	“Edit HTML Templates”
To create or change Visualforce email templates:	“Customize Application”
To create or change public email template folders:	“Manage Public Templates”



Users with the “Manage Public Template” permission can no longer access the hidden email template folders of other users and can’t save templates in the hidden folders of other users. In addition, these users can no longer access all shared folders. Now, the owner of a shared folder must specifically add other users to the folder’s sharing group.

Administrator permissions aren’t affected but administrators may receive access requests from users for files they could previously read and edit. Administrators can modify access by changing a folder’s global settings to Public (so all users can access it) or Shared (and adding the requesting user to the shared group).

## Partner Users

Partner users can access Salesforce through partner portals or communities you create.

***Removed Change My Password Button For Partner Users with Single Sign-On***  
***Change in Behavior For The Username Field On Partner Users***

### Removed Change My Password Button For Partner Users with Single Sign-On

If a partner user with Single Sign-On views their profile from the Welcome Component in their portal, the **Change My Password** button is no longer visible. Partner users with single sign-on must contact their portal administrator for help resetting their password.

### Change in Behavior For The Username Field On Partner Users

Delegated external user administrators can now edit the Username field for partner users, if the partner user doesn’t have the Single Sign-On permission. Their ability to edit this field is not affected by whether they are assigned the Single Sign-On permission or not. Prior to the Winter 14 release, delegated administrators with the Single Sign-On permission weren’t able to edit this field for partner users.

### Improved Security For Salesforce to Salesforce

Starting in Winter 14, users must have the “Manage Connections” permission to view Salesforce to Salesforce connections and templates. Users without this permission will get an error when they try to access the Connections Home Page. We added this requirement to ensure that only people with proper permissions can see the Salesforce to Salesforce connections in your organization. As in previous releases, users with the “Manage Connections” permission can manage connections and templates.

# Data.com

Data.com is the solution for delivering leading 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 Data.com Data Assessments.

## **Data.com Prospector**

Use Data.com Prospector to search for Data.com accounts and contacts directly on the Data.com tab, and if you have a Data.com 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 Social Key—Generally Available**

Data.com Social Key, which is now generally available, works with Social Accounts and Contacts and Data.com Clean to make it easier to follow your contacts and leads on social networks.

# Data.com Prospector

Use Data.com Prospector to search for Data.com accounts and contacts directly on the Data.com tab, and if you have a Data.com license, you can add records to Salesforce.

## ***Get to Salesforce Records Directly from Data.com Search Results***

## ***Expanded Definition of What's Considered a Duplicate Record***

## ***Increased Export Limit***

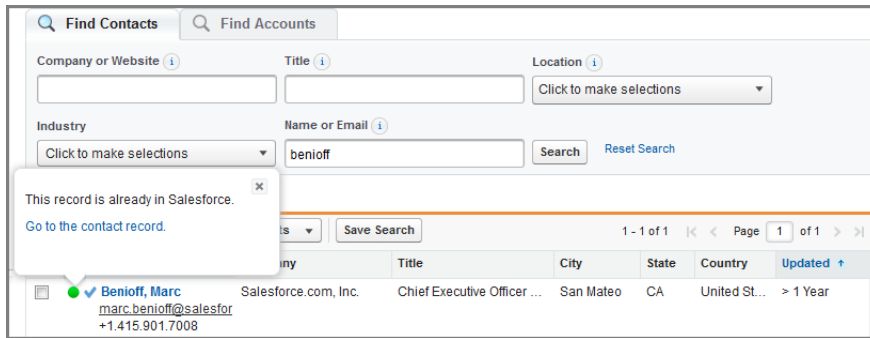
## ***Simplified Definition of "Inactive" for Account Records***

## ***Data.com Licenses & Limits Page Rebranded with Data.com Prospector Name***

## ***Data.com Prospector Additional Enhancements***

# Get to Salesforce Records Directly from Data.com Search Results

In previous releases, a green dot (●) next to a record in Data.com search results indicated that the record was already in Salesforce. With Winter '14, the green dot also takes you directly to the Salesforce record. Users can simply hover over the green dot and click the link that appears. If Salesforce has duplicate entries for a particular record, the link takes users to a list of records.



## Expanded Definition of What's Considered a Duplicate Record

If users add a contact from Data.com that's already in Salesforce as a lead, it will now be considered a duplicate record. The same is true if users add a lead that's already in Salesforce as a contact. By default, users cannot add duplicate records from Data.com, but you can allow duplicates for your organization.

For existing organizations, the preferences to allow duplicates for contacts that are already in Salesforce as leads *and* leads that are already in Salesforce as contacts are automatically selected.

### Allowing Duplicate Data.com Records in Salesforce

## Allowing Duplicate Data.com Records in Salesforce

Data.com Prospector license available in: **Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

Organizations that use a sharing model may want to allow Data.com users to add duplicate account, contact, or lead records to Salesforce. Keep these things in mind when setting your duplicate preferences.

- Records are considered duplicates when they have the same Data.com ID number in the `Data.com Key` field. This includes records that were added from Data.com as both contacts and leads.
- You can allow duplicates by object for the entire organization—not for individual users. If, however, you want to prevent a user or profile from being able to add duplicates, you can create a trigger.
- Records that are already in Salesforce are marked with an icon (●) in the search results and can be re-added by any Data.com user if duplicates are allowed by the organization.
- Records that have been added to Salesforce from Data.com are marked with an icon (✓) in the search results. Adding a record counts against the record addition limit only the first time it's added to Salesforce. When a record is added as a duplicate, it will *not* be counted against the record addition limit.

To set up your duplicate preferences, follow these steps.

1. From Setup, click **Data.com Administration** > **Preferences**.
2. In the Duplicate Preferences section of the page, select the objects for which you want to allow duplicates.

## Increased Export Limit

We increased the Data.com export limit from 50,000 records to 100,000 records. This aligns with the limit for adding records. Records are exported in batches of up to 50,000. If two batches are needed, the records are sent in a .zip file. Users can still export only as many records as their record limit allows.

## Simplified Definition of “Inactive” for Account Records

In previous releases, Data.com considered an account inactive if its record had out-of-date or inaccurate information, or if the company was identified by Dun & Bradstreet (D&B) as being non-marketable. In Winter '14, an account is considered inactive if D&B has marked it as out of business. This simplified definition of inactive makes reviewing records easier.

## Data.com Licenses & Limits Page Rebranded with Data.com Prospector Name

We updated the prospecting section of the Data.com Licenses & Limits page with the new Data.com Prospector name.

As in past releases, you can access the page by clicking **Data.com Administration > Licenses & Limits**. From there, you can see which version of Data.com Prospector you have (Corporate or Premium), the number of Prospector licenses your organization has, and your organization's record addition limits.

## Data.com Prospector Additional Enhancements

*Using Data.com Prospector with State and Country Picklists*

### Using Data.com Prospector with State and Country Picklists

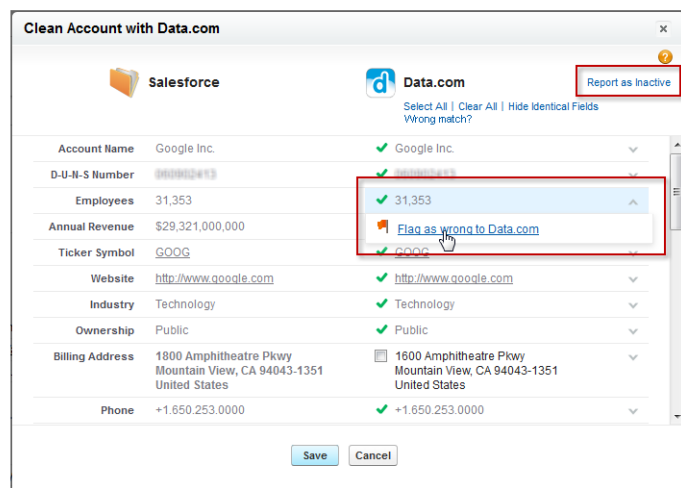
State and country picklists (now generally available) allow users to select states and countries from predefined, standardized lists, making data entry easier and helping ensure cleaner data. If you use Data.com Prospector with state and country picklists, be aware of the following.

- Data.com records may contain states and countries that are not included in the standard state and country picklists. You'll need to add these states and countries to the picklist before Data.com users can add or clean these records. The states and countries that you may need to add to the picklist are:
  - ◇ American Samoa (AS)
  - ◇ Guam (GU)
  - ◇ Hong Kong (HK)
  - ◇ Marshall Islands (MH)
  - ◇ Netherlands Antilles (AN)
  - ◇ Northern Mariana Islands (MP)
  - ◇ Serbia and Montenegro (CS)
  - ◇ United States Minor Outlying Islands (UM)
- When you export files from the Data.com tab, additional fields are included in the export file. `BillingState` and `BillingCountryCode` are on the export file for account records. `MailingState` and `MailingCountryCode` are on the export file for contact records.

For more information about state and country picklists, see “State and Country Picklists Overview” in the Salesforce Help.

## 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.



### [Clean Info Objects](#)

### [Clean Info Custom Report Types](#)

### [Record Cleaning from List Views](#)

### [Reporting an Account, Contact, or Lead as Inactive or Active to Data.com](#)

When you use Data.com Clean to clean a Salesforce record, if you know the related account, contact, or lead is either out of business or not active at a company, you can report that information to Data.com. If an account, contact, or lead has been reported as *Inactive* to Data.com, we'll let you know. If you believe the account, contact, or lead is *Active*, you can tell us that, too.

### [Flagging an Account, Contact, or Lead Field Value as Wrong or Right to Data.com](#)

When you use Data.com Clean to clean a Salesforce record, if you know that one of its fields has an incorrect, or “wrong” value, you can report that information to Data.com. If a field value has been reported as wrong, we'll let you know. If you believe the field value is correct, or “right,” you can tell us that, too.

### [Data.com Clean Additional Enhancements](#)

## Clean Info Objects

We've created a set of background objects that store the metadata used to determine a record's clean status. There's a clean info object for accounts, one for contacts, and one for leads.

### [Understanding the Account Clean Info Object](#)

Account Clean Info is a background object that stores the metadata used to determine an account record's clean status.

### Understanding the Contact Clean Info Object

Contact Clean Info is a background object that stores the metadata used to determine a contact record's clean status.

### Understanding the Lead Clean Info Object

Contact Clean Info is a background object that stores the metadata used to determine a lead record's clean status.

## Understanding the Account Clean Info Object

Account Clean Info is a background object that stores the metadata used to determine an account record's clean status.

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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Account Clean Info provides a snapshot of the data in your Salesforce account record and its matched Data.com record at the time the Salesforce record was cleaned.

Account Clean Info includes a number of bit vector fields, whose component fields each correspond to individual object fields and provide related data or status information about those fields. For example, the bit vector field `IsDifferent` has an `IsDifferentState` field. If the `IsDifferentState` field's value is `False`, that means the `State` field value is *the same* on the Salesforce account record and its matched Data.com record.

These are the bit vector fields.

- `CleanedBy` indicates who (a user) or what (a Clean job) cleaned the account record.
- `IsDifferent` indicates whether or not a field on the account record has a value that differs from the corresponding field on the matched Data.com record.
- `IsFlaggedWrong` indicates whether or not a field on the account record has a value that is flagged as wrong to Data.com.
- `IsReviewed` indicates whether or not a field on the account record is in a `Reviewed` state, which means that the value was reviewed but not accepted.

Administrators can modify a limited set of Account Clean Info fields from the Account Clean Info page.

Developers can create triggers that read the Account Clean Info fields to help automate the cleaning or related processing of account records. For example, you might create a trigger that reads the `Clean Status` field on the Account object. If an account record's `Clean Status` field value is `Different` but the record has no `Billing Street` value, the trigger could update the record's status to `Not Compared`.

## Understanding the Contact Clean Info Object

Contact Clean Info is a background object that stores the metadata used to determine a contact record's clean status.

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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Contact Clean Info provides a snapshot of the data in your Salesforce contact record and its matched Data.com record at the time the Salesforce record was cleaned.

Contact Clean Info includes a number of bit vector fields, whose component fields each correspond to individual object fields and provide related data or status information about those fields. For example, the bit vector field `IsDifferent` has an `IsDifferentEmail` field. If the `IsDifferentEmail` field's value is `False`, that means the `Email` field value is *the same* on the Salesforce contact record and its matched Data.com record.

These are the bit vector fields.

- `CleanedBy` indicates who (a user) or what (a Clean job) cleaned the contact record.
- `IsDifferent` indicates whether or not a field on the contact record has a value that differs from the corresponding field on the matched Data.com record.
- `IsFlaggedWrong` indicates whether or not a field on the contact record has a value that is flagged as wrong to Data.com.
- `IsReviewed` indicates whether or not a field on the contact record is in a `Reviewed` state, which means that the value was reviewed but not accepted.

Developers can create triggers that read the Contact Clean Info fields to help automate the cleaning or related processing of contact records.

## Understanding the Lead Clean Info Object

Contact Clean Info is a background object that stores the metadata used to determine a lead record's clean status.

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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Lead Clean Info provides a snapshot of the data in your Salesforce lead record and its matched Data.com record at the time the Salesforce record was cleaned.

Lead Clean Info includes a number of bit vector fields, whose component fields each correspond to individual object fields and provide related data or status information about those fields. For example, the bit vector field `IsDifferent` has an `IsDifferentTitle` field. If the `IsDifferentTitle` field's value is `False`, that means the `Title` field value is *the same* on the Salesforce lead record and its matched Data.com record.

These are the bit vector fields.

- `CleanedBy` indicates who (a user) or what (a Clean job) cleaned the lead record.
- `IsDifferent` indicates whether or not a field on the lead record has a value that differs from the corresponding field on the matched Data.com record.
- `IsFlaggedWrong` indicates whether or not a field on the lead record has a value that is flagged as wrong to Data.com.
- `IsReviewed` indicates whether or not a field on the lead record is in a `Reviewed` state, which means that the value was reviewed but not accepted..

Developers can create triggers that read the Lead Clean Info fields to help automate the cleaning or related processing of lead records.

## Clean Info Custom Report Types

Clean Info custom report types and the reports you create from them can help you view clean information for multiple records at a time. Use this information to identify patterns and trends in your data and to manage or modify how your records are cleaned.

### Creating a Custom Report Type for Account, Contact, or Lead Clean Info

Create custom report types to report on clean information for accounts, contacts, and leads.

## Creating a Custom Report Type for Account, Contact, or Lead Clean Info

Create custom report types to report on clean information for accounts, contacts, and leads.

Data.com Prospector license available in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Data.com Clean license available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

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

Clean Info custom report types can help you easily see clean information for multiple records in one report. Use that information to identify patterns and trends in your data and to manage or modify how your records are cleaned.

1. From Setup, click **Create > Report Types**.
2. Click **New Custom Report Type**.
3. For Primary Object, select **Accounts**, **Contacts**, or **Leads**—whatever object you want to report on—and define the other required fields.
4. For Category, select either **Accounts & Contacts** or **Leads**, as appropriate.
5. Click **Next**.
6. Relate the companion Clean Info object (Account Clean Info, Contact Clean Info, or Lead Clean Info) to the primary object you selected. Accept the default for A to B Relationship.
7. Select a deployment status.
8. Click **Save**.

Now you can create custom reports based on your new custom report types.

## Report on Salesforce Records with a Specific Clean Status

Create a custom report to show Salesforce account, contact, or lead records that have a specific clean status (such as **Different**).

Data.com Prospector license available in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Data.com Clean license available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

User Permissions Needed	
To create, edit, and delete reports:	“Create and Customize Reports”
	AND
	“Report Builder”



Choose fields to display from the Account, Contact, or Lead objects. Using data from companion Clean Info objects, show Salesforce and Data.com record values side by side. Report results can help you identify consistent reasons records might have a specific clean status. Use what you learn to manage how records are cleaned in your organization.

For example, you can create a report to show all records whose clean status is `Different` side by side with their matched Data.com records. If you identify patterns in your data that cause this status, you might create triggers or API customizations to adjust your data and have more records with `In Sync` status..

Let's create a `Contacts by Clean Status` report.

1. Before you can create the `Contacts by Clean Status` report, make sure your organization has a custom report type that links the Contact object to the Contact Clean Info object and makes fields from both objects available to report on.
2. Create your report: click the Reports tab, then click **New Report**.
3. Select `Contacts by Clean Status` as the report type.
4. Click **Create**.
5. From the parent object, `Contacts`, select the fields you want to report on. For example, you might choose:
  - `Contact ID`
  - `Clean Status`
  - `Full Name`
  - `Mailing Address`
  - `Phone`
  - `Email`
6. From the related object, `Contact Clean Info`, select fields that correspond to the Contact object fields. For contact clean info, you might choose:
  - `Contact Clean Info ID`
  - `First Name`
  - `Last Name`
  - `Address`
  - `Phone`
  - `Email`
  - `Last Match Date`
7. Add a field filter to the report: For the field, select `Clean Status`. For the operator, select `equals`, and for the value, select `Different`.
8. Define the remaining fields.
9. Save the report and run it.
10. Examine the report to see if you can identify patterns in your data that cause certain records to have a clean status of `Different`.

## Record Cleaning from List Views

Clean multiple account, contact, and lead records at a time directly from list views.

### *Configuring List Views for Data.com Clean*

Before your Data.com Clean users can clean records from a list, you'll need to add the `Clean Status` field to your organization's list views.

### ***Cleaning a List of Salesforce Records with Data.com Clean***

With Data.com Clean, you can select account, contact, and lead records from a list, and clean them all at one time.

## **Configuring List Views for Data.com Clean**

Before your Data.com Clean users can clean records from a list, you'll need to add the `Clean Status` field to your organization's list views.

Data.com Clean license available in: **Professional, Enterprise, Performance, and Unlimited** Editions

User Permissions Needed	
To create custom list views:	"Read" on the type of record included in the list
To create, edit, or delete public list views:	"Manage Public List Views"

1. Click the tab (Accounts, Contacts, or Leads) for the object whose records you want to clean from your list.



**Note:** If your organization uses DUNSRight matching to clean account records, list view cleaning is not available for account records.

2. Select a view from the drop-down and click **Edit**.
3. Scroll down the Available Fields list to find the `Clean Status` field, then add it to the list of Selected Fields. The **Clean** button will automatically be added to the list view.
4. If you use Data.com Social Key, you can also add the fields for the social networks you've enabled (LinkedIn®, Twitter, or Facebook) to your contact list views.  
The social network fields aren't available on the lead list views.

## **Cleaning a List of Salesforce Records with Data.com Clean**

With Data.com Clean, you can select account, contact, and lead records from a list, and clean them all at one time.

Data.com Prospector license available in: **Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance, and Unlimited** Editions

Data.com Clean license available in: **Professional, Enterprise, Performance, and Unlimited** Editions

User Permissions Needed	
To clean account records:	"Edit" on accounts
To clean contact records:	"Edit" on contacts
To clean lead records:	"Edit" on leads
To create custom list views:	"Read" on the type of record included in the list
To create, edit, or delete public list views:	"Manage Public List Views"

Data.com Clean offers a number of ways to clean records. 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.

Cleaning from a list works for all the account, contact, and lead records you have access to in Salesforce—not just those you previously added from Data.com. When you click the Accounts, Contacts, or Leads tab, you can select a view to see a list of the records you’re allowed to view. The results you see are called a *list view*. From the list view, simply select the records you want to clean and Data.com Clean does the rest.



**Note:** If you’re cleaning records from a standard list view, make sure your system administrator has added the `Clean Status` field to the view. If you’re cleaning records from a custom list view you’ve created, you’ll need to add the `Clean Status` field yourself. If you use Data.com Social Key together with Social Accounts and Contacts, you or your administrator can also add the fields for the applicable social networks (LinkedIn, Twitter, or Facebook) to your contact list views.

1. Click the tab (Accounts, Contacts, or Leads) for the object whose records you want to clean from your list.
2. Select a view from the drop-down and click **Edit**.
3. From the list, select the records you want to clean, and click **Clean**.
4. Select one of these Clean options.
  - `Update Clean Status` will update each record’s `Clean Status` field. If you use Social Key, social handles will be added to the record, if available.
  - `Update Clean Status and Fill Blank Fields` will update each record’s `Clean Status` field and fill blank fields with Data.com data. If you use Social Key, social handles will be added to the record, if available.
5. Click **Update**.  
We’ll provide a confirmation message telling you how many records were matched, updated, and whether any errors occurred. If your organization uses Social Key with contacts and leads, we’ll also let you know if we were able to supply social handles.
6. Review the changes to your records.  
If you selected the option to update only the `Clean Status` field and now find records with a clean status of `Different`, you can manually clean each record from its detail page.

## Reporting an Account, Contact, or Lead as Inactive or Active to Data.com

When you use Data.com Clean to clean a Salesforce record, if you know the related account, contact, or lead is either out of business or not active at a company, you can report that information to Data.com. If an account, contact, or lead has been reported as `Inactive` to Data.com, we’ll let you know. If you believe the account, contact, or lead is `Active`, you can tell us that, too.

Data.com Prospector license available in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Data.com Clean license available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

User Permissions Needed	
To clean account records:	“Edit” on accounts
To clean contact records:	“Edit” on contacts
To clean lead records:	“Edit” on leads

An account, contact, or lead may be designated as `Active` or `Inactive` by either Data.com or a Data.com Clean user. For accounts, `Inactive` means out of business, and for contacts or leads, it means the associated person no longer works at the company.

If a record is **Inactive**, we'll let you know the source of that status, and if the source is Data.com, we'll tell you why. For example, we'll tell you if an account is out of business, a contact is no longer employed at the company, or a contact or lead's phone or email is invalid.

1. From the account, contact, or lead record, click **Clean** to open the comparison page.
2. If the account, contact, or lead is inactive, click **Report as Inactive**.
3. Click **Save**.  
The record's **Clean Status** field now shows that it's **Inactive**.
4. If an account has been reported as inactive, but the company remains in business, or a contact or lead has been reported as inactive, but the person still works at the company, you can clean its record again. On the comparison page, you'll see a message telling you the record's current reported status—out of business for accounts or **Inactive** for contacts and leads—and who reported it: Data.com or a user.
5. Click **Report as Active**.  
The record's **Clean Status** field reverts to the value it had before the record was reported as **Inactive**. For example, if a contact's **Clean Status** is **Reviewed**, and then the contact is reported as **Inactive**, its clean status will change to **Inactive**. If the contact is later reported as **Active**, its clean status reverts to **Reviewed**.

## Flagging an Account, Contact, or Lead Field Value as Wrong or Right to Data.com

When you use Data.com Clean to clean a Salesforce record, if you know that one of its fields has an incorrect, or “wrong” value, you can report that information to Data.com. If a field value has been reported as wrong, we'll let you know. If you believe the field value is correct, or “right,” you can tell us that, too.

Data.com Prospector license available in: **Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance, and Unlimited** Editions

Data.com Clean license available in: **Professional, Enterprise, Performance, and Unlimited** Editions

User Permissions Needed	
To clean account records:	“Edit” on accounts
To clean contact records:	“Edit” on contacts
To clean lead records:	“Edit” on leads

When you clean an account, contact, or lead record, if you know that a particular field value is incorrect, you can flag that value as **wrong** to Data.com. If the value has been flagged as **wrong**, but you know the value is correct, you can flag it as **right**. On the comparison page, most fields offer the flagging option.



**Note:** If your account, contact, or lead record's **Clean Status** value is **In Sync**, and you flag a field value as **wrong** on the comparison page, the record's **Clean Status** value changes to **Reviewed**.

1. From the record, click **Clean** to open the comparison page.
2. If you want to flag a field value as **wrong**, click the down arrow next to the field and select **Flag as wrong to Data.com**.  
A red flag (🚩) appears next to the field.
3. Click **Save**.
4. If a field value has been flagged as **wrong**, but you know it's right, click the down arrow next to the field and select **Flag as right to Data.com**.  
The red flag disappears.

## 5. Click **Save**.

When an `email` field value is flagged as wrong, that information is immediately submitted to Data.com's automated fact processing system. If enough Data.com users flag the same email, the record may ultimately be marked as `Inactive` by Data.com. When other fields are flagged as wrong, the information is reviewed by data stewards at Data.com or D&B.

# Data.com Clean Additional Enhancements

[Enhanced `CleanStatus` API Field on Account, Contact, and Lead Objects](#)

[Clean Status Value: Skipped](#)

[Account Site Field on Comparison Page for Selecting a Data.com Match](#)

[Using Data.com Clean with State and Country Picklists](#)

## Enhanced `CleanStatus` API Field on Account, Contact, and Lead Objects

The `CleanStatus` field on the Account, Contact, and Lead objects supports the `update()` call. Each object's `CleanStatus` field also offers a new picklist value: `Skipped`. See the *Salesforce SOAP API Developer's Guide* for complete details on these fields.

## Clean Status Value: Skipped

We've added a new Data.com clean status value: `Skipped`. Data.com sets the status value under certain conditions, but developers can also set this value using the API. Records with `Skipped` status are always skipped during *incremental sync* Clean jobs, and always processed during *full sync* Clean jobs.

Data.com sets a Salesforce account, contact, or lead record's clean status to `Skipped` under these conditions.

- The record previously had a clean status of `Not Compared`  
*and*
- When the record was last saved, it encountered an error related to a validation rule, trigger, or other customization.

If both of these conditions are met, the record is skipped during the next *incremental sync* Clean job or when it is next manually cleaned by a user.

If you want to *deliberately* skip a set of records during *incremental syncs*, you can update their `Clean Status` field values to `Skipped` using the API. For example, you might need to adjust your organization's data or validation rules and have that set of records cleaned by the next *full sync* Clean job after those adjustments are complete.

*Full sync* Clean jobs process Salesforce records with *any* clean status, even if they encountered errors related to validation rules, triggers, or other customizations when last saved.

For more information, check out "Understanding Data.com Clean Status" in the Salesforce Help.

## Account Site Field on Comparison Page for Selecting a Data.com Match

If you need to select a matching Data.com record for a Salesforce account record, you'll see the `Account Site` field has replaced the `Ownership` field. We've made the `Account Site` field available on the comparison page in response to customer

requests because it is more useful for selecting the right match. For complete details about selecting a matching Data.com record for an account, see “Selecting a Matching Data.com Record for a Salesforce Account” in the Salesforce Help.

## Using Data.com Clean with State and Country Picklists

State and country picklists (now generally available) allow users to select states and countries from predefined, standardized lists, making data entry easier and helping ensure cleaner data. Implementing state and country picklist includes converting your existing data to the standard picklist values. If your organization uses Data.com Clean you need to suspend Clean jobs until the picklist conversion is finished.

For more information about state and country picklists, see “State and Country Picklists Overview” in the Salesforce Help.

## Data.com Social Key—Generally Available

Data.com Social Key, which is now generally available, works with Social Accounts and Contacts and Data.com Clean to make it easier to follow your contacts and leads on social networks.

### *Data.com Social Key Overview*

Data.com Social Key works with Social Accounts and Contacts and Data.com Clean to make it easier to learn more about your contacts and leads in Salesforce or on social network sites. Your organization must have Data.com Clean enabled to use Social Key.

### *Implementing Social Key*

Implementing Data.com Social Key is easy. Just follow a few simple steps.

### *Enabling Social Key*

Before your organization can use Social Key to find and associate social handles for your contact and lead records, you must enable the feature.

### *Enabling and Configuring Social Accounts and Contacts*

There are a few steps you need to complete before your users will have access to social data on their accounts, contacts, and leads.

### *Configuring Data.com Clean Jobs for Social Key*

Social Key provides social handles through Data.com Clean jobs. You need to make sure your Clean jobs are configured for Social Key.

### *Configuring Data.com Clean List View Cleaning for Social Key*

Social Key provides social handles when users clean contact or lead records from a list. You'll need to add a few fields to your organization's list views.

### *Viewing Data.com Social Key Job History*

The Data.com Social Key Job History lets you review your current jobs and access job error logs.

### *Viewing Your Data.com Social Key Update Rates*

Data.com Social Key metrics and analytics tell you how your organization's contacts and leads have been updated with social data, so it's important to check your update rates on a regular basis.

## Data.com Social Key Overview

Data.com Social Key works with Social Accounts and Contacts and Data.com Clean to make it easier to learn more about your contacts and leads in Salesforce or on social network sites. Your organization must have Data.com Clean enabled to use Social Key.

Data.com Clean license available in: <b>Professional, Enterprise, Performance, and Unlimited</b> Editions
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Social Key available in: <b>Professional, Enterprise, Performance, and Unlimited</b> Editions
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When Clean jobs are run or records are cleaned from a list, Social Key finds and associates social handles for your contacts and leads. Social Key currently provides social handles for LinkedIn®, Twitter®, and Facebook® for contacts and leads in the United States only.

Users log in to a social network from a contact or lead's detail page and view the associated profile from within the Social Accounts and Contacts viewer. There's no manual search required.



**Note:** Depending on contacts' and leads' privacy settings, as well as the permissions set by their friends or connections and the site's terms of use, users might not see as much information as they would if logged in to their social network accounts directly.

## Implementing Social Key

Implementing Data.com Social Key is easy. Just follow a few simple steps.

Data.com Clean license available in: <b>Professional, Enterprise, Performance, and Unlimited</b> Editions
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Social Key available in: <b>Professional, Enterprise, Performance, and Unlimited</b> Editions
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User Permissions Needed	
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To implement Social Key:	"Customize Application"
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1. [Enable Social Key](#).
2. If you haven't yet, [enable Social Accounts and Contacts](#) and select the social networks you want to get social profiles from.
3. [Make sure your Data.com Clean settings, preferences, and job schedule are configured for Social Key](#).
4. [Make sure the Clean Status field has been added to your contact and lead list views, and, optionally, add the fields for the social networks that you've enabled to your contact list views](#).
5. After jobs have run, you can [check out their Social Key job history](#).

## Enabling Social Key

Before your organization can use Social Key to find and associate social handles for your contact and lead records, you must enable the feature.

Data.com Clean license available in: <b>Professional, Enterprise, Performance, and Unlimited</b> Editions
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Social Key available in: <b>Professional, Enterprise, Performance, and Unlimited</b> Editions
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User Permissions Needed	
To implement Social Key:	“Customize Application”

1. From Setup, click **Data.com Administration** > **Social Key** > **Settings**.
2. Click **Enable Social Key**.

If you also need to enable and set up Social Accounts and Contacts, we'll let you know after you enable Social Key.

## Enabling and Configuring Social Accounts and Contacts

There are a few steps you need to complete before your users will have access to social data on their accounts, contacts, and leads.

Business accounts available in: **All Editions** except **Database.com**

Person accounts available in: **Enterprise, Performance, Unlimited, and Developer** Editions

Contacts available in: **All Editions** except **Database.com**

Leads available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Data.com Clean available in: **Professional, Enterprise, Performance, and Unlimited** Editions

Social Key available in: **Professional, Enterprise, Performance, and Unlimited** Editions

User Permissions Needed
To enable, configure, or disable Social Accounts and Contacts: “Customize Application”

Enable Social Accounts and Contacts so your users can keep up to date on their accounts', contacts', and leads' social information—right within Salesforce. After you enable the feature, select the networks your organization can use. Your organization's users can also configure Social Accounts and Contacts for their own use: they can turn the feature on and off and select the networks they want.

If your organization also uses Data.com Social Key, enable that feature to get your contacts' and leads' social handles automatically when Clean jobs are run or records are cleaned from a list.



**Note:** The Social Accounts and Contacts feature is enabled by default for organizations created after the Spring '12 release. If your organization was created before that, you need to enable the feature yourself.

1. From Setup, click **Customize** > **Social Accounts and Contacts** > **Settings**.
2. Select **Enable Social Accounts and Contacts**.
3. Select the social networks that your organization can use. By default, all social networks are selected.
4. Click **Save**.
5. Let your users know they can configure Social Accounts and Contacts for their individual use.

Enable Social Key if your organization will use it.

## Configuring Data.com Clean Jobs for Social Key

Social Key provides social handles through Data.com Clean jobs. You need to make sure your Clean jobs are configured for Social Key.



Data.com Clean license available in: <b>Professional, Enterprise, Performance, and Unlimited</b> Editions
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Social Key available in: <b>Professional, Enterprise, Performance, and Unlimited</b> Editions
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User Permissions Needed
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To implement Social Key:
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"Customize Application"
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Social Key works with Social Accounts and Contacts and Data.com Clean to make it easier to follow your contacts and leads on social networks. From Social Accounts and Contacts, select the social networks you want. The Social Key process runs during your automated Clean jobs, so to use Social Key, you need to make sure Clean is enabled, and select and schedule the jobs you'll need.

When you enable Social Key, the next scheduled Clean job will run a full sync with Data.com for the objects you've enabled for clean jobs (contacts, leads, or both). Social Key will provide social handles at regular intervals after that, at the same time as your Clean jobs. For example, if you run your clean jobs once per week, on Wednesday, the Social Key job will do a full sync every other Wednesday.



**Note:** If a Clean job fails, the Social Key process fails, as well. To view Clean and Social Key job histories, from Setup, click **Data.com Administration > Clean > Jobs..**

If you need guidance on setting up Data.com Clean or verifying your preferences or settings, just click **Help for this Page** on any Clean setup page.

1. From Setup, click **Data.com Administration > Clean > Settings.**
2. Confirm that Data.com Clean is enabled.
3. From Setup, click **Data.com Administration > Clean > Preferences.**
4. Confirm that Clean jobs are enabled for the objects for which you want to get social handles. We provide them for contacts and leads.
5. From Setup, click **Data.com Administration > Clean > Jobs.**
6. Confirm that Clean jobs are scheduled.

## Configuring Data.com Clean List View Cleaning for Social Key

Social Key provides social handles when users clean contact or lead records from a list. You'll need to add a few fields to your organization's list views.

Data.com Clean license available in: <b>Professional, Enterprise, Performance, and Unlimited</b> Editions
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Social Key available in: <b>Professional, Enterprise, Performance, and Unlimited</b> Editions
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User Permissions Needed
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To implement Social Key
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"Customize Application"
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To create custom list views:
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"Read" on the type of record included in the list
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To create, edit, or delete public list views:
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"Manage Public List Views"
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Social Key works with Social Accounts and Contacts and Data.com Clean to make it easier to follow your contacts and leads on social networks. From Social Accounts and Contacts, select the social networks you want. The Social Key process runs when users clean records from a list.

1. Click the tab for the object whose records you want to clean from a list: **Contacts** or **Leads**.
2. Select a view from the drop-down and click **Edit**.
3. Make sure the **Clean Status** field has been added to the Selected Fields.  
Adding this field automatically adds the **Clean** button to the list view.
4. Optionally, add the fields for the social networks you've enabled (LinkedIn, Twitter, or Facebook) to your contact list views.

The social network fields aren't available on the lead list views.

## Viewing Data.com Social Key Job History

The Data.com Social Key Job History lets you review your current jobs and access job error logs.

Data.com Clean license available in: <b>Professional, Enterprise, Performance, and Unlimited</b> Editions
Social Key available in: <b>Professional, Enterprise, Performance, and Unlimited</b> Editions

User Permissions Needed	
To implement Social Key:	"Customize Application"

The Data.com Social Key process runs during your automated Data.com Clean jobs to find and associate social handles for contacts and leads. The Social Key Jobs History table lists recent clean jobs and provides details related to Social Key. If a Clean job fails, the Social Key process fails, as well.

1. From Setup, click **Data.com Administration > Clean > Jobs**.
2. Review general Clean job history if you need to.
3. View job details in the Social Key Jobs History section.
4. If the job encountered any errors when processing one or more records, click the link in the **Entity Errors** column to download the job log .csv file.

We store job logs for seven days.

Here are the definitions for the table columns.

Column Heading	Definition and Troubleshooting Guidelines
Date	The date the job was run.
Time Submitted	The time the job was submitted to the job queue. Jobs run independently, so this might not be the exact time the job was run.
Job Type	The type of job: <b>Contacts</b> or <b>Leads</b> .
Job Status	<p>The status of the job:</p> <p>Processing: the job is in process.</p> <p>Completed: the job has finished running (with or without errors).</p> <p>Failed: the job failed to run.</p> <p>Aborted: the job was aborted before or while it ran.</p>

Column Heading	Definition and Troubleshooting Guidelines
Records	The number of Salesforce records processed and matched by the Clean job.
Records with Handle	The number of Salesforce records processed that were updated with one or more social handles.
Records without Handle	The number of Salesforce records processed that weren't updated with any social handles.
LinkedIn Handles	The number of LinkedIn social handles the job attempted to update Salesforce records with.
Twitter Handles	The number of Twitter social handles the job attempted to update Salesforce records with.
Facebook Handles	The number of Facebook social handles the job attempted to update Salesforce records with.
Entity Errors	<p>The total number of entity errors a job encountered while it ran. A dash indicates either no errors or no data. If the job produces an entity error job log, click the link to download and open its .csv file. There you'll find an explanation of any entity error that was produced because a record failed to save—for example, because of a validation rule failure. Entity errors usually result from validation rule failures or required field violation. If an explanation exists, we'll provide it.</p> <p>The unique ID of a record that produced an error during the job. To open the record, append the 15-digit ID to the URL of your Salesforce instance. For example:  <a href="https://na1.salesforce.com/0013000000hKBTq">https://na1.salesforce.com/0013000000hKBTq</a>.</p>

## Viewing Your Data.com Social Key Update Rates

Data.com Social Key metrics and analytics tell you how your organization's contacts and leads have been updated with social data, so it's important to check your update rates on a regular basis.

Data.com Clean license available in: <b>Professional, Enterprise, Performance, and Unlimited</b> Editions
Social Key available in: <b>Professional, Enterprise, Performance, and Unlimited</b> Editions

User Permissions Needed
To view Social Key update rates: "Customize Application"

Social Key update rates are organized by both record type (so you can see how many contacts and leads in your organization were updated with social handles) and social handle (so you can see which handles were available most often).

1. From Setup, click **Data.com Administration > Clean > Metrics & Analytics**.
2. To find out when the last calculation occurred, check the `Last Calculated` field above the table.



**Note:** The data in the tables is calculated daily, but we store the time and calculate the date based on GMT, so depending on time adjustments, the date shown may be different from the date when the calculations occurred.

Also, because this data is calculated once per day, it may differ slightly from the data in Data.com dashboards and reports.

3. View update information in the Social Key Update Rates section.

The data represents records that have been updated since your organization started using Social Key. Here are the definitions for the table columns.

**Table 1: Records Updated**

Column	Definition
Records	The object for which Social Key jobs ran (contacts or leads).
Processed	The number of each type of Salesforce record (contacts or leads) processed by Social Key.
Updated	The number of each type of processed Salesforce record (contacts or leads) that have been updated with at least one social handle.
Update Rate (% of Processed)	The percentage of each type of processed Salesforce record (contacts or leads) that have been updated with at least one social handle.

**Table 2: Social Handles Updated**

Column	Definition
Social Handle	The social handles enabled for Social Key (LinkedIn®, Twitter®, or Facebook®).
Contacts	The number of social handles (LinkedIn, Twitter, or Facebook) that have been added to contact records.
Leads	The number of social handles (LinkedIn, Twitter, or Facebook) that have been added to lead records.
Total	The number of social handles (LinkedIn, Twitter, or Facebook) that have been added to contact <i>and</i> lead records.

**Table 3: Social Handle Update Rate (by Social Network)**

Column	Definition
Social Network	The social network for which we provide the social handles (LinkedIn, Twitter, or Facebook).
Update Rate	The percentage of total updated social handles that are from LinkedIn, Twitter, or Facebook.

# Service

Salesforce's Service Cloud gives you the tools to provide a comprehensive customer service experience to your customers.

## Case Feed

Case Feed gives support agents a more streamlined way of creating, managing, and viewing cases. It includes publishers, which let agents create case notes, log calls, change the status of cases, and communicate with customers in a Chatter-like feed.

## Chatter Answers

Chatter Answers is a self-service and support community where users can post questions and receive answers and comments from other users or your support agents. Chatter Answers brings together Case, Questions and Answers, and Salesforce Knowledge articles in a unified experience. Chatter Answers has several new and improved features in Winter '14.

## Entitlement Management

Entitlement Management lets you and your support agents verify and fulfill customers' support contracts. Entitlement Management has several new and improved features in Winter '14.

## Ideas

Ideas is a community of users who post, vote for, and comment on ideas. An Ideas community provides an online, transparent way for you to attract, manage, and showcase innovation. Ideas has several new and improved features in Winter '14.

## Knowledge

Salesforce Knowledge, your Knowledge Centered Support certified knowledge base, has several new and improved features in Winter '14.

## Live Agent

Live Agent lets service organizations connect with customers or website visitors in real time through a Web-based, text-only live chat. Live Agent has several new and improved features in Winter '14.

## Open CTI

Open CTI helps partners integrate Salesforce with computer-telephony integration systems without installing adapter programs on call center users' machines. Open CTI has several new and improved features in Winter '14.

## Salesforce Console for Service

The Salesforce Console for Service is an app that's designed for users in fast-paced environments who need to find, update, and create records quickly to support their customers. The Salesforce Console for Service has several new and improved features in Winter '14.

## Console Tab

The Agent console in the Console tab combines information to help service agents do more.

## Customer Users

Customer users can access Salesforce through Customer Portals or communities you create.

# Case Feed

Case Feed gives support agents a more streamlined way of creating, managing, and viewing cases. It includes publishers, which let agents create case notes, log calls, change the status of cases, and communicate with customers in a Chatter-like feed.

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

### **Case Feed Automatically Enabled in New Organizations**

Case Feed is automatically enabled and assigned to all standard profiles in Salesforce organizations created after the Winter '14 release.

### **New Publisher JavaScript API Events Let Custom Salesforce Console Components Interact with Case Feed**

Four new events that can be published through the `publish` method on the `Sfdc.canvas.publisher` object let you create custom Salesforce console components that interact with actions in the Case Feed publisher.

### **Add Visualforce Pages to Case Detail Pages in Case Feed**

You can now customize and add functionality to case detail pages for Case Feed users by adding Visualforce pages to those layouts with the page layout editor.

### **Updated Look for Feed Items in Case Feed**

The details that appear below certain feed items in Case Feed now appear surrounded by a light grey box.

### **Combined Filter and Sort Options in Case Feed**

If your Case Feed layout includes feed filters as a drop-down list in the center column, that list is now combined with the list of feed sorting options.

### **New Labels for Portal-Related Buttons in Case Feed**

We've renamed the button in the Case Feed portal publisher and the button that appears below the feed items for portal posts.

## **Case Feed Automatically Enabled in New Organizations**

Case Feed is automatically enabled and assigned to all standard profiles in Salesforce organizations created after the Winter '14 release.

If you don't want to use Case Feed, you can disable it: from Setup, click **Cases > Support Settings** and deselect **Case Feed Enabled**.

For information on customizing Case Feed based on your company's needs, see "Setting Up Case Feed" in the online help.

## **New Publisher JavaScript API Events Let Custom Salesforce Console Components Interact with Case Feed**

Four new events that can be published through the `publish` method on the `Sfdc.canvas.publisher` object let you create custom Salesforce console components that interact with actions in the Case Feed publisher.

For example, you could create a console component that lets support agents browse Salesforce Knowledge articles and then, with one click, include the full, formatted text of an article in a new message in the Case Feed email action.

These events support interaction with Case Feed:

Name	Description
<code>publisher.selectAction</code>	Selects the specified action and puts it in focus.

Name	Description
<code>publisher.setActionInputValues</code>	Specifies which fields on the action should be populated with specific values, and what those values are.
<code>invokeAction</code>	Triggers the submit function (such as sending an email or posting a portal comment) on the specified action.
<code>customActionMessage</code>	Passes a custom event to a custom action. Supported for Visualforce-based custom actions only.

For more information on using these events, see [Customizing Case Feed with Visualforce](#).

## Add Visualforce Pages to Case Detail Pages in Case Feed

You can now customize and add functionality to case detail pages for Case Feed users by adding Visualforce pages to those layouts with the page layout editor.

You can use any Visualforce page that includes the standard case controller.

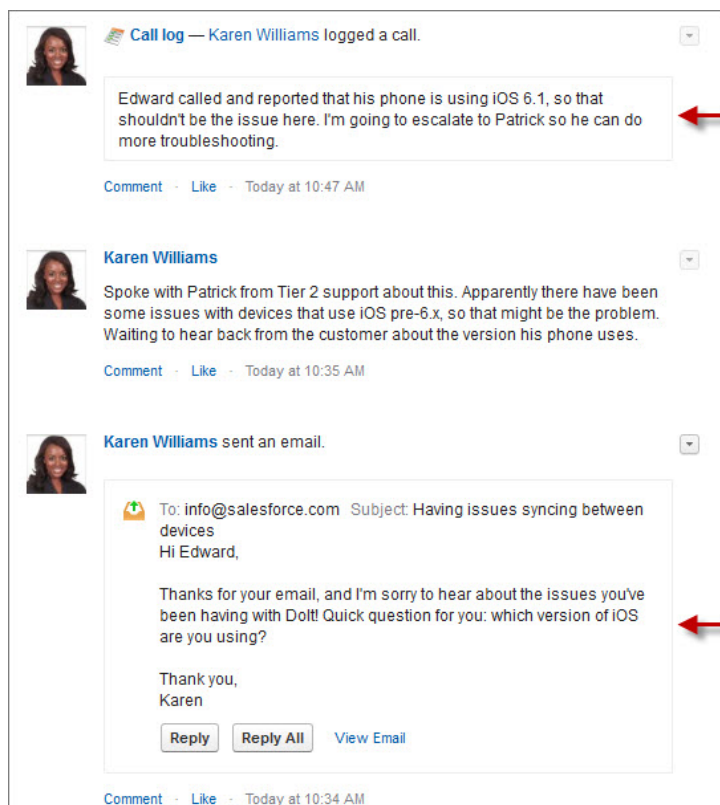
To edit Case Feed layouts, click **Customize** > **Cases** > **Page Layouts** and choose a layout from `Page Layouts for Case Feed Users`.

## Updated Look for Feed Items in Case Feed

The details that appear below certain feed items in Case Feed now appear surrounded by a light grey box.

These items have the updated look.

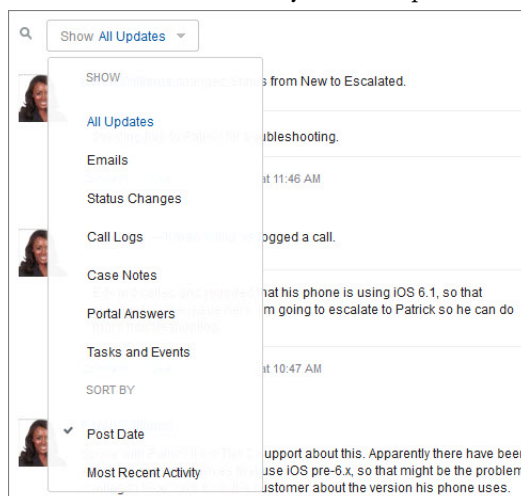
- Email messages
- Portal posts
- Call logs
- Case status changes
- Case comments
- Articles
- Live chat transcripts



## Combined Filter and Sort Options in Case Feed

If your Case Feed layout includes feed filters as a drop-down list in the center column, that list is now combined with the list of feed sorting options.

The filter options are listed first in the combined list, followed by the sort options.



If your layout includes feed filters as a fixed or floating list in the left column, that list and the sort options list remain separate.

## New Labels for Portal-Related Buttons in Case Feed

We've renamed the button in the Case Feed portal publisher and the button that appears below the feed items for portal posts.



The portal publisher button, which was labeled **Answer via Portal**, is now **Post Answer**. The button that appears with portal-related feed items has been renamed from **Remove from Portal** to **Remove Answer**.

For more information on using the portal publisher, see “Communicating with Customers via the Customer Portal and Chatter Answers” in the Salesforce Help.

## Chatter Answers

Chatter Answers is a self-service and support community where users can post questions and receive answers and comments from other users or your support agents. Chatter Answers brings together Case, Questions and Answers, and Salesforce Knowledge articles in a unified experience. Chatter Answers has several new and improved features in Winter '14.

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

### **Activity History**

You can view user activity for Questions and Ideas on Chatter profile pages.

### **Rich Text and Images in Chatter Answers Replies**

The rich text editor is now available for users when they reply to a question.

### **Updated User Interface for Questions**

We've made several important improvements to the Q&A tab so that it's even easier for your customers to ask a question and get an answer. These changes increase the usability of the Chatter Answers user experience and don't affect the behavior of Chatter Answers.

### **Reply to Questions with Email**

Now you can reply to a question directly from an email notification without having to go to the Q&A tab.

### **Update Needed for Notification URLs When Enabling My Domain**

Existing organizations with Chatter Answers must update email notification URLs when they enable My Domain.

### **Customize Chatter Answers with Visualforce Components**

Structure your Chatter Answers zones in all new ways with Chatter Answers Visualforce components.

### **Customize the Account Creation Experience for Chatter Answers Portal Users**

Implement the `ChatterAnswers.AccountCreator` interface with the `ChatterAnswersRegistration` Apex class to create a custom account creation and registration experience for Chatter Answers portal users.

### **Build the Chatter Answers Search into Your Applications**

We've exposed the Chatter Answers search through Chatter in Apex and the Chatter REST APIs.

### **Customize Component Events with the Chatter Answers JavaScript API—Pilot**

The Chatter Answers JavaScript API lets you add additional functionality to actions in Chatter Answers.

## Activity History

You can view user activity for Questions and Ideas on Chatter profile pages.

In Winter '14, activity statistics, such as how many posts you've made and how many likes you've received in Ideas and Questions appear on your profile page so that others can learn about your participation in the community.

Click your name anywhere around the application to view your profile. If available, you can also click the Profile tab or **Your Name > My Profile** at the top of the page. View other people's profiles by clicking their name.

Activity history appears on the Overview tab of your profile and shows how your activity stacks up to other people's. You can also evaluate the activity of other members of the community when you look at their profile.

The screenshot shows a user profile for 'An Lin' with the following details:

- Header:** Chatter > People > An Lin
- Profile Picture:** A woman working on a laptop, with a green 'Moderator' badge.
- Navigation:** Feed, Overview (selected)
- About Me:**
  - EDUCATION: University of California, Berkeley
  - EXPERIENCE: 5 years in current position
  - SKILLS: Management, Agile Development
  - MISSION: To bring World Wide Computing to the top of the pile
  - PERSONAL: Married with two young sons
- Contact:**
  - APAC Sales Director
  - admin@wwwcomputing.com
  - 1 Market St
  - San Francisco, CA 94105
  - US
  - Allison Wheeler (Manager)
- Contribution:**
  - Active Influencer: [Progress bar]
  - 3 posts & comments
  - 2 comments received
  - 0 likes received
- Community Activity (highlighted in red box):**
  - Questions:**
    - Questions Asked: 1
    - Questions Answered: 4
    - Solved Questions: 0
  - Ideas:**
    - Ideas Created: 2
    - Idea Comments Received: 1
    - Ideas Voted On: 0
- Files Owned:** No files have been added yet.
- Groups:** Join or create groups

When Chatter Answers is enabled for your organization, the total numbers for the following activities appear on your profile page:

- Questions you've asked
- Questions you've answered
- Questions you've solved with a best answer

Click **Questions** to navigate back to the Q&A tab.

When Reputation in Ideas is enabled by your administrator, the total numbers for the following activities appear on your profile page:

- Ideas you've created
- Comments you've received
- Comments and ideas you've voted on

Click **Ideas** to navigate back to the Ideas tab.

## Rich Text and Images in Chatter Answers Replies

The rich text editor is now available for users when they reply to a question.

User Permissions Needed	
To set up Chatter Answers:	“Customize Application”
	AND
	“Manage Users”
	AND
	“Edit Self-Service Users”

Administrators can give community members access to a rich text editor for replies, enabling them to format text and add images when answering questions. Images can be up to 1 MB in size. There is a 32,000 character limit for public replies. The rich text editor is enabled by default for new organizations. For existing organizations, if rich text is enabled for questions, it's automatically enabled for replies. Enabling the rich text editor makes the rich text available for both questions and replies.

To enable rich text for users in your organization, from Setup, click **Customize > Chatter Answers > Settings**, then select **Enable Rich Text Editor**.

## Updated User Interface for Questions

We've made several important improvements to the Q&A tab so that it's even easier for your customers to ask a question and get an answer. These changes increase the usability of the Chatter Answers user experience and don't affect the behavior of Chatter Answers.

When the Optimize Question Flow preference is enabled, users can see more information to help them find an answer when asking a question.

We've updated the Chatter Answers Q&A tab to bring you the following improvements:

1. Additional filter and sort options have been added to make viewing questions and answers even easier. The filter and sort options have been combined into one drop-down list. Community members and support agents can select different viewing options for questions in the feed.

Searches in the Chatter Answers Q&A tab can be filtered to show questions based on:

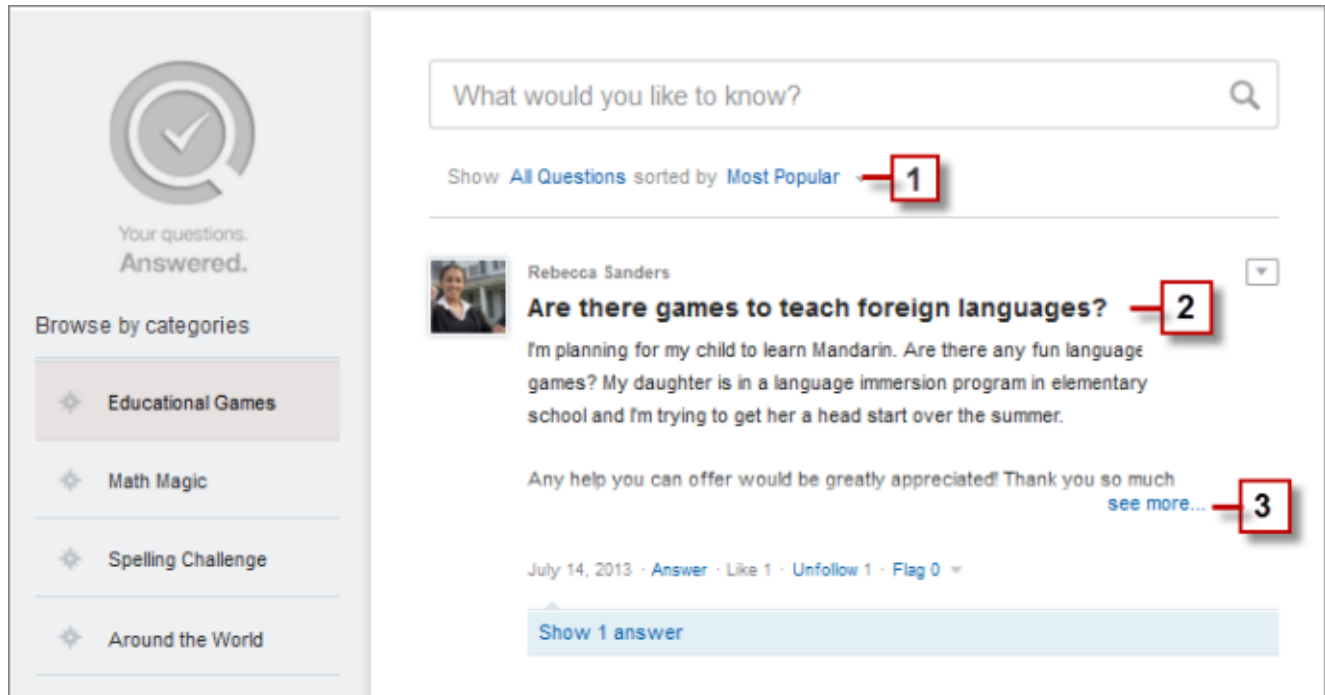
- **All Questions** shows all questions in the zone, as well as Salesforce Knowledge articles, when enabled.
- **Unanswered Questions** shows all questions that don't have replies.
- **Unsolved Questions** shows all questions that don't have a best answer.
- **Solved Questions** shows all questions that have a best answer, as well as Salesforce Knowledge articles, when enabled.
- **My Questions** shows all questions you've asked and are following.

You can then sort the results based on the following options:

- **Date Posted** sorts questions with the most recently asked questions appearing first.
- **Recent Activity** sorts questions with the most recent replies and comments appearing first.
- **Most Popular** sorts questions that have received the most likes, upvotes, and followers appearing first.

Administrators can edit the labels for **All Questions**, **Solved Questions**, **Unanswered Questions**, and **Unsolved** to meet the needs of the community.

2. The text color for titles of questions has changed from blue to black. Clicking on the title or the body of the question switches to the single item view of the question.
3. Questions have been condensed to show the first few lines of the post. Click **see more** to view the entire question and click **see less** to collapse the section back to a text area that is 100 pixels high.



## Reply to Questions with Email

Now you can reply to a question directly from an email notification without having to go to the Q&A tab.

When you receive email notifications related to a question, you can conveniently reply directly from your email and the reply appears as an answer on the Q&A tab. You'll receive an email notification for the following events:

- Someone answers a question you've asked or are following.
- Customer support or a moderator selects a best answer for a question you've asked or are following.



**Note:** To reply to email notifications, your administrator must enable email replies on the Chatter Answers Settings page.

Consider these tips when sending email replies:

- Replies must be sent from the email address specified on your profile. If you use email aliases or email forwarding services that send replies from a different email address, your replies won't be processed.
- If replies contain your personal email signature, the signature text is treated as part of your comment. Default signatures inserted by mobile devices, such as *Sent from my iPhone*, are automatically removed from replies. Before replying, delete custom signatures and any extra text you don't want posted to the community.
- Attachments in replies are ignored.
- Before replying, check the email address that displays in the **To** field of your email. Valid addresses contain tokens, or long character strings, both before and after the **@** symbol, such as `w8t27apy1@j321imd9gbs.d8rx.d.chatter.salesforce.com`. Some email applications may automatically use the **From** address from the original email, such as `ReplyToQ&A@<your.company>.com`, which is not a valid address for receiving replies. If you see this shortened address in the **To** field of your reply email, replace it with the valid reply-to address in the email header information. For example, in an application such as IBM® Lotus Notes®:

1. Open the original email.
2. Click **View** > **Show** > **Page Source**.

3. In the ReplyToQ&A section, copy the email address that looks like:  
w8t27apy1@j321imd9gbs.d8rx.d.chatter.salesforce.com.
4. Paste the reply-to address in the To field of your reply email.

## Update Needed for Notification URLs When Enabling My Domain

Existing organizations with Chatter Answers must update email notification URLs when they enable My Domain.

User Permissions Needed	
To create or edit a zone and to set up a domain name:	"Customize Application"

When you set up a domain name for your organization using My Domain, all of your application URLs change. If you have an existing URL for email notifications in an internal zone and subsequently set up a custom domain using My Domain, you must manually update the Email Notification URL field for the internal zone.

1. From Setup, click **Customize > Chatter Answers > Zones**.
2. In the Email Notification URL field, clear the existing URL so that the field is blank.
3. Click **Save**.  
The system populates the field with the My Domain URL.

## Customize Chatter Answers with Visualforce Components

Structure your Chatter Answers zones in all new ways with Chatter Answers Visualforce components.

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

In Winter '14, you can control the arrangement of Chatter Answers elements such as the feed, sign in, filters, and the Search/Ask bar. Add any of the Chatter Answers components to the Visualforce page that customizes your zone. You can include the following components, in any order:

- chatteranswers:aboutme
- chatteranswers:guestsignin
- chatteranswers:feedfilter
- chatteranswers:feeds
- chatteranswers:searchask
- chatteranswers:categoryfilter

For example, the following Visualforce page includes all of the standard Chatter Answers elements, but they appear in a different order on the resulting page than they do when you use the chatteranswers:allfeeds component. In this example, the Search/Ask component and the feed filter appear below the feed instead of above it.

```
<apex:page language="en_US" showHeader="false" cache="true">
<body>
  <div class="csMini">
    <div class="threecolumn">
      <div class="leftContent">
        <chatteranswers:guestsignin />
        <chatteranswers:aboutme communityId="09aD00000000cfE"/>
        <chatteranswers:categoryfilter communityId="09aD00000000cfE"/>
      </div>
```

```

<div class="mainContent">
  <div class="lowerMainContent" id="lowerMainContent">
    <div id="rightContent" class="rightContent"></div>
    <div id="centerContent" class="centerContent">
      <chatteranswers:feeds communityId="09aD00000000cfE"/>
      <chatteranswers:searchask communityId="09aD00000000cfE"/>
      <chatteranswers:feedfilter />
    </div>
  </div>
</div>
<div class="clearingBox"></div>
</div>
</div>
</body>
</apex:page>

```

## Customize the Account Creation Experience for Chatter Answers Portal Users

Implement the `ChatterAnswers.AccountCreator` interface with the `ChatterAnswersRegistration` Apex class to create a custom account creation and registration experience for Chatter Answers portal users.

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

The `ChatterAnswers.AccountCreator` interface has one method, `createAccount`, which accepts basic user information and creates an Account record. The implementation of this method returns the user ID. Specify the class name of the `ChatterAnswers.AccountCreator` interface implementation in the `registrationClassName` attribute in the `<chatteranswers:registration>` Visualforce component.

For information on creating a custom registration experience for your Chatter Answers portal users, see [ChatterAnswers.AccountCreator Interface](#) on page 286 and [registrationClassName Attribute Added to the <chatteranswers:registration> Component](#) on page 271.

## Build the Chatter Answers Search into Your Applications

We've exposed the Chatter Answers search through Chatter in Apex and the Chatter REST APIs.

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

The Chatter Answers search returns questions and articles with special relevancy scores, such as number of votes and best answers. Now you can integrate the same rich Chatter Answers search that's in the user interface into your applications using Chatter in Apex and the Chatter REST APIs.

For information on building the Chatter Answers search into your applications, see "Zones resources" in [New and Changed Resources](#).

## Customize Component Events with the Chatter Answers JavaScript API—Pilot

The Chatter Answers JavaScript API lets you add additional functionality to actions in Chatter Answers.

**Note:**

The Chatter Answers JavaScript API is currently available through a pilot program. For information on using the Chatter Answers JavaScript API, contact [salesforce.com](https://salesforce.com).

You can create custom Chatter Answers community experiences using Chatter Answers components in a Visualforce page. The Chatter Answers JavaScript API exposes four events for modifying the behavior of Chatter Answers components or the interaction of Chatter Answers components with components you create.

- `FEED_READY`—Indicates that the Chatter Answers feed has finished loading. You can trigger other events after this event is fired.
- `EDIT_MY_SETTINGS_CLICK`—Handles the opening of the My Settings overlay.
- `FEED_ITEM_SELECTED`—Opens a specific feed item in single item view and is triggered by the action of a feed item selected from the Search/Ask component.
- `HOVER_USER`—Handles the behavior for the hover overlay, which can display reputation or user information, when you hover over a user's user name. You can override this event.

For documentation on using the Chatter Answers JavaScript API, see the [Chatter Answers JavaScript API Developer's Guide](#) (English only).

## Entitlement Management

Entitlement Management lets you and your support agents verify and fulfill customers' support contracts. Entitlement Management has several new and improved features in Winter '14.

Available in: <b>Enterprise, Performance, Unlimited, and Developer</b> Editions with the Service Cloud
--

### Create More Flexible Entitlement Processes with Recurring Milestones

Recurring milestones allow milestones to repeat within an entitlement process whenever the milestone criteria match the case criteria.

### Entitlement Versioning—Generally Available

Entitlement versioning is generally available. Entitlement versioning saves you time by letting you update an entitlement process and all of the entitlements and cases associated with it with a single click.

### Monitor Case Activity with Milestone Feed Items

Milestone feed items provide an additional way for support agents to monitor case activity.

### View Milestones on the Case Feed Page with the Milestone Tracker

We've created a component that you can add to the Case Feed page that shows the countdown time to an active milestone's Target Date or how long a milestone has been in violation.

### Show the Time Since a Milestone Target Was Violated

Add `Time Since Target` fields to the Case Milestones related list and the Case Milestone Detail page to quickly view how much time has passed since a milestone's target date was violated.

### Change the Account Associated with an Entitlement

Support agents can now change the account associated with an entitlement, making it easy to update the entitlement if an asset covered by the entitlement changes owner or to correct the account associated if the case covered by the entitlement was assigned the wrong account or contact.



## Create More Flexible Entitlement Processes with Recurring Milestones

Recurring milestones allow milestones to repeat within an entitlement process whenever the milestone criteria match the case criteria.

Milestones are required steps in your support process. They're metrics that represent service levels to provide to each of your customers. Examples of milestones include First Response and Resolution Times on cases. You can set up a milestone to occur once in an entitlement process or to recur until the entitlement process exits. The following recurrence types are available for milestones:

Recurrence Type	Description
None	The milestone occurs only once for the case.
Independent	The milestone occurs whenever the milestone criteria match the case criteria.
Sequential	The milestone occurs whenever the case criteria match the milestone criteria and the previous occurrence's Target Date has passed.

For more information on setting up recurring milestones, see “Creating Milestones” in the Salesforce Help.

### Milestones with Independent Recurrence

Independent recurring milestones always use the current time as the Start Date.

For milestones with independent recurrence, the milestone occurs whenever the milestone criteria match the case criteria until the entitlement process exits. Only one occurrence of a milestone can be active at a time. For all occurrences, the Start Date is the current time when the milestone criteria match the case criteria, regardless of when the previous occurrence was complete.

For example, a milestone called Engineer Solution Proposed is set up to track case escalation to Engineering. When the Engineer Solution Proposed milestone occurs, the support agent expects a proposed solution from Engineering within four hours.

At 10 a.m., the support agent escalates a case to Engineering by changing a field that, due to workflow rules, causes the milestone criteria to match the case criteria. As a result, the Engineer Solution Proposed milestone is created with a Start Date of the current time, which is 10 a.m. The milestone's Target Date is 2 p.m., four hours from the Start Date. At 11 a.m., well before the target date, an engineer proposes a solution that's sent to the customer and the Engineer Solution Proposed milestone is complete.

However, the solution proposed doesn't solve the customer's issue. At 1 p.m., the support agent escalates the case to Engineering and the Engineer Solution Proposed milestone is created again—this time with a Target Date of 5 p.m.

After the second occurrence of the Engineer Solution Proposed milestone, the case has two milestones:

- One milestone that started at 10 a.m. and is now complete
- One milestone that started at 1 p.m. and is incomplete with a Target Date of 5 p.m.

The milestone can recur as many times as necessary until the entitlement process is completed.

### Milestones with Sequential Recurrence

Sequential recurring milestones have a start time that's based on the Target Date of the preceding occurrence of the milestone.

For milestones with sequential recurrence, the milestone occurs whenever the case criteria match the milestone criteria and the previous occurrence's Target Date has passed, until the entitlement process exits. Only one occurrence of a milestone can be active at a time. For the first occurrence, the Start Date is the current time when the milestone criteria match the case criteria. For subsequent occurrences, the Start Date must be after the Target Date of the previous occurrence. If an occurrence



is completed before its Target Date and the milestone criteria match the case criteria again, then the next occurrence will start at the previous occurrence’s Target Date. If an occurrence is completed after its Target Date, the next occurrence’s Start Date will be the current time when the milestone criteria match the case criteria.

For example, a milestone called Customer Contact Made is set up to track daily contact with a customer as part of an SLA. The milestone is complete when the support agent communicates with the customer. The Customer Contact Made milestone has a target time of 24 hours.

At 10 a.m. on Monday, a case is created with the Customer Contact Made milestone. The Target Date for the milestone is 24 hours from the start time, 10 a.m. on Tuesday. At 11 a.m. on Monday, the support agent communicates with the customer. The Customer Contact Made milestone is complete. In addition, the next occurrence of the Customer Contact Made milestone is created. However, because the previous occurrence’s Target Time is still in the future, the Start Date of this occurrence is 10 a.m. on Tuesday.

After the second occurrence of the Customer Contact Made milestone, the case has two milestones:

- One milestone that started at 10 a.m. on Monday and is now complete
- One milestone scheduled to start at 10 a.m. on Tuesday. that’s incomplete with a Target Date of 10 a.m. on Wednesday.


If the support agent communicates with the customer multiple times on Monday, it won’t have any effect on the Tuesday milestone.

## Entitlement Versioning—Generally Available

Entitlement versioning is generally available. Entitlement versioning saves you time by letting you update an entitlement process and all of the entitlements and cases associated with it with a single click.

Entitlement versioning lets you make changes to existing entitlement processes, even if they’re assigned to active entitlements and cases. This can be useful if the business rules behind your entitlement processes change, for example, or if you need to create multiple versions of the same entitlement process that have only minor differences. With entitlement versioning, you don’t need to create entirely new processes; you can simply create new versions of existing ones.

For information on creating multiple versions entitlement processes, see “Entitlement Versioning Overview” in the Salesforce

Help or  [watch a demo](#) (2:20 minutes).

## Monitor Case Activity with Milestone Feed Items


Milestone feed items provide an additional way for support agents to monitor case activity.

User Permissions Needed	
To enable milestone feed items:	“Manage Entitlements”

When you enable milestone feed items, your support agents see notifications in the Case Feed when a milestone is completed or violated. Milestone feed items for cases a user owns or follows also appear on the user profile page.

This setting applies only if you have Chatter and entitlement management enabled.

1. From Setup, click **Customize > Entitlement Process > Settings**.
2. Select **Enable milestone feed items**.

 **Note:** Enabling milestone feed items doesn't create feed items for milestones that have already been completed or violated.


## View Milestones on the Case Feed Page with the Milestone Tracker

We've created a component that you can add to the Case Feed page that shows the countdown time to an active milestone's Target Date or how long a milestone has been in violation.

User Permissions Needed	
To create and edit page layouts:	"Customize Application"
To assign page layouts:	"Manage Users"

Agents working on cases need to be aware of how much time they have until their milestones are due because their performance is often measured based on how often they miss milestones. The milestone tracker lets agents see the time remaining on an active milestone or how overdue the milestone is if its Target Date has passed, along with a list of upcoming milestones and closed milestones, all on the Case Feed page.

To enable the milestone tracker for your support agents:

1. From Setup, click **Customize** > **Cases** > **Page Layouts**.
2. In Page Layouts for Case Feed Users, click  next to a layout and choose **Edit feed view**.
3. In the Other Tools and Components area, select the **Milestone Tracker**, and specify where on the page you want it to appear.
4. Click **Save**.

You can add the milestone tracker to your custom pages by including the `<apex:milestoneTracker>` component in a Visualforce page. For information on the new `<apex:milestoneTracker>` component, see the [New `<apex:milestoneTracker>` Component](#).

## Show the Time Since a Milestone Target Was Violated

Add `Time Since Target` fields to the Case Milestones related list and the Case Milestone Detail page to quickly view how much time has passed since a milestone's target date was violated.

User Permissions Needed	
To view case milestones:	"Read" on cases
To edit case milestones:	"Edit" on cases

Milestones are required steps in your support process. They're metrics that represent service levels to provide to each of your customers. Examples of milestones include First Response and Resolution Times on cases. A milestone's target date is the date or time by which the milestone should be completed.

The `Time Since Target` fields on cases calculate the time that has elapsed since a milestone target was violated. You can choose to display the time in days, hours and minutes, or minutes and seconds. You can add these fields to the Case Milestones related list on the Case Detail page and to the Case Milestone Detail page.

To show `Time Since Target` in the Case Milestones related list on the Case Detail page:

1. From Setup, click **Customize** > **Cases** > **Page Layouts**.
2. Under Case Page Layouts, click **Edit** next to a page layout .

- 3. In the page layout palette, click **Related Lists**.
- 4. Click the wrench icon above the Case Milestones related list.
- 5. Add any of the Time Since Target fields to the Selected Fields list.
- 6. Click **OK**.

When you add Time Since Target to the Case Milestone related list, the field is visible to agents on the Case Detail page when a case includes the milestone and the milestone target is violated.

To show the Time Since Target field on a Case Milestone Detail page:

- 1. From Setup, click **Customize > Cases > Case Milestones > Page Layouts**.
- 2. Click **Edit** next to a page layout.
- 3. From the Fields list in the palette, , drag the Time Since Target fields you want to the page layout.
- 4. Click **Save**.

When you add Time Since Target to a Case Milestone Detail page, the field is visible to agents when a case includes the milestone and the milestone target is violated.

The time since target remains fixed after the milestone is complete. The time since target calculates the completion date minus the target date when a milestone is completed after the target date.

## Change the Account Associated with an Entitlement

Support agents can now change the account associated with an entitlement, making it easy to update the entitlement if an asset covered by the entitlement changes owner or to correct the account associated if the case covered by the entitlement was assigned the wrong account or contact.

User Permissions Needed	
To view entitlements:	“Read” on entitlements
To change entitlements:	“Edit” on entitlements

To change the account associated with an entitlement:

- 1. Click **Edit** on the entitlement you want to change.
- 2. Select the Account Name. To quickly find an asset in the lookup dialog box, select criteria from the Filter by fields. Administrators can set lookup filters to restrict filter values and results.
- 3. Click **Edit**.

For information on editing entitlements, see “Editing Entitlements” in the Salesforce Help.

## Ideas

Ideas is a community of users who post, vote for, and comment on ideas. An Ideas community provides an online, transparent way for you to attract, manage, and showcase innovation. Ideas has several new and improved features in Winter '14.

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

### Activity History

You can view user activity for Questions and Ideas on Chatter profile pages.

### “Like” Comments

Community members can like a comment.

### Set a Profile Type for Your Ideas Users

Show all user profiles in the same way within a zone with the `Ideas User Profile` setting.

## Activity History

You can view user activity for Questions and Ideas on Chatter profile pages.

In Winter '14, activity statistics, such as how many posts you've made and how many likes you've received in Ideas and Questions appear on your profile page so that others can learn about your participation in the community.

Click your name anywhere around the application to view your profile. If available, you can also click the Profile tab or **Your Name > My Profile** at the top of the page. View other people's profiles by clicking their name.

Activity history appears on the Overview tab of your profile and shows how your activity stacks up to other people's. You can also evaluate the activity of other members of the community when you look at their profile.

Chatter > People > An Lin

Feed Overview

**About Me**

EDUCATION: University of California, Berkeley  
 EXPERIENCE: 5 years in current position  
 SKILLS: Management, Agile Development  
 MISSION: To bring World Wide Computing to the top of the pile  
 PERSONAL: Married with two young sons

**Contact**

**APAC Sales Director**  
 admin@wwwcomputing.com  
 1 Market St  
 San Francisco, CA 94105  
 US  
 Allison Wheeler (Manager)

**Contribution**

Active Influencer

3 posts & comments | 2 comments received | 0 likes received

**Community Activity**

Questions	
Questions Asked	1
Questions Answered	4
Solved Questions	0

Ideas	
Ideas Created	2
Idea Comments Received	1
Ideas Voted On	0

When Chatter Answers is enabled for your organization, the total numbers for the following activities appear on your profile page:

- Questions you've asked
- Questions you've answered
- Questions you've solved with a best answer

Click **Questions** to navigate back to the Q&A tab.

When `Reputation` in Ideas is enabled by your administrator, the total numbers for the following activities appear on your profile page:

- Ideas you've created
- Comments you've received
- Comments and ideas you've voted on

Click **Ideas** to navigate back to the Ideas tab.

## "Like" Comments

Community members can like a comment.

Now you can like a comment to show your support for great input related to an idea.

Below a comment, click **Like**. To stop liking a comment, click **Unlike**.

Comments now show the number of people who like the comment. When a comment receives a like, it adds to the comment's total score.

## Set a Profile Type for Your Ideas Users

Show all user profiles in the same way within a zone with the `Ideas User Profile` setting.

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

User Permissions Needed	
To create or edit a zone:	"Customize Application"

There are three profile types you can set for all of the Ideas users for a zone. You can choose between users' Chatter profile, the Ideas zone profile that they set up on their profile page, and a custom user profile with a Visualforce page. You can access a user's profile page by clicking on their username.

To set a profile type for Ideas users in a zone:

1. From Setup, click **Customize > Ideas > Settings**.
2. Click **Edit**.
3. Select an `Ideas User Profile` type for all user profiles in the zone.

User Profile Type	Description
Chatter profile	The user's Chatter profile is the default user profile type. If you select this option and a user doesn't have a Chatter profile, then the Ideas zone profile is used.
Ideas zone profile	The profile that the user sets up for the Ideas zone. This profile type is used for Ideas zones in portals.
Custom profile with a Visualforce page	You can specify a Visualforce page for a custom profile for all Ideas users in the zone. If you select this profile type, you must specify a Visualforce page in <code>Custom Profile Page</code> .

#### 4. Click **Save**.

For new organizations starting with the Winter '14 release, the default for the user profile type is the Chatter profile. For organizations created prior to the Winter '14 release, the Ideas zone profile is used.

You can customize these Ideas settings using the `enableChatterProfile` and `ideasProfilePage` fields in the IdeasSettings metadata type. For information on modifying these settings in the user interface, see the [Metadata API Developer's Guide](#).

## Knowledge

Salesforce Knowledge, your Knowledge Centered Support certified knowledge base, has several new and improved features in Winter '14.

Salesforce Knowledge is available in **Performance** and **Developer** editions.  
Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

### **Salesforce Knowledge Access for Internal Users**

Full Salesforce license users no longer need a Knowledge User license to view articles.

### **Knowledge One with Federated Search**

Knowledge One, on the new Knowledge tab, lets you search both published and draft articles plus any external data sources you've connected to Salesforce.

### **More Custom Fields for Article Types**

Now you can include nine more custom fields on your article types.

### **Search Articles to Create Smart Article Links**

While writing an article, you can quickly search your existing Salesforce Knowledge Articles and add a smart link, which automatically adjusts when the name or URL of the article is changed.

### **Chatter Feed Available on Article Toolbar**

You can view and post comments and follow articles before they are published.

### **Topics on Salesforce Knowledge Articles—Pilot**

Articles, with draft or published status, support topics through a pilot program in Winter '14.

### **Metadata API Support for Article Approval Actions**

On deployed article types, you can use the metadata API to set article actions and workflow rules.

### **Play Videos from Any Provider with a Custom Visualforce Page**

Using a custom Visualforce page and the HTML editor, you can insert a video from any provider into your Salesforce Knowledge articles.

## Salesforce Knowledge Access for Internal Users

Full Salesforce license users no longer need a Knowledge User license to view articles.

In Winter'14, Salesforce Knowledge read access is available for full Salesforce licenses without the Knowledge User license. However, other actions (create, edit, delete, and publish) require the Knowledge User license, the Manage Articles permission, and the article action on the article type.



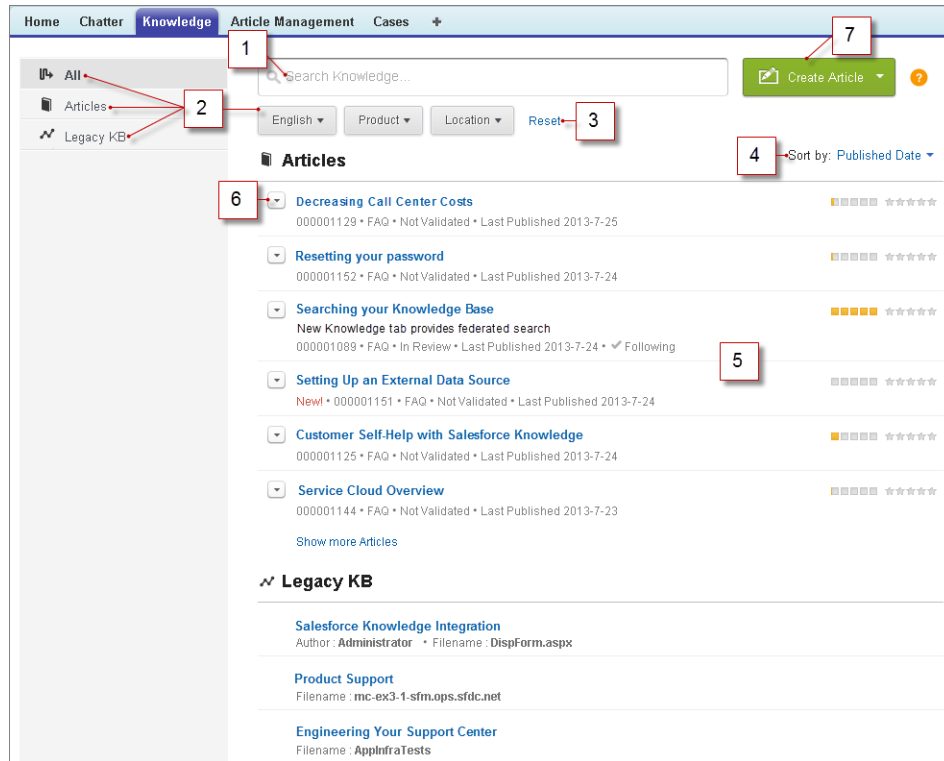
**Tip:** If you were previously managing both users with and without Knowledge access on the same profile, permission set, or role, duplicate the profile, permission set, or role and remove create, read, update, and delete access for those you do not want to see Knowledge articles.

License	Read Access	Create, Edit, Delete, and Publish Access
Service cloud (Enterprise and Unlimited editions)	Read on the article type	Users need: <ul style="list-style-type: none"> <li>Knowledge User license</li> <li>Manage Articles permission</li> <li>Article action on the article type</li> </ul>
Service cloud (Performance edition)	Read on the article type	Users need: <ul style="list-style-type: none"> <li>Manage Articles permission</li> <li>Article action on the article type</li> </ul>
Sales cloud (Enterprise, Unlimited, and Performance editions)	Read on the article type	Users need: <ul style="list-style-type: none"> <li>Knowledge User license</li> <li>Manage Articles permission</li> <li>Article action on the article type</li> </ul>
Social Intranet	Read on the article type	Not applicable
Community and Portals	Read on the article type	Not applicable
Chatter Plus	Users need: <ul style="list-style-type: none"> <li>Knowledge User license</li> <li>Read on the article type</li> </ul>	Users need: <ul style="list-style-type: none"> <li>Knowledge User license</li> <li>Manage Articles permission</li> <li>Article action on the article type</li> </ul>
Force.com	Users need: <ul style="list-style-type: none"> <li>Knowledge User license</li> <li>Read on the article type</li> </ul>	Users need: <ul style="list-style-type: none"> <li>Knowledge User license</li> <li>Manage Articles permission</li> <li>Article action on the article type</li> </ul>

## Knowledge One with Federated Search

Knowledge One, on the new Knowledge tab, lets you search both published and draft articles plus any external data sources you've connected to Salesforce.

Knowledge One displays all your Salesforce Knowledge articles and any of your external data sources, such as Microsoft® SharePoint®. Also, if you use case feed, the Knowledge tab layout is applied to the article sidebar. Knowledge One merges functionality of the old Articles tab and the Article Management tab and uses federated search to search all your resources at once so you can:




1. Search all your Salesforce Knowledge articles (both drafts and published) and any of your external data sources, such as Microsoft® SharePoint®.
2. Select filters to refine your search results.
  - When **All** is selected, you can filter by language and data category, depending on what your organization supports.
  - When **Articles** or **My Draft** is selected you can filter by:
    - ◊ Article status: Published, Draft, and Draft Translations
    - ◊ Language: Values depend on those supported in your organization
    - ◊ Data categories: Values depend on those created in your organization
    - ◊ Article type: Values depend on those created in your organization
    - ◊ Validation Status: No Filter (all articles), Not Validated (articles that are not validated), Validated (validated articles), and any other values supported in your organization such as in review.
  - When an external source is selected, there are no filters and the general article information displayed is controlled by your external object search layout.
3. Click **Reset** to return all filters to their default setting.
4. Sort articles by published date, rating, most viewed, and title.
5. View information by clicking on the article or external source title. Below the title you can find general article information such as: new article indication, article number, article type, validation status, last published date, article view comparison, and article rating comparison.
6. Use the drop-down by each article to follow or unfollow, edit, publish, and delete an article, depending on your permissions.
7. Use the **Create Article** drop-down to select an article type and create an article.

### Enabling Knowledge One


For organizations new to Salesforce Knowledge in Winter '14 and later, Knowledge One is already enabled. To switch to Knowledge One in older organizations, add the Knowledge One permission to your profiles or permission sets.



To add the Knowledge One permission to a profile:

1. From Setup, click **Administration Setup > Manage Users > Profiles**.
2. Click the profile you want to add the Knowledge One permission to.
3. In the  **Find Settings...** box, enter Knowledge.
4. Select **Knowledge One** from the list of suggestions.
5. Click **Edit**.
6. Under Knowledge Management, check Knowledge One.
7. Click **Save**.

To add the Knowledge One permission to a permission set:

1. From Setup, click **Administration Setup > Manage Users > Permission Sets**.
2. Click the permission set you want to add the Knowledge One permission to.
3. In the  **Find Settings...** box, enter Knowledge.
4. Select **Knowledge One** from the list of suggestions.
5. Under Knowledge Management, check the Enabled check box for Knowledge One.
6. Click **Save**.

Once Knowledge One is available for your users, you'll need to define your external data sources. Your external data sources appear under your articles both in the search results and the left-side panel.








**Note:** External data sources are available in beta. Log a salesforce.com support ticket to enable your external objects.

## More Custom Fields for Article Types

Now you can include nine more custom fields on your article types.

The new fields are:

Field Type	Description
Article Currency	In a multiple currency organization, an article can have an article currency field to set the article's currency ISO code.
Currency	<p>Allows users to enter a currency amount. The system automatically formats the field as a currency amount. This can be useful if you export data to a spreadsheet application.</p> <div>  <p><b>Note:</b> Salesforce uses the round-half-to-even tie-breaking rule for currency fields. For example, 23.5 becomes 24, 22.5 becomes 22, -22.5 becomes -22, and -23.5 becomes -24.</p> <p>Values lose precision after 15 decimal places.</p> </div>
Email	Allows users to enter an email address, which is validated to ensure proper format. Character limit is 80. If this field is specified for contacts or leads, users can choose the address when clicking <b>Send an Email</b> . Note that you can't use custom email addresses for mass emails.

Field Type	Description
Formula	<p>Allows users to automatically calculate values based on other values or fields such as merge fields.</p> <p> <b>Note:</b> Salesforce uses the round half up tie-breaking rule for numbers in formula fields. For example, 12.345 becomes 12.35 and -12.345 becomes -12.35.</p> <p>In Database.com, the Formula editor does not provide a <b>Check Syntax</b> button. Syntax checking occurs when the user attempts to save the formula.</p>
Lookup Relationship	<p>Creates a relationship between two records so you can associate them with each other. For example, opportunities have a lookup relationship with cases that lets you associate a particular case with an opportunity. A lookup relationship creates a field that allows users to click a lookup icon and select another record from a popup window. On the associated record, you can then display a related list to show all of the records that are linked to it. You can create lookup relationship fields that link to users, standard objects, or custom objects. If a lookup field references a record that has been deleted, Salesforce clears the value of the lookup field by default. Alternatively, you can choose to prevent records from being deleted if they're in a lookup relationship.</p> <p>Lookup relationship fields are not available in Personal Edition.</p> <p>Lookup relationship fields to campaign members are not available; however, lookup relationship fields from campaign members to other objects are available.</p>
Number	<p>Allows users to enter any number. This is treated as a real number and any leading zeros are removed.</p> <p> <b>Note:</b> Salesforce uses the round half up tie-breaking rule for number fields. For example, 12.345 becomes 12.35 and -12.345 becomes -12.34. Salesforce rounds numbers referenced in merge fields according to the user's locale, not the number of decimal spaces specified in the number field configuration.</p>
Percent	<p>Allows users to enter a percentage number, for example, '10'. The system automatically adds the percent sign to the number.</p> <p> <b>Note:</b> If the decimal value is greater than 15, and you add a percent sign to the number, a runtime error occurs.</p> <p>Values lose precision after 15 decimal places.</p>
Phone	<p>Allows users to enter any phone number. Character limit is 40.</p> <p>Salesforce automatically formats it as a phone number.</p> <p>If you are using Salesforce CRM Call Center, custom phone fields are displayed with the  button, allowing click-to-dial functionality. Consequently, salesforce.com recommends that you do not use a custom phone field for fax numbers.</p>
Picklist (Dependent)	Allows users to select a value from a list dependent on the value of another field.
URL	Allows users to enter up to 255 characters of any valid website address. When users click the field, the URL opens in a separate browser window. Note that only the first 50 characters are displayed on the record detail pages.

## Search Articles to Create Smart Article Links

While writing an article, you can quickly search your existing Salesforce Knowledge Articles and add a smart link, which automatically adjusts when the name or URL of the article is changed.

User Permissions Needed	
To create articles:	“Manage Articles” AND “Create” and “Read” on the article type
To edit draft articles:	“Manage Articles” AND “Read” and “Edit” on the article type
To edit published or archived articles:	“Manage Articles” AND “Create,” “Read,” and “Edit” on the article type

In Winter '14, authors can search for an article to reference in another article and create a smart link all within the rich text editor. Smart links automatically adjust when the name or URL of an article is changed. For example, when the URL Name of an article is changed, Salesforce Knowledge automatically updates the article's URL based on the channel, adds the site prefix for a public knowledge base, and adds the community name for the community portal.

To use a keyword search to create a smart link in a rich text area field:

1. Place your cursor where you'd like to place the link.

2. Click the link icon, .

The Link Article dialog appears.

3. Optionally, select which language to search. If no language is selected, Salesforce Knowledge returns those articles in your knowledge base's default language that are related to your keyword search.
4. Optionally, select the publish status type to search.
  - Online (default if no publish status is selected)
  - Draft
  - Draft translations (if your knowledge base supports multiple languages)
5. Enter article keywords into the search bar.
6. Click the search icon at the end of the search bar. The top 20 related articles display.
7. Select the article to reference in a smart link from the article list.



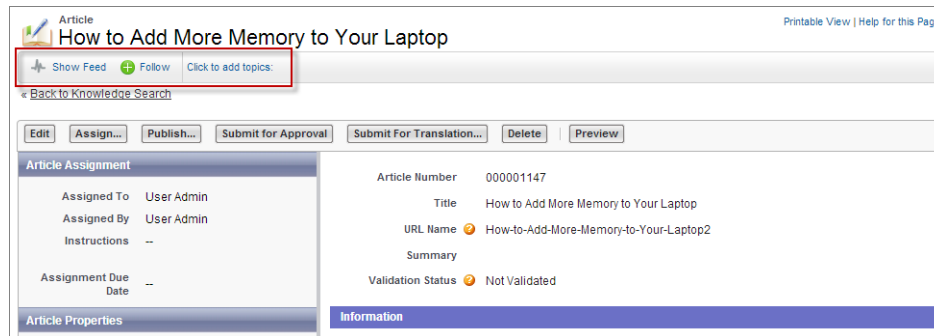
**Important:** Smart links are based on the channels they are in. Therefore, you can't add a smart link to an article in another channel. For example, an article on your public knowledge base can't link to an article only published in your internal channel.

8. Optionally, click **Go to Article** to view the article in another window and ensure it is the correct reference.
9. Optionally, click the **Target** tab and select where the referenced article will display.
  - **Not Set:** Opens the linked article in the same frame as it was clicked.
  - **Frame:** Opens the linked article in a designated frame.
  - **New Window (\_blank):** Opens the linked article in a new window or tab.
  - **Topmost Window (\_top):** Opens the linked article in the full body of the window.
  - **Same Window (\_self):** Opens the linked article in the same frame as it was clicked.
  - **Parent Window (\_parent):** Opens the linked article in the parent frame.
10. Click **OK**.

## Chatter Feed Available on Article Toolbar

You can view and post comments and follow articles before they are published.

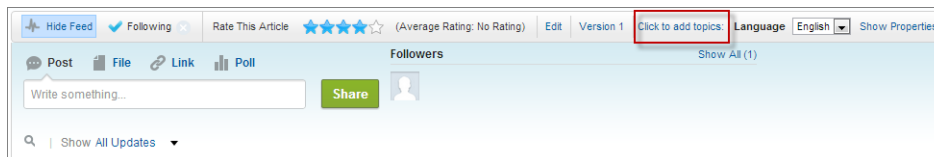
Now the Chatter feed is available on the article detail page. You can follow an article and view and add Chatter posts, while it is still in draft status. If you are part of the [Topics on Salesforce Knowledge Articles](#) pilot, you can add topics as well.



## Topics on Salesforce Knowledge Articles—Pilot

Articles, with draft or published status, support topics through a pilot program in Winter '14.

With the topics on articles pilot, you can classify and search articles by assigning topics. 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.



Once your organization is part of the pilot program, your administrators can allow users to create, assign, delete, and edit topics with profile permissions.



**Note:** For information on enabling topics on articles for your organization, contact [salesforce.com](https://salesforce.com).

## Metadata API Support for Article Approval Actions

On deployed article types, you can use the metadata API to set article actions and workflow rules.

Salesforce Knowledge article approval actions and workflow rules are now supported in the Metadata API on deployed article types. For article version (`_kav`) in approval processes, the supported action types are:

- Knowledge Action
- Email Alert
- Field Update
- Outbound Message

Creating approval processes and workflow rules lets your organization automate many of the tasks involved with managing its knowledge base. Approval processes automate the approval of published articles. When implemented with Salesforce

Knowledge, approval processes give you additional control over the content of your articles and the process used to approve them. For example, you can create a process that requires legal and management teams to approve articles containing sensitive information. Workflow rules let you create email alerts, update fields, or send outbound API messages when an article meets certain criteria. For example, you could create a workflow rule that sends an email alert to the article type owner when a new article is created from a case.



**Note:** Tasks are not supported by article type workflow.

## Play Videos from Any Provider with a Custom Visualforce Page

Using a custom Visualforce page and the HTML editor, you can insert a video from any provider into your Salesforce Knowledge articles.

For example, create a Visualforce page:

```
<apex:page showHeader="false" showChat="false" sidebar="false">
  <iframe width="560" height="315"
    src="http://myvideo.provider.com/embed/{!$CurrentPage.parameters.VideoID}"
    frameborder="0" allowfullscreen="true">
  </iframe>
</apex:page>
```

Then, with the HTML editor, authors can reference videos using this code:

```
<iframe frameborder="0" height="315"
  src="https://<salesforce_instance>/apex/Video?videoID=12345"
  width="560">
</iframe>
```

## Live Agent

Live Agent lets service organizations connect with customers or website visitors in real time through a Web-based, text-only live chat. Live Agent has several new and improved features in Winter '14.

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

### **Automated Chat Invitations—Generally Available**

Create and customize automated chat invitations to invite visitors to your website to chat with an agent. With this release, Live Agent automated chat invitations are generally available.

### **Customize Supervisor Settings**

Customize supervisors' settings for all of your Live Agent configurations to give supervisors the permissions they need to monitor their agents effectively.

### **Merge Fields Available for Custom Agent Name and Auto Greetings**

Incorporate merge fields into your Live Agent custom agent name and automatic chat greetings to personalize the chat experience for agents and customers.

### **Customize Agent Names**

Customize an agent's name as it appears to customers to personalize the chat experience.

### **Create, Delete, and Edit Live Agent Session Records**

Create, delete, and edit Live Agent session records to keep your organization's customer service information up-to-date.

### **Critical Wait Alerts for Unanswered Chats**

Optimize agents' response times by alerting them to answer an engaged chat after a certain amount of time while they chat with customers in the Salesforce console.

### **Filter Agents by Button and Status in the Supervisor Panel**

Filter the Agent Status List in the Supervisor panel using enhanced filters to better monitor agents' activities.

### **Enable Live Agent's Pre-Chat API**

Protect sensitive customer information by controlling developers' access to the Pre-Chat API.

### **User Interface Improvements for Live Agent Components**

There are several changes to the look and feel of the Live Agent application in the Salesforce console, making Live Agent more modern and easier to use.

### **API Improvements for Live Agent**

The Live Agent APIs include new methods to make developing for Live Agent incredibly powerful, giving your developers more control to customize how Live Agent works for your organization.

## **Automated Chat Invitations—Generally Available**

Create and customize automated chat invitations to invite visitors to your website to chat with an agent. With this release, Live Agent automated chat invitations are generally available.

Automated chat invitations are animated pop-ups that appear on your website inviting customers to chat with an agent. These invitations are highly customizable, letting you adapt them to serve your company's exact needs. Let's take a look at some of the custom options available for invitations.

- **Associate invitations with agents' skills.** Route chats to the appropriate agent when a customer accepts a chat invitation by associating invitations with specific skills. For example, an invitation that appears on a customer checkout page may be associated with agents that have sales skills.
- **Associate invitations with specific deployments.** Create customized invitations for different areas of your website by associating different invitations with different Live Agent deployments.
- **Animate your invitations.** Customize how invitations appear—for example, by fading gradually onto the screen or sliding from one area of the screen to another. If you're feeling ambitious, use JavaScript to create custom animations.



**Note:** The default animation options are available in the latest versions of the Chrome, Firefox, Safari, and Internet Explorer Web browsers. They aren't available in earlier versions of Internet Explorer.

- **Customize your invitation with images.** Using a Force.com site, upload images to customize your invitation.
- **Use logical operators to create sending rules.** Customize the criteria for your sending rule to define how and when automated invitations are sent to customers. With sending rules, you can set invitations to trigger based on certain criteria, such as whether a customer has a certain amount of merchandise in their shopping cart.

Here's an example of what an automated invitation might look when it appears to customers:



To get started with automated chat invitations, from Setup, click **Customize > Live Agent > Chat Buttons & Invitations**.

For more information on setting up and customizing automated chat invitations, see the “Live Agent Automated Chat Invitation Overview” in the Salesforce Help in the Salesforce Help.

## Customize Supervisor Settings

Customize supervisors’ settings for all of your Live Agent configurations to give supervisors the permissions they need to monitor their agents effectively.

On the Live Agent Configurations page, administrators can now customize supervisors’ settings to make it easier for them to monitor their agents’ activities. For example, you can select whether or not supervisors can monitor their agents’ ongoing chats or send whisper messages to agents during their chats with customers, and define default filters to sort agents in the Agent Status list in the Supervisor Panel.

To get started with supervisor settings, in Setup, click **Customize > Live Agent > Live Agent Configurations**.

## Merge Fields Available for Custom Agent Name and Auto Greetings

Incorporate merge fields into your Live Agent custom agent name and automatic chat greetings to personalize the chat experience for agents and customers.

These merge fields let you personalize the agent name and greeting as they appear to customers when they start a chat with an agent. For example, you can use merge fields to display the custom agent name as the agent’s first name using the `First Name` merge field, or incorporate the `Visitor Name` merge field into your message to greet the customer by name. You can use merge fields in the Custom Agent Name and Auto Greeting fields associated with Live Agent Configurations, chat buttons, or automated invitations.

To see a full list of the merge fields you can use in your Live Agent configurations, in Setup, click **Customize > Live Agent > Live Agent Configurations > Available Merge Fields**.



To see a full list of merge fields available for your chat buttons or invitations, in Setup, click **Customize > Live Agent > Chat Buttons and Invitations > Available Merge Fields**.

For more information about customizing agent names, see [Customize Agent Names](#).

## Customize Agent Names

Customize an agent's name as it appears to customers to personalize the chat experience.

On the Live Agent Configurations page, you can now customize the name of the agents associated with that configuration using merge fields in the `Custom Agent Name` field.

To customize agent names associated with Live Agent Configurations, in Setup, click **Customize > Live Agent > Live Agent Configurations**.

On the Chat Buttons and Invitations page, you can customize agent names that are associated with specific buttons or chat invitations.



**Note:** The custom agent name associated with a chat button or invitation will override the custom agent name associated with a Live Agent configuration.

To customize agent names associated with chat buttons or invitations, in Setup, click **Customize > Live Agent > Chat Buttons and Invitations**.

Merge fields let you personalize the agent's name as it appears to customers and in the associated chat transcript. For example, use the `First Name` merge field for your custom agent name to display an agent's first name in customer chats.

For more information on merge fields, see [Merge Fields Available for Custom Agent Name and Auto Greetings](#).

## Create, Delete, and Edit Live Agent Session Records

Create, delete, and edit Live Agent session records to keep your organization's customer service information up-to-date.

Previously, session records were created automatically whenever an agent logged into Live Agent. However, you could not create a new record from scratch, delete an old record, or edit standard fields on existing records.

These changes give your agents and supervisors more power to control session records and their content, letting you keep session records relevant and up-to-date.

To start working with Live Agent session records, click the **Live Agent Sessions** tab.

## Critical Wait Alerts for Unanswered Chats

Optimize agents' response times by alerting them to answer an engaged chat after a certain amount of time while they chat with customers in the Salesforce console.

On the Agent Configuration page in Setup, we've added the **Critical Wait Alert Time** field, which allows you to select how many seconds an agent has to answer a customer's chat before the chat tab alerts the agent to answer it. Your agents no longer have to guess how long they can wait to answer a chat, optimizing their time to help customers solve their problems more quickly.

To get started with these alerts, from Setup, click **Customize > Live Agent > Agent Configurations**.

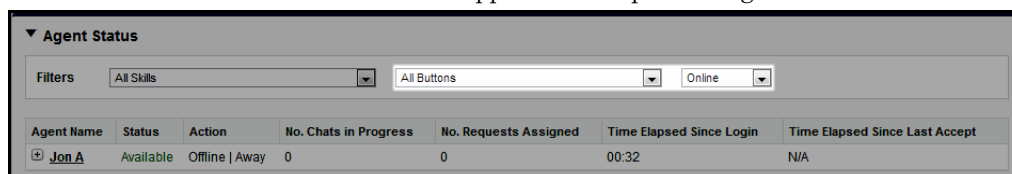
## Filter Agents by Button and Status in the Supervisor Panel

Filter the Agent Status List in the Supervisor panel using enhanced filters to better monitor agents' activities.

Previously, supervisors could only filter their Agent Status list by the skills that were associated with their agents. Now, supervisors are able to filter their Agent Status list by their agents' skills plus the following new criteria:

- **Buttons**—Lets you view a list of agents who are associated with a specific button.
- **Status**—Lets you view a list of agents who have a particular status, such as Online, Away, or Offline.

With these enhanced filtering options, supervisors can more closely monitor agents' activities, choosing to view only lists of agents that are relevant to their interests. The new filters appear at the top of the Agent Status list:



## Enable Live Agent's Pre-Chat API

Protect sensitive customer information by controlling developers' access to the Pre-Chat API.

The Pre-Chat API is a Live Agent API that allows developers to access information that customers provide in the pre-chat forms they complete before they begin chatting with an agent. Because the API gives developers access to potentially sensitive customer information, an administrator must first enable access to the Pre-Chat API on a particular deployment.

To give developers access to the Pre-Chat API, in Setup, click **Customize > Live Agent > Deployments**, then select **Allow Access to Pre-Chat API**.

## User Interface Improvements for Live Agent Components

There are several changes to the look and feel of the Live Agent application in the Salesforce console, making Live Agent more modern and easier to use.

### **Chat Tab Alerts for Waiting and Ended Chats**

Notifications in chat tabs for Live Agent in the Salesforce console alert agents who haven't answered a customer's chat in a certain amount of time, or if the customer terminates the chat.

### **Preview Chat Requests and Transfers**

Preview customer information for new chat requests and chat transfers to get up to speed on the customer's issue before accepting a request in the Salesforce console.

### **Updated Look for the Chat Request List**

The Live Agent chat request list in the Salesforce console got a facelift to make it easier to use.

### **Updated Look for the Agent Chat Window**

The chat window for agents using Live Agent in the Salesforce console now has a more modern look to improve agents' chat experience.

### Setup Label Changed from “Agent Configurations” to “Live Agent Configurations”

The former “Agent Configurations” label has been changed to “Live Agent Configurations” in the Live Agent setup menu to better describe the functionality of the page.

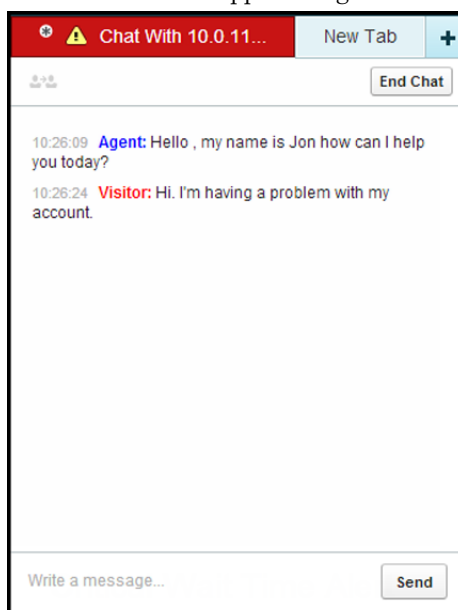
## Chat Tab Alerts for Waiting and Ended Chats

Notifications in chat tabs for Live Agent in the Salesforce console alert agents who haven’t answered a customer’s chat in a certain amount of time, or if the customer terminates the chat.

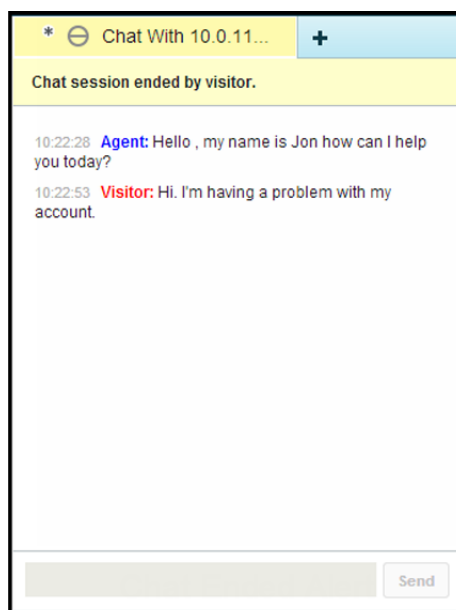
If an agent leaves a customer’s chat unanswered for a certain amount of time, the tab associated with that chat flashes red with an exclamation point to alert the agent to attend to that customer. You can customize how long an agent can wait to answer a chat before they receive this alert by editing the `Critical Wait Alert Time` on the Agent Configuration page in Setup. For more information on this new setting, see [Critical Wait Alerts for Unanswered Chats](#).

If a customer terminates a chat with an agent, the tab associated with that tab displays an icon to show that the customer left the chat.

With these tab alerts, your agents can optimize their time as they chat with multiple customers without switching from tab to tab. Here’s how the new tab alerts appear to agents:



Critical Wait Time Alert



Chat Ended Alert

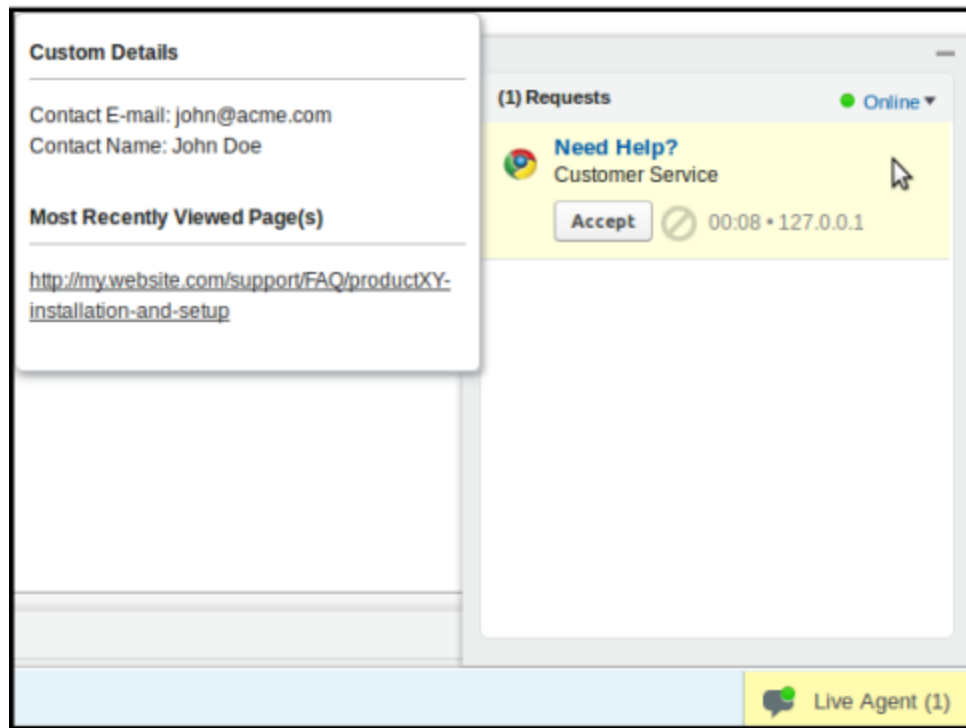
## Preview Chat Requests and Transfers

Preview customer information for new chat requests and chat transfers to get up to speed on the customer’s issue before accepting a request in the Salesforce console.

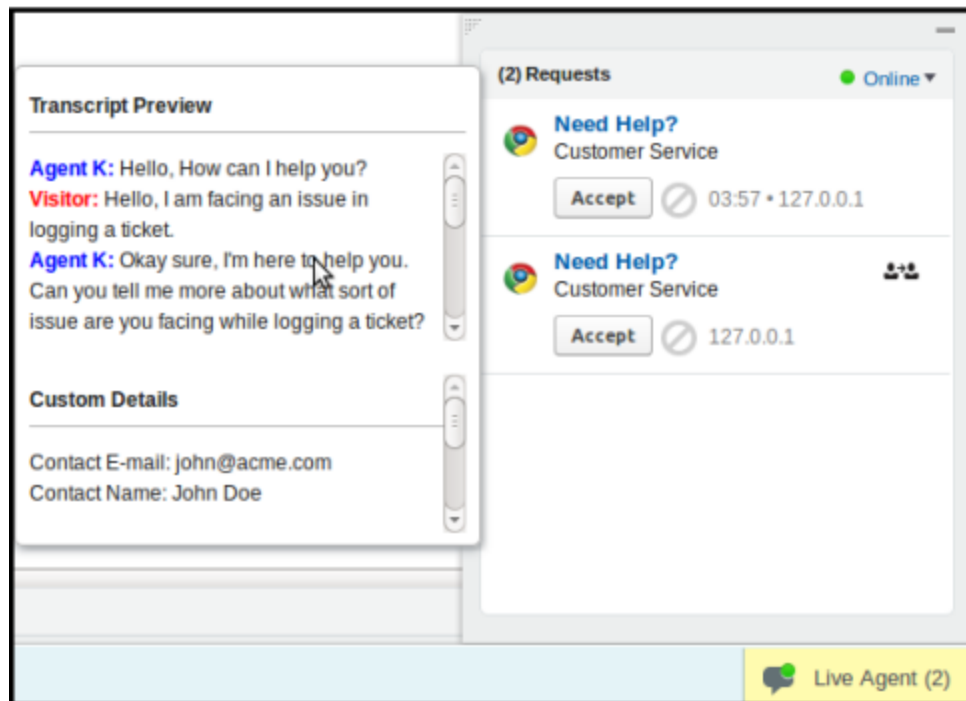
Your agents can get up to speed on the customer’s issues and concerns before they accept a chat with a customer. When agents receive a new chat request, they can hover over the request in the chat request window and preview details about the customer, such as the customer’s name, email address, and the last page they viewed on your website. When agents receive a chat transfer request, they can hover over the request and see the customer’s details as well as the transcript of the customer’s previous chat, if applicable. This ensures that your agents are prepared to answer a customer’s questions as quickly as possible.

Here's what an agent might see when they hover over a chat or transfer request in the Salesforce console:

## New Requests



## Transfer Requests



## Updated Look for the Chat Request List

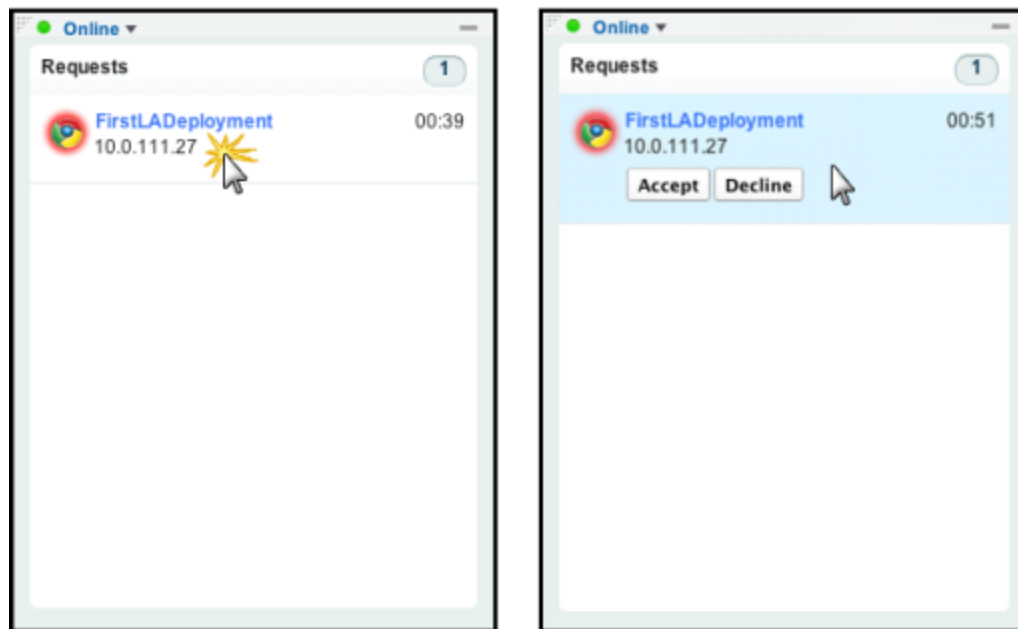
The Live Agent chat request list in the Salesforce console got a facelift to make it easier to use.

Here are some of the updates we made to the chat request list to improve your agents' chatting experience:

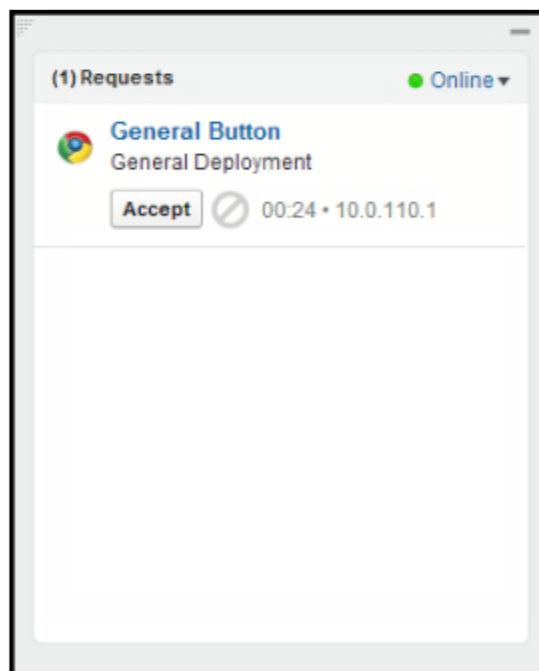
- The name of the chat button from which the chat was initiated is now displayed on every request. Previously, agents could only see the name of the deployment from which the chat was initiated.
- Action items display directly on each request. Previously, agents had to click on the request to accept or reject a chat.
- We've improved the organization of elements in the list. For example, the Status drop-down list is now on the right side, and the number of pending chat requests is displayed to the left of the Requests label.
- Unanswered chat requests are highlighted in yellow. Previously, requests were highlighted in blue when agents clicked on them.

Here's how the new chat request list compares to the old one:

Before:



After:



## Updated Look for the Agent Chat Window

The chat window for agents using Live Agent in the Salesforce console now has a more modern look to improve agents' chat experience.

We made several small changes to the design of the agent chat window to make it sleeker and easier to use:

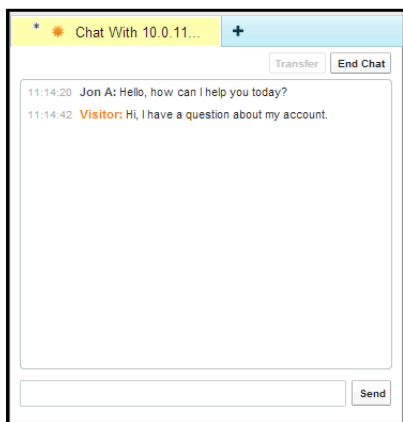
- The customer name now appears in red, and the visitor name appears in blue.
- The **Transfer** button in the upper right part of the chat window has been changed to a transfer icon in the upper left part of the window. The new icon is grayed out if agents don't have permission to transfer chats.
- The gray border around the chat in the window has been removed.
- “Write a message...” now appears in the agent's input area.



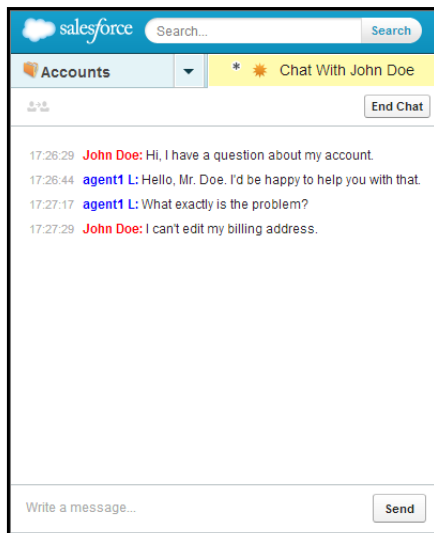
**Note:** This doesn't appear in the chat log if you're using Internet Explorer versions 8 or 9.

Here's how the agent chat log has changed since the last release:

Before:



After:



## Setup Label Changed from “Agent Configurations” to “Live Agent Configurations”

The former “Agent Configurations” label has been changed to “Live Agent Configurations” in the Live Agent setup menu to better describe the functionality of the page.

To access the Live Agent Configurations page, in Setup, click **Customize > Live Agent > Live Agent Configurations**.

## API Improvements for Live Agent

The Live Agent APIs include new methods to make developing for Live Agent incredibly powerful, giving your developers more control to customize how Live Agent works for your organization.

### Live Agent API Versions

The Live Agent Deployment API and Pre-Chat API are now versioned to match other Salesforce APIs.

#### Access Your Live Agent API Endpoint

Access your organization's Live Agent API endpoint to allow your developers to customize Live Agent.

#### Live Agent Deployment API: New Methods

Several methods have been added to Live Agent's Deployment API to let you to search for or create new customer records automatically when an agent accepts a chat request.

#### Live Agent Pre-Chat API: Generally Available

The Live Agent Pre-Chat API allows you to access customer details from pre-chat forms to better incorporate them into the customer service experience. With this release, the Live Agent Pre-Chat API is generally available.

#### Live Agent REST API: Generally Available

The Live Agent Pre-Chat API allows you to access customer details from pre-chat forms to better incorporate them into the customer service experience. With this release, the Live Agent Pre-Chat API is generally available.

## Live Agent API Versions

The Live Agent Deployment API and Pre-Chat API are now versioned to match other Salesforce APIs.

Different methods and parameters are available in different versions of Live Agent's APIs. Before you begin developing with these APIs, make sure you're using the correct version number in your code.

### Deployment API Versions

You can find out what version of the Deployment API your organization uses from the deployment code that's generated after you create a deployment.

Summer '13 and earlier releases support version 28.0 of the Deployment API. The URL for API version 28.0 looks like this:  
`https://hostname.salesforceliveagent.com/content/g/deployment.js`

Winter '14 supports version 29.0 of the Deployment API. The URL for API version 29.0 contains the version number:  
`https://hostname.salesforceliveagent.com/content/g/js/29.0/deployment.js`



**Note:** To use new methods and parameters in your deployments, you must update the deployment code on each of your Web pages to use the URL for version 29.0 of the Deployment API.

For more information about updates to the Deployment API, see [Live Agent Deployment API: New Methods](#) on page 179.

### Pre-Chat Information API Versions

Winter '14 supports version 29.0 of the Pre-Chat API. The URL for API version 29.0 contains the version number:  
`https://hostname.salesforceliveagent.com/content/g/js/29.0/prechat.js`

You can find your organization's hostname by looking in the deployment code that's generated after you create a deployment.



## Access Your Live Agent API Endpoint

Access your organization's Live Agent API endpoint to allow your developers to customize Live Agent.

We've included the non-editable `Live Agent API Endpoint` field on the Live Agent Settings page. Use this Live Agent API endpoint to complete the URLs to call Live Agent REST API resources.

To find your organization's Live Agent API endpoint, from Setup, click **Customize > Live Agent > Settings**.

## Live Agent Deployment API: New Methods

Several methods have been added to Live Agent's Deployment API to let you to search for or create new customer records automatically when an agent accepts a chat request.

Method	Description
<code>findOrCreate</code>	Finds or creates a record of the specified type when an agent accepts a chat request.
<code>findOrCreate.map</code>	Searches for or creates records that contain customer data specified by the <code>addCustomDetail</code> Deployment API method.
<code>findOrCreate.saveToTranscript</code>	Saves the record that you found or created using the <code>findOrCreate</code> and <code>findOrCreate.map</code> Deployment API methods to the chat transcript associated with the chat.
<code>findOrCreate.showOnCreate</code>	Opens the record you found or created using the <code>findOrCreate</code> and <code>findOrCreate.map</code> Deployment API methods automatically in a subtab in the to the Salesforce console.
<code>findOrCreate.linkToEntity</code>	Links the record that you found or created using the <code>findOrCreate</code> and <code>findOrCreate.map</code> Deployment API methods to another record of a different record type that you created using a separate <code>findOrCreate</code> API call.

For more information (English only) about the Live Agent Deployment API, see the [Live Agent Developer's Guide](#).

## Live Agent Pre-Chat API: Generally Available

The Live Agent Pre-Chat API allows you to access customer details from pre-chat forms to better incorporate them into the customer service experience. With this release, the Live Agent Pre-Chat API is generally available.

The following Live Agent Pre-Chat API methods are available in API version 29.0 and later.

Resource	Description
<code>findOrCreate.map</code>	Searches for or creates records that contain the customer data specified in the pre-chat form completed by the customer. This method maps the value of the custom details to the fields on the specified record in the Salesforce console.
<code>findOrCreate.map.doFind</code>	Specifies which fields in your <code>findOrCreate.map</code> method to use to search for an existing record. You can search for one or more fields within records.

Resource	Description
<code>findOrCreate.map.isExactMatch</code>	Specifies which fields in your <code>findOrCreate.map</code> method require an exact field name match when you search for existing records. You can specify this for one or more fields within records.
<code>findOrCreate.map.doCreate</code>	Specifies which fields in your <code>findOrCreate.map</code> method to use to create a new record if an existing record isn't found. You can specify one or more fields for creating new records.
<code>findOrCreate.saveToTranscript</code>	Saves the record that you found or created using the <code>findOrCreate.map.doCreate</code> or <code>findOrCreate.map.doFind</code> Pre-Chat API methods to the chat transcript associated with the chat when the chat ends.
<code>findOrCreate.showOnCreate</code>	Opens the record you found or created using the <code>findOrCreate.map.doCreate</code> and <code>findOrCreate.map.doFind</code> Pre-Chat API methods automatically in a subtab in the to the Salesforce console.
<code>findOrCreate.linkToEntity</code>	Links the record that you found or created using the <code>findOrCreate.map.doFind</code> and <code>findOrCreate.map.doCreate</code> Pre-Chat API methods to another record of a different record type that you created using a separate <code>findOrCreate.map</code> API call.
<code>findOrCreate.displayToAgent</code>	Specifies which pre-chat details to display to an agent in the Details tab in Salesforce console when the agent receives a chat request.
<code>preChatInit</code>	Extracts the custom details that have been passed into the chat through the <code>addCustomDetail</code> Deployment API method and integrates them into a pre-chat form.

For more information (English only) about the Live Agent Pre-Chat API, see the [Live Agent Developer's Guide](#).

## Live Agent REST API: Generally Available

The Live Agent REST API allows you to customize and extend the functionality of Live Agent chat windows in your company's mobile and Web applications. With this release, the Live Agent REST API is generally available.

With the Live Agent REST API, you no longer have to rely on Visualforce to develop customized chat windows. The Live Agent REST API resources let your developers extend the functionality of chat windows beyond simple HTML and JavaScript environments, allowing them to develop chat windows that merge seamlessly into your company's own applications.

The following Live Agent REST API resources are available in API version 29.0 and later.

Resource	Description
<code>ChasitorInit</code>	Initiates a new chat visitor session.
<code>ChasitorNotTyping</code>	Indicates that the chat visitor is not typing in the chat window.
<code>ChasitorResyncState</code>	Reestablishes the chat visitor's state, including the details of the chat, after a <code>ResyncSession</code> request is completed.
<code>ChasitorSneakPeek</code>	Provides a chat visitor's message that is viewable through Sneak Peek.
<code>ChasitorTyping</code>	Indicates that a chat visitor is typing a message in the chat window.

Resource	Description
ChatEnd	Indicates that a chat visitor has ended the chat.
ChatMessage	Returns the body of the chat message sent by the chat visitor.
CustomEvent	Indicates a custom event was sent from the chat visitor during the chat.
Messages	Returns all events that were sent between agents and chat visitors during a chat session.
MultiNoun	Batches multiple POST requests together if you're sending multiple messages at the same time.
ResyncSession	Reestablishes a customer's chat session on a new server if the session is interrupted and the original server is unavailable.
SessionId	Establishes a new Live Agent session on the Live Agent servers.

For more information (English only) about the Live Agent REST API, see the [Live Agent REST API Developer's Guide](#).

## Open CTI

Open CTI helps partners integrate Salesforce with computer-telephony integration systems without installing adapter programs on call center users' machines. Open CTI has several new and improved features in Winter '14.

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

### Force.com Canvas for Open CTI

Now you can add Force.com Canvas applications to Open CTI.

### New Open CTI Method: `notifyInitializationComplete()`

Advanced administrators and developers can now specify a standby URL for a SoftPhone.

## Force.com Canvas for Open CTI

Now you can add Force.com Canvas applications to Open CTI.

This means you can take your new or existing applications and make them available to users as part of their call-control tool with Salesforce.

Open CTI and Force.com Canvas are similar—they're a set of tools and JavaScript APIs that developers can use to add third-party systems to Salesforce. Together, they let developers add applications to computer-telephony integration (CTI) systems that are fully integrated parts of Salesforce. Note that after you add a canvas app to Open CTI, you must add it to your call center's definition file for it to appear.

For more information (English Only), see the [Force.com Canvas Developer's Guide](#) and the [Open CTI Developer's Guide](#).

## New Open CTI Method: `notifyInitializationComplete()`

Advanced administrators and developers can now specify a standby URL for a SoftPhone.

Open CTI is an API that provides programmatic access to Salesforce for computer-telephony integration (CTI) systems. Open CTI lets developers:

- Build CTI systems that integrate with Salesforce without the use of CTI adapters.
- Create customizable SoftPhones (call-control tools) that function as fully integrated parts of Salesforce and the Salesforce console.
- Provide users with CTI systems that are browser and platform agnostic, for example, CTI for Microsoft® Internet Explorer®, Mozilla® Firefox®, Apple® Safari®, or Google Chrome™ on Mac, Linux, or Windows machines.

With Winter '14, the following new method is available.

Method	Description
<code>notifyInitializationComplete()</code>	<p>Notifies Salesforce that the SoftPhone initialization is complete and that Salesforce should not switch to a standby URL. While the SoftPhone initializes, a loading icon displays in the SoftPhone area.</p> <p>To use a standby URL, you must specify it in the call center's definition file.</p>

For information (English only) on customizing and building CTI systems with Open CTI, see the [Open CTI Developer's Guide](#).

## Salesforce Console for Service

The Salesforce Console for Service is an app that's designed for users in fast-paced environments who need to find, update, and create records quickly to support their customers. The Salesforce Console for Service has several new and improved features in Winter '14.

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

### [Service Cloud Console Name Change](#)

Console apps are available in both Service Cloud and Sales Cloud. To simplify support and documentation, the Service Cloud Console has been renamed **Salesforce Console for Service**.

### [Salesforce Console Supports Microsoft® Internet Explorer 10®](#)

The Salesforce console is available for use with Microsoft's Internet Explorer® 10 browser.

### [Lookup Components for the Salesforce Console](#)

You can use point-and-click to add lookup fields as custom console components.

### [Home Tab for the Salesforce Console](#)

Administrators can add the Home tab to a Salesforce console.

### [Most Recent Items](#)

You can quickly access the last ten tabs you viewed or edited in the Salesforce console, without having to search Salesforce.

**Keyboard Shortcuts Panel**

Now you can open a panel in the Salesforce console to refer to a list of keyboard shortcuts.

**Force.com Canvas for the Salesforce Console**

Now you have a new option to add external applications to a Salesforce console.

**Salesforce Console Integration Toolkit: New Methods**

The Salesforce Console Integration Toolkit is an API that provides advanced administrators and developers programmatic access to the console so they can extend it to meet your business needs.

Service Cloud Console Name Change

Console apps are available in both Service Cloud and Sales Cloud. To simplify support and documentation, the Service Cloud Console has been renamed **Salesforce Console for Service**.

In the Setup area, the menu names have changed to reflect the console app’s name change. From Setup, administrators should click **Customize > Console** to administer console apps.

Salesforce Console Supports Microsoft® Internet Explorer 10®

The Salesforce console is available for use with Microsoft’s Internet Explorer® 10 browser.

Lookup Components for the Salesforce Console

You can use point-and-click to add lookup fields as custom console components.

Custom console components let you customize, extend, or integrate the footer, sidebars, highlights panels, and interaction logs of a Salesforce console. Previously, you had to create a Visualforce page to display a lookup field as a component related to a record on a primary tab or subtab. Now you can add the same functionality with the click of a few buttons.

**Adding Lookup Components**

Adding Lookup Components

User Permissions Needed	
To add custom console components:	“Customize Application”
To create Visualforce pages:	“Customize Application”
To manage canvas apps:	“Customize Application”

To add a lookup field as a custom console component:

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 a lookup field component, choose Lookup from **Type**.

5. Select the lookup field's name.
6. Enter the height or width of the component as it should display in a console.
7. Click **Save**.

Optionally, you can add more fields to the lookup component by defining the object's mini page layout. For more information, see “Defining Mini Page Layouts for the Agent Console” in the Salesforce Help.



**Note:** You can't add lookup components to packages on the AppExchange.

## Home Tab for the Salesforce Console

Administrators can add the Home tab to a Salesforce console.

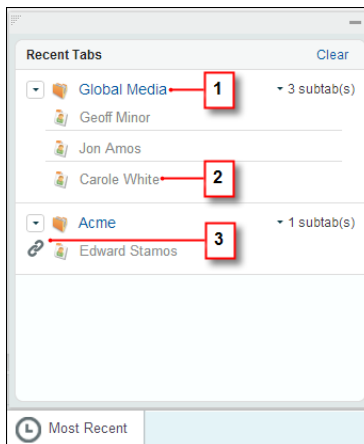
The Home tab lets users create Chatter posts, view dashboard snapshots, and view tasks on a calendar. To include the Home tab on a console, administrators must add the Home tab to the console's navigation tab. For more information see “Creating a Salesforce Console App” in the Salesforce Help.

## Most Recent Items

You can quickly access the last ten tabs you viewed or edited in the Salesforce console, without having to search Salesforce.

Most recently used items are just a click away in the console's footer—just click **Most Recent**.

Here's what Most Recent Tabs looks like:



1. Primary tab
2. Subtab
3. Link to share

**Viewing Recently Used Tabs**

**Turning on the Most Recent Tabs Component**




## Viewing Recently Used Tabs

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

If set up by your administrator, you can quickly access the last ten primary tabs that you recently used in a Salesforce console. This saves you time from searching for tabs you just viewed or edited. In addition, you can access ten subtabs from each primary tab. To access recently used tabs, click **Most Recent** in the console’s footer.

- To display a recently used tab with its subtabs, click the tab’s name.
- To display a recently used tab as a primary tab without subtabs, click  and **Open in primary tab**.
- To copy the URL of a recently used tab and send it to another user, click  and **Get link to share**.
- To view a list of subtabs for a recently used tab, click **subtab(s)**. When the list displays, you can click a subtab to view it; or you can click  to copy a subtab’s URL and send it to another user.
- To clear the list of recently used tabs and start fresh, click **Clear**.

Items that don’t display as tabs, such as meeting request overlays, don’t display in the Most Recent footer.

## Turning on the Most Recent Tabs Component

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 turn on Most Recent Tabs:	“Customize Application”


If a Salesforce console is set up, you can add the Most Recent Tabs component to the footer. The component saves users time by letting them quickly access the last ten primary tabs that they viewed or edited, without having to search Salesforce.

1. From Setup, click **Create > Apps**.
2. Select a Salesforce console app.
3. Click **Edit**.
4. In Choose Console Components, add Most Recent Tabs to Selected Items.
5. In Align Custom Console Component, choose whether the component will appear in the footer’s right or left side.
6. Click **Save**.

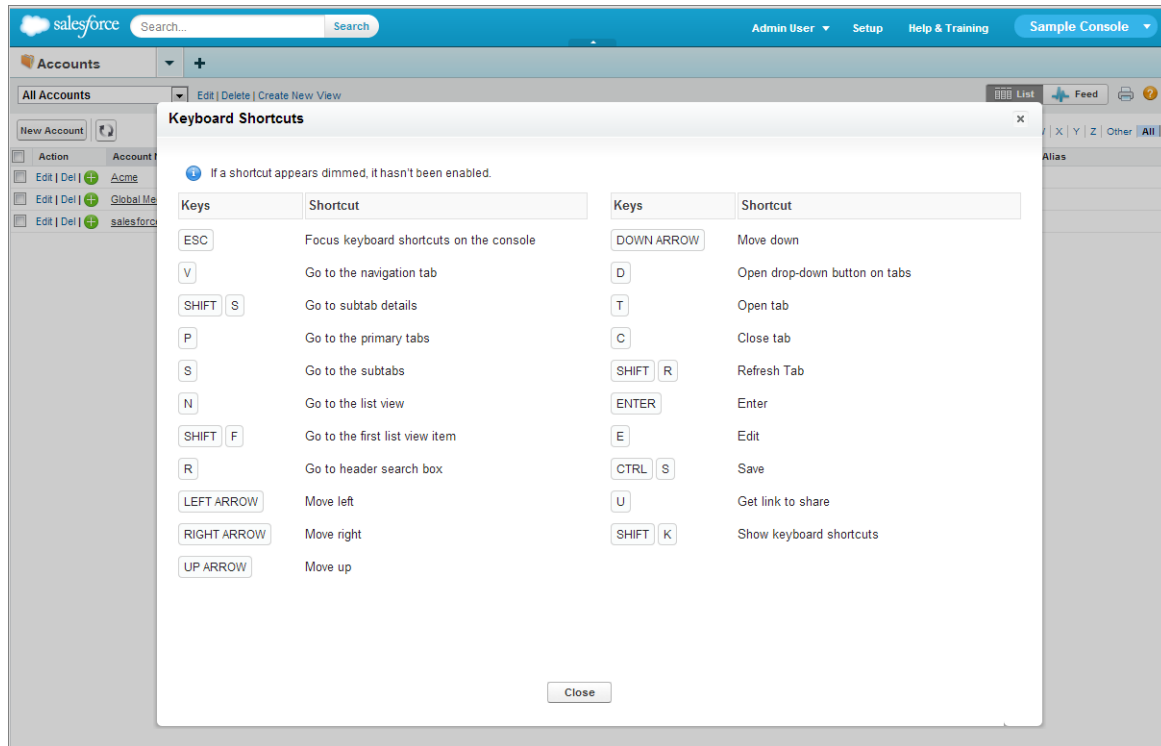
## Keyboard Shortcuts Panel

Now you can open a panel in the Salesforce console to refer to a list of keyboard shortcuts.

Shortcuts help you work more efficiently with a console because they let you perform actions without a mouse. When you

click  and select **Show Keyboard Shortcuts** in a console, you can now see combinations of keys and their actions. Alternatively, if turned on by administrators, you can open the panel by pressing SHIFT+K. If a shortcut appears dimmed, it hasn't been enabled or it's been customized.

Here's what the keyboard shortcut panel looks like:



For more information, see “Default Keyboard Shortcuts for a Salesforce Console” and “Customizing Keyboard Shortcuts for a Salesforce Console” in the Salesforce Help.

## Force.com Canvas for the Salesforce Console

Now you have a new option to add external applications to a Salesforce console.

Previously, you had the option to integrate and extend console functions using Visualforce or the Salesforce Console Integration Toolkit. Now, you have the additional option of using Force.com Canvas to extend or integrate a console.

Force.com Canvas and the Salesforce Console Integration Toolkit are similar—they're a set of tools and JavaScript APIs that developers can use to add third-party systems to Salesforce. Together, they let developers add applications to a console that are fully integrated parts of Salesforce. One of the benefits of Force.com Canvas, however, is the ability to choose an authentication method, such as a signed request or OAuth 2.0 protocol. Note that for a canvas app to appear in a console, you must add it to the console as a custom console component.

For more information (English Only), see the [Force.com Canvas Developer's Guide](#) and the [Salesforce Console Integration Toolkit Developer's Guide](#).



## Salesforce Console Integration Toolkit: New Methods

The Salesforce Console Integration Toolkit is an API that provides advanced administrators and developers programmatic access to the console so they can extend it to meet your business needs.

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 can use the toolkit to open and close tabs in the console to streamline a business process.

With Winter '14, the following new methods are available.

Live Agent Method	Description
<code>acceptChat()</code>	Accepts a chat request. Available in API version 29.0 or later.
<code>declineChat()</code>	Declines a chat request. Available in API version 29.0 or later.
<code>endChat()</code>	Ends a chat in which an agent is currently engaged. Available in API version 29.0 or later.
<code>getAgentInput()</code>	Returns the string of text which is currently in the agent's text input area in the chat log of a chat with a specific chat key. Available in API version 29.0 or later.
<code>getAgentState()</code>	Returns the agent's current Live Agent status, such as Online, Away, or Offline. Available in API version 29.0 or later.
<code>getChatLog()</code>	Returns the chat log of a chat associated with a specific chat key. Available in API version 29.0 or later.
<code>getChatRequests()</code>	Returns the chat keys of the chat requests that have been assigned to an agent. Available in API version 29.0 or later.
<code>getDetailsByChatKey()</code>	Returns the details of the chat associated with a specific chat key. Available in API version 29.0 or later.
<code>getDetailsByPrimaryTabId()</code>	Returns the details of the chat associated with a specific primary tab ID. Available in API version 29.0 or later.
<code>getEngagedChats()</code>	Returns the chat keys of the chats in which the agent is currently engaged. Available in API version 29.0 or later.
<code>getMaxCapacity()</code>	Returns the maximum chat capacity for the current agent, as specified in the agent's assigned agent configuration. Available in API version 29.0 or later.

Live Agent Method	Description
<code>onAgentSend()</code>	Registers a function to call when an agent sends a chat message through the Salesforce console. This method intercepts the message and occurs before it is sent to the chat visitor. Available in API version 29.0 or later.
<code>onAgentStateChanged()</code>	Registers a function to call when agents change their Live Agent status, such as from Online to Away. Available in API version 29.0 or later.
<code>onChatCanceled()</code>	Registers a function to call when a chat visitor cancels a chat request. Available in API version 29.0 or later.
<code>onChatCriticalWaitState()</code>	Registers a function to call when a chat becomes critical to answer or a waiting chat is answered. Available in API version 29.0 or later.
<code>onChatDeclined()</code>	Registers a function to call when an agent declines a chat request. Available in API version 29.0 or later.
<code>onChatEnded()</code>	Registers a function to call when an engaged chat ends. Available in API version 29.0 or later.
<code>onChatRequested()</code>	Registers a function to call when an agent receives a chat request. Available in API version 29.0 or later.
<code>onChatStarted()</code>	Registers a function to call when an agent starts a new chat with a customer. Available in API version 29.0 or later.
<code>onChatTransferredOut()</code>	Registers a function to call when an engaged chat is transferred out to another agent. Available in API version 29.0 or later.
<code>onCurrentCapacityChanged()</code>	Registers a function to call when an agent's capacity for accepting chats changes—for example, if an agent accepts a new chat, ends a currently engaged chat, or otherwise changes the number of chats to which they are assigned, or if a chat request is pushed to their chat queue. Available in API version 29.0 or later.
<code>onCustomEvent()</code>	Registers a function to call when a custom event takes place during a chat. Available in API version 29.0 or later.
<code>onNewMessage()</code>	Registers a function to call when a new message is sent from a customer, agent, or supervisor. Available in API version 29.0 or later.
<code>onTypingUpdate()</code>	Registers a function to call when the customer's text in the chat window changes. If Sneak Peek is enabled, this function is called whenever the customer edits the text in the chat window. If Sneak Peek is not enabled, this function is called whenever a customer starts or stops typing in the chat window. Available in API version 29.0 or later.

Live Agent Method	Description
<code>sendCustomEvent()</code>	Sends a custom event to the client-side chat window for a chat with a specific chat key. Available in API version 29.0 or later.
<code>sendMessage()</code>	Sends a new chat message from the agent to a chat with a specific chat key. Available in API version 29.0 or later.
<code>setAgentState()</code>	Sets an agent's Live Agent status, such as Online, Away, or Offline. Available in API version 29.0 or later.

For more information (English only) about the toolkit, see the [Salesforce Console Integration Toolkit Developer's Guide](#).

## Console Tab

The Agent console in the Console tab combines information to help service agents do more.

### [New Location of Agent Console in Setup](#)

To access the Agent Console from Setup, click **Customize > Agent Console**.

## New Location of Agent Console in Setup

To access the Agent Console from Setup, click **Customize > Agent Console**.

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

Previously, the path from Setup was **Customize > Console**. This path now leads to setup for the [Salesforce Console](#).

## Customer Users

Customer users can access Salesforce through Customer Portals or communities you create.

### [Removed Change My Password Button For Customer Users with Single Sign-On](#) [Change in Behavior For The Username Field On Customer Users](#)

## Removed Change My Password Button For Customer Users with Single Sign-On

If a customer user with Single Sign-On views their profile from the Welcome Component in their portal, the **Change My Password** button is no longer visible. Customer users with single sign-on must contact their portal administrator for help resetting their password.

## Change in Behavior For The Username Field On Customer Users

Delegated external users administrators can now edit the `Username` field for customer users, if the customer user doesn't have the Single Sign-On permission. Their ability to edit this field is not affected by whether they are assigned the Single Sign-On permission or not. Prior to the 'Winter 14 release, delegated administrators with the Single Sign-On permission weren't able to edit this field for customer users.

# Analytics

The Winter '14 release brings even more power and flexibility to reports and dashboards. You can analyze historical trends, embed report charts in object records, and use the new analytics API to develop your own Salesforce analytics applications.

## **Historical Trend Reporting**

On top of the standard up-to-the-minute reporting on the current state of your business, Winter '14 adds the ability to analyze day-to-day and week-to-week change in the Opportunities object and up to three custom objects.

## **Embedded Analytics**

Users can now get the data they need right on their most-visited pages, without having to go to the Reports tab. You can embed report charts in record detail pages for any standard or custom object. Users are empowered to make decisions based on data they see in the context of the page.

## **Analytics API**

The REST-based Analytics API will revolutionize the way you access and visualize your Salesforce data. The API gives you programmatic access to report data defined using the report builder. You can easily integrate report data into any web or mobile application, inside or outside the Salesforce platform. And you can define rich visualizations on top of the API to animate the data.

## **Show or Hide Role Hierarchy in Reports**

Salesforce hierarchies are powerful, but if yours is a little complex, it takes up valuable space in the header of your reports. Now, a simple click lets you show or hide hierarchies on Salesforce reports.

## **Report Types Support for User Sharing**

With Winter '14, User Sharing is automatically available in new organizations. If your organization has enabled User Sharing, and the internal organization-wide default for the User object is set to Private, you can allow some report users to see data belonging to users they wouldn't normally be able to see.

## **Restrict List View Creation**

You can restrict some users' ability to create list views, so you don't have too many list views cluttering users' screens.

## **Analytics Folder Sharing is On By Default**

The new report and dashboard folder sharing model, introduced in Summer '13, is enabled by default for new organizations created in Winter '14 or later. In existing organizations, you must use the Setup menu to activate it.

## **Resize the Reports and Dashboards Folder List**

On the Reports tab, you can now drag to resize the left pane, where report and dashboard folders are listed, so you can see the full name of any report folder.

## **Report Charts from Page Layouts in the Metadata API**

The metadata for report charts added to standard or custom object detail page layouts (`LayoutItem`) is now available for packaging via the Metadata API.

## **Format of Report Object in the SOAP API**

When you query the Salesforce Report object in the SOAP API using SOQL, you can filter or sort by the `Format` of the report.

# Historical Trend Reporting

On top of the standard up-to-the-minute reporting on the current state of your business, Winter '14 adds the ability to analyze day-to-day and week-to-week change in the Opportunities object and up to three custom objects.

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

Creating historical views of your organization's data has never been easier. As you work towards your sales goal, what deals are pushing out? Pulling in? Getting bigger? Historical trending helps you analyze this kind of change as you work in Salesforce.

Historical trending comes with a new custom report type designed to highlight changes between five snapshot dates, such as five business days or five business weeks. You can visually represent the data changes in charts and on dashboards. You can also create and customize historical trending reports via the Metadata API and the new Analytics API.

For existing organizations, you must activate historical trend reporting in the Setup menu. For new organizations created in Winter '14 and thereafter, it is activated by default.

Opportunity Name	Amount (Historical)	Amount	Close Date (Historical)	Close Date
Acme	\$26,000	\$16,000	2/15/2013	2/28/2013
Advanced Interconnections Corp* - 32K	\$18,000	\$20,000	2/28/2013	2/28/2013
Advanced Interconnections Corp* - 8K	\$12,000	\$8,000	2/15/2013	2/28/2013
Allied Technologies - 40K	\$30,000	\$39,000	2/15/2013	2/15/2013
Data Solutions	\$10,000	\$3,000	2/28/2013	2/28/2013
DFC Inc. - 50K	\$55,000	\$45,700	2/15/2013	2/28/2013
Eastern Shipping	\$21,500	\$21,500	2/28/2013	2/28/2013

**Figure 1: (1) Snapshot up to five dates to track day-to-day or week-to-week trends. (2) Current and historical values are shown side by side for easy comparison. (3) Changed dates and amounts are highlighted in red or green.**



**Important:** Historical trend reporting in Salesforce is not a replacement for a data warehouse and will not be extended in the future to serve warehouse requirements. Hard system limits are enforced to ensure its usefulness for the purpose for which it was built. This includes limits on the time duration of tracking, limits on row count, and limits on fields and objects that are tracked.

## Report on Historical Trends

Suppose you want to monitor your company's sales pipeline to make sure it contains enough activity to meet current and future sales goals. You'll need to compare historical and current values of key Opportunity attributes, such as dates, amounts, and status changes, to see how the pipeline has changed over time. You may want to focus on deals whose value grew or shrank, or deals that moved into or out of a given target period.

## Watch Your Pipeline Change Over Time

Let's say you want to know how the total value of your pipeline today compares with its value yesterday. Create a simple report to compare the two dates.

Limitations on Historical Trend Reporting

Historical trending in Salesforce is subject to certain limits on the time during which data is tracked, the number of rows of data, and the fields and objects you can track. These limits are designed to restrict the data set so that reports return data quickly.

Report on Historical Trends

Suppose you want to monitor your company’s sales pipeline to make sure it contains enough activity to meet current and future sales goals. You'll need to compare historical and current values of key Opportunity attributes, such as dates, amounts, and status changes, to see how the pipeline has changed over time. You may want to focus on deals whose value grew or shrank, or deals that moved into or out of a given target period.

Salesforce makes three months of historical data available for you to analyze. (The amount of historical data you can work with in practice depends on your organization’s data design and use patterns.) You can select up to five date snapshots in that span to compare, using up to four historical filters.



**Note:** The system is optimized for day-to-day and week-to-week reporting. Using longer durations is not recommended and may result in reports timing out and not returning. For small companies with fewer Opportunities records, month-to-month trending may work, but this is not a design goal of the feature.

Set Up Historical Trend Reporting

To make historical trend reports available to your users, use filters to configure the amount of data that’s captured for historical reporting and then select the fields that will be available for historial reports.

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

User Permissions Needed	
To create, edit, and delete reports:	“Create and Customize Reports”
	AND
	“Report Builder”

Shape your historical trend data so that there’s enough for users to exploit but it doesn’t exceed the space limits. Consider which fields contain historical data that your users will want to analyze, and which fields contain data you can leave out.



**Important:** Retaining historical data increases the amount of data you need to store. The effect depends on the ways your organization works. For example, if someone updates the status of a typical opportunity record every day or two, the historical trending data for the Status field on the Opportunity object will take up more space than it would if opportunity status values changed only once or twice a month. You’ll get an email alert if any of your trended objects is in danger of exceeding the data limit.

- 1. From Setup, click **Customize > Reports and Dashboards > Historical Trending**.
- 2. Select the object that you want to do historical trend reporting on.  
You can select Opportunities and up to three custom objects.
- 3. Select **Enable Historical Trending**.
- 4. Use the filters under **Select Data** to narrow down the records that your historical trending reports will include.  
For example, to drop out the least likely deals, set Stage not equal to *Prospecting*.



**Note:** You’re working with fields in this step, but you’re not yet selecting the fields that will be available for historical trending reports. All you’re doing here is specifying the total amount of data that will be captured for historical trend reports.

- 5. Under **Select Fields**, choose up to eight fields to make available for historical trend reporting.  
Users will be able to select these fields when they create historical trending reports.



**Note:** For Opportunities reporting, five fields are preselected: Amount, Close Date, Forecast Category, Probability, and Stage. You can add three more.

After you enable historical trending, a new custom report type is available for users to choose when they create a new report. If you enable historical trending on a new field, that field is automatically added to the historical trending report layout. If you need to turn off historical trending, keep these points in mind.

- When you turn off historical trending for a field, that field’s historical data is deleted.
- When you turn off historical trending for an object, all historical data and configuration settings are deleted for that object, including the object’s historical trending report type and any reports that have been created with it.
- When you turn off historical trending for a field, and then delete that field, the field’s historical data will not be available if historical trending is enabled again.



**Note:**

- The historical fields available to each user depend on the fields that user can access. If your permissions change and you can no longer see a given field, that field’s historical data also becomes invisible.
- Each historical field has the same field-level security as its parent field. If the field permissions for the parent field change, the historical field’s permissions change accordingly.

## Watch Your Pipeline Change Over Time

Let’s say you want to know how the total value of your pipeline today compares with its value yesterday. Create a simple report to compare the two dates.

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

User Permissions Needed	
To create, edit, and delete reports:	“Create and Customize Reports”
	AND
	“Report Builder”

- 1. Create an opportunity history report.
  - a. On the Reports tab, click **New Report**.
  - b. Under **Select Report Type > Opportunities**, select Opportunities with Historical Trending.
  - c. Click **Create**.

- 2. For Show, select All Opportunities.

Note that the default value in the Historical Date Field is Yesterday, and the Amount (Historical) field shows yesterday’s date.





**Tip:** “Yesterday” is a *rolling* date value, meaning that it points to a date that is relative to today’s date. If you run this same report tomorrow, Amount (Historical) will show today’s date.

3. Click the down arrow in the headers of the Amount (Historical) and the Amount–Today columns. Click Summarize This Field, then select Sum.  
The total amount appears at the bottom of each column.
4. Click the down arrow in the header of the Amount column and select Show Changes.
5. Click **Run Report**.
6. In the Change column, observe the difference between the total value of the Amount (Historical) column and that of the Amount–Today column.



**Tip:** You can see changes at a glance by looking for values that are colored green or red.

You’ve created a simple historical trending report that can help you analyze your pipeline’s behavior.

## Limitations on Historical Trend Reporting

Historical trending in Salesforce is subject to certain limits on the time during which data is tracked, the number of rows of data, and the fields and objects you can track. These limits are designed to restrict the data set so that reports return data quickly.

- You can make up to three months of data available for historical trend reporting.
- Up to 5 million rows of historical trending data can be stored for each object. Historical data capture stops when the limit is exceeded. The admin is alerted by email when any object reaches 70 percent of the limit, and again if the limit is exceeded.
- Each historical trend report can contain up to 100 fields. In Opportunities reports, this includes the standard preselected fields, which can’t be disabled.
- You can specify up to five historical snapshot dates in each historical trend report.
- You can use up to four historical filters on each historical trend report.
- These field types are supported: Number, Currency, Date, Picklist.
- Internet Explorer 6 is not supported.
- The Report Wizard is not supported. Historical trend reports can only be created with the Report Builder.



**Important:** If a picklist field is already being used in a historical trending data filter, think hard before changing any of its values. You could make that field less useful for historical reporting in the future.

## Embedded Analytics

Users can now get the data they need right on their most-visited pages, without having to go to the Reports tab. You can embed report charts in record detail pages for any standard or custom object. Users are empowered to make decisions based on data they see in the context of the page.

Available in: All editions except Database.com

User Permissions Needed	
To view page layouts:	“View Setup”
To embed charts on page layouts:	“Customize Application”

For example, here’s an opportunity record that shows key data directly on its detail page.



Adding a Report Chart to a Page Layout

To embed a report chart on standard or custom object pages, edit the object’s page layout with the enhanced page layout editor, then add the chart.

Example of Report Charts on an Account Page

In this example, we've embedded two report charts on an important account page that show deals in the pipeline and open support cases for the account. From looking at the charts, the account executive can quickly gauge the account’s activity and health.

Limits on Report Charts in Pages

Consider these limits when embedding charts in detail pages.

Adding a Report Chart to a Page Layout

To embed a report chart on standard or custom object pages, edit the object’s page layout with the enhanced page layout editor, then add the chart.

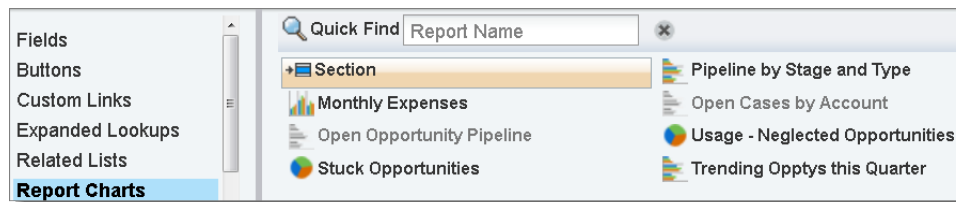
Available in: All editions except Database.com

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

Before you add a chart, check that:

- Its source report is in a folder that’s shared with users who need access. Reports in personal report folders are unavailable to add to a page.
- The source report format is summary or matrix.
- The source report has a chart.

1. Go to the page layout editor for the object you’re adding a chart to.
  - For a standard object, from Setup, click **Customize** > **Object** > **Page Layouts**.
  - For a custom object, from Setup, click **Create** > **Objects**, then choose the object.
2. Click **Edit** next to the page layout.
3. Click **Report Charts**.



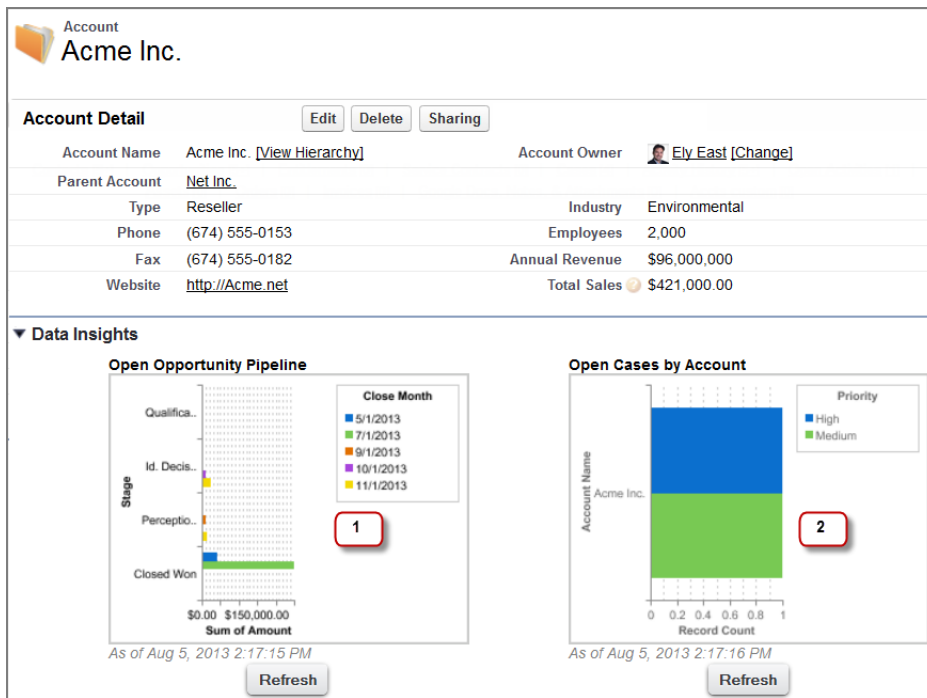
4. In the Quick Find box, type the name of the report and click to find and select the report chart. You can browse up to 200 recently viewed reports by chart type in the Report Charts palette.
5. Drag the chart to a new or existing section of the layout.
6. Click on the chart to customize it.
7. Click **Save**.

The **Preview As** option is unavailable for report charts.

## Example of Report Charts on an Account Page

In this example, we've embedded two report charts on an important account page that show deals in the pipeline and open support cases for the account. From looking at the charts, the account executive can quickly gauge the account's activity and health.

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



**Figure 2: Report Charts on an Account Page**

1. The pipeline chart shows opportunities for the account in various stages including two that were won. The account executive can hover on the chart to get the value of each opportunity (Values are highlighted if the source report chart has hover enabled). She is able to click the chart, go to the report, and get more details for these opportunities.
2. From the charts on open cases, she can see there are a couple of unresolved support issues for the account. She can click the chart, drill into the report for case details and follow up with the support engineers to get them resolved before a crucial meeting with the client.

## Limits on Report Charts in Pages

Consider these limits when embedding charts in detail pages.

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

- You can have two report charts per page.
- You can only add report charts from the enhanced page layout editor. The mini console and the original page layout editor are not supported.
- On detail pages, users can refresh up to 100 report charts every 60 minutes.
- Your organization can refresh up to 3,000 report charts every 60 minutes.

## Analytics API

The REST-based Analytics API will revolutionize the way you access and visualize your Salesforce data. The API gives you programmatic access to report data defined using the report builder. You can easily integrate report data into any web or mobile application, inside or outside the Salesforce platform. And you can define rich visualizations on top of the API to animate the data.

To access the Analytics API, establish an authenticated OAuth session and encode responses and requests in JSON.

Available in: **All** editions that are API enabled except **Database.com**

User Permissions Needed	
To run reports:	“Run Reports”

**Usage Example for the Analytics API**

Let’s look at an example to see how easy it is to do pull data dynamically into a mobile app with the Analytics API.

**Resources for the Analytics API**

The Analytics API provides resources for querying report metadata and data, filtering report data dynamically, and getting results at the summary or record detail level.

**Analytics API Limits**

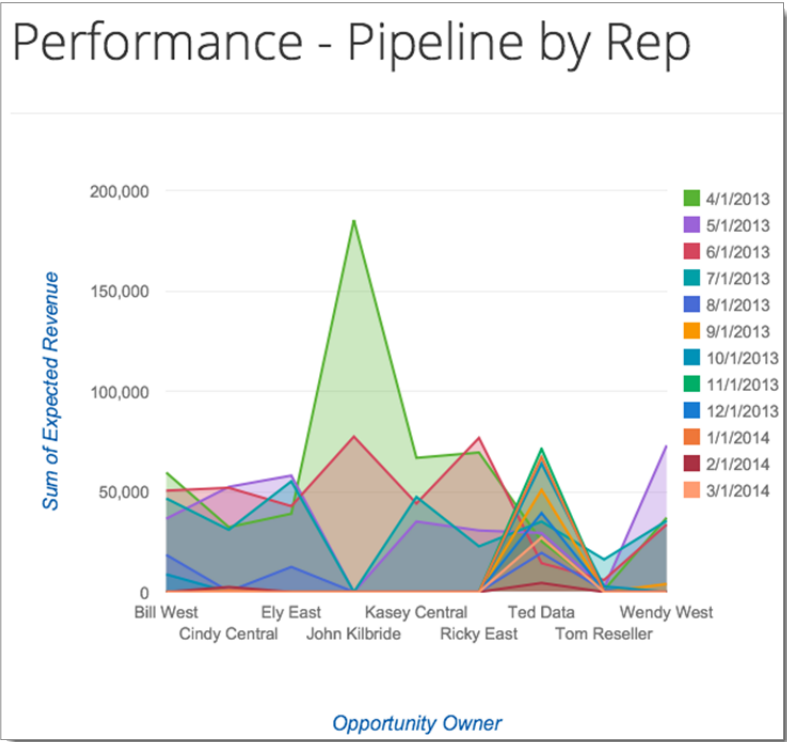
The Analytics API has some restrictions in addition to the general API limits.

**Usage Example for the Analytics API**

Let’s look at an example to see how easy it is to do pull data dynamically into a mobile app with the Analytics API.

The mobile app shows a chart of all deals in the pipeline for the quarter. The data is from a sales opportunity pipeline Salesforce report grouped by account rep and monthly quota.

Now an account rep can stay up to date on her pipeline by pulling up the chart on her phone or tablet and filtering to compare against deals closed by her peers, or zeroing in on just those closed by her.



Here's how the Analytics API works behind the scenes to allow this seamless flow of data between Salesforce and the app:

- When the rep opens the app she gets the latest numbers, because the Instances resource of the API ran the Salesforce pipeline report asynchronously. Generally, it's a good idea to run reports asynchronously, because you can run more reports and store results for later access. This means you can show the user current data each time she reopens the app, without running into API limits or report timeout limits, even for reports that take longer to run.
- When the rep filters to compare against deals closed by her peers, the API does a couple of things:
  1. It uses the Describe resource to fetch metadata from the Salesforce pipeline report based on her filters.
  2. It then feeds this metadata in an Execute resource request to run the pipeline report synchronously (right away), which means the results are available only for a short time. While the rep can see the data change on her phone, the underlying source report in Salesforce is never changed by the API.

For more information and code snippets, see the [Analytics API Developer Guide](#).

## Resources for the Analytics API

The Analytics API provides resources for querying report metadata and data, filtering report data dynamically, and getting results at the summary or record detail level.

You can run a report and get results immediately, or you can run more reports asynchronously and store their results for later access.



**Note:** You can extract report metadata and get both summary and detailed data results for all report formats except the joined format.

The API has the following resources.

Resource	Description	Supported HTTP Method	Resource URL
Describe	Gives metadata for a report. This includes information about fields defined in the report as detail columns, summaries, custom summary formulas, and groupings.	GET	/services/data/v29.0/analytics/reports/<reportId>/describe
Execute Sync	Gives summary level data with or without details for a report. Returns specific report data if you define filters in the metadata of a POST request.	GET, POST	<ul style="list-style-type: none"> <li>• Summary data: /services/data/v29.0/analytics/reports/&lt;reportId&gt;</li> <li>• Summary data with details: /services/data/v29.0/analytics/reports/&lt;reportId&gt;?includeDetails=true</li> </ul>
Execute Async	Returns an instance that stores summary level data with or without details for a report run asynchronously. To get specific results, you can define filters in the metadata of the request.	POST	<ul style="list-style-type: none"> <li>• Summary data: /services/data/v29.0/analytics/reports/&lt;reportId&gt;/instances</li> <li>• Summary data with details: /services/data/v29.0/analytics/reports/&lt;reportId&gt;/instances?includeDetails=true</li> </ul>

Resource	Description	Supported HTTP Method	Resource URL
Instances List	Lists all the instances of a report that was run asynchronously.	GET	/services/data/v29.0/analytics/reports/<report Id>/instances
Instance Results	Depending on the type of your request, gives either summary level data or both summary as well as record level data for an instance of a report run asynchronously.	GET	/services/data/v29.0/analytics/reports/<report Id>/instances/<report Instance Id>
List	Gives a list of reports that you most recently viewed in the Salesforce app--except those in the joined report format.	GET	/services/data/v29.0/analytics/reports

## Analytics API Limits

The Analytics API has some restrictions in addition to the general API limits.

- Cross filters, standard report filters, and filtering by row limit are unavailable when filtering data.
- Historical trend reports in tabular format are unavailable.
- The API can process only reports that contain up to 100 fields selected as columns.
- The List resource returns up to 200 reports that the API user recently viewed.
- Your organization can request as many as 500 synchronous report runs per hour through the Execute Sync resource.
- The API supports as many as 20 synchronous report run requests at a time.
- The Instances List resource returns up to 2000 instances of a report that was run asynchronously.
- The API supports as many as 200 requests at a time to get results of asynchronous report runs.
- Your organization can request as many as 1200 asynchronous requests per hour through the Execute Async resource.
- Asynchronous report run results are available within a 24-hour rolling period.

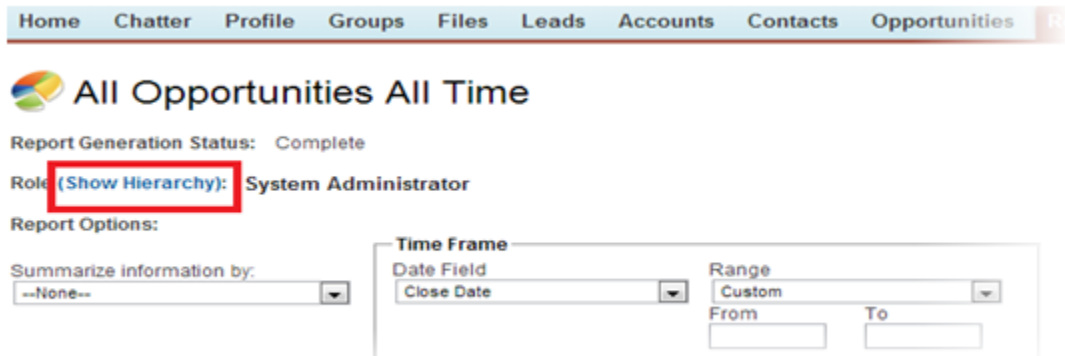
## Show or Hide Role Hierarchy in Reports

Salesforce hierarchies are powerful, but if yours is a little complex, it takes up valuable space in the header of your reports. Now, a simple click lets you show or hide hierarchies on Salesforce reports.

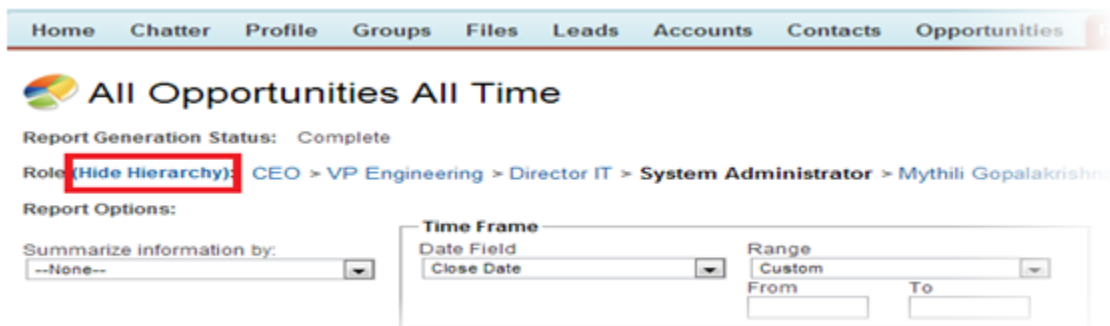
Available in: **All** editions except **Database.com**

User Permissions Needed	
To view Reports:	“Run Reports”

The role hierarchy listing at the top of Opportunity and Activity reports is now hidden by default, so you don't have to scroll down to view the actual report data. Leaving the role hierarchy hidden can be especially handy if your organization includes a portal, because a full listing of portal roles can take a lot of screen space to display.



**Figure 3: Click Show Hierarchy to see a list of roles that have access to an Opportunity or Activity report.**



**Figure 4: Click Hide Hierarchy to stop seeing the list of roles.**

Each user can choose to show the role hierarchy, to see exactly who has access to this report data. To show it, click Show Hierarchy in the upper left corner of the screen where the report results appear. To hide it again, click Hide Hierarchy.

## Report Types Support for User Sharing

With Winter '14, User Sharing is automatically available in new organizations. If your organization has enabled User Sharing, and the internal organization-wide default for the User object is set to Private, you can allow some report users to see data belonging to users they wouldn't normally be able to see.

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

By default, these reports are accessible only to users who have the appropriate access. However, you can change the setting such that users without the appropriate access to the relevant users can see those reports.

Additionally, some reports may display a user's role. When a user can see a record but does not have access to the record owner, the user can see the owner's role on those reports.

The following report types are affected:

- Accounts
- Account Owners
- Accounts with Assets



- Accounts with Custom Objects
- Accounts with Partners
- API Usage
- Campaigns with Opportunities
- Customizable Forecasting: Forecast History
- Customizable Forecasting: Opportunity Forecasts
- Custom Object Opportunity with Quotes Report
- Events with Invitees
- Opportunity
- Opportunity Field History
- Opportunity History
- Opportunity Trends
- Opportunities and Connections
- Opportunities with Competitors
- Opportunities with Contact Roles
- Opportunities with Contact Roles and Products
- Opportunities with Custom Objects
- Opportunities with Partners
- Opportunities with Products
- Opportunities with Products and Schedules
- Opportunities with Quotes and Quote Documents
- Opportunities with Quotes and Quote Line Items
- Opportunities with Sales Teams
- Opportunities with Sales Teams and Products
- Split Opportunities
- Split Opportunities with Products
- Split Opportunities with Products and Schedules

See [User Sharing—Generally Available](#) for more information.

## Restrict List View Creation

You can restrict some users' ability to create list views, so you don't have too many list views cluttering users' screens.

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

A new permission, “Create and Customize List Views,” is available. Users who don't have this permission can't create new list views. All users have this permission by default.

For example, suppose you want all support agents to use a shared set of list views managed by support supervisors. Assign the “Create and Customize List Views” permission to the Support Supervisor role and remove it from the Support Agent role.



**Important:** When you remove the “Create and Customize List Views” permission from a user, that user can still see any list views they have access to. However, that user's private list views — that is, list views that are not shared with anyone — can't be edited or deleted, even by users with the “Modify All Data” permission.

## Analytics Folder Sharing is On By Default

The new report and dashboard folder sharing model, introduced in Summer '13, is enabled by default for new organizations created in Winter '14 or later. In existing organizations, you must use the Setup menu to activate it.

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

In organizations created in Winter '14 or later, standard report and dashboard folders are not automatically shared with portal or community users. Portal and community users have access only to report and dashboard folders that are explicitly shared with them.

In existing organizations, enabling analytics sharing does not change access for portal and community users. All users retain access to report and dashboard folders equivalent to the access they had before analytics sharing was enabled.

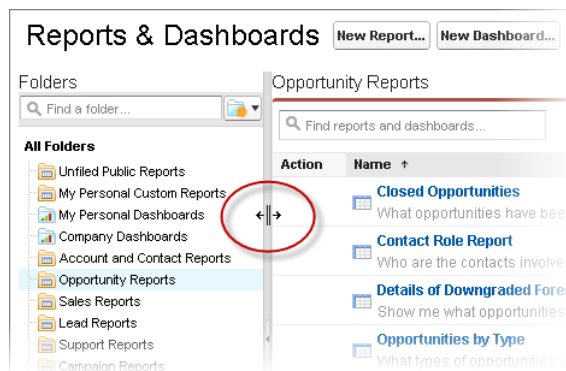
The Setup option to enable analytics sharing does not appear in organizations created in Winter '14 or later, because analytics sharing is on by default.

For information about the new analytics folder sharing model, see “Share Reports and Dashboards” in the Salesforce Help.

## Resize the Reports and Dashboards Folder List

On the Reports tab, you can now drag to resize the left pane, where report and dashboard folders are listed, so you can see the full name of any report folder.

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



## Report Charts from Page Layouts in the Metadata API

The metadata for report charts added to standard or custom object detail page layouts (`LayoutItem`) is now available for packaging via the Metadata API.

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

For more information, see the [Updated Metadata Types and Fields](#) section of the release notes.

## Format of Report Object in the SOAP API

When you query the Salesforce Report object in the SOAP API using SOQL, you can filter or sort by the `Format` of the report.

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

This is helpful when you want to find reports by their format, which can be Tabular, Summary, Matrix, or Multiblock (Joined). For more information, see the [New and Changed Objects](#) section of the release notes.

# Site.com

Site.com is a Web content management system (CMS) that makes it easy to build dynamic, data-driven Web pages quickly, edit content in real time, and manage your websites.

## **Multilingual Site Support—Generally Available**

Now generally available in Winter '14, multilingual site support lets site administrators and designers create different language versions of a site. And because all languages are maintained within the site, you don't need to create and maintain a separate site for each language.

## **Custom Properties for Widgets**

Widgets let designers and administrators save time by building custom page elements that you and your team can reuse throughout the site. With the introduction of custom properties in Winter '14, you can now allow greater flexibility over how your widgets are reused.

## **Sandbox Enabled for Site.com**

With Winter '14, Site.com is now supported on sandbox environments for both Site.com sites and Site.com community sites.

## **HTML Import**

Site.com Studio now supports importing HTML pages.

## **New Broken Link Finder**

The broken link finder helps you search your pages for broken links. This is especially useful when importing HTML pages.

## **New Live Mode for Editing Content**

With Live Mode, site administrators, designers, and contributors can preview pages, templates, and widgets as they would appear to users on different platforms, such as mobile devices and computer screens.

## **Inline Editor**

With Live Mode, you can now quickly edit text using the new inline editor. And because you're editing the text inline, you always know exactly how the finished page will look when it's live.

## **Default Doctype Changed to HTML5**

We've changed the default doctype property of pages from XHTML 1.0 to HTML5, which is the latest version.

## **Approval Processes Enabled in Site.com—Pilot**

Site.com now supports approval processes.

## **External Reference Checking Enabled in Site.com**

External reference checking is now enabled for all Site.com sites.

## **Additional Updates to Site.com Studio**

Check out some of the other recent updates to Site.com Studio.

## **Organization ID Required for Domain Names**

Adding a domain to Site.com or Force.com Sites organizations requires the use of an 18-character organization ID in the CNAME target.

### New Company Community License

Available in: **Developer**, **Enterprise**, and **Unlimited** Editions, this is an internal user license. It's designed for users to access Force.com Light application custom objects, custom tabs, Chatter (people, groups, feeds, files), and a Community that includes a Site.com site.

### New Company Community Permission Set License

Use the Company Community Add-on permission set license to give read-only access to Salesforce Knowledge for users with a Force.com user license.

## Multilingual Site Support—Generally Available

Now generally available in Winter '14, multilingual site support lets site administrators and designers create different language versions of a site. And because all languages are maintained within the site, you don't need to create and maintain a separate site for each language.

Available for purchase in: **Enterprise**, **Performance**, and **Unlimited** Editions

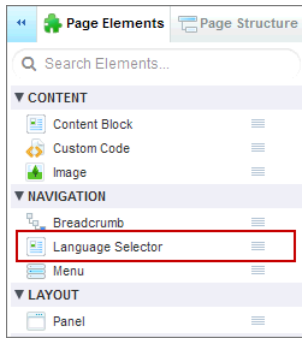
Available (with limitations) in: **Developer** Edition

We've added a new Languages view (1) to the Site Configuration section of the Overview tab. In the Languages view, you can define the default site language, choose from over 150 languages to add to your site, and manage language properties. You can also export site content for translation, and then import the translated content back into the site.

After you add languages to the site, you'll notice a language selector (2) that lets you switch between the available languages when editing the content of a page. This makes content editing quick and easy because you never have to leave the page to change to another language.

The screenshot displays the Site.com administration interface. On the left, the 'Overview' tab is selected, and the 'Languages' view (labeled with a red box and the number 1) is active in the 'My Site' configuration section. The main content area shows the 'Languages' configuration page. At the top right, a 'Change Site Language' dropdown menu (labeled with a red box and the number 2) is set to 'English (US)'. Below this, the 'Default Site Language' is also set to 'English (US)'. A table titled 'Site Languages' lists 'French - français' and 'German - Deutsch'. The 'Language Settings' for 'French - français' are shown, including 'Active on Live Site' (checked), 'Fallback Language' (set to 'English (US)'), and 'Display Label' (set to 'French - français (FR)').

In addition, by adding a new Language Selector page element to your pages or templates, you can let site visitors choose their preferred language from those available when viewing the site. And in case any part of the site content isn't available in their chosen language, you can specify a *fallback* language to display instead.



For example, if a site visitor chooses Japanese from the language selector, but there's no Japanese content available for that page, the page displays content in the fallback language instead.

## Custom Properties for Widgets

Widgets let designers and administrators save time by building custom page elements that you and your team can reuse throughout the site. With the introduction of custom properties in Winter '14, you can now allow greater flexibility over how your widgets are reused.

Available for purchase in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available (with limitations) in: **Developer** Edition

When you create a new widget, you can add custom properties to it and specify their values in the Properties pane. Then, by adding custom code or content blocks to the widget, you can access the property values using expressions. Expressions serve as placeholders for data that will be replaced with information when the page loads.

In turn, when you add the widget to a page, it creates a copy or *instance* of the widget. You can't edit the widget instance, but you can update its property values. Because expressions are just placeholders, their values are updated automatically when you update the values in the Properties pane.

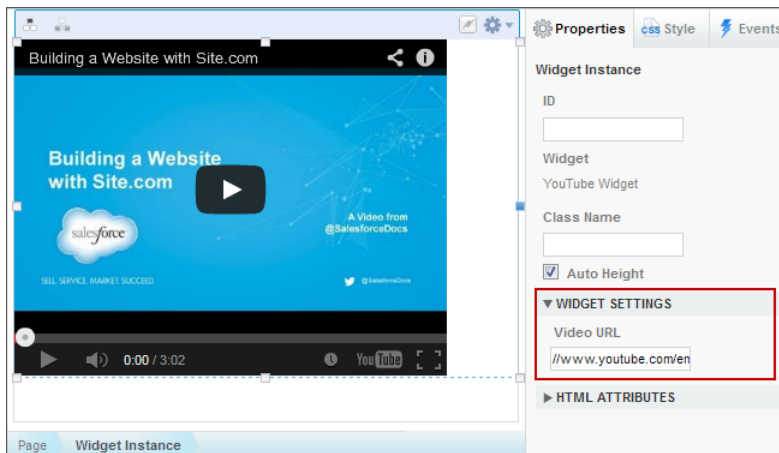
For example, let's say you want to create a YouTube widget using the following embed code:

```
<iframe width="560" height="315" src="//www.youtube.com/embed/hcUaN6XBTz4" frameborder="0" allowfullscreen></iframe>
```

In this case, you want users to specify which video to display when they add an instance of the widget to the page. By adding a custom property called `videoURL` and specifying an initial value, you could instead use the following code:

```
<iframe width="560" height="315" src="{!videoURL}" frameborder="0" allowfullscreen></iframe>
```

Now, when users add the YouTube widget to the page, they can point to a different video by updating the `videoURL` property in the Properties pane, which automatically updates the value represented by the `{!videoURL}` expression.



## Sandbox Enabled for Site.com

With Winter '14, Site.com is now supported on sandbox environments for both Site.com sites and Site.com community sites.

Available for purchase in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available (with limitations) in: **Developer** Edition

You can create, edit and preview sites using Site.com Studio. Using a .site file, you can also copy Site.com and Site.com community sites from sandbox back to your production organization. This process replaces your existing site with the content you've been modifying on sandbox.

Within Site.com Studio, you can preview production sites before publishing them to a live domain, but you can't actually test with real objects and code. Sandbox sites allow you to not just test the static content in your site, but also any dynamic data elements in your site before publishing them.



**Note:** You can't publish sites from sandbox to a production environment.

## HTML Import

Site.com Studio now supports importing HTML pages.

Available for purchase in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available (with limitations) in: **Developer** Edition


With this new feature, you can now import entire websites. If you create a zipped file that includes the folder structure and assets of your website, you can import it. Site.com will duplicate the folder structure from the zipped file when importing it. This saves you from having to recreate your existing site and the assets from scratch.

## New Broken Link Finder

The broken link finder helps you search your pages for broken links. This is especially useful when importing HTML pages.

Available for purchase in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available (with limitations) in: **Developer** Edition

Site.com attempts to format links correctly when importing an HTML page into your site. You can check for any links that might still be broken using the link finder. Open the page, select  > **Find Broken Links**. A dialog displays showing any broken links. To fix the link, click **Edit**. The link opens in the editor where you can make corrections.

## New Live Mode for Editing Content

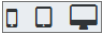



With Live Mode, site administrators, designers, and contributors can preview pages, templates, and widgets as they would appear to users on different platforms, such as mobile devices and computer screens.

Available for purchase in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available (with limitations) in: **Developer** Edition

There is also an [inline editor](#) for making quick changes to content blocks on a page.

Site.com contributors are automatically placed in Live Mode for all content editing. They can edit the content blocks they've been given access to by the site administrators. Site administrators and designers can switch between Live and Design modes by using the slider on the Site.com Studio toolbar. Live Mode has these options:

- The preset device  buttons quickly adjust the size of your page to preview how it looks on mobile devices, tablets, or computer screens.
- With the slider , you can manually adjust the page to any size between 320x320 and 2880x2280 pixels.
- You can use the resizing handles at the edge of the frame to resize the screen.
- The preset  button allows you to store custom screen sizes that you use frequently.
- Rotate  changes the orientation for the screen from portrait to landscape.

## Inline Editor

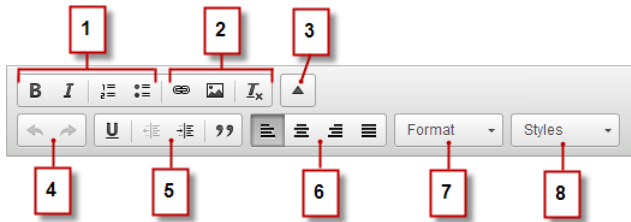
With Live Mode, you can now quickly edit text using the new inline editor. And because you're editing the text inline, you always know exactly how the finished page will look when it's live.

Available for purchase in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available (with limitations) in: **Developer** Edition

If you're a contributor, you can use the inline editor to edit any editable text areas on the page. Editable areas display a grey border when you hover over the text. Alternatively, if you're a designer or site administrator, you can use the inline editor only when you're viewing the page in Live Mode.





The inline editor lets you:

- Control the text style and layout (1) by:
  - ◊ Applying bold or italic formatting
  - ◊ Inserting numbered or bulleted lists
- Add images and hyperlinks, and remove unwanted formatting (2).
- Expand the toolbar (3) to access additional options (4–8).
- Undo and redo your edits (4).
- Control the text style and layout (5) by:
  - ◊ Applying underline formatting
  - ◊ Setting text alignment
  - ◊ Applying blockquote formatting
- Set paragraph indentation (6).
- Apply paragraph and heading styles (7).
- Apply additional styles, such as highlighting (8).



**Tip:** Avoid applying formatting, such as different fonts or highlighting, directly to text whenever possible. Instead, it's best practice to use the paragraph and heading styles to quickly apply consistent formatting throughout the site. This also ensures that all page text is updated automatically if a site administrator or designer modifies the site's paragraph and heading styles.

## Default Doctype Changed to HTML5

We've changed the default doctype property of pages from XHTML 1.0 to HTML5, which is the latest version.

Available for purchase in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available (with limitations) in: **Developer** Edition

The Document Type Definition (DTD) or *doctype* of a page defines which version of HTML it's using. This information is used by some browsers to trigger a standard rendering mode.

As an administrator or designer, when you create a new site page or page template, its doctype property is now automatically set to HTML5. With HTML5, you can take advantage of several semantic HTML5 elements that describe the content they contain.

## Approval Processes Enabled in Site.com—Pilot

Site.com now supports approval processes.

Available for purchase in: **Enterprise, Performance, and Unlimited** Editions

Available (with limitations) in: **Developer** Edition



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

You can create an approval process that allows you to control content published on your site. Setting up approval processes in Site.com is a two-part process. You first set up an approval process in your organization. After that, you must enable approvals on your site.



**Note:** Sites can't be published in a sandbox. If you approve a changelist to publish in a sandbox, the approval actions are executed, but the changelist can only be recalled from the Change History list. It can't be published.

After you enable approvals for a particular site, the publish process is changed into an approval process. Users see a Submit Changes button instead of a Publish button. The process for selecting content to send for approval remains the same as the publishing process.

When users send changes for approval, a changelist is created. Changelists are submitted for approval and acted on by any matching Salesforce approval processes that is defined in the organization. Typically, an email is generated and sent to the approver with a link to the changelist. When the approver clicks the link in the email, it opens up the changelist detail page where the approver can view, approve, or reject the changes.

When approvals are enabled, additional filtering buttons appear at the top of the Change History list on the Overview tab. During the approval cycle, all changelists are tracked in the Change History list within the site. From there, site administrators can see the progress and state of any submitted changelist.

Let's say your company has a policy that all new web content for a site must be reviewed and approved by the director of marketing before it's published. You first create an approval process in your organization that designates the site where the changelists will come from. Next, add the director of marketing as the approver. After you've created the approval process, you then turn on approvals for that site.

## External Reference Checking Enabled in Site.com

External reference checking is now enabled for all Site.com sites.

Available for purchase in: **Enterprise, Performance, and Unlimited** Editions

Available (with limitations) in: **Developer** Edition

This functionality, previously available for other Salesforce features, is now protecting your links to real time data objects on your site pages. For example, if someone from your organization tries to modify an object that is used in your site, they receive a warning that the object is in use.

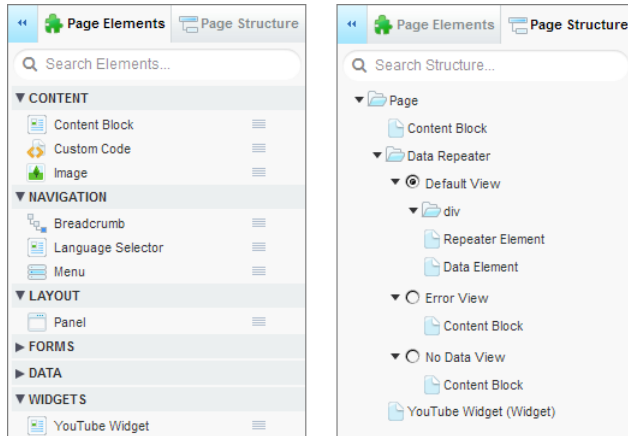
## Additional Updates to Site.com Studio

Check out some of the other recent updates to Site.com Studio.

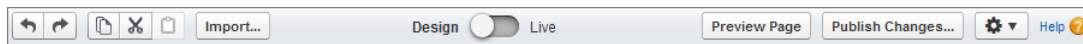
Available for purchase in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available (with limitations) in: **Developer** Edition

- To help you find page elements and custom widgets more easily, we added a search box to the Page Elements pane. We also added a search box to the Page Structure pane to make it easier to find items on the page. But that's not all! Now you can resize both panes for a clearer view of all page elements.



- We streamlined the toolbar in the page editing view. In addition to adding the new [Live Mode feature](#), the **Page Actions** button was replaced with the icon and the **Edit Content** button was removed.



- On the Overview tab, the **Site Actions** button was replaced with the icon. Also, the Publish History view was renamed “Change History” and the Recent Changes view was removed.

## Organization ID Required for Domain Names

Adding a domain to Site.com or Force.com Sites organizations requires the use of an 18-character organization ID in the CNAME target.

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

Currently, another organization could potentially take your domain name in the time it takes for the name to become live. This window of opportunity is small, but adding the unique `orgID` to the CNAME target eliminates the problem.

The format is `domain.orgID.live.siteforce.com`. For example, a domain of `www.example.com` would have the CNAME target of `www.example.com.00dx0000000001aaa.live.siteforce.com`, where `00dx0000000001aaa` is the organization ID.

If your existing domain uses the current format of `domain.live.siteforce.com` or `subdomain.force.com` as the CNAME target, it will continue to function properly. Modifying the certificate of the domain or the composition of sites on that domain will continue to update the `domain.live.siteforce.com` CNAME.

If you delete an existing `domain.live.siteforce.com` CNAME from your organization, you must meet the new criteria to add the domain back again.

The 18-character organization ID appears when you add a new domain within Domain Management in Setup.

## New Company Community License

Available in: **Developer**, **Enterprise**, and **Unlimited** Editions, this is an internal user license. It's designed for users to access Force.com Light application custom objects, custom tabs, Chatter (people, groups, feeds, files), and a Community that includes a Site.com site.

Company Community users have read-only access to Salesforce Knowledge articles and limited access to cases for creating and reading their own cases. They can also:

- Access up to 10 custom objects and 10 custom tabs
- Use content, ideas, and answers
- Use activities, tasks, calendar, and events
- Have read-only access to accounts and contacts

## New Company Community Permission Set License

Use the Company Community Add-on permission set license to give read-only access to Salesforce Knowledge for users with a Force.com user license.

Available for an additional cost in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

Once you've assigned the Company Community Add-on permission set license to a user, add the "Allow View Knowledge" permission to a permission set, and then assign that permission set to the user. See "Assigning Permission Set Licenses" in the Salesforce Help for more information.

# Force.com Customization

Customization features enable you to expand your organization by enhancing your objects, data, and fields, customizing your organization's look and feel, augmenting your business processes, creating websites, and creating apps—all using point-and-click tools. Customization features also include tools to administer and secure your organization.

## ***SalesforceA Mobile App for Administrators***

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

## ***Workflow for the User Object—Beta***

You can now create workflow rules and actions for the User object.

## ***Search in Setup—Beta***

With Advanced Setup Search, you can search for Setup pages, custom profiles, permission sets, public groups, roles, and users from the sidebar in Setup.

## ***Freezing User Accounts***

You can temporarily suspend a user account that requires more work to deactivate.

## ***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 multilanguage, multicurrency, and translated content.

## ***Critical Updates***

Features that are made available shortly after the release may require special preparation.

## ***Additional Customization***

Even small customization enhancements can make Salesforce easier to use.

# SalesforceA Mobile App for Administrators

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

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.

For more information, see [SalesforceA](#) on page 64.

## Workflow for the User Object—Beta

You can now create workflow rules and actions for the User object.

Available in: **Enterprise, Performance, Unlimited, Developer, and Database.com** Editions

Tasks, Sites, and Email Alerts are not available in **Database.com**

### User Permissions Needed

To create or change workflow rules and actions:

“Customize Application”



#### Note:

This release contains a beta version of workflow on the User object that is production quality but has known limitations. To provide feedback and suggestions, go to [IdeaExchange](#).

With support for the User object, you can set up workflow rules to:

- Send welcome email messages with training resources to newly created users.
- Send email alerts when users change roles or are deactivated.
- Use field updates to deactivate temporary employees after a specified period.
- Use outbound messages to sync user data with third-party systems.

You can now replace any Apex triggers you’ve been using to work around the previous lack of workflow on the User object. However, don’t forget to delete those Apex triggers once you activate their equivalent workflow rules. Otherwise, both Apex triggers and workflow rules will fire and cause unexpected results, such as overwritten field updates or redundant email messages.

### Beta Limitations for Workflow on the User Object

Understand these limitations before you create workflow rules or workflow actions for the User object.

- Tasks are not supported as workflow actions for the User object.
- When setting the workflow rule criteria, you can’t select `Current User` fields using the picklists. You can, however, use a formula to set the rule criteria and include fields from the current user. In the formula editor, click **Insert Field**, select `$User`, select the field, and click **Insert**.
- Remember that custom validation rules run *before* workflow rules are executed. Refer to “Triggers and Order of Execution” in the *Force.com Apex Code Developer’s Guide*.

## Search in Setup—Beta

With Advanced Setup Search, you can search for Setup pages, custom profiles, permission sets, public groups, roles, and users from the sidebar in Setup.

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


User Permissions Needed	
To enable Advanced Setup Search:	“Customize Application”
To search Setup:	“View Setup and Configuration”

**Note:**


- Advanced Setup Search is in beta; it is production quality but has known limitations.
- After Winter '14 is available for your organization, it might take a few weeks before your organization's group, permission set, profile, and role data is indexed and searchable. During those initial weeks, searches might not return all possible results.

To use Advanced Setup Search, enable the Advanced Setup Search user interface setting. From Setup, click **Customize > User Interface**, then scroll to *Enable Advanced Setup Search (Beta)*. If Advanced Setup Search is disabled, users can find only Setup pages.

Advanced Setup Search is multipurpose, allowing you to use it in different ways.

- To find Setup pages, type part or all of a Setup page name in the Setup Search box. As you type in this box, you'll immediately see Setup pages whose names match what you're typing. Click the name of the page to open it.
- To find custom profiles, permission sets, public groups, roles, or users, enter at least two consecutive characters of the item you want and click  or press Enter. In the Setup Search Results page that appears, select the item you want from the list.

For example, let's say you want to see all the workflow rules in your organization. Enter *workf*. As you enter letters, the Setup menu shrinks to include only the menus and pages that match your search terms. You'll quickly see the link for the page you want (**Workflow Rules**).

Next, perhaps you want to change the password for one of your users, Jane Smith. Enter *smit* and click . From the Setup Search Results page, click the Jane Smith result to go directly to her user detail page.



**Tip:** When viewing setup search results, you can bookmark the results page in your Web browser to easily perform the same search in the future. For example, if you often search for “smit”, you can bookmark the results page to perform the same search again. The URL for this bookmark would be something like

<https://MyCompany.salesforce.com/ui/setup/SetupSearchResultsPage?setupSearch=smit>.

## Freezing User Accounts

You can temporarily suspend a user account that requires more work to deactivate.

Available in: <b>Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com Editions</b>
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User Permissions Needed	
To freeze user accounts:	“Manage Users”

In some cases, you can't immediately deactivate an account (such as when a user is selected in a custom hierarchy field). To prevent users from logging into your organization while you perform the steps to deactivate them, you can freeze user accounts. For example, let's say a user, JoAnn Baker, just left your company and you want to deactivate her account. However, she's

selected in a custom hierarchy field, so you'll need to perform some more steps to remove her from the field. Since you can't immediately deactivate her account, you can freeze it in the meantime.

To freeze a user account:

1. From Setup, click **Manage Users > Users**.
2. Click the name of the user whose account you want to freeze.
3. Click **Freeze**.



**Note:** Freezing user accounts doesn't make their user licenses available for use in your organization. You must deactivate user accounts to make their user licenses available.

## General Administration

Administration helps you manage your organization to suit your business needs.

### *Permission Set Licenses*

You can assign permissions to give users access to certain features. However, some permissions require users to have a permission set license before they can be assigned any permission sets containing those permissions.

### *Geolocation Performance Improvements*

The performance of filters and queries using geolocation fields in a `WHERE` condition have been improved in certain circumstances. Enabling the performance improvement requires creating a custom index on the relevant geolocation custom field.

### *Rich Text Area Editor Context Menu Changes*

The behavior of the context menu in the rich text field editor has changed. Previously, when right-clicking in the HTML editing area of a rich text field, the editor-specific context menu appeared. In Winter '14 right-clicking displays the browser's native context menu instead.

## Permission Set Licenses

You can assign permissions to give users access to certain features. However, some permissions require users to have a permission set license before they can be assigned any permission sets containing those permissions.

Available in: <b>Enterprise, Performance, Unlimited, and Developer</b> Editions
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For example, before a user can be assigned a permission set that includes the "Use Identity Connect" permission, that user must have been assigned the Identity Connect permission set license.

Only the new permissions "Use Identity Connect" and "Sales Console" require permission set licenses. No permissions that existed before Winter '14 require a permission set license. Permission set licenses are superseding user feature licenses. Beginning with Winter '14, new features that require an additional license will require a permission set license rather than a user feature license. This change doesn't affect existing user feature licenses.

To purchase permission set licenses, contact your salesforce.com representative. To see an example of how to assign a permission set license, see [Assigning the Sales Console User Permission Set License](#) on page 110.



## Geolocation Performance Improvements

The performance of filters and queries using geolocation fields in a `WHERE` condition have been improved in certain circumstances. Enabling the performance improvement requires creating a custom index on the relevant geolocation custom field.

The conditions for being able to take advantage of the improved performance include the following:

- At least 100,000 records with a geolocation custom field used in a query.
- A query or filter condition that calculates and compares distances between a geolocation field on those records and another position, using the `<`, `>`, or `within` operator. For example, finding all store locations within 10 miles of the customer's location.
- A data distribution where the typical query results are “small” compared to the overall data set. A good rule of thumb is that typical query results should ideally be fewer than 10% of the overall records. The smaller the typical results set is compared to the full data set, the greater the performance impact is likely to be.

These conditions are necessary, but aren't a guarantee that an index on a geolocation field will improve performance. Many factors affect performance, including the specific queries being performed, the influence of other indexes on those queries, and so on. If your organization is making use of geolocation fields, and you want to investigate using a custom index to improve performance, contact Salesforce Support to request an evaluation of your organization's use case. If adding a custom index improves performance, Support can add it to any of your geolocation custom fields.

### Example: List View Filter

Here is a list view filter definition that might benefit from a custom index on the relevant geolocation custom field.

The screenshot shows the 'Edit View' interface for a list view named 'Local Contacts'. The view is defined by the following criteria:

- View Name:** Local Contacts
- View Unique Name:** Local\_Contacts
- Created By:** Michael Alderete, 8/1/2013 5:44 AM
- Modified By:** Michael Alderete, 8/1/2013 5:44 AM
- Filter By Owner:** All Contacts (selected)
- Filter By Campaign (Optional):** Campaign Name: (empty)
- Filter By Additional Fields (Optional):**
  - Field:** Home Location
  - Operator:** within
  - Value:** 10.000000 miles
  - Latitude:** 37.790000
  - Longitude:** -122.390000

This list view definition includes a filter that uses a custom geolocation field, and filters using the `within` operator, to limit the view to contacts who have a Home Location within 10 miles. The performance of this list view might be improved by adding an index on the Home Location custom field.

## Example: SOQL Query

Here is a SOQL query that might benefit from a custom index on the relevant geolocation custom field.

```
SELECT name__c, address__c FROM Warehouses__c
WHERE (DISTANCE(warehouse_location__c, GEOLOCATION(37.775,-122.418), "mi") < 20)
ORDER BY DISTANCE(warehouse_location__c, GEOLOCATION(37.775,-122.418), "mi")
```

The WHERE clause is searching for records where a DISTANCE () calculation is under 20 miles. Assuming other conditions align, this is a very good candidate for a custom index on the geolocation field.

## Rich Text Area Editor Context Menu Changes

The behavior of the context menu in the rich text field editor has changed. Previously, when right-clicking in the HTML editing area of a rich text field, the editor-specific context menu appeared. In Winter '14 right-clicking displays the browser's native context menu instead.

The context menu in Salesforce Knowledge behaves differently. A right-click still accesses the HTML editor's editor-specific context menu. Press CTRL (CMD on Mac) and right-click to access the browser's native context menu.

## Data

The Force.com platform makes it easy for you to import your data and track its history.

**Data Import Wizard—Beta**

**Field History Data Retention**

## Data Import Wizard—Beta

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

This release contains a beta version of the Data Import Wizard. The feature is automatically enabled for all organizations.

The Data Import Wizard provides a unified interface that lets you import a number of standard Salesforce objects, including accounts, contacts, leads, and solutions. The wizard also lets you import custom objects.

To start using the new wizard, from Setup click **Data Management > Data Import Wizard**.



**Note:** The separate import wizards for accounts, contacts, leads, solutions, and custom objects are still available during the beta. Their functionality hasn't changed. To see a list of differences between the old and new wizards, review the [import wizards comparison table](#).

## Field History Data Retention

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

Earlier this year, salesforce.com announced that it would enable a feature in its Summer '13 release to automatically delete field history data older than 18 months for certain organizations (those created after 12:00 a.m. on June 2, 2011). As a result

of customer feedback, we have suspended this feature. Salesforce.com is now working on a future service that will give you the ability to retain your field history for longer periods of time. To date, we have not deleted any field history data from any customer organization.

In Winter '14, salesforce.com is offering a pilot feature for Field History data retention. The feature is only available through the Salesforce Enterprise and Tooling APIs, and gives you the ability to define the field history data that you would like to retain, and the length of time you would like to retain it. Contact your account team or Customer Support for more information about joining the pilot.

## Business Logic and Process Automation

Workflow, Approvals, and Visual Workflow provide point-and-click tools for automating and simplifying complex business processes.

### **End of Support for the Legacy Desktop Flow Designer**

As of Winter '14, the legacy desktop Flow Designer is no longer supported. For more information, contact salesforce.com Customer Support.

### **Approvals in the Salesforce1 Apps**

In Salesforce1, users can receive approval request notifications, tap a notification to view the administrator-selected approval page fields, and then tap **Approve** or **Reject**.

### **Approval Comment Merge Fields are Available in All Approvals-Related Email Alerts**

The `{!ApprovalRequest.Comments}` merge field can be used in *any* approvals-related email alert.

### **New Limit of 30 Steps per Approval Process**

The limit on the number of approval steps per approval process was increased from 15 to 30.

## End of Support for the Legacy Desktop Flow Designer

As of Winter '14, the legacy desktop Flow Designer is no longer supported. For more information, contact salesforce.com Customer Support.

We recommend using the Cloud Flow Designer to create your flows. To get started, see the [Cloud Flow Designer Workbook](#) and the [Visual Workflow Implementation Guide](#).

To see how features and elements differ between the legacy desktop Flow Designer and the Cloud Flow Designer, see the [Flow Designer Matrix](#).

## Approvals in the Salesforce1 Apps

In Salesforce1, users can receive approval request notifications, tap a notification to view the administrator-selected approval page fields, and then tap **Approve** or **Reject**.

Available in: <b>Enterprise, Performance, Unlimited, and Developer</b> Editions
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The user can also:

- Submit comments with the approval or rejection.
- View the approval history related list for the record.

All other approvals-related functionality is currently unsupported in Salesforce1. For limitations and differences from the full Salesforce site, see [Differences with Approvals](#) on page 58.

## Approval Comment Merge Fields are Available in All Approvals-Related Email Alerts

The `{!ApprovalRequest.Comments}` merge field can be used in *any* approvals-related email alert.

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

Previously, *all* approval merge fields named `{!ApprovalRequest.field_name}` returned values only when used in an approval assignment email template. When used in templates for other email alert actions—in workflow rules or approval processes—the approval merge fields returned `null`.

Now, for example, if a request is rejected at any approval step, you can include the approver's rejection comment in an email alert to the submitter.



**Note:** The `{!ApprovalRequest.Comments}` merge field returns only the most recently entered comment in emails for an approval step that requires unanimous approval from multiple approvers.

## New Limit of 30 Steps per Approval Process

The limit on the number of approval steps per approval process was increased from 15 to 30.

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

With the limit increase, you shouldn't need to use the programmatic workaround of having Apex triggers send records through a series of approval processes, unless, of course, your approval process requires more than 30 steps.

## Security

Use security to protect both your data and applications.

### **RelayState Parameter Default Changed**

If you use SAML 2.0, you can use the `RelayState` parameter to control where users get redirected after a successful login.

### **Entire SAML Assertion Now Signed**

SAML responses now include signed assertions.

### **Custom Attributes for Connected Apps**

Previously known as Service Provider SAML Attributes, Connected App Custom Attributes allow developers or administrators to send user attributes to a connected app.

### **Automatic Installation of Salesforce Apps**

Salesforce apps are now implemented as connected apps and automatically installed in your organization.

### **Updated Connected Apps OAuth Usage Page**

The Connected Apps OAuth Usage page has been redesigned and now offers more functionality.

### **Creating Service Providers as SAML-Enabled Connected Apps**

You create service providers by creating a SAML-enabled connected app.

### **Restricting User Email Domains**

You can define a whitelist to restrict the email domains allowed in a user's `Email` field.

### **Visibility and Control for Sessions and Identity Confirmation**

Identity confirmation activations exposes activated device IP address and client browser information.

### **Session-Level Security**

You can use the new security level associated with a user's login method to restrict access to certain types of resources.

### **Two-Factor Authentication**

Winter '14 adds two-factor authentication, using time-based tokens for identity confirmation.

### **New Location of My Domain in Setup**

To access the My Domain page from Setup, click **Domain Management** > **My Domain**.

### **Identity Provider Auto-Enabled for New My Domains**

When a new My Domain is created, the SAML Identity Provider is automatically enabled, although no service providers are configured by default.

### **Using OpenID Connect Authentication Providers**

You can now use any third-party Web application that implements the server side of the OpenID Connect protocol, such as Amazon, Google, and PayPal, as an authentication provider to log into your Salesforce organization, portal, or site with single sign-on.

### **Mutual Authentication**

You can now set up secure server-to-server connections initiated by a client.

### **Using Frontdoor.jsp to Log Into Salesforce**

You can use `frontdoor.jsp` to give users access to Salesforce from a custom Web interface, such as a remote access Force.com site or other API integration, using their existing session ID and the server URL.

### **Customizable Branding on Login Page**

Customize the look and feel of your login page by adding a background color, logo, and right-frame content.

### **Add Alternate Identity Providers on Login Page**

Allow users to authenticate using alternate identity providers right from your login page.

### **Identity License**

Users with an Identity user license have access to connected apps and Chatter apps. The user must also have the "Use Identity Features" permission.

### **Identity Connect License**

The Identity Connect permission set license enables you to assign the "Use Identity Connect" permission to your users. Identity Connect provides Active Directory integration.

## **RelayState Parameter Default Changed**

If you use SAML 2.0, you can use the `RelayState` parameter to control where users get redirected after a successful login.

When a service provider initiates login, the default `RelayState` is now `/`. In previous releases, the default `RelayState` was `/home/home.jsp`.

## Entire SAML Assertion Now Signed

SAML responses now include signed assertions.

SAML Identity Provider assertions are now signed with the same certificate used to sign the rest of the SAML response. The assertions previously inherited their signature from the SAML Response signature but were not independently signed.

## Custom Attributes for Connected Apps

Previously known as Service Provider SAML Attributes, Connected App Custom Attributes allow developers or administrators to send user attributes to a connected app.

Developers can set attributes for a connected app, and administrators can delete or edit those attributes. Administrators can also add additional custom attributes. Attributes added, edited, or deleted by administrators override attributes set by developers.

Custom attributes are available for all connected apps. When using SAML, attributes will be sent as SAML attribute statements. When using OAuth, attributes are available as a `custom_attributes` object in the user's Identity URL.

## Automatic Installation of Salesforce Apps

Salesforce apps are now implemented as connected apps and automatically installed in your organization.

Salesforce apps built as connected apps have been placed into two managed packages – one for Chatter-related apps and one for non-Chatter-related apps. To simplify administration, each package is asynchronously installed in your organization the first time any user in the organization performs either of the following actions for any one of the Salesforce apps in the package:

- A user accesses the connected app's OAuth approval page
- The connected app performs a refresh token flow for the app

The packages are scheduled to be available for installation starting Friday, September 20, 2013. The packages can be installed at different times, depending upon when their apps are accessed. This means that many administrators will see Salesforce connected apps (for example, Salesforce for Outlook), and the packages that contain these apps, installed in their organizations with no action on their part because they were installed automatically.

## Updated Connected Apps OAuth Usage Page

The Connected Apps OAuth Usage page has been redesigned and now offers more functionality.

On the updated page, you can:

- Click **View App Info** to go to the detail page of the connected app. Alternatively, if the connected app isn't yet installed, click **Install**.
- Click **Block** to end all current user sessions with the connected app and block all new sessions. Blocking an app is not permanent. You can click **Unblock** to allow users to log in and access the app at another time.

## Creating Service Providers as SAML-Enabled Connected Apps

You create service providers by creating a SAML-enabled connected app.

Available in: **Developer, Enterprise, Performance, Unlimited, and Database.com** Editions

You can't create service providers from the Identity Provider page anymore. Instead,

1. From Setup, click **Create > Apps**.
2. In the Connected Apps section, click **New**.
3. Enter the required Basic Information, and under Web App settings, select **Enable SAML**.
4. Specify the following:

**Entity Id**

This value comes from the service provider. Each entity ID in an organization must be unique. If you're accessing multiple apps from your service provider, you only need to define the service provider once, and then use the `RelayState` parameter to append the URL values to direct the user to the correct app after signing in.

**ACS URL**

The ACS, or assertion consumer service, URL comes from the SAML service provider.

**Subject Type**

Specifies which field defines the user's identity for the app. Options include the user's username, federation ID, user ID, a custom attribute, or an algorithmically calculated persistent ID.

**Name ID Format**

Specifies the format attribute sent in SAML messages. "Unspecified" is selected by default. Depending on your SAML service provider, you may want to set this to email address, persistent, or transient.

**Issuer**

By default, the standard issuer for your identity provider is used (your organization's My Domain). If your SAML service provider requires a different value, specify it here.

The `Start URL` and `Service Provider Certificate` fields are optional.

5. Click **Save**.
6. Authorize users to access the SAML application by clicking **Manage Apps > Connected Apps**, clicking the name of the application, and selecting the desired profiles and/or permission sets.

After a service provider is defined, you can get information about it from Setup by clicking **Manage Apps > Connected Apps** and clicking the name of a connected app in the list.

## Restricting User Email Domains

You can define a whitelist to restrict the email domains allowed in a user's `Email` field.

Available in: **All** Editions

User Permissions Needed	
To restrict user email domains:	"Manage Users"

To add an email domain to the whitelist:

1. From Setup, click **Manage Users > Allowed Email Domains**.



**Note:** If you don't see this page, contact your salesforce.com representative to enable it.

- 2. Click **New Allowed Email Domain**.
- 3. Enter a **Domain**.

You can enter a top-level domain, such as `sampledoc.org`, or a sub-domain, such as `emea.sampledoc.org`.

- 4. Click **Save**.

You can repeat the steps to add more email domains to the whitelist.

Once you've added one or more whitelisted email domains, the **Email** field for each new user must match a whitelisted domain.

The **Email** field for existing users doesn't have to comply with the whitelist. However, if you edit an existing user, you must update the **Email** field to match a whitelisted email domain.



**Note:** The email domain whitelist doesn't apply to users external to your organization, such as portal, Communities, or Chatter External users.

## Visibility and Control for Sessions and Identity Confirmation

Identity confirmation activations exposes activated device IP address and client browser information.

Available in: **All Editions**

Identity confirmation is used to verify the identities of users coming from unknown devices, and adds an extra layer of security on top of the authentication and single-sign-on features. When a user comes from an unknown device with a new IP address, the user is challenged to provide an identity confirmation code delivered via email, SMS, or a mobile authenticator app. Once the user completes the identity confirmation challenge, the device (and client browser) is considered activated.

## Session-Level Security

You can use the new security level associated with a user's login method to restrict access to certain types of resources.

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

User Permissions Needed	
To set session security:	"Customize Application"

You can restrict access to certain types of resources based on the level of security associated with the authentication (login) method for the user's current session. By default, each login method has one of two security levels: Standard or High Assurance. You can change the session security level and define policies so specified resources are only available to users with a High Assurance level.

The different authentication methods are assigned these security levels, by default.

- Username and Password — Standard



- Delegated Authentication — Standard
- Two-Factor Authentication — High Assurance
- Authentication Provider — Standard
- SAML — Standard



**Note:** The security level for a SAML session can also be specified using the `SessionLevel` attribute of the SAML assertion sent by the identity provider. The attribute can take one of two values, `STANDARD` or `HIGH_ASSURANCE`.

To change the security level associated with a login method:

1. From Setup, click **Security Controls** > **Session Settings**.
2. Under Session Security Levels, select the login method.
3. Click the **Add** or **Remove** arrow to move it to the proper category.

Currently, the only features that use session-level security are connected apps, reports, and dashboards. You can set policies requiring High Assurance on these types of resources and specify an action to take if the session used to access the resource is not High Assurance. The two supported actions are:

- Block — This blocks access to the resource by showing an insufficient privileges error.
- Raise session level — This redirects you to a Two-Factor Authentication flow for raising the session's security level to High Assurance. Once you complete the flow successfully, you can access the resource.

To set a High Assurance required policy for accessing a connected app:

1. From Setup, go to **Administer** > **Manage Apps** > **Connected Apps**.
2. Click **Edit** next to the connected app.
3. Select **High Assurance session required**.
4. Select one of the two actions presented.
5. Click **Save**.

To set a High Assurance required policy for accessing reports and dashboards:

1. From Setup, go to **Build** > **Customize** > **Reports & Dashboards** > **Access Policies**.
2. Select the **High Assurance session required**.
3. Select one of the two actions presented.
4. Click **Save**.

The session levels have no impact on any resources in the app other than connected apps, reports, and dashboards for which explicit security policies have been defined.

## Two-Factor Authentication

Winter '14 adds two-factor authentication, using time-based tokens for identity confirmation.

Salesforce uses time-based tokens from a supported mobile authenticator app as a form of two-factor authentication to verify users' identity and prevent unauthorized access to the service during login and whenever a High Assurance security level is required.

### Setting Two-Factor Authentication Login Requirements

Administrators can require users to enter a time-based token generated from an authenticator app on their mobile device when they log into Salesforce.

### Using Time-Based Tokens to Access the API

Administrators can set the “Two-Factor Authentication for API Logins” permission to allow the use of a time-based token to access the service instead of the standard security token.

### Using Time-Based Tokens for Identity Confirmation

Time-based tokens can now be used in addition to SMS-based and email-based login verification to activate a computer.

## Setting Two-Factor Authentication Login Requirements

Administrators can require users to enter a time-based token generated from an authenticator app on their mobile device when they log into Salesforce.

Available in: **Enterprise, Performance, Unlimited, Developer, and Database.com** Editions

User Permissions Needed	
To edit profiles and system permissions:	“Manage Users”
	AND
	“Customize Application”

To require this verification every time users log into Salesforce, select the “Two-Factor Authentication for User Interface Logins” permission in the user profile or permission set.



**Note:**  [Enhancing Security with Two-Factor Authentication](#) (6:56 minutes)

See a demonstration of Two-Factor Authentication for Salesforce, and when to use it.

Users are prompted to add a time-based token the next time they log into Salesforce. They must enter the changing token from their mobile app every time they log in.



**Note:** Users aren’t asked for a verification code the first time they log in to Salesforce.

Once users add a time-based token to their account they can also use the token to confirm their identity when they activate their computer. Partner Portal and Customer Portal users aren’t required to activate computers to log in.

## Using Time-Based Tokens to Access the API

Administrators can set the “Two-Factor Authentication for API Logins” permission to allow the use of a time-based token to access the service instead of the standard security token.

Available in: **Enterprise, Performance, Unlimited, Developer, and Database.com** Editions

User Permissions Needed	
To edit profiles and system permissions:	“Manage Users”
	AND
	“Customize Application”

If users add a time-based token to their account and “Two-Factor Authentication for API Logins” permission is enabled in their user profile or permission set, they must use this token instead of the standard security token whenever it’s requested, such as when resetting the account’s password.



**Note:** Since the “Two-Factor Authentication for User Interface Logins” permission is a prerequisite for this one, users must add a time-based token when logging into Salesforce through the user interface if this feature is enabled.

## Using Time-Based Tokens for Identity Confirmation

Time-based tokens can now be used in addition to SMS-based and email-based login verification to activate a computer.

Available in: **All Editions**

All users can add a time-based token to their account using a mobile authenticator app. The changing time-based token from the mobile app can be used whenever they’re prompted to confirm their identity, such as when logging in from an unknown IP address.

1. Download the [supported authenticator app](#) for the type of mobile device you’re using.
2. From your user detail page in Salesforce, click **Add** next to **Time-Based Token**.
3. For security purposes, you’re prompted to log into your account.
4. Scan the QR code with the authenticator app on your mobile device.

Alternatively, you can manually enter your username and the key displayed when you click **Can’t scan the QR code?** into the app.

5. Enter the token generated from the mobile app into the **Token** field in Salesforce.

The authenticator app generates a new token every 30 seconds.

6. Click **Verify and Add**.

## New Location of My Domain in Setup

To access the My Domain page from Setup, click **Domain Management** > **My Domain**.

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

Previously, the path from Setup was **Company Profile** > **My Domain**.

## Identity Provider Auto-Enabled for New My Domains

When a new My Domain is created, the SAML Identity Provider is automatically enabled, although no service providers are configured by default.

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

Previously, administrators had to access security control settings to enable the identity provider.

This change does not affect existing My Domains.

## Using OpenID Connect Authentication Providers

You can now use any third-party Web application that implements the server side of the OpenID Connect protocol, such as Amazon, Google, and PayPal, as an authentication provider to log into your Salesforce organization, portal, or site with single sign-on.

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”

To specify authentication providers, from Setup, click **Security Controls > Auth. Providers**.

## Mutual Authentication

You can now set up secure server-to-server connections initiated by a client.

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

Salesforce now supports mutually authenticated transport layer security (TLS) on inbound connections. This allows secure server-to-server connections initiated by a client using client certificate authentication, and means that both the client and the server authenticate and verify that they are who they say they are. Previously, only the ability to secure outbound calls was supported, by using mutually authenticated SSL/TLS connections.

This feature includes:

- Client certificates uploaded and stored in the database, where they are used for verification.
- A mechanism to prevent falling back to the standard TLS port.
- The ability to add certificates signed by a certificate authority (CA) trusted by Salesforce.

Setting up mutual authentication requires action by both the organization administrator and the API client manager.

### Administrator Actions

1. Contact salesforce.com to have mutual authentication turned on for your organization.
2. Generate the Certificate Signing Request (CSR) for the client certificate the API client will present when attempting to establish the mutually authenticated TLS connection to Salesforce. It's important that the client certificate be signed by one of the salesforce.com trusted root certificate authorities. The list is maintained here: [Outbound Messaging SSL CA Certificates](#).
3. Once the certificate is signed, upload the certificate to the organization at **Security Controls > Certificate and Key Management**. Upload the signed client certificate to the Mutual Authentication Certificates table in order for Salesforce to properly validate the client certificates presented by the client when initiating an inbound mutually authenticated TLS connection.

4. Enable the Enforce SSL/TLS Mutual Authentication user permission for the API client user. This permission forces the use of port 8443 for secure connections.

This permission can be added to a profile or assigned to an individual user with a permission set.

### API Client Manager Actions

Configure the API client to connect on port 8443 and present the client certificate. This configuration process is very environment-specific and not under the control of salesforce.com. The client needs to be configured to present the complete certificate chain (**root** > **intermediate** > **client**) to salesforce.com for the certificate to be properly validated.

For information on enabling this feature for your organization, contact salesforce.com.

## Using Frontdoor.jsp to Log Into Salesforce

You can use `frontdoor.jsp` to give users access to Salesforce from a custom Web interface, such as a remote access Force.com site or other API integration, using their existing session ID and the server URL.

Available in: **All Editions**

To authenticate users with `frontdoor.jsp`, you must pass the server URL and session ID to `frontdoor.jsp` in this format:

```
https://instance.salesforce.com/secur/frontdoor.jsp?sid=session_ID&retURL=optional_relative_url_to_open
```

### Instance

You must know the instance of the user's organization. For example, if the `serverUrl` returned when you log in via the API is `https://na1.salesforce.com`, `na1` is the instance. The rest of the server address (the `salesforce.com` domain name) remains the same.

If you're building an integration for a single Salesforce organization, you can hard-code this value. If you're building an integration for multiple organizations, parse the instance from the `serverUrl` of the returned `LoginResult` from the SOAP API `login()` call.

### Session ID

You can obtain the session ID from:

- The `access_token` from an OAuth authentication



**Tip:** One of the scopes specified when you create a Connected App must be `web` or `full`.

- The `LoginResult` returned from a SOAP API `login()` call
- The `Apex UserInfo.getSessionId()`

The session ID returned using the Visualforce `{!GETSESSIONID() }` can't be used on `frontdoor.jsp`.

### Relative URL to Open

You can optionally include a URL-encoded relative path to redirect users to the Salesforce user interface or a particular record, object, report, or Visualforce page (for example, `/apex/MyVisualforcePage`).

## Customizable Branding on Login Page

Customize the look and feel of your login page by adding a background color, logo, and right-frame content.

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

User Permissions Needed	
To customize a login page:	"Customize Application"

Customizing your login page helps users recognize your page by tying it to your company's branding.

1. From Setup, click **Domain Management > My Domain**.
2. Click **Edit**.
3. To customize your logo, upload an image.  
Images can be .jpg, .gif or .png files up to 100 KB in size. Maximum image size is 250px by 125px.
4. To customize your login page background, click the color picker or enter a valid hexadecimal color code.
5. Enter the URL to be included in the right side iframe on the login page.  
Content must be located at a URL that uses SSL encryption and the https:// prefix. Maximum content size is 478px by 397px.
6. Optionally, select additional authentication services to include on your login page.
7. Click **Save**.

## Add Alternate Identity Providers on Login Page

Allow users to authenticate using alternate identity providers right from your login page.

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

User Permissions Needed	
To add identity providers on a login page:	"Customize Application"

If you have enabled single sign-on and configured SAML, or if you have set up external authentication providers, you can provide links to these alternate identity providers on your login page. Users will be sent to the alternate identity provider's login screen to authenticate and then redirected back to Salesforce. Identity providers can be added by customizing your login page.



**Note:** Available authentication services include all providers configured in **Security > Single Sign-On Settings** and in **Security > Authentication Providers** except Janrain. You must develop a custom login screen to make the Janrain login widget available on your login page.

To include SAML identity providers as available authentication services, you must enable multiple SAML configurations for your organization. From Setup, go to **Security > Single Sign-On Settings** and click **Enable Multiple Configs**.

1. From Setup, click **Domain Management > My Domain**.
2. Click **Edit**.

3. Select one or more authentication services as identity providers.
4. Click **Save**.

## Identity License

Users with an Identity user license have access to connected apps and Chatter apps. The user must also have the “Use Identity Features” permission.

Available for an additional cost in: **Enterprise, Performance, Unlimited** and **Developer** Editions.

Ten free Identity user licenses are included with each trial Enterprise Edition organization or new Developer Edition organization.

After installing connected apps and Chatter apps, administrators can provide access to Identity license users through profile and permission set assignments.

See also [App Launcher for Identity License Users](#) on page 247.

## Identity Connect License

The Identity Connect permission set license enables you to assign the “Use Identity Connect” permission to your users. Identity Connect provides Active Directory integration.

Available for an additional cost in: **Enterprise, Performance**, and **Unlimited** Editions.

Ten free Identity Connect user licenses are included with each trial Enterprise Edition organization.

Once you’ve assigned the Identity Connect permission set license to a user, add the “Use Identity Connect” permission to a permission set and assign that permission set to the user. See “Assigning Permission Set Licenses” in the Salesforce Help for more information.

## Sharing

Sharing improves your control over who sees what.

### ***User Sharing—Generally Available***

Control who sees who in the organization with standard sharing functionality.

### ***New Description Field for Sharing Rules***

Provide a description to your sharing rules for better usability.

### ***Sharing Records with Managers Groups***

Share records up or down the management chain using sharing rules or manual sharing.

### ***External Organization-Wide Defaults—Pilot***

Eliminate sharing overhead for internal users while maintaining a Private organization-wide default for external users.

### ***Parallel Organization-Wide Default Updates—Pilot***

Speed up organization-wide default updates in large organizations.

### Asynchronous Recalculation of Sharing Rules—Pilot

Speed up sharing recalculation when creating and updating sharing rules.

### Monitoring Parallel Recalculations

Monitor the progress of your parallel recalculations.

### Contact Visibility under Shared Accounts

Customer Portal users gain access to other portal contacts if the contact object is Controlled By Parent.

## User Sharing—Generally Available

Control who sees who in the organization with standard sharing functionality.

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

Watch a Demo:  [Who Sees Whom: User Sharing](#) (6:05 minutes)

User Sharing enables you to show or hide an internal or external user from another user in your organization. Previously, User Sharing for external users was enabled by default with Communities, while User Sharing for internal users was available through a pilot program.

With Winter '14, User Sharing is automatically enabled in new organizations. You can:

- Set the organization-wide defaults for user records to Private or Public Read Only.
- Create user sharing rules based on group membership or other criteria.
- Create manual shares for user records to open access to individual users or groups.
- Control the visibility of external users in customer or partner portals and communities.

Existing organizations can contact salesforce.com to enable User Sharing.

How can your organization use User Sharing? For example, you might be a manufacturer who needs to include all dealers in your organization while still keeping them from seeing or interacting with each other. You can set the organization-wide defaults for the user object to Private. Then, open up access among groups of dealers who need to see and interact with each other in the organization with sharing rules or manual sharing. Additionally, you can assign the “View All Users” permission to users who need to see everyone in the organization.

To see who you have access to, from Setup, click **Manage Users > Users**.



**Note:** If you have access to a record owned by a user to whom you don't have access, you'll receive an insufficient privileges error when hovering on the owner's name. Similarly, on Chatter, if you lost access to a user, you cannot @ mention him or her. You'll not be able to hover their names for a full profile nor see their profile page. But you can @ mention the user if you are in a Chatter group together or if you are in the same conversation thread.

### Understanding User Sharing

Implement User Sharing via a combination of organization-wide defaults, user sharing rules, manual sharing, and permissions.

### Setting the Organization-Wide Sharing Defaults for User Records

Set the organization-wide sharing defaults for the user object before opening up access.

### Creating User Sharing Rules

Share members of a group to members of another group, or share users based on criteria.



### **Granting Access to User Records**

Grant access to users to enable them to see and interact with you.

### **User Sharing Visibility for Teams**

Provide better visibility controls when using Sales Teams.

### **Controlling Standard Report Visibility**

Show or hide standard reports that might expose data of users to whom a user doesn't have access.

## **Understanding User Sharing**

Implement User Sharing via a combination of organization-wide defaults, user sharing rules, manual sharing, and permissions.

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

With user sharing, you can set an organization-wide default for internal and external user records. You can then extend access using sharing rules based on membership to public groups, roles, or territories, or use manual sharing to share individual user records with other users or groups.

When you enable user sharing, users can see other users in search, list views, and so on only if they have Read access on those users.

Review these user sharing considerations before implementing them for your organization.

### **“View All Users” permission**

This permission can be assigned to users who need Read access to all users, regardless of the sharing settings. If you already have the “Manage Users” permission, you are automatically granted the “View All Users” permission.

### **Organization-wide defaults for user records**

This setting defaults to Private for external users and Public Read Only for internal users. When the default access is set to Private, users can only read and edit their own user record. Users with subordinates in the role hierarchy maintain read access to the user records of those subordinates.

### **User sharing rules**

General sharing rule considerations apply to user sharing rules. User sharing rules are based on membership to a public group, role, or territory. Each sharing rule shares members of a source group with those of the target group. You must create the appropriate public groups, roles, or territories before creating your sharing rules. Users inherit the same access as users below them in the role hierarchy.

### **Manual sharing for user records**

Manual sharing can grant read or edit access on an individual user, but only if the access is greater than the default access for the target user. Users inherit the same access as users below them in the role hierarchy. Apex managed sharing is not supported.

### **User sharing for external users**

Users with the “Manage External Users” permission have access to external user records for Partner Relationship Management, Customer Service, and Customer Self-Service portal users, regardless of sharing rules or organization-wide default settings for User records. The “Manage External Users” permission does not grant access to guest or Chatter External users.

## User Sharing Compatibility

When the organization-wide default for the user object is set to Private, User Sharing does not fully support these features.

- Chatter Messenger is not available for external users. It is available for internal users only when the organization-wide default for the user object is set to Public Read Only.
- Customizable Forecasts—Users with the "View All Forecast" permission can see users to whom they don't have access.
- Salesforce CRM Content—A user who can create libraries can see users they don't have access to when adding library members.
- Standard Report Types—Some reports based on standard report types expose data of users to whom a user doesn't have access. For more information, see [Controlling Standard Report Visibility](#).

## Setting the Organization-Wide Sharing Defaults for User Records

Set the organization-wide sharing defaults for the user object before opening up access.

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

User Permissions Needed	
To set default sharing access:	"Manage Users"

For user records, you can set the organization-wide sharing default to Private or Public Read Only. The default must be set to Private if there is at least one user who shouldn't see a record.

Let's say that your organization has internal users (employees and sales agents) and external users (customers/portal users) under different sales agents or portal accounts, with these requirements:

- Employees can see everyone.
- Sales agents can see employees, other agents, and their own customer user records only.
- Customers can see other customers only if they are under the same agent or portal account.

To meet these requirements, set the default external access to Private, and extend access using sharing rules, manual sharing, or user permissions.

When the feature is first turned on, the default access setting is Private for external users. The default for internal users is Public Read Only. To change the organization-wide defaults for external access to the user object:

1. From Setup, click **Security Controls > Sharing Settings**.
2. Click **Edit** in the Organization-Wide Defaults area.
3. Select the default internal and external access you want to use for user records.

The default external access must be more restrictive or equal to the default internal access.

4. Click **Save**.

Users have Read access to those below them in the role hierarchy and full access on their own user record.

## Creating User Sharing Rules

Share members of a group to members of another group, or share users based on criteria.

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

User Permissions Needed	
To create sharing rules:	"Manage Users"

User sharing rules can be based on membership to public groups, roles, or territories, or on other criteria such as Department and Title. By default, you can define up to 300 user sharing rules, including up to 50 criteria-based sharing rules. Contact Salesforce.com for information about increasing these limits.

User sharing rules based on membership enable user records belonging to members of one group to be shared with members of another group. Before you can create a membership-based user sharing rule, confirm that the appropriate groups have been created.

Users inherit the same access as users below them in the role hierarchy.

1. From Setup, click **Security Controls > Sharing Settings**.
2. In the User Sharing Rules related list, click **New**.
3. Enter the **Label Name** and click the **Rule Name** field to auto-populate it.
4. Enter the **Description**. This field describes the sharing rule. It is optional and can contain up to 1000 characters.
5. Select a rule type.
6. Depending on the rule type you selected, do the following:
  - a. **Based on group membership**—Users who are members of a group can be shared with members of another group. In the **Users who are members of** line, select a category from the first drop-down list and a set of users from the second drop-down list (or lookup field, if your organization has over 200 groups, roles, or territories).
  - b. **Based on criteria**—Specify the Field, Operator, and Value criteria that records must match to be included in the sharing rule. The fields available depend on the object selected, and the value is always a literal number or string. Click **Add Filter Logic...** to change the default AND relationship between each filter.
7. In the **Share with** line, specify the group that should have access to the user records. Select a category from the first drop-down list and a set of users from the second drop-down list or lookup field.
8. Select the sharing access setting for users.

Access Setting	Description
Read Only	Users can view, but not update, records. They can see target users in list views, lookups, search, and interact with them on Chatter.
Read/Write	Users can view and update records.

## Granting Access to User Records

Grant access to users to enable them to see and interact with you.

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

User Permissions Needed	
To grant access to your own user record:	“Read” on the user with whom you’re sharing
To grant access to any other user record:	“Manage Users”

Users can manually grant access to user records so other users can see them. Users inherit the same access as users below them in the role hierarchy.

Granting access to a user record makes the user’s detail page visible to others, and makes the user visible in lookups, list views, search, and so on.

You can share your user record manually if others cannot access it otherwise through the organization-wide defaults, sharing rules, or role hierarchy. The higher level of access is maintained if you gain access through more than one method. High-volume portal users can be shared with other users using manual shares, but not in sharing rules.

To grant access to a user record:

1. From Setup, click **Manage Users** > **Users**. Click the name of the user you want to share.
2. On the User Detail page, click **Sharing**.
3. Click **Add**.
4. From the drop-down list, select the group, user, role, or territory to share with.
5. Choose which users will have access by adding them to the Share With list.
6. Select the access level for the record you are sharing.

Possible values are Read/Write or Read Only, depending on your organization-wide defaults for users. You can only grant a higher access than your organization-wide default.

7. Click **Save**.

To edit or delete the record access, click **Sharing** on the record, and click **Edit** or **Del** next to the manual share. You might not see the **Edit** option if your organization-wide defaults is set to Public Read Only as the only valid access level on the manual share is Read/Write.

## User Sharing Visibility for Teams

Provide better visibility controls when using Sales Teams.

With Winter ’14, organizations with User Sharing will see the following changes when working with account teams, opportunity teams, and case teams.

- You can only add users to your teams (including default teams) if you have Read access on those users.
- If you lose access to a default team member, you’ll still see their team member records and names, but not their full profiles.
- You can delete any of your default team members even if you don’t have Read access on the user.

## Controlling Standard Report Visibility

Show or hide standard reports that might expose data of users to whom a user doesn’t have access.

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

User Permissions Needed	
To set standard report visibility:	“Manage Users”

You can control whether users can see reports based on standard report types that might expose data of users to whom they don't have access. When User Sharing is first enabled, all reports that contain data of users to whom a viewing user does not have access are hidden.

To enable report visibility:

1. From Setup, click **Security Controls > Sharing Settings**.
2. Click **Edit** in the Organization-Wide Defaults area.
3. Select the **Standard Report Visibility** checkbox to allow users to view reports based on standard report types that might expose data of users to whom they don't have access. Or deselect this checkbox if you want to hide these reports.
4. Click **Save**.

If the organization-wide default for the user object is Private and the checkbox is selected, a viewing user can only see the names of the users they don't have access to in the report. User details such as username and email are hidden.

When you deselect the **Standard Report Visibility** checkbox, users with the "View All Users" permission can still see all reports based on standard report types. All users can also see these reports if the organization-wide default for the user object is Public Read Only.

## New Description Field for Sharing Rules

Provide a description to your sharing rules for better usability.

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

When creating or editing a sharing rule, you now have the option to fill in or update the **Description** field to describe the sharing rule, below the **Label Name** and **Rule Name** fields. The maximum length for this field is 1000 characters.

The **Description** field can also be populated or updated via the SOAP API and the Metadata API.

## Sharing Records with Managers Groups

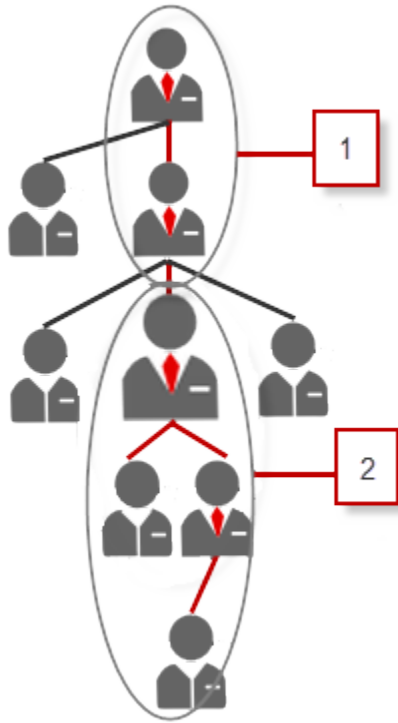
Share records up or down the management chain using sharing rules or manual sharing.

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



**Note:** Manager Groups is not automatically enabled in your organization. For information on enabling Manager Groups, contact salesforce.com.

The role hierarchy controls the level of visibility that users have into your organization's data. With Winter '14, you can use manager groups to share records with your management chain, instead of all managers in the same role based on the role hierarchy. Manager groups can be used wherever other groups are used, such as in a manual share or sharing rule. But they cannot be added to other groups and don't include portal users. Manager groups can contain Standard and Chatter Only users only.



Every user has two manager groups.

1. Managers Group: Your direct and indirect managers
2. Manager Subordinates Group: You and your direct and indirect reports

To find out who a user's manager is, from Setup, click **Manage Users > Users**. Click a user's name. The **Manager** field on the user detail page displays the user's manager.

With manager groups, you can share records to these groups via manual sharing, sharing rules, and Apex managed sharing. Apex sharing reasons is not supported.

For example, you might have a custom object for performance reviews whose organization-wide default is set to Private. After deselecting the **Grant Access Using Hierarchies** check box, only the employee who owns the review record can view and edit it. To share the reviews up the management chain, administrators can create a sharing rule that shares to a user's Managers Group. Alternatively, the employee can share the review record with his or her Managers Group using manual sharing.

Inactive users remain in the groups of which they are members, but all relevant sharing rules and manual sharing are retained in the groups.



**Note:** If your organization has User Sharing enabled, you can't see the users whom you don't have access to. Additionally, a querying user who doesn't have access to a user cannot query that user's groups.

## External Organization-Wide Defaults—Pilot

Eliminate sharing overhead for internal users while maintaining a Private organization-wide default for external users.

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



**Note:** External Organization-Wide Defaults is available through a pilot program. For more information on enabling this feature for your organization, contact salesforce.com.

Previously, external organization-wide defaults was available for custom objects and users only. The latter is available as part of [User Sharing](#). With Winter '14, you can also use external organization-wide defaults for accounts, cases, contacts, and opportunities.

Object	1 — Default Internal Access	2 — Default External Access
Lead	Private	Private
Account, Contract and Asset	Public Read Only	Private
Contact	Public Read Only	Private
Opportunity	Public Read Only	Private
Case	Public Read Only	Private
Campaign	Public Full Access	Public Full Access
User	Public Read Only	Private

### 1. Default Internal Access

### 2. Default External Access

External users include:

- Authenticated Website users
- Chatter External Users
- Customer Portal users
- Guest users
- High-Volume Portal Users
- Partner Portal users
- Service Cloud Portal users

Without external organization-wide defaults, if your organization wanted Public Read Only or Public Read/Write access for internal users but Private for external users, you would have to set the default access to Private and create a sharing rule to share records with all internal users.

With separate organization-wide defaults, you can achieve similar behavior by setting **Default Internal Access** to Public Read Only or Public Read/Write and **Default External Access** to Private without an additional sharing rule. Setting the default internal access as Public Read Only or Public Read/Write also speeds up performance for reports, list views, searches, and API queries.

### Setting the External Organization-Wide Defaults

External Organization-Wide Defaults enable you to set a different default access level for external users.

### Disabling External Organization-Wide Defaults

Disabling External Organization-Wide Defaults results in one organization-wide default for each object.

## Setting the External Organization-Wide Defaults

External Organization-Wide Defaults enable you to set a different default access level for external users.

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

User Permissions Needed	
To set default sharing access:	“Manage Users”



**Note:** External Organization-Wide Defaults is available through a pilot program. For more information on enabling this feature for your organization, contact salesforce.com.

Before you set the external organization-wide defaults, make sure that it is enabled. From Setup, click **Security Controls** > **Sharing Settings**, and click the **Enable External Sharing Model** button.

When you first enable external organization-wide defaults, the **Default Internal Access** and **Default External Access** are set to the original default access level. For example, if your organization-wide default for contacts is Private, the **Default Internal Access** and **Default External Access** will be Private as well.

To set the external organization-wide default for an object:

1. From Setup, click **Security Controls** > **Sharing Settings**
2. Click **Edit** in the Organization-Wide Defaults area.
3. For each object, select the default access you want to use.

You can assign the following access levels.

Access Level	Description
Controlled by Parent	Users can perform actions (such as view, edit, delete) on a record on the detail side of a master-detail relationship if they can perform the same action on all associated master records.
Private	Only users who are granted access by ownership, permissions, role hierarchy, manual sharing, or sharing rules can access the records.
Public Read Only	All users can view all records for the object.
Public Read/Write	All users can view and edit all records for the object.



**Note:** The **Default External Access** level must be more restrictive or equal to the **Default Internal Access** level. For example, you can have a custom object with **Default External Access** set to Private and **Default Internal Access** set to Public Read Only.

4. Click **Save**.

## Disabling External Organization-Wide Defaults

Disabling External Organization-Wide Defaults results in one organization-wide default for each object.

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

User Permissions Needed	
To disable external organization-wide defaults:	“Manage Users”

Before disabling this feature, set **Default External Access** and **Default Internal Access** to the same access level for each object.



To disable the external organization-wide defaults:

1. From Setup, click **Security Controls > Sharing Settings**
2. Click **Disable External Sharing Model** in the Organization-Wide Defaults area.

After disabling the external organization-wide defaults, you'll see the **Default Access** setting instead of the **Default External Access** and **Default Internal Access** settings in the organization-wide defaults area. If you have User Sharing, the **Default External Access** settings for the account, contact, case, and opportunity objects remain visible but they are disabled.

## Parallel Organization-Wide Default Updates—Pilot

Speed up organization-wide default updates in large organizations.

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



**Note:** Parallel Organization-Wide Default Updates is available through a pilot program. For more information on enabling it for your organization, contact salesforce.com.

With parallel organization-wide default updates, the resulting recalculations are run in parallel and asynchronously in the background. Large organizations experience faster recalculations when updating the organization-wide defaults that affect large amounts of data.

When you update the organization-wide defaults, recalculations continue in the background and you'll receive an email notification upon completion. Refresh the Sharing Settings page to see your changes. Before the recalculation completes, you can't run other sharing operations such as creating a sharing rule or updating the organization-wide defaults.

Additionally, you can monitor the progress of your parallel recalculations on the [Background Jobs](#) page.

## Asynchronous Recalculation of Sharing Rules—Pilot

Speed up sharing recalculation when creating and updating sharing rules.

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



**Note:** This information applies to organizations who are part of the ongoing pilot program for asynchronous recalculation of sharing rules. For more information on enabling it for your organization, contact salesforce.com.

When you create or update sharing rules, the resulting recalculation is processed asynchronously and sequentially. With Winter '14, these recalculations are processed asynchronously and in parallel for new organizations. Your sharing rules recalculates faster as available resources are allocated appropriately for parallel processing. Recalculation continues in the background and an email notification is sent upon completion. Before the recalculation completes, you can't run other sharing operations such as creating a sharing rule or updating the organization-wide defaults.

Additionally, you can monitor the progress of your parallel recalculations on the [Background Jobs](#) page.

## Monitoring Parallel Recalculations

Monitor the progress of your parallel recalculations.

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

#### User Permissions Needed

To monitor background jobs:	“View Setup and Configuration”
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Parallel sharing rule recalculation is run when you click the Recalculate button for the sharing rules on the Sharing Settings page. Similarly, recalculating your sharing rules on the Defer Sharing page triggers parallel recalculation.

To monitor the progress of your parallel recalculations, from Setup, click **Monitoring > Background Jobs**.

Previously, the **Job Types** column displays either `Parallel Sharing Rule Recalculation` or `Parallel Asynchronous Org-Wide Default Sharing Update` to represent all parallel sharing operations.

With Winter '14, the job types are more granular and differentiate between sharing rule operations for each object, organization-wide default updates, and sharing rule operations via the Metadata API. For example, if parallel recalculation is run when an account criteria-based sharing rule is updated, the **Job Types** column displays `Parallel Sharing Rule Recalculation` and the **Job Sub Types** column displays `Account - Criteria-based Sharing Rule`.

## Contact Visibility under Shared Accounts

Customer Portal users gain access to other portal contacts if the contact object is Controlled By Parent.

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

Portal users can see portal-enabled contacts under the same account if the organization-wide default is Private for accounts and Controlled by Parent for contacts. With Winter '14, when you grant a Customer Portal user access to an account, the user gains access to all portal-enabled contacts under that account as well. This behavior is similar to the current behavior for Partner Portal users and Customer Portal super users.



**Note:** This change is visible when you're using the API or Visualforce pages, and has no impact on the user interface.

## Globalization

Globalization tools help administrators manage multilanguage, multicurrency, and translated content.

***Custom State and Country Picklists—Generally Available***

***Rename Standard Objects and Fields***

## Custom State and Country Picklists—Generally Available

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

State and country picklists allow users to select states and countries from predefined, standardized lists, instead of entering state and country data into text fields. State and country picklists allow for faster and easier data entry and help to ensure cleaner data that can be leveraged for other uses—in reports and dashboards, for example—with more dependable results. The

states and countries in the picklists are based on ISO-3166 standard values, making them compatible with other applications as well.

State and country picklists are available in the shipping, billing, mailing, and “other” address fields in the account, campaign members, contact, contract, lead, person accounts, quotes, and service contracts standard objects. The picklists are also available for managing users and companies in Administration Setup. To use the picklists, first choose the country and then choose from the options that automatically populate the state or province picklist.

You can use the state and country picklists in most places that state and country fields are available in Salesforce, including:

- Record edit and detail pages
- List views, reports, and dashboards
- Filters, functions, rules, and assignments

You can also search state and country picklists using Advanced Search.

For a step-by-step guide to implementing state and country picklists, see [Implementing State and Country Picklists](#).

To provide feedback on state and country picklists, go to [IdeaExchange](#).



**Note:** In Summer '13, Salesforce released a beta version of state and country picklists. Since then, we have made a number of improvements for general availability, including:

- Enhanced metadata discovery, which alerts you to potential problems in workflow rules, assignment rules, auto-response rules, and so on, when you enable state and country picklists.
- Enhanced support for Translation Workbench.
- Availability in Web-to-Lead forms.

## Rename Standard Objects and Fields

Salesforce now supports the renaming of standard objects and standard fields through the Metadata API. See CustomFieldTranslation under [Updated Metadata Types and Fields](#).

## Critical Updates

Features that are made available shortly after the release may require special preparation.

### [Clickjack Protection for Non-Setup Salesforce Pages](#)

This critical update enables clickjack protection for all non-setup Salesforce pages to protect against user interface redress attacks.

## Clickjack Protection for Non-Setup Salesforce Pages

This critical update enables clickjack protection for all non-setup Salesforce pages to protect against user interface redress attacks.

Available in: <b>All Editions</b>
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Previously, to protect against clickjacking for non-setup Salesforce pages, you had to select **Enable clickjack protection for non-setup Salesforce pages** under **Setup > Security Controls > Session Settings**.

When you activate this critical update, clickjack protection for non-setup Salesforce pages will be enabled automatically for your organization. Otherwise, on the auto-activation date, the protection will be enabled for all organizations by default.

If your organization displays non-setup Salesforce pages within a frame or `<iframe>`, it's possible that the pages will either display as a blank page or without the frame after clickjack protection is enabled. The behavior varies depending on your browser and its version. Although there are reasons to frame pages, framed pages can be used by hackers.

You have two options for handling your existing framed pages:

- Don't turn off clickjacking protection for your organization. Instead, discontinue displaying these pages within a frame or `<iframe>`. This is the recommended solution.
- Disable clickjack protection for your organization. This allows you to continue framing non-setup Salesforce pages, but the pages remain vulnerable to clickjack attacks. This option is not recommended.



**Note:** In the Spring '14 release, the ability to disable clickjack protection from the Session Settings page will be removed, so you'll have to contact salesforce.com Customer Support if you need to disable it. However, disabling clickjack protection is not recommended.

## Additional Customization

Even small customization enhancements can make Salesforce easier to use.

### ***"Chatter Feed" Section of the Page Layout Editor Now "Publisher Actions"***

#### ***Email Log Size Limits***

Email logs return an increased number of records in multiple downloadable .zip files.

#### ***Outbound Single Email Limit***

The number of emails you can send in a day has changed for selected organizations.

#### ***App Launcher for Identity License Users***

The App Launcher presents icons for all of the current user's standard apps and connected apps in a single tab.

## **"Chatter Feed" Section of the Page Layout Editor Now "Publisher Actions"**

Available in: <b>All</b> Editions
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In the enhanced page layout editor, the Chatter Feed section is now labeled Publisher Actions.

## **Email Log Size Limits**

Email logs return an increased number of records in multiple downloadable .zip files.

Available in: <b>All</b> Editions except for <b>Database.com</b>
--

Email logs now return a maximum of 500,00 records. An email log request can now result in multiple downloadable .zip files. Each .zip file can hold up to 100,00 records, so your request might return up to five .zip files for download. Email logs still count toward the overall file storage limit.

## Outbound Single Email Limit

The number of emails you can send in a day has changed for selected organizations.

Available in: **All** Editions

For Developer Edition organizations and those evaluating Salesforce during a trial period, you can now send single emails to a maximum of 15 email addresses per day. If you send emails via the user interface and the API, both count towards this limit.

## App Launcher for Identity License Users

The App Launcher presents icons for all of the current user’s standard apps and connected apps in a single tab.

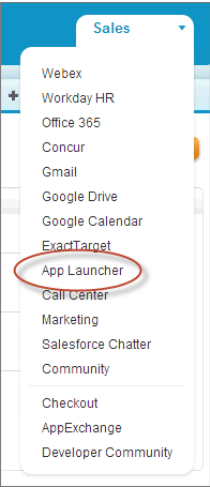
Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

User Permissions Needed	
To see the App Launcher	“Use Identity Features”

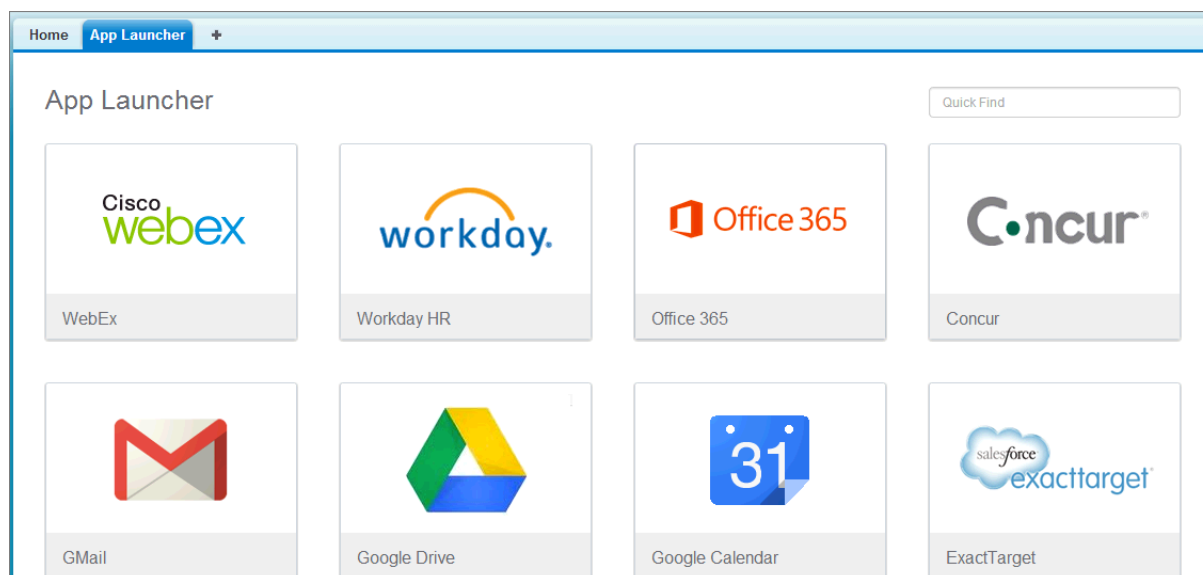
Users must have access to a standard app or connected app for it to appear in the App Launcher. And, the connected app must have a valid Start URL.

The App Launcher presents logos that link to your connected apps and standard apps, all from one tab in Salesforce. It appears as an app in the Force.com App Menu for users assigned a profile or permission set with “Use Identity Features” enabled and the App Launcher set to **Visible**.

The App Launcher is an app you select on any Salesforce page from the drop-down app menu.



In the App Launcher, click an installed app icon to launch the app.



See also [Identity License](#) on page 233.

# Force.com Development

Force.com helps you develop new applications and integrations that extend your organization, or that you provide for resale.

## ***Improvements to Deployment Monitoring***

Get more information about the cancellation, success, or failure of a deployment when you're using the Force.com Migration Tool.

## ***Changed Relationship Name for Notes and Attachments Related List***

The relationship name for the Notes and Attachments related list has changed.

## ***Canvas Apps in the Publisher and the Chatter Feed—Pilot***

In addition to listing your app on the Chatter tab, you can now expose canvas apps as publisher actions and as Chatter feed items.

## ***Canvas Apps in the Salesforce1 App—Pilot***

Now you can make Force.com Canvas apps accessible from Salesforce1.

## ***Flexible API Limits—Pilot***

We're working on making our Force.com Platform limits more robust and intelligent to support spikes in API requests. If this feature is enabled and your organization exceeds its API request limits, requests will be processed if our service has capacity to handle them.

## ***Deleting Components in a Managed Package—Pilot***

ISVs can delete custom fields and tabs in a previously released managed package.

## ***Sandbox***

Use sandboxes to develop, test, and simulate deployment of your customization.

## ***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 Winter '14 are focused on improving the experience of developing HTML5 apps, with some additional development tools 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***

Apex code is the first multitenant, on-demand programming language for developers interested in building the next generation of business applications.

## ***API***

Use the API to create apps that integrate Salesforce with other services.

**ISVforce**

Winter '14 includes several features that make it easier for partners to develop and distribute applications.

## Improvements to Deployment Monitoring

Get more information about the cancellation, success, or failure of a deployment when you're using the Force.com Migration Tool.

Available in: **Enterprise, Performance, Unlimited** and **Database.com** Editions

We improved the status messages listed on the **Monitor Deployments**. The values are:

- Pending—The deployment has not started. It is waiting in a queue.
- In Progress—The deployment process started, but has not finished. See the `Components` and `Tests` counts on the page to track the deployment progress.
- Cancel Requested—The deployment is being rolled back, but is not yet fully canceled.
- Succeeded—All components deployed successfully, and all tests ran successfully.
- Succeeded (partially)—A subset of changes were committed to the organization, but some files were missing, some components had errors, or some tests failed. You can only receive this status with the deployment option `RollBackOnError = false`.
- Canceled—The deployment has been successfully canceled. No changes were committed to the organization.
- Failed—No changes were committed to the organization because files were missing, components had errors, or tests failed.

On the **Monitor Deployments** page, the `Start Time` now shows the date and time when the deployment starts (In Progress), not the time the deployment is waiting in a queue (Pending).

Also, the button to cancel a deployment has changed from “Abort” to “Cancel” to reflect the status messages more closely.

In addition, get real time error message details while a deployment is in-progress using the Metadata API and the Force.com Migration Tool. For more information, see the release notes for the [Metadata API](#) on page 330. With this information, you can decide to cancel a deployment in-progress, fix an issue and re-start the deployment

## Changed Relationship Name for Notes and Attachments Related List

The relationship name for the Notes and Attachments related list has changed.

`CombinedAttachments` now provides data for the Notes and Attachments related list. Until now, `NotesAndAttachments` was the relationship name used to provide data for this related list. For example, when creating a Visualforce page, this sample generates the Notes and Attachments related list on an account:

```
<apex:relatedList subject="{!account}"
  list="CombinedAttachments" />
```



**Note:**

- Because the Case object doesn't support notes, its relationship name for attachments was called `Attachments`. It is now also updated to `CombinedAttachments`.
- If you describe a standard or custom object, the `NotesAndAttachments` relationship still shows up, although you should use the `CombinedAttachments` relationship name to get related notes and attachments.



# Canvas Apps in the Publisher and the Chatter Feed—Pilot

In addition to listing your app on the Chatter tab, you can now expose canvas apps as publisher actions and as Chatter feed items.

Available in: **Enterprise, Performance, Unlimited, Professional (with Force.com Canvas enabled), and Developer** Editions



**Note:** Support for Force.com Canvas apps in the publisher and in the Chatter feed is currently available through a pilot program and is available in all new Development Edition organizations. For information on enabling it for your organization, contact salesforce.com.

This means you can extend the standard publisher and feed to include content from your Web applications. Now you can give users the ability to quickly take action through the native publisher, but that action happens in your application—all 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 actions of a canvas app. These actions can then integrate with the Chatter 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 shows the Salesforce publisher interface. At the top, there are buttons for 'Post', 'Link', 'Time App' (highlighted with a red box), and 'More'. Below these buttons, the text 'Logging my hours for 7/30' is displayed. The main content area is titled 'Log your Hours' and contains a form with the following fields: 'Date Worked' (with a clock icon) set to '7/30/2013', 'Hours Worked' set to '8', and a 'Comments' section with the text 'Working on the new project'. At the bottom of the form, there is a 'To My Followers' dropdown menu and a green 'Share' button.

Developers can use canvas apps in the publisher to:

- Add content from a Web application into the Chatter publisher.
- Create a custom action that exposes a canvas app.
- Integrate your canvas app directly into the publisher life cycle: post from your canvas app into the Chatter feed, use the Share button functionality, and designate where to post your message.

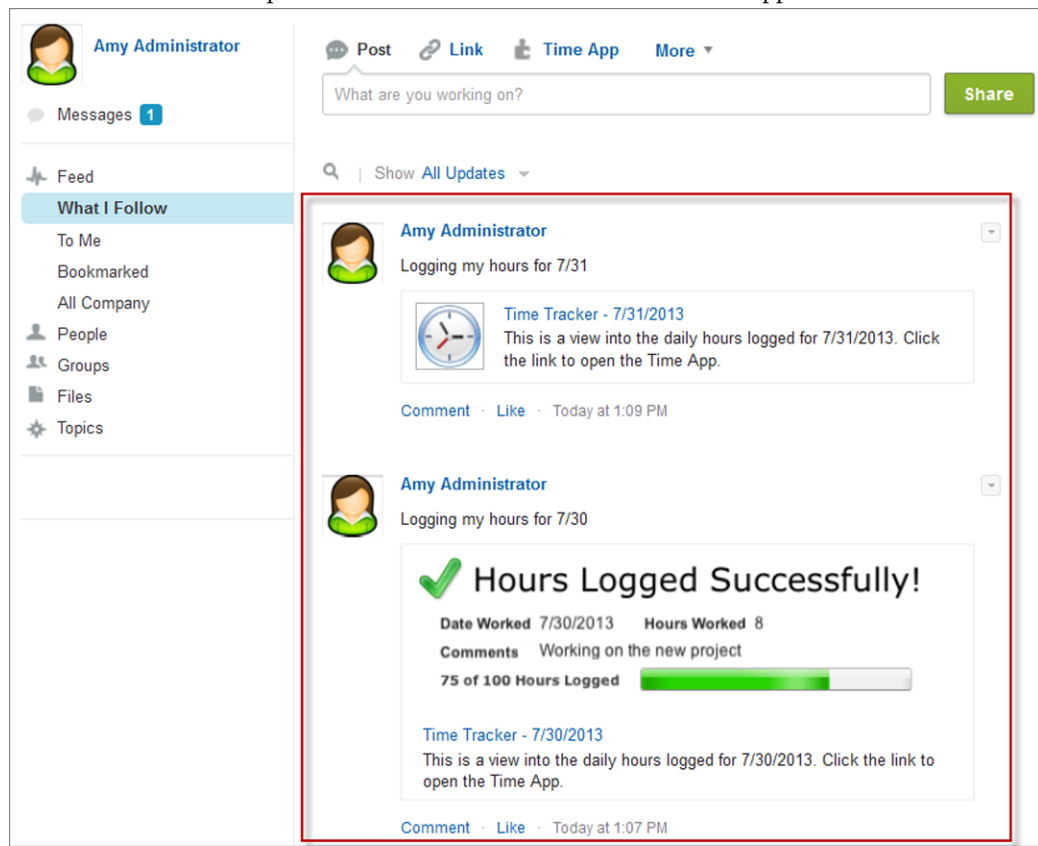
For example, you might have a canvas app that your users use to log their hours worked. You can create a publisher action that allows a user to open that canvas app in the publisher so they can quickly submit a time record, all right from within the publisher.

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.

## Canvas Apps in the Chatter 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.

When you create a canvas app Chatter feed item, it contains a thumbnail image, a link title, and a description. When the user clicks on the link or the description, the canvas app opens up in the feed. If the user clicks the link again, the content is collapsed, giving users a seamless experience for working in their feed. This graphic shows an example of canvas apps in the feed where the first feed item is collapsed and the second feed item shows the full app.



Developers can use canvas apps in the feed to:

- Post to the Chatter feed from a canvas app in the publisher or through the Chatter API.
- Display a canvas app inside a Chatter feed item.

For example, you might have a canvas app that allows a user to log their hours worked. You can now programmatically create a feed item that displays a canvas app which shows the user their currently logged hours.

In addition, the feed item could display actions depending on the current user. So 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 in the Salesforce1 App—Pilot

Now you can make Force.com Canvas apps accessible from Salesforce1.

Available in: **Enterprise, Performance, Unlimited, Professional (with Force.com Canvas enabled), and Developer Editions**



**Note:** Support for Force.com Canvas apps in Salesforce1 is currently available through a pilot program and is available in all new Developer Edition organizations. For information on enabling it for your organization, contact salesforce.com.

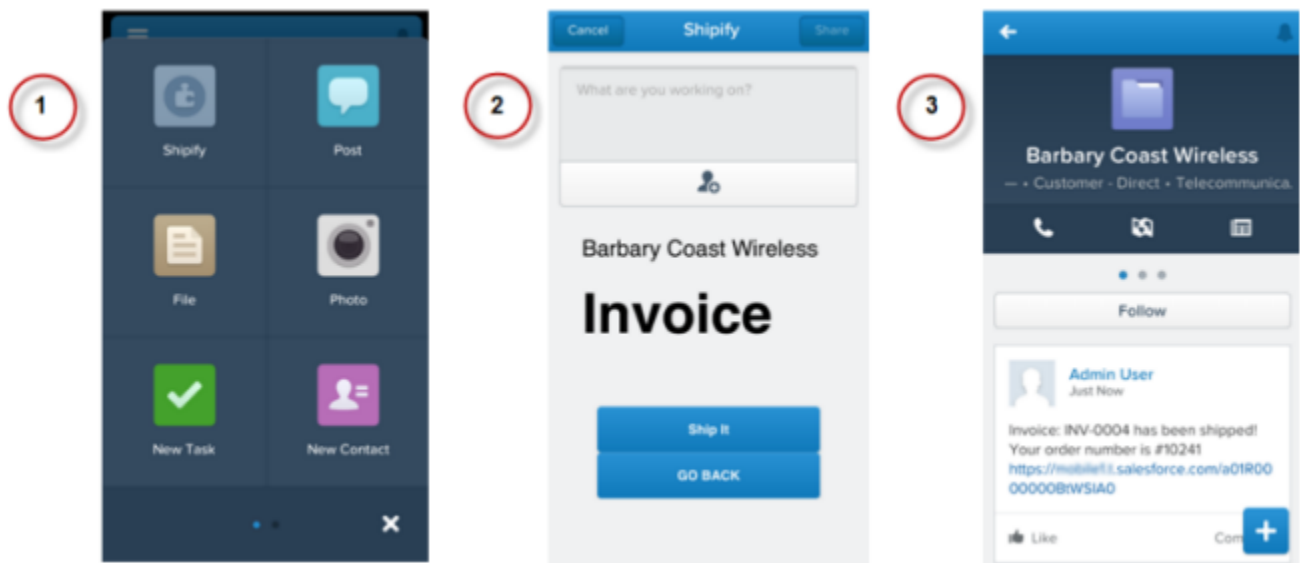
Force.com Canvas enables you to expose your canvas apps in Salesforce1. The Salesforce1 app is Salesforce on the go. This enterprise-class mobile app gives you real-time access to the same information that you see in the office, but it's organized for getting work done when you're away from your desk. Just like in the full Salesforce site, users can access publisher and Chatter feed items, including Force.com Canvas apps.

Developers can:

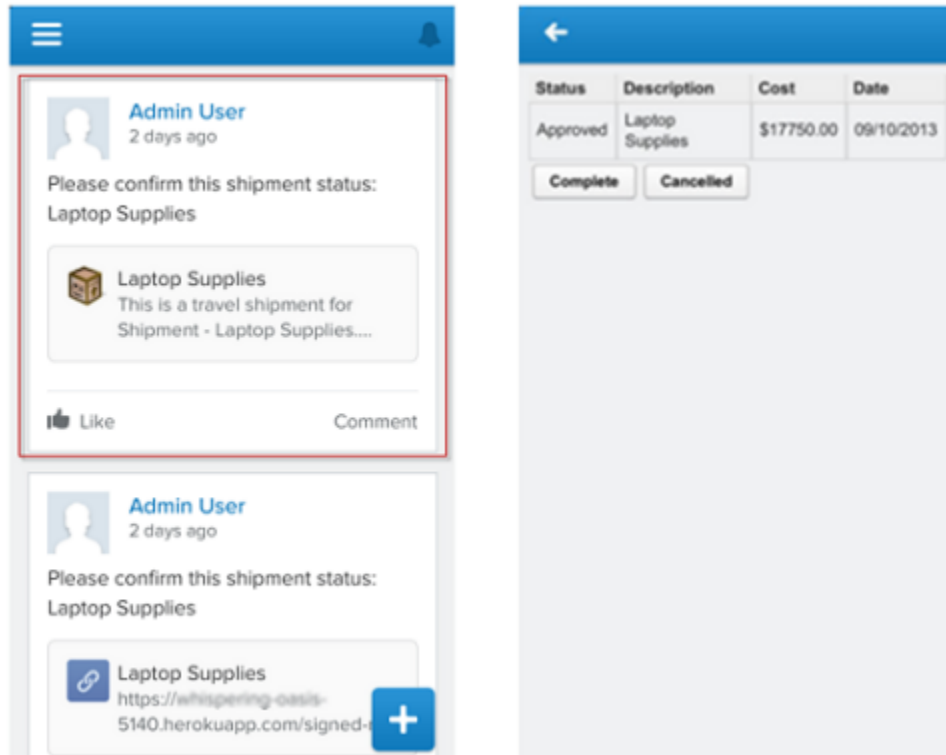
- Expose a canvas app in Salesforce1 as a publisher action. An icon indicates a canvas app. You can use either the default puzzle icon or upload a custom icon for the related publisher action.
- Post to the feed from a canvas app in Salesforce1 or through the Chatter API.
- Display a canvas app inside a feed item from within Salesforce1. An icon indicates a canvas app. You can use either the default puzzle icon or provide a thumbnail URL in the feed item to display a custom icon.

In the following example, you can see how a canvas custom action is used with the publisher within Salesforce1 to help warehouse employees process shipments using a canvas app named Shipify.

1. Users can tap the Shipify icon in the publisher to access it.
2. After selecting an invoice, users can access a screen from which they can ship items for the invoice.
3. Once items are shipped, the application sets the invoice status to Closed and creates a feed item for the related account to indicate that the items have shipped.



In the following images, you can see a canvas feed item that was created after a user processed an order. To confirm shipment, another user can tap the canvas icon to open up the canvas app right within the mobile device.



Users can still access your canvas app from within the full Salesforce site on a desktop machine. The additional functionality for mobile devices that Salesforce1 offers doesn't impact or limit existing functionality.

## Flexible API Limits—Pilot

We're working on making our Force.com Platform limits more robust and intelligent to support spikes in API requests. If this feature is enabled and your organization exceeds its API request limits, requests will be processed if our service has capacity to handle them.



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

Flexible limits allow your organization to exceed its API request limit up to 50 percent above your normal limits within the limit timeframe (typically 24 hours). For example, if your daily limit for API requests is 100,000, it's extended to 150,000. The following day, if your organization activity spikes again, the limit will be extended to 150,000 requests again.

If our service no longer has capacity to handle the extra API requests, the flexible limits are retracted and normal limits apply.

### Which Limits are Covered?

Flexible limits apply to the number of API requests per 24-hour period for these APIs:

- SOAP API
- REST API
- Bulk API (batch limit: batches per rolling 24-hour period)
- Streaming API (number of events per rolling 24-hour period)



**Note:** Apex callouts to the SOAP API and REST API respect the flexible limits.

## How Can I Tell When Limits are Exceeded?

You can check your API usage in Salesforce. From **Setup**:

- Click **System Overview** to see API requests in the last 24 hours.
- Click **API Usage Notifications** to set up an email notification whenever your organization exceeds a specified limit for the number of API requests made in a specified span of hours.
- Click **Jobs > Bulk Data Load Jobs** to see the number of Bulk API batches processed in the last 24 hours.
- Click **Company Profile > Company Information** to see Streaming API events in the last 24 hours.

Some additional features have been added in this release to help you proactively manage limits in your code:

- [LimitInfoHeader](#) for SOAP API—Use this header to monitor your API limits as you make SOAP API requests.
- [Limit Info Header](#) for REST API—Use this header to monitor your API limits as you make REST API requests.
- [Limits Resource—Pilot](#)—Use this REST resource to check your current usage versus API limits.

## Deleting Components in a Managed Package—Pilot

ISVs can delete custom fields and tabs in a previously released managed package.

Available in: **Developer** Edition



**Note:** This feature is currently available through a pilot program. For information on enabling it for your organization, please contact salesforce.com.

The deletion of managed custom fields and tabs was not supported previously, to avoid the risk of data loss or integration failures in subscriber organizations. However, for complex packages, the number of custom fields and tabs can grow very large over multiple release cycles. The ability to delete custom fields and tabs can be very useful in such cases. It provides ISVs greater flexibility in maintaining and upgrading their apps.

Once you delete a custom field or tab in a managed package, you can't restore it or create another custom field or tab with the same name. However, 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.



**Note:** It's your responsibility to educate your customers about the potential impact from any components you delete. You should list all custom fields or tabs you've deleted and notify subscribers of any actions they need to take, in the Release Notes for your upgraded package.

Deleting a managed custom field in a package under development will:

- Permanently delete all the data that currently exists in the field
- Permanently delete all tracked history data associated with the field
- Permanently delete any filters that use the custom field
- Change the result of assignment or escalation rules that rely on this field
- Prevent the creation of another managed custom field with the same name

Deleting a managed custom tab in a package under development will:

- Change the result of assignment or escalation rules that rely on this tab
- Prevent the creation of another managed custom tab with the same name

Deleting a managed custom field in a subscriber organization will:

- Delete all dependent information for any dependent or controlling field
- Change the result of assignment or escalation rules that rely on this field

To preserve a record of data for future reference, subscribers can run a data export before deleting custom fields. From Setup, click **Data Management > Data Export**.

You can delete custom fields and tabs from a managed package, both declaratively, from the user interface, and programmatically, using the Metadata API. In the latter case, specify the custom fields or tabs 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 custom fields or tabs that aren't managed. For more information, see the [Metadata API Developer's Guide](#).

## Sandbox

Use sandboxes to develop, test, and simulate deployment of your customization.

***“Configuration Only” Sandboxes Renamed to “Developer Pro”***

***Sandbox Sizes Increase***

***Hyphen Now Required in Sandbox Subdomain Name***

Salesforce is changing the way we address Force.com Sites domain names.

## “Configuration Only” Sandboxes Renamed to “Developer Pro”

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

“Configuration Only” sandboxes are now called “Developer Pro” and the storage size has been increased. For more information, see [Sandbox Sizes Increase](#) on page 256.

## Sandbox Sizes Increase

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Database.com** Editions

Salesforce has increased the storage limits for Developer and Developer Pro (formerly named “Configuration Only”) sandboxes.

- Developer sandboxes increased from 10 MB to a 200 MB storage limit.
- Developer Pro sandboxes increased from a 500 MB to a 1 GB storage limit.
- Full sandboxes continue to have the same storage limit as your production organization.

## Hyphen Now Required in Sandbox Subdomain Name

Salesforce is changing the way we address Force.com Sites domain names.

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

The system now requires a single hyphen to separate sandbox names from subdomain names, instead of a period. The format is `[sandboxName]-[subdomain].[instance].force.com`. For example `https://mysandbox-mycompany.cs1.force.com`.

This applies only to Force.com Sites. It doesn't affect My Domains or Force.com IDE settings.

No action is required. All existing deployments will get updated automatically.

## Change Sets and Deployment

Administrators and developers now have new ways to use change sets and external tools for deployments.

If you're using the Force.com Migration Tool or Force.com IDE, also see the changes in the [Metadata API](#) on page 330.

[Approval Post Templates Available in Change Sets](#)

[Compact Layouts Available in Change Sets](#)

[Flexible Pages Available in Change Sets](#)

[User Permissions in Profile Settings in Change Sets](#)

[Change Sets Queue and Processing Improvements](#)

## Approval Post Templates Available in Change Sets

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

Post templates for Approvals in Chatter are now available in change sets.

Now you can easily use change sets to deploy approval processes that reference post templates. You no longer need to remove references to post templates from the approval process before uploading it, or recreate the post templates in the destination organization before deploying the approval process.

You do, however, need to resave any post templates that contain custom fields before adding them to the change set. From Setup, click **Create > Workflow & Approvals > Post Templates**. For each post template, click **Edit** and then **Save**.

## Compact Layouts Available in Change Sets

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

Compact layouts—the new mobile-optimized record layouts for Salesforce1—are available in change sets.

## Flexible Pages Available in Change Sets

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

Flexible Pages—the new mobile app home pages for Salesforce1—are available in change sets.

## User Permissions in Profile Settings in Change Sets

Available in **Enterprise, Performance, Unlimited**, and **Database.com** Editions

User permissions (such as “Manage Users”) are now included in profile settings for change sets.

## Change Sets Queue and Processing Improvements

Available in: **Enterprise, Performance, Unlimited** and **Database.com** Editions

Change set deployments are now queued for processing to avoid collisions between multiple users trying to deploy changes at the same time.

Also, Salesforce no longer prevents navigation away from a change set detail page while the change set is deployed or validated. During a deployment or validation, you can leave the change set detail page, and come back later to see if it has been processed.

## 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

### **Code Search**

#### **Save Order Debug View**

The Developer Console includes a new Save Order debug view that provides a visual timeline of DML actions.

#### **SOSL Search Support and Query History**

#### **Static Resource Editors**

The Developer Console Source Code Editor now supports JavaScript, XML, CSS, and plain text.

#### **Override Log Levels for a Class or Trigger**

The Developer Console now allows you to define log levels for a specific class or trigger.

## Code Search

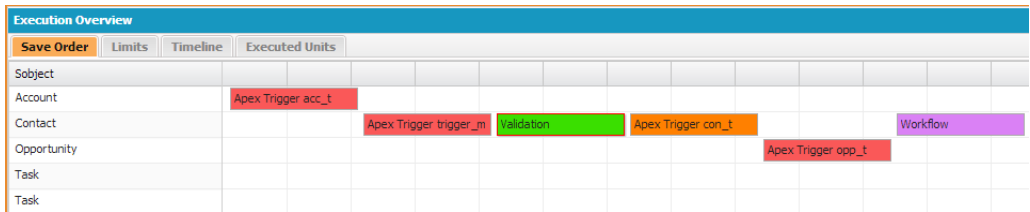
New in this release, the Developer Console includes integrated code search for all file types. Click **File > Search in Files** or press CTRL+SHIFT+H.

## Save Order Debug View

The Developer Console includes a new Save Order debug view that provides a visual timeline of DML actions.

The Save Order tab displays a color-coded timeline of DML actions. For each DML action taken, save order elements are shown as boxcars in the timeline.





For details on a specific element, click the associated boxcar in the timeline. The popup window displays additional information, including a link to navigate directly to the relevant place in the log.

To view the ID(s) of affected records, click the name of the sObject in the left pane.

## SOSL Search Support and Query History

The Query Editor in the Developer Console now supports SOSL search. In SOSL search results with multiple objects, each object is displayed on a separate tab.

The Query Editor also includes a new Query History panel that lists the last 10 queries for quick reuse.

## Static Resource Editors

The Developer Console Source Code Editor now supports JavaScript, XML, CSS, and plain text.

To create a new JavaScript, XML, CSS or text file, click **File > New > Static Resource**. In the New Static Resource popup window, enter a name for the file, choose the correct **MIME Type**, and click **Submit**.

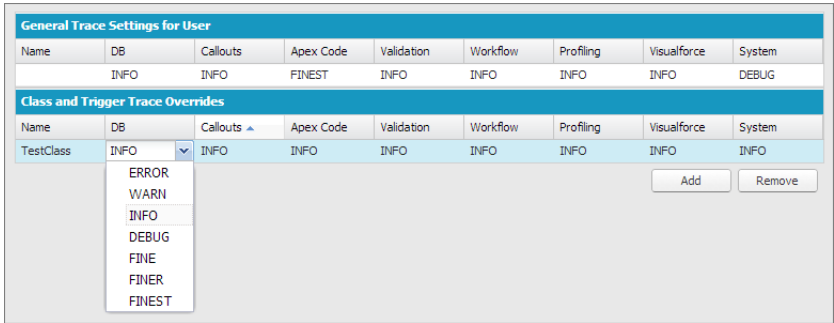
## Override Log Levels for a Class or Trigger

The Developer Console now allows you to define log levels for a specific class or trigger.

Logging levels determine how much request information is saved in a debug log. Parsing a large log can take a long time. To reduce the size of a log, adjust the logging level. Use verbose logging for code you’re reviewing. Use terse logging for code you’re not interested in.

To specify logging levels for future requests, click **Debug > Change Log Levels**. This page allows you to define general settings and override the general log levels for a specific class or trigger.

To define log levels for a class or trigger, click **Add** and choose the class or trigger from the list. Click an entry to choose from the list of available log levels.

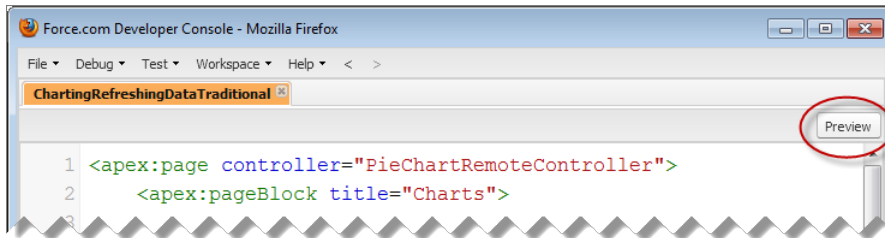


# Improved Visualforce Development in the Developer Console

Visualforce development in the Developer Console has been improved in several ways to make working in the Developer Console as easy as using the Visualforce Development Mode footer.

## Preview a Visualforce Page

Click **Preview** in a Visualforce tab to open and use the page in a separate window.



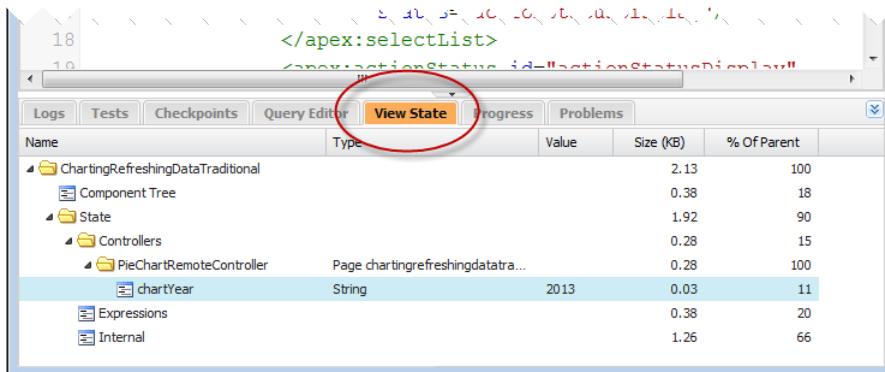
A Visualforce page in a preview window reloads automatically when you save changes to it or the page's controller code.

## Inspect a Visualforce Page's View State—Beta



**Note:** This release contains a beta version of the View State tab in the Developer Console that is production quality but has known limitations.

The **View State** tab in the Developer Console allows you to examine the view state for a Visualforce page request.



The View State tab in the Developer Console works the same as the View State tab in the Visualforce Development Mode footer, except that double-clicking a folder node doesn't open a usage pie chart window. See "About the View State Tab" in the *Visualforce Developer's Guide* for details.

To enable the View State tab:

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 Personal Information** > **Personal Information**.
  - If you clicked **My Settings**, select **Personal** > **Advanced User Details**.
3. Click **Edit**.

4. Select the `Development Mode` checkbox if it isn't selected.
5. Select the `Show View State in Development Mode` checkbox.
6. Click **Save**.



**Note:** Since the view state is linked to form data, the View State tab only appears if your page contains an `<apex:form>` tag. In addition, the View State tab displays only on pages using custom controllers or controller extensions.

## Visualforce

Visualforce enhancements in Winter '14 are focused on improving the experience of developing HTML5 apps, with some additional development tools improvements and other changes.

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

For further information on features affected by these enhancements, refer to the *Visualforce Developer's Guide*.

### HTML5 Development with Visualforce

Visualforce features a number of improvements in Winter '14 that are intended to make HTML5 development easier.

#### Additional Visualforce Improvements

Visualforce features a number of other changes in Winter '14, ranging from enhanced or changed administrative user interface elements, to new and enhanced components, to pilot features and bug fixes.

## HTML5 Development with Visualforce

Visualforce features a number of improvements in Winter '14 that are intended to make HTML5 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 together to create significantly new and better forms for user input.

### New `<apex:input>` Component

`<apex:input>` is a new, HTML5-friendly, general purpose input component that adapts to the data expected by a form field. It uses the HTML `type` attribute, particularly values new in HTML5, to allow client browsers to display type-appropriate user input widgets, such as a date picker or range slider, or use a type-specific keyboard on touch devices, or to perform client-side formatting or validation, such as with a numeric range or a telephone number.

#### *type Attribute for `<apex:input>` and `<apex:inputField>`*

Use the new `type` attribute with `<apex:input>` and `<apex:inputField>` to display input user interface elements using HTML5 browser features or JavaScript user interface widgets, to supplement or replace the default Salesforce input elements.

### HTML5 `<datalist>` Element for Input Components

The HTML5 `<datalist>` element specifies a list of values to associate with an `<input>` element, which can be used to show a list of completion options filtered by input. Use the new `list` attribute for the `<apex:input>`, `<apex:inputField>`, and `<apex:inputText>` components to generate a `<datalist>` block for the associated input field.

### Additional Components with Support for Pass-Through HTML Attributes

You can add arbitrary attributes to many Visualforce components that will be “passed through” to the rendered HTML. This is useful, for example, when using Visualforce with JavaScript frameworks, such as jQuery Mobile, AngularJS, and Knockout, which use `data-*` or other attributes as hooks to activate framework functions. It can also be used to improve usability with HTML5 features such as placeholder “ghost” text, pattern client-side validation, and `title` help text attributes.

### Accessibility Improvements to Visualforce Components

The accessibility of Visualforce pages has been improved, by improving the semantics and completeness of the HTML generated by a number of Visualforce components.

### Deferred Loading of JavaScript Resources via `<apex:includeScript>`

The `<apex:includeScript>` component has a new attribute, `loadOnReady`, which controls whether a JavaScript resource loaded by the component is loaded immediately (existing behavior), or is delayed until the document model (DOM) for the page is constructed.

### Code Sample for HTML5 Features

Many of the new HTML5 development features in Visualforce are demonstrated in this code sample. It provides examples of using the new `<apex:input>` component, HTML5 pass-through attributes, the `list` attribute for auto-complete using `<datalist>`, and new user interface and accessibility options on the `<apex:selectRadio>` component.

## New `<apex:input>` Component

`<apex:input>` is a new, HTML5-friendly, general purpose input component that adapts to the data expected by a form field. It uses the HTML `type` attribute, particularly values new in HTML5, to allow client browsers to display type-appropriate user input widgets, such as a date picker or range slider, or use a type-specific keyboard on touch devices, or to perform client-side formatting or validation, such as with a numeric range or a telephone number.

An `<apex:input>` component generates an HTML `<input>` tag, and the component’s `type` attribute sets the corresponding `type` attribute of the HTML tag. `type` can be set explicitly in Visualforce markup, or set to “auto” to have the component detect the appropriate type from the controller property or method signature. See [type Attribute for `<apex:input>` and `<apex:inputField>`](#) on page 263 for extended details of the `type` attribute.

Auto-detection of `type` behaves similarly to how `<apex:inputField>` adapts to the data type of sObject fields. However, unlike `<apex:inputField>`, `<apex:input>` can’t be used with compound fields, such as Account Billing Address, which combine multiple separate data elements.

Use this component to get user input for a controller property or method that does *not* correspond to a field on a Salesforce object. Since it doesn’t correspond to a Salesforce field, or any other data on an object, custom code is required to use the value the user enters.

Here’s a simple form that collects basic contact data.

```
<apex:form>
  <apex:pageBlock title="{!acct.Name} Contacts">

    <apex:pageBlockSection id="contactDetails" title="New Contact">

      <apex:input label="First Name" value="{!cFirstName}"/>
      <apex:input label="Last Name" value="{!cLastName}"/>
      <apex:input label="Mobile Number" value="{!cMobile}" type="tel"/>
      <apex:input label="Email" value="{!cEmail}" type="email"
        html-pattern="^[a-zA-Z0-9._-]+@example.com$"/>

    </apex:pageBlockSection>
  </apex:pageBlock>
</apex:form>
```

```
</apex:pageBlock>  
</apex:form>
```

See [Code Sample for HTML5 Features](#) on page 267 for an extended code sample that illustrates additional ways to use the `<apex:input>` component.

The specific user interface displayed for different input types is determined by the browser, not Visualforce. All modern browsers support the `type` attribute for the `<input>` tag, but not all HTML5 types are supported in all browsers. Non-supporting browsers will default to a text field for unknown `type` attributes. Test carefully in your target browsers to verify intended behavior.

`<apex:input>` is supported in API version 29.0 and later, and requires that the `<apex:page>` `docType` attribute be set to “html-5.0”.

## type Attribute for `<apex:input>` and `<apex:inputField>`

Use the new `type` attribute with `<apex:input>` and `<apex:inputField>` to display input user interface elements using HTML5 browser features or JavaScript user interface widgets, to supplement or replace the default Salesforce input elements.

The value of the `type` attribute is passed through to the HTML `<input>` tag, allowing you to enable new HTML5 client-side behaviors such as auto-formatting phone numbers, a “clear” button to reset the field, or type-specific user interface widgets, such as date pickers, or type-specific keyboards on touch-based devices. This can be especially valuable for mobile applications, since the default Visualforce input elements are optimized for mouse and keyboard input, rather than a touch screen.

These behaviors combine well and become even more sophisticated when used with pass-through attributes to enable HTML5 features such as client-side validation. Client-side validation doesn’t replace the standard server-side validation performed by Visualforce, but it can provide immediate feedback for invalid input, instead of requiring a round trip to the server. See [Code Sample for HTML5 Features](#) on page 267 for an extended code sample that shows how to combine the `type` attribute with pass-through attributes to achieve different behaviors.

Valid values for the `type` attribute are:

- auto
- date
- datetime
- datetime-local
- month
- week
- time
- email
- number
- range
- search
- tel
- text
- url

The `type` specified must be compatible with the data type of the sObject field or controller method or property return type, or it will generate a compiler error when the page is saved. If you don’t set a `type` for an `<apex:inputField>` component, it defaults to its standard smart behavior. If you don’t set a `type` for an `<apex:input>` component, it defaults to “text”.

When used with `<apex:inputField>`, date and time types by default still show the standard Salesforce date/time picker widget. To suppress the date/time picker, in favor of a native browser or JavaScript picker, also set `showDatePicker="false"` on the `<apex:inputField>`.

When used with `<apex:inputField>`, picklist fields always show the standard Salesforce picklist widget. To override this standard user interface element, use an `<apex:input>` component on the form, and handle the submitted data manually. See [Code Sample for HTML5 Features](#) on page 267 for an extended code sample that shows a way to use picklist values with `<apex:input>`.

The specific user interface displayed for different input types is determined by the browser, not Visualforce. All modern browsers support the `type` attribute for the `<input>` tag, but not all HTML5 types are supported in all browsers. Non-supporting browsers will default to a text field for unknown `type` attributes. Test carefully in your target browsers to verify intended behavior.

The `type` attribute for the `<apex:input>` and `<apex:inputField>` components, and the `showDatePicker="false"` attribute for `<apex:inputField>`, are supported in API version 29.0 and later, and requires that the `<apex:page>` `docType` attribute be set to “html-5.0”.

## HTML5 `<datalist>` Element for Input Components

The HTML5 `<datalist>` element specifies a list of values to associate with an `<input>` element, which can be used to show a list of completion options filtered by input. Use the new `list` attribute for the `<apex:input>`, `<apex:inputField>`, and `<apex:inputText>` components to generate a `<datalist>` block for the associated input field.

The `list` attribute is specified as either a comma-delimited static string or a Visualforce expression. An expression can resolve to either a comma-delimited string, or a list of objects. List elements can be any data type, as long as that type can be coerced to a string, either as an Apex language feature or via a `toString()` method.

For example:

```
<apex:inputText value="{!preferredBrowser}" list="{!modernBrowsers}"
  html-inputText="Enter your preferred browser" html-autocomplete="on" />
```

Note the use of the HTML pass-through attribute `autocomplete`, which is required for many browsers to use the `<datalist>` for auto-completion of form input.

See [Code Sample for HTML5 Features](#) on page 267 for an extended code sample that illustrates several ways to use the `list` attribute.

The specific user interface behavior for `<datalist>` is determined by the browser, not Visualforce. The `<datalist>` tag is supported in most modern browsers. Test carefully in your target browsers to verify intended behavior.

The `list` attribute for `<apex:inputField>` and `<apex:inputText>` is supported in API version 29.0 and later, and requires that the `<apex:page>` `docType` attribute be set to “html-5.0”.

## Additional Components with Support for Pass-Through HTML Attributes

You can add arbitrary attributes to many Visualforce components that will be “passed through” to the rendered HTML. This is useful, for example, when using Visualforce with JavaScript frameworks, such as jQuery Mobile, AngularJS, and Knockout, which use `data-*` or other attributes as hooks to activate framework functions. It can also be used to improve usability with HTML5 features such as placeholder “ghost” text, pattern client-side validation, and title help text attributes.

The range of components that support this feature has expanded considerably in Winter ’14. The following components support pass-through attributes:

- `<apex:column>`
- `<apex:commandButton>`
- `<apex:commandLink>`
- `<apex:component>`

- `<apex:dataTable>`
- `<apex:form>`
- `<apex:iframe>`
- `<apex:image>`
- `<apex:includeScript>`
- `<apex:input>`
- `<apex:inputCheckbox>`
- `<apex:inputField>`
- `<apex:inputHidden>`
- `<apex:inputSecret>`
- `<apex:inputText>`
- `<apex:inputTextArea>`
- `<apex:messages>`
- `<apex:outputField>`
- `<apex:outputLabel>`
- `<apex:outputLink>`
- `<apex:outputPanel>`
- `<apex:outputText>`
- `<apex:page>`
- `<apex:pageBlock>`
- `<apex:pageBlockButtons>`
- `<apex:pageBlockSection>`
- `<apex:pageBlockSectionItem>`
- `<apex:pageBlockTable>`
- `<apex:panelBar>`
- `<apex:panelBarItem>`
- `<apex:panelGrid>`
- `<apex:sectionHeader>`
- `<apex:selectCheckboxes>`
- `<apex:selectList>`
- `<apex:selectOption>`
- `<apex:selectOptions>`
- `<apex:selectRadio>`
- `<apex:stylesheet>`
- `<apex:tab>`
- `<apex:tabPanel>`

See [Code Sample for HTML5 Features](#) on page 267 for an extended code sample that illustrates the use of pass-through attributes. For additional considerations and examples of using HTML attributes, including specifics of the generated HTML, see Setting Custom HTML Attributes on Visualforce Components in the *Visualforce Developer's Guide*.

## Accessibility Improvements to Visualforce Components

The accessibility of Visualforce pages has been improved, by improving the semantics and completeness of the HTML generated by a number of Visualforce components.

The following components are affected.

- `<apex:inputField>`—when used within an `<apex:pageBlockSection>`, the table that displays the input element and its label now has appropriate header cells, improving the semantic relationship between field and label.
- `<apex:inputFile>`—`<label>` tag added to increase accessibility and usability.
- `<apex:messages>`—`role="alert"` attribute added so that screen reader users are alerted when there's an important message displayed using this component.
- `<apex:outputField>`—when used within an `<apex:pageBlockSection>`, the table that displays the field's value and its label now has appropriate header cells, improving the semantic relationship between field and label.
- `<apex:pageMessages>`—`role="alert"` attribute added so that screen reader users are alerted when there's an important message displayed using this component.
- `<apex:selectCheckboxes>`—see [<fieldset> and <legend> for <apex:selectCheckboxes> and <apex:selectRadio>](#).
- `<apex:selectRadio>`—see [<fieldset> and <legend> for <apex:selectCheckboxes> and <apex:selectRadio>](#).

Existing Visualforce pages that use these components will generate the new HTML automatically, improving their accessibility without new developer effort.

With exceptions noted below, these 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.

#### **`<fieldset>` and `<legend>` for `<apex:selectCheckboxes>` and `<apex:selectRadio>`**

The accessibility of the HTML generated by the `<apex:selectCheckboxes>` and `<apex:selectRadio>` components is improved, by wrapping the resulting HTML within a `<fieldset>` tag.

In addition, three new attributes are available on `<apex:selectCheckboxes>` and `<apex:selectRadio>` that allow you to add a `<legend>` to the `<fieldset>`, and to control the visibility of the legend text and the border around the grouped input elements.

Attribute Name	Attribute Type	Description
<code>borderVisible</code>	Boolean	Controls whether the border around the <code>&lt;fieldset&gt;</code> that wraps the checkboxes or radio buttons group is visible or hidden. The default value is <code>false</code> , there is no border.
<code>legendInvisible</code>	Boolean	Controls whether the legend text is displayed or hidden. The default value is <code>false</code> , the legend text is displayed for all users.  When set to <code>true</code> , the <code>&lt;legend&gt;</code> has a styling attribute added, <code>class="assistiveText"</code> , which preserves the legend text in the DOM, but moves the display off-screen. This makes the text accessible to screen readers, without being displayed visually.
<code>legendText</code>	String	The text to be displayed as a legend for the checkboxes or radio buttons group. When the border is visible, the legend is inlaid along the top-left edge of the border. When <code>legendText</code> is an empty string, or not set, no legend is added.

These changes to the `<apex:selectCheckboxes>` and `<apex:selectRadio>` components are versioned, and you must update your pages to API version 29.0 or later to use them.



## Deferred Loading of JavaScript Resources via <apex:includeScript>

The <apex:includeScript> component has a new attribute, `loadOnReady`, which controls whether a JavaScript resource loaded by the component is loaded immediately (existing behavior), or is delayed until the document model (DOM) for the page is constructed.

Set the `loadOnReady` attribute to `true` to cause JavaScript referenced by the component to wait to be loaded until the page is “ready.” For example, <apex:includeScript loadOnReady="true" value={\$Resource.waitUntilReadyScript}"/>. Scripts loaded this way will be added to the DOM after the `onload` event is triggered, instead of immediately. This occurs after the DOM is constructed, but can be before child frames or external resources (such as images) have finished loading.

Setting `loadOnReady="true"` can improve the performance of the initial display of the page, but should only be used for scripts that aren’t needed until after the page is fully loaded.

The default value for `loadOnReady` is `false`.

## Code Sample for HTML5 Features

Many of the new HTML5 development features in Visualforce are demonstrated in this code sample. It provides examples of using the new <apex:input> component, HTML5 pass-through attributes, the `list` attribute for auto-complete using <datalist>, and new user interface and accessibility options on the <apex:selectRadio> component.

This Visualforce page displays a form for adding details to a contact.

```
<apex:page standardController="Contact" extensions="ContactExtras" docType="html-5.0">

<!--
  This page expects to be referenced along with the ID of an existing contact record
  For example: https://<salesforce_instance>/apex/ContactForm?id=003D000000QB6wh
-->

<apex:form id="theForm">
  <apex:pageBlock title="Contact: {! Contact.Name }" >

    <apex:pageBlockSection id="contactDetails" title="Contact Details" columns="1">

      <apex:inputField value="{! Contact.MobilePhone }" type="tel"
        html-placeholder="999-999-9999"
        html-autofocus="true"
      />

      <apex:inputField value="{! Contact.Email }" type="email"
        html-placeholder="you@example.com"
        html-pattern="^[a-zA-Z0-9._-]+@example.com$"
        html-title="Please enter an example.com email address"
      />

      <apex:inputField value="{! Contact.Birthdate }" type="date"
        showDatePicker="false"
      />

      <apex:inputField value="{! Contact.Pick_A_Number__c }" type="auto"
        html-min="0" html-max="100" html-step="5"
        html-title="Must be between 0 and 100"
      />

      <apex:inputField value="{! Contact.Favorite_Color__c }" type="text"
        list="{! colorsList }"
      />

    </apex:pageBlockSection>

  </apex:pageBlock>
</apex:form>
```

```

        <apex:inputField value="{! Contact.Favorite_Shape__c }"
            list="circle,square,rectangle,triangle,hexagon,cube,sphere"
        />

        <apex:selectRadio value="{! Contact.LeadSource}" layout="pageDirection"
            legendText="Select a source for this contact" borderVisible="true">
            <apex:selectOptions value="{! sourcesList }"/>
        </apex:selectRadio>

    </apex:pageBlockSection>

    <apex:pageBlockSection id="contactExtras" title="Contact Extras" columns="1">

        <apex:input label="Car Color" value="{! fText }" list="{! colorsList }"/>

        <apex:input label="Steps Today" value="{! fNumber }" type="number"
            html-min="0" html-max="50000"
        />

        <apex:input label="Favorite Date in History" value="{! fDate }"
            type="auto"
        />

    </apex:pageBlockSection>

    <apex:pageBlockButtons location="bottom">
        <apex:commandButton id="commandButton" value="Update"
            action="{!quickSave}" reRender="theForm"
        />
    </apex:pageBlockButtons>

</apex:pageBlock>
</apex:form>
</apex:page>

```

The supporting controller extension is deliberately simple. It's intended to support the above markup, rather than to do anything useful itself.

```

public class ContactExtras {

    public ContactExtras(ApexPages.StandardController controller) { }

    // Stub properties, to allow use on the form
    // Real code would do something with them, like save to the record
    public String fText { get; set; }
    public Integer fNumber { get; set; }
    public Date fDate { get; set; }

    // Create a list of colors (strings) for use in a list attribute,
    // for auto-completion via a <datalist>
    // The choices come from a picklist custom field; you can use
    // the list with any field, not just that picklist field
    public List<String> getColorsList() {
        List<String> colors = new List<String>();
        Schema.DescribeFieldResult picklistColors = Contact.Favorite_Color__c.getDescribe();

        for (Schema.PicklistEntry color : picklistColors.getPicklistValues()) {
            colors.add(color.getValue());
        }
        return colors;
    }

    // Again from a picklist field, convert the values into a list that
    // can be used with an <apex:selectRadio> component
    public List<SelectOption> getSourcesList() {
        List<SelectOption> sources = new List<SelectOption>();
        Schema.DescribeFieldResult picklistSources = Contact.LeadSource.getDescribe();
        for (Schema.PicklistEntry source : picklistSources.getPicklistValues()) {

```

```

        sources.add(new SelectOption(source.getValue(), source.getValue()));
    }
    return sources;
}

```

## Additional Visualforce Improvements

Visualforce features a number of other changes in Winter '14, ranging from enhanced or changed administrative user interface elements, to new and enhanced components, to pilot features and bug fixes.

### **Preview Page Button for Visualforce Pages**

Setup list views for Visualforce pages now include a button to open the page directly from the list, and other Visualforce Setup pages allow opening the page from the Detail and Edit views.

### **Available for Touch Checkbox Renamed**

The Available in Touch checkbox on the create Visualforce page has been renamed Available for Salesforce mobile apps. The create Visualforce page is accessible in Setup by clicking **Develop > Pages > New**.

### **New <apex:milestoneTracker> Component**

<apex:milestoneTracker> is a new Visualforce component that displays the milestone tracker on the Case Feed page.

### **registrationClassName Attribute Added to the <chatteranswers:registration> Component**

The registrationClassName attribute has been added to the <chatteranswers:registration> component.

### **chatteranswers:allfeeds forceSecureCustomWebAddress Attribute Deprecated**

The forceSecureCustomWebAddress attribute of the <chatteranswers:allfeeds> Visualforce component is deprecated in Salesforce API version 29.0 and later, and has no effect on the page.

### **Server-Side View State—Pilot**

Server-side view state maintains a Visualforce page's view state on the server, instead of sending it back and forth during form submissions and responses. This can reduce the amount of data being transmitted per request, which can improve performance, especially over connections with limited bandwidth or high latency, such as a mobile wireless connection.

### **SOQL WHERE Clause No Longer Reset In a StandardSetController Initialized with a queryLocator**

In prior releases there was a software defect that could cause a StandardSetController initialized with a queryLocator to lose the WHERE clause when save() was called on the controller.

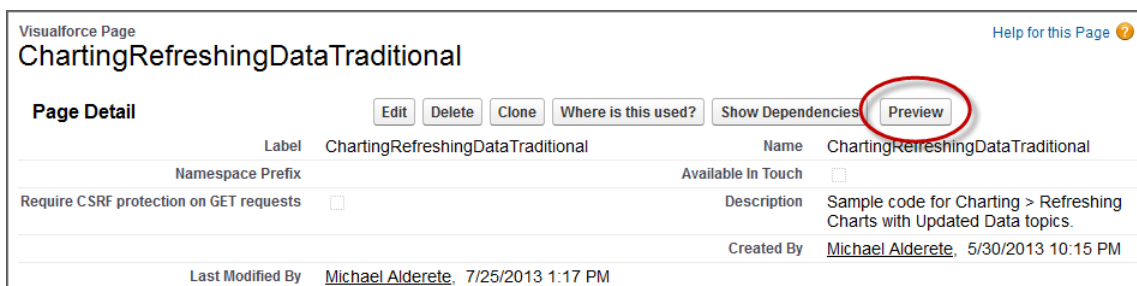
## Preview Page Button for Visualforce Pages

Setup list views for Visualforce pages now include a button to open the page directly from the list, and other Visualforce Setup pages allow opening the page from the Detail and Edit views.



Click the Preview button (📄) to open a Visualforce page in a new window.

Visualforce page detail and edit views have added a Preview button that does the same thing:



Click **Preview** to open the page in a new window.

## Available for Touch Checkbox Renamed

The Available in Touch checkbox on the create Visualforce page has been renamed Available for Salesforce mobile apps. The create Visualforce page is accessible in Setup by clicking **Develop** > **Pages** > **New**.

This checkbox was renamed because it now also supports Visualforce pages in the Salesforce1 apps. Visualforce support in Salesforce Touch is unchanged.

## New <apex:milestoneTracker> Component

<apex:milestoneTracker> is a new Visualforce component that displays the milestone tracker on the Case Feed page.

Entitlements help you determine if your customers are eligible for customer support so you can create cases for them. A customer may be eligible for support based on a particular asset, account, or service contract. Milestones are required steps in your support process. They're metrics that represent service levels to provide to each of your customers. Examples of milestones include First Response and Resolution Times on cases.

The milestone tracker shows the countdown time to an active milestone's Target Date or how long a milestone has been in violation. You can add it to the Case Feed page so that agents can see the time remaining on an active milestone or how overdue the milestone is if its Target Date has passed, along with a list of upcoming milestones and closed milestones.

The `entityId` attribute is required when you use the <apex:milestoneTracker> component in a Visualforce page.

```
<apex:page standardController="Case" showHeader="true">
  <apex:milestoneTracker entityId="{!case.id}" />
</apex:page>
```

For information on the milestone tracker, see [View Milestones on the Case Feed Page with the Milestone Tracker](#).

## registrationClassName Attribute Added to the <chatteranswers:registration> Component

The `registrationClassName` attribute has been added to the `<chatteranswers:registration>` component.

This attribute specifies the name of the Apex class that implements the `ChatterAnswers.AccountCreator` Apex interface. If this attribute isn't used, Chatter Answers registration uses the generated `ChatterAnswersRegistration` or `ChatterAnswers` Apex class.

For information on using the `registrationClassName` attribute, see [Customize the Account Creation Experience for Chatter Answers Portal Users](#).

## chatteranswers:allfeeds forceSecureCustomWebAddress Attribute Deprecated

The `forceSecureCustomWebAddress` attribute of the `<chatteranswers:allfeeds>` Visualforce component is deprecated in Salesforce API version 29.0 and later, and has no effect on the page.

Absolute URLs in the Chatter Answers feed now use a secure custom Web address by default, so setting this attribute isn't necessary. For existing organizations already using this attribute, there will be no change in the behavior of your Visualforce page.

## Server-Side View State—Pilot

Server-side view state maintains a Visualforce page's view state on the server, instead of sending it back and forth during form submissions and responses. This can reduce the amount of data being transmitted per request, which can improve performance, especially over connections with limited bandwidth or high latency, such as a mobile wireless connection.

This feature is available as a limited pilot. Contact [salesforce.com](mailto:salesforce.com) to request inclusion in the pilot program.

## SOQL WHERE Clause No Longer Reset In a StandardSetController Initialized with a queryLocator

In prior releases there was a software defect that could cause a `StandardSetController` initialized with a `queryLocator` to lose the `WHERE` clause when `save()` was called on the controller.

Here's a simple example that would exhibit the problem.

```
public class OpportunityListController {

    public ApexPages.StandardSetController setCon {
        get {
            if(setCon == null) {
                setCon = new ApexPages.StandardSetController(
                    Database.getQueryLocator(
                        [SELECT Name, CloseDate FROM Opportunity WHERE Amount > 0]
                    )
                );
                setCon.setPageSize(10);
            }
            return setCon;
        }
    }
}
```

```

        set;
    }

    public List<Opportunity> getOpportunities() {
        return (List<Opportunity>) setCon.getRecords();
    }

    public PageReference dropWhereClauseOops() {
        setCon.save();
        return null;
    }
}

```

If a Visualforce page called the action method `dropWhereClauseOops()`, the `WHERE` condition would be lost, and the page would show all opportunities, instead of just those with non-zero amounts.

It's a very specific, isolated bug, but if it affected your application code, you might have put some effort into writing a workaround. In Winter '14 this bug has been fixed and, if you like, you can remove any workaround.

## 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: **Enterprise, Performance, Unlimited, Professional (with Force.com Canvas enabled), and Developer** Editions

The version of the Force.com Canvas SDK is 29.0.

For more information, see the Force.com Canvas Developer's Guide.

### **API Enabled User Permission No Longer Required**

A user no longer requires the API enabled permission to run an installed canvas app.

### **SDK Object and Field Changes**

The following changes have been made to the objects and fields in the Force.com Canvas SDK.

### **Force.com Canvas Support for Streaming API**

Force.com Canvas provides an event and methods that enable canvas apps to listen for Streaming API notifications.

## API Enabled User Permission No Longer Required

A user no longer requires the API enabled permission to run an installed canvas app.

Available in: **Enterprise, Performance, Unlimited, Professional (with Force.com Canvas enabled), and Developer** Editions

To access this field, from Setup, navigate to **Manage Users > Profiles** and then click **Edit** next to a profile. The `API Enabled` field is in the Administrative Permissions section.

## SDK Object and Field Changes

The following changes have been made to the objects and fields in the Force.com Canvas SDK.

Available in: **Enterprise, Performance, Unlimited, Professional (with Force.com Canvas enabled), and Developer** Editions

- The `referenceId` field has been added to the Application object.

Field	Description
<code>applicationId</code>	The ID of the canvas app.
<code>authType</code>	The access method of the canvas app. You specify this value when you expose the canvas app by creating a connected app.
<code>canvasUrl</code>	The URL of the canvas app, for example: <code>http://instance.salesforce.com:8080/canvas_app_path/canvas_app.jsp</code> .
<code>developerName</code>	The internal name of the canvas app. You specify this value in the <code>API Name</code> field when you expose the canvas app by creating a connected app.
<code>name</code>	The name of the canvas app.
<code>namespace</code>	The Salesforce namespace prefix associated with the canvas app.
<code>referenceId</code>	The unique ID of the canvas app definition. Used internally.
<code>version</code>	The version of the canvas app. This value changes after you update and re-publish a canvas app in an organization.

```
"application":
{
  "applicationId": "06Px000000003ed",
  "authType": "SIGNED_REQUEST",
  "canvasUrl": "http://instance.salesforce.com:8080/canvas_app_path/canvas_app.jsp",
  "developerName": "my_java_app",
  "name": "My Java App",
  "namespace": "org_namespace",
  "referenceId": "09HD00000000AUM",
  "version": "1.0.0"}
```

- The `clientHeight` and `clientWidth` fields have been added to the Dimensions object.

Field	Description
<code>clientHeight</code>	The values of <code>clientHeight</code> are sent to the canvas app within <code>SignedRequest</code> and can be used to set the height of the outermost <code>div</code> element. This field is useful for setting the height of an app that's accessed from a mobile device. The field can be referenced as <code>sr.context.environment.dimensions.clientHeight</code> , where <code>sr</code> is the parsed signed request JavaScript object.
<code>clientWidth</code>	The values of <code>clientWidth</code> are sent to the canvas app within <code>SignedRequest</code> and can be used to set the width of the outermost <code>div</code> element. This field is useful for setting the width of an app that's accessed from a mobile device. The field can be referenced as <code>sr.context.environment.dimensions.clientWidth</code> , where <code>sr</code> is the parsed signed request JavaScript object.
<code>height</code>	The height of the <code>iFrame</code> in pixels.
<code>width</code>	The width of the <code>iFrame</code> in pixels.

Field	Description
maxHeight	The maximum height of the iFrame in pixels. Defaults to 2,000; “infinite” is also a valid value.
maxWidth	The maximum width of the iFrame in pixels. Defaults to 1,000; “infinite” is also a valid value.

```
"dimensions":
{
  "clientHeight": "50px",
  "clientWidth": "70px",
  "height": "900px",
  "width": "800px",
  "maxHeight": "2000px",
  "maxWidth": "1000px"
},
```

## Force.com Canvas Support for Streaming API

Force.com Canvas provides an event and methods that enable canvas apps to listen for Streaming API notifications.

Available in: **Enterprise, Performance, Unlimited, Professional (with Force.com Canvas enabled), and Developer** Editions

These events and methods include:

- `sfdc.streamingapi`—JavaScript event that you create and associate with a Streaming API channel defined by a PushTopic. See [Using the Streaming API Event](#).
- `subscribe`—Subscribes to the `sfdc.streamingapi` event that you define. See [Subscribing to a Streaming API Event](#).
- `unsubscribe`—Unsubscribes from the `sfdc.streamingapi` event. See [Unsubscribing from a Streaming API Event](#).

[Using the Streaming API Event](#)

[Subscribing to a Streaming API Event](#)

[Unsubscribing from a Streaming API Event](#)

## Using the Streaming API Event

The Force.com Canvas SDK contains an event called `sfdc.streamingapi` that lets you define an event in your canvas app and associate that event with a Streaming API channel. You then use the `subscribe` method to subscribe to the event and receive Streaming API notifications.

For example, in Salesforce, you can create a Streaming API channel that receives notifications when an InvoiceStatement is updated and the Status changes to Closed. In your canvas app, you can then create an event associated with that channel and subscribe to it. In Salesforce, whenever an invoice statement is closed, the activated canvas app receives the notification and can perform an action such as displaying a message to the user.

Here are some considerations when defining the Streaming API event:

- The event takes a single parameter that contains the PushTopic name.
- The PushTopic name must be prefaced by “/topic/.”

```
{name:"sfdc.streamingapi", params:{topic:"/topic/myPushTopicName"}}
```



## Subscribing to a Streaming API Event

This code example shows how to call the `subscribe` method so that a canvas app can subscribe to a Streaming API event. When you subscribe to an event, you call the standard `sfdc.canvas.client.subscribe` method that you use to subscribe to a canvas app event. When you call the `subscribe` method, you must pass in the client and the Streaming API event. Only canvas apps that are open and subscribed to the event can receive Streaming API notifications.

In this example, the `onComplete` method specifies the function that runs after the code successfully subscribes to the event. The `onData` method specifies the function that runs when a Streaming API notification is received by the event.

```
// Subscribe to Streaming API events.
// The PushTopic to subscribe to must be passed in.
// The 'onComplete' method may be defined,
// and will fire when the subscription is complete.
Sfdc.canvas(function() {
    sr = JSON.parse('<%=signedRequestJson%>');
    var handler1 = function(){ console.log("onData done");},
    handler2 = function(){ console.log("onComplete done");};
    Sfdc.canvas.client.subscribe(sr.client,
        {name : 'sfdc.streamingapi', params:{topic:"/topic/InvoiceStatements"}},
        onData : handler1, onComplete : handler2)
    );
});
```

When you call the `subscribe` method, a REST call is made to ensure that the canvas app has the OAuth scope needed to connect to the Streaming API. Therefore, each time a canvas app subscribes to a Streaming API event, one API call is used and is counted against the organization's total API requests limits. The canvas app needs at least the "Access and Manage Your Data (API)" OAuth scope to connect to the Streaming API.

If the call to the `subscribe` method is successful, the `onComplete` method is called with a payload of `{success:true,handle:handle}`. The `handle` is an array that contains the name of the Streaming API channel being subscribed to and the `subscriptionId` is an integer that contains a unique ID. For example, `["/topics/InvoiceStatements", subscriptionId]`. If the call to the `subscribe` method fails, the `onComplete` method is called with a payload of `{success:false,errorMessage:msg}`. The `msg` is a string that contains the cause of the error.

To receive Streaming API notifications, you must create a channel defined by a `PushTopic`. For more information, see "Step 2: Create a `PushTopic`" in the [Force.com Streaming API Developer's Guide](#).

## Unsubscribing from a Streaming API Event

This code example shows how to call the `unsubscribe` method so that a canvas app can unsubscribe from a Streaming API event.

```
//Unsubscribe from Streaming API events.
//The PushTopic to unsubscribe from must be passed in.
Sfdc.canvas(function() {
    sr = JSON.parse('<%=signedRequestJson%>');
    Sfdc.canvas.client.unsubscribe(sr.client, {name : 'sfdc.streamingapi',
        params:{topic:"/topic/InvoiceStatements"}});
});
```

## Apex Code

Apex code is the first multitenant, on-demand programming language for developers interested in building the next generation of business applications.

Available in: **Performance, Unlimited, Developer, Enterprise, and Database.com** Editions

Apex includes the following enhancements. For detailed information on these enhancements, refer to the [Force.com Apex Code Developer's Guide](#).

#### **Statement Limit Elimination**

#### **Scheduled Job Name and Type Available in Queries**

#### **PreviousFireTime Reset for Upgraded Scheduled Apex Jobs**

#### **Triggers for Topic and TopicAssignment**

#### **QuickAction.QuickActionRequest Class Update**

#### **Chatter in Apex**

#### **Changed Error Behavior**

#### **Code Coverage Information in the Developer Console Only**

## Statement Limit Elimination

The code statement limit has been removed. Apex transactions are no longer limited by the number of code statements they can execute, allowing you to potentially execute more code statements than the previously enforced statement limit.

To protect against infinite processes overusing shared CPU resources, the maximum CPU time for a transaction is 10,000 milliseconds for synchronous Apex, and 60,000 milliseconds for asynchronous Apex (Batch Apex and future methods).

CPU time is calculated for all executions occurring in the transaction—for the executing Apex code, and any processes that are called from this code, such as package code and workflows. CPU time is private for a transaction and is isolated from other transactions. If the CPU limit is exceeded, a `LimitException` that can't be handled is thrown, as is the case with any other governor limit that has been exceeded.

Operations that don't consume application server CPU time aren't counted toward CPU time. For example, the portion of execution time spent in the database for DML, SOQL, and SOSL isn't counted, nor is waiting time for Apex callouts.

## Scheduled Job Name and Type Available in Queries

You can now obtain the name and type of a scheduled job programmatically via SOQL queries. Previously, this information couldn't be obtained in a query. The new `CronJobDetail` SOAP API object exposes the name and type of a scheduled job. Each `CronTrigger` record, which represents a scheduled job, is now associated with a `CronJobDetail` record that provides the additional information about the job's name and type.

To get the job's name and the job's type, use the `CronJobDetail` relationship when performing a query on `CronTrigger`. This example retrieves the most recent `CronTrigger` record with the job name and type from `CronJobDetail`.

```
CronTrigger job =
    [SELECT Id, CronJobDetail.Id, CronJobDetail.Name, CronJobDetail.JobType
     FROM CronTrigger ORDER BY CreatedDate DESC LIMIT 1];
```

Alternatively, you can query `CronJobDetail` directly to get the job's name and type. This next example gets the job's name and type for the `CronTrigger` record queried in the previous example. The corresponding `CronJobDetail` record ID is obtained by the `CronJobDetail.Id` expression on the `CronTrigger` record.

```
CronJobDetail ctd =
    [SELECT Id, Name, JobType
     FROM CronJobDetail WHERE Id = :job.CronJobDetail.Id];
```

To obtain the total count of all Apex scheduled jobs excluding all other scheduled job types, perform the following query.

```
SELECT COUNT() FROM CronTrigger WHERE CronJobDetail.JobType = '7'
```

These are the available job types on the `CronJobDetail` SOAP API object. Each job type label is listed with its value in parenthesis. Use the job type value when querying for a specific job type.

- Data Export (0)
- Dashboard Refresh (3)
- Analytic Snapshot (4)
- Scheduled Apex (7)
- Report Run (8)
- Batch Job (9)

## PreviousFireTime Reset for Upgraded Scheduled Apex Jobs

To take advantage of a new and improved scheduling infrastructure introduced in Summer '13, Apex jobs scheduled before Summer '13 are upgraded to run on this new scheduling infrastructure. As a result of this upgrade, the `PreviousFireTime` field of the `CronTrigger` associated with the upgraded scheduled Apex job is set to `null`. Starting with the first scheduled Apex job execution and for every subsequent execution, the system will update `PreviousFireTime` with the expected value after each run completes.

This upgrade applies to scheduled Apex jobs only and not to other scheduled job types.

## Triggers for Topic and TopicAssignment

`Topic` and `TopicAssignment` objects now support triggers. To create the triggers in the Salesforce user interface, from Setup, click **Customize** > **Topics** > **Topic Triggers** or **Customize** > **Topics** > **TopicAssignment Triggers**, and then click **New**.

## New Classes, Methods, and Interfaces

The following are new Apex classes and methods.

***Database Methods and Result Classes***

***Schema Methods and Describe Result Classes***

***New Available QuickAction Describe method and class***

***New QuickAction Describe method and class***

***QuickAction.DescribeLayoutComponent Class***

***QuickAction.DescribeLayoutItem Class***

***QuickAction.DescribeLayoutRow Class***

***QuickAction.DescribeLayoutSection Class***

***QuickAction.DescribeQuickActionDefaultValue Class***

***ChatterAnswers.AccountCreator Interface***

***New BusinessHours Methods***

***New QuickAction Methods***

## Database Methods and Result Classes

New methods have been added to the `Database` class. Previously, the merge DML operation was only available as a DML statement. With the addition of the new merge methods to the `Database` class, you can now perform a merge using the appropriate `Database` method, optionally getting errors returned, if any, instead of exceptions resulting from the merge operation. Also, two utility methods have been added (`getDeleted` and `getUpdated`). These methods are described in more detail in this table.

Name	Arguments	Return Type	Description
<code>getDeleted</code>	String <i>sObjectType</i> Datetime <i>startDate</i> Datetime <i>endDate</i>	<code>Database.GetDeletedResult</code>	<p>Returns the list of individual records that have been deleted for an sObject type within the specified start and end dates and times.</p> <p>The <i>sObjectType</i> argument is the sObject type name for which to get the deleted records, such as <code>account</code> or <code>merchandise__c</code>.</p> <p>The <i>startDate</i> argument is the start date and time of the deleted records time window.</p> <p>The <i>endDate</i> argument is the end date and time of the deleted records time window.</p> <p>Results are returned for no more than 15 days previous to the day the call is executed (or earlier if an administrator has purged the Recycle Bin).</p> <p>Example:</p> <pre>Database.GetDeletedResult r = Database.getDeleted( 'Merchandise__c', Datetime.now().addHours(-1), Datetime.now());</pre>
<code>getUpdated</code>	String <i>sObjectType</i> Datetime <i>startDate</i> Datetime <i>endDate</i>	<code>Database.GetUpdatedResult</code>	<p>Returns the list of individual records that have been updated for an sObject type within the specified start and end dates and times.</p> <p>The <i>sObjectType</i> argument is the sObject type name for which to get the updated records, such as <code>account</code> or <code>merchandise__c</code>.</p> <p>The <i>startDate</i> argument is the start date and time of the updated records time window.</p> <p>The <i>endDate</i> argument is the end date and time of the updated records time window.</p> <p>Results are returned for no more than 30 days previous to the day the call is executed.</p> <p>Example:</p> <pre>Database.GetUpdatedResult r = Database.getUpdated(</pre>

Name	Arguments	Return Type	Description
			<pre>'Merchandise__c', Datetime.now().addHours(-1), Datetime.now());</pre>
merge	sObject <i>master</i> Id <i>duplicate</i> (Optional) Boolean <i>allOrNone</i>	Database.MergeResult	<p>Merges the specified duplicate record into the master sObject record of the same type, deleting the duplicate, and reparenting any related records. Merges only accounts, contacts, or leads.</p> <p>The <i>master</i> argument is the master sObject record the duplicate record is merged into.</p> <p>The <i>duplicate</i> argument is the ID of the record to merge with the master. This record must be of the same sObject type as the master.</p> <p>Optional <i>allOrNone</i> argument—Set to <i>false</i> to return any errors encountered in this operation as part of the returned result. If set to <i>true</i>, this method throws an exception if the operation fails. The default is <i>true</i>.</p> <p>Each executed <i>merge</i> method counts against the governor limit for DML statements.</p>
merge	sObject <i>master</i> sObject <i>duplicate</i> (Optional) Boolean <i>allOrNone</i>	Database.MergeResult	<p>Merges the specified duplicate sObject record into the master sObject of the same type, deleting the duplicate, and reparenting any related records.</p> <p>The <i>master</i> argument is the master sObject record the duplicate record is merged into.</p> <p>The <i>duplicate</i> argument is the sObject record to merge with the master. This sObject must be of the same type as the master.</p> <p>Optional <i>allOrNone</i> argument—Set to <i>false</i> to return any errors encountered in this operation as part of the returned result. If set to <i>true</i>, this method throws an exception if the operation fails. The default is <i>true</i>.</p> <p>Each executed <i>merge</i> method counts against the governor limit for DML statements.</p>
merge	sObject <i>master</i> List<Id> <i>duplicates</i> (Optional) Boolean <i>allOrNone</i>	List<Database.MergeResult>	<p>Merges up to two records of the same sObject type into the master sObject record, deleting the others, and reparenting any related records.</p> <p>The <i>master</i> argument is the master sObject record the other records are merged into.</p> <p>The <i>duplicates</i> argument is a list of IDs of up to two records to merge with the master. These records must be of the same sObject type as the master.</p>

Name	Arguments	Return Type	Description
			<p>Optional <i>allOrNone</i> argument—Set to <i>false</i> to return any errors encountered in this operation as part of the returned result. If set to <i>true</i>, this method throws an exception if the operation fails. The default is <i>true</i>.</p> <p>Each executed <i>merge</i> method counts against the governor limit for DML statements.</p>
merge	sObject <i>master</i> LIST<SObject> <i>duplicates</i> (Optional) Boolean <i>allOrNone</i>	List<Database.MergeResult>	<p>Merges up to two records of the same object type into the master sObject record, deleting the others, and reparenting any related records.</p> <p>The <i>master</i> argument is the master sObject record the other sObjects are merged into.</p> <p>The <i>duplicates</i> argument is a list of up to two sObject records to merge with the master. These sObjects must be of the same type as the master.</p> <p>Optional <i>allOrNone</i> argument—Set to <i>false</i> to return any errors encountered in this operation as part of the returned result. If set to <i>true</i>, this method throws an exception if the operation fails. The default is <i>true</i>.</p> <p>Each executed <i>merge</i> method counts against the governor limit for DML statements.</p>

The following are new supporting classes for the *getDeleted* and *getUpdated* methods.

- *Database.GetDeletedResult*—Contains the deleted records retrieved for a specific sObject type and time window.
- *Database.DeletedRecord*—Contains information about a deleted record.
- *Database.GetUpdatedResult*—Contains the result for the *Database.getUpdated* method call.


The following is the supporting class for *merge* methods.

- *Database.MergeResult*—Contains the result of a merge Database method operation.

## Schema Methods and Describe Result Classes

The following are new methods for the *Schema* class. These new methods result in parity with the counterpart SOAP API calls.

Name	Arguments	Return Type	Description
describeSObjects	List<String> <i>types</i>	List<Schema. DescribeSObjectResult>	<p>Describes metadata (field list and object properties) for the specified sObject or array of sObjects.</p> <p>The <i>types</i> argument is a list of sObject type names you want to describe.</p>

Name	Arguments	Return Type	Description
			<p>This method is similar to the <code>getDescribe</code> method on the <code>Schema.sObjectType</code> token. Unlike the <code>getDescribe</code> method, this method allows you to specify the <code>sObject</code> type dynamically and describe more than one <code>sObject</code> at a time.</p> <p>You can first call <code>describeGlobal</code> to retrieve a list of all objects for your organization, then iterate through the list and use <code>describeSObjects</code> to obtain metadata about individual objects. The <code>describeSObjects</code> method is limited to a maximum of 100 objects returned.</p> <p>Example:</p> <pre>Schema.DescribeSObjectResult[] descResult =     Schema.describeSObjects(         new String[]{             'Account', 'Contact'});</pre>
<code>describeTabs</code>		<code>LIST&lt;Schema.DescribeTabSetResult&gt;</code>	<p>Returns information about the standard and custom apps available to the running user.</p> <p>An app is a group of tabs that works as a unit to provide application functionality. For example, two of the standard Salesforce apps are “Sales” and “Call Center.”</p> <p>The <code>describeTabs</code> method returns the minimum required metadata that can be used to render apps in another user interface. Typically, this call is used by partner applications to render Salesforce data in another user interface, such as in a mobile or connected app.</p> <p>In the Salesforce user interface, users have access to standard apps (and might also have access to custom apps) as listed in the Salesforce app menu at the top of the page. Selecting an app name in the menu allows the user to switch between the listed apps at any time.</p> <p> <b>Note:</b> The “All Tabs” tab isn’t included in the list of described tabs.</p> <p>Example:</p> <pre>Schema.DescribeTabSetResult[] tabSetDesc =     Schema.describeTabs();</pre>

The following are new supporting classes for `describeTabs` that contain result metadata information.

- `Schema.DescribeTabSetResult`—Contains metadata information about a standard or custom app available in the Salesforce user interface.
- `Schema.DescribeTabResult`—Contains tab metadata information for a tab in a standard or custom app available in the Salesforce user interface.
- `Schema.DescribeColorResult`—Contains color metadata information for a tab.
- `Schema.DescribeIconResult`—Contains icon metadata information for a tab.

## New Available QuickAction Describe method and class

The new `QuickAction` `describeAvailableQuickActions` method returns an array of available quick action describe result objects (`QuickAction.DescribeAvailableQuickActionResult`). Each result object contains describe metadata information for a publisher quick action that is available for a specified parent.



**Note:** In the application, `QuickActions` are referred to as actions or publisher actions.

Method	Return Type	Description
<code>getLabel</code>	<code>String</code>	The publisher action label.
<code>getName</code>	<code>String</code>	The publisher action name.
<code>getType</code>	<code>String</code>	The publisher action type.


## New QuickAction Describe method and class

The new `QuickAction` `describeQuickActions` method returns an array of quick action describe result objects (`QuickAction.DescribeQuickActionResult`). Each result object contains describe metadata information for a publisher quick action for a specified `sObject`.



**Note:** In the application, `QuickActions` are referred to as actions or publisher actions.

The `QuickAction.DescribeQuickActionResult` class has the following instance methods.

Method	Return Type	Description
<code>getCanvasApplicationName</code>	<code>String</code>	Returns the name of the Canvas application, if used.  <div>  <b>Note:</b> Support for Force.com Canvas apps in the publisher and in the Chatter feed is currently available through a pilot program and is available in all new Development Edition organizations. For information on enabling it for your organization, contact <a href="https://salesforce.com">salesforce.com</a>. </div>
<code>getDefaultValues</code>	<code>LIST&lt;QuickAction.DescribeQuickActionDefaultValue&gt;</code>	Returns the default values for an action.



Method	Return Type	Description
getHeight	Integer	Returns the height in pixels of the action pane.
getIconName	String	Returns the actions' icon name.
getIconUrl	String	Returns the URL of the 32x32 icon used for the action.
getIcons	LIST <Schema.DescribeIconResult>	Returns a list of <code>Schema.DescribeIconResult</code> objects that describe colors used in a tab.
getLabel	String	Returns the action label.
getLayout	QuickAction. DescribeLayoutSection	Returns the layout sections that comprise an action.
getMiniIconUrl	String	Returns the 16x16 icon URL.
getName	String	Returns the action name.
getSourceObjectType	String	Returns the object type used for the action.
getTargetParentField	String	Returns the parent object's type for the action.
getTargetRecordTypeId	String	Returns the record type of the targeted record.
getTargetObjectType	String	Returns the action's target object type.
getType	String	Returns a create or custom Visualforce action.
getVisualforcePageName	String	If Visualforce is used, returns the name of the associated page for the action.
getWidth	Integer	If a custom action is created, returns the width in pixels of the action pane.

## QuickAction.DescribeLayoutComponent Class

The new `QuickAction.DescribeLayoutComponent` class represents the smallest unit in a layout—a field or a separator.



**Note:** In the application, `QuickActions` are referred to as actions or publisher actions.

The `QuickAction.DescribeLayoutComponent` class has the following instance methods.

Method	Return Type	Description
getDisplayLines	Integer	Returns the vertical lines displayed for a field. Applies to <code>textarea</code> and multi-select picklist fields.
getTabOrder	Integer	Returns the tab order for the item in the row.
getType	String	Returns the name of the <code>QuickAction.DescribeLayoutComponent</code> type for this component.

Method	Return Type	Description
getValue	String	Returns the field name if the type for <code>QuickAction.DescribeLayoutComponent</code> is <code>textarea</code> .

## QuickAction.DescribeLayoutItem Class

Represents an individual item in a `QuickAction.DescribeLayoutRow`. For most fields on a layout, there is only one component per layout item. However, in a display-only view, the `QuickAction.DescribeLayoutItem` might be a composite of the individual fields (for example, an address can consist of street, city, state, country, and postal code data). On the corresponding edit view, each component of the address field would be split up into separate `QuickAction.DescribeLayoutItems`.



**Note:** In the application, `QuickActions` are referred to as actions or publisher actions.

The `QuickAction.DescribeLayoutItem` class has the following instance methods.

Method	Return Type	Description
getLabel	String	Returns the label text for this item.
getLayoutComponents	<code>LIST&lt;QuickAction.DescribeLayoutComponent&gt;</code>	Returns a list of <code>QuickAction.DescribeLayoutComponents</code> for this item.
isEditable	Boolean	Indicates whether this item can be edited ( <code>true</code> ) or not ( <code>false</code> ).
isPlaceholder	Boolean	Indicates whether this item is a placeholder ( <code>true</code> ) or not ( <code>false</code> ). If <code>true</code> , this item is blank.
isRequired	Boolean	Indicates whether this item is required ( <code>true</code> ) or not ( <code>false</code> ). This is useful if, for example, you want to render required fields in a contrasting color.

## QuickAction.DescribeLayoutRow Class

Represents a row in a `QuickAction.DescribeLayoutSection`. A `QuickAction.DescribeLayoutRow` consists of one or more `QuickAction.DescribeLayoutItem` objects. For each `QuickAction.DescribeLayoutRow`, a `QuickAction.DescribeLayoutItem` refers either to a specific field or to an “empty” `QuickAction.DescribeLayoutItem` (one that contains no `QuickAction.DescribeLayoutComponent` objects). An empty `QuickAction.DescribeLayoutItem` can be returned when a given `QuickAction.DescribeLayoutRow` is sparse (for example, containing more fields on the right column than on the left column).



**Note:** In the application, `QuickActions` are referred to as actions or publisher actions.

The `QuickAction.DescribeLayoutRow` class has the following instance methods.

Method	Return Type	Description
getLayoutItems	LIST<QuickAction. DescribeLayoutItem>	Returns either a specific field or an empty QuickAction.DescribeLayoutItem (one that contains no QuickAction.DescribeLayoutComponent objects).
getNumItems	Integer	Returns the number of QuickAction.DescribeLayoutItem.

## QuickAction.DescribeLayoutSection Class

Represents a section of a layout and consists of one or more columns and one or more rows (an array of QuickAction.DescribeLayoutRow).



**Note:** In the application, QuickActions are referred to as actions or publisher actions.

The QuickAction.DescribeLayoutSection class has the following instance methods.

Method	Return Type	Description
getColumns	Integer	Returns the number of columns in the QuickAction.DescribeLayoutSection.
getHeading	String	The heading text (label) for the QuickAction.DescribeLayoutSection.
getLayoutRows	LIST<QuickAction. DescribeLayoutRow>	Returns an array of one or more QuickAction.DescribeLayoutRow objects.
getRows	Integer	Returns the number of rows in the QuickAction.DescribeLayoutSection.
isUseCollapsibleSection	Boolean	Indicates whether the QuickAction.DescribeLayoutSection is a collapsible section (true) or not (false).
isUseHeading	Boolean	Indicates whether the heading is used (true) or not (false).

## QuickAction.DescribeQuickActionDefaultValue Class

Returns a default value for a quick action. Represents the default values of fields to use in default layouts.



**Note:** In the application, QuickActions are referred to as actions or publisher actions.

The QuickAction.DescribeQuickActionDefaultValue class has the following instance methods.

Method	Return Type	Description
getDefaultValue	String	Returns the default value of the quick action.
getField	String	Returns the field name of the action.

## ChatterAnswers.AccountCreator Interface

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

The `ChatterAnswers.AccountCreator` interface is a new interface that creates `Account` records that will be associated with Chatter Answers users. The `ChatterAnswers.AccountCreator` is specified in the `registrationClassName` attribute of a `chatteranswers:registration` Visualforce component. This interface is called by Chatter Answers and allows for custom creation of `Account` records used for portal users.

The `ChatterAnswers.AccountCreator` interface has one method, `createAccount`, which accepts basic user information and creates an `Account` record. The implementation of this method returns the account ID.

This is an example implementation of the `ChatterAnswers.AccountCreator` interface. The `createAccount` method implementation accepts user information and creates an `Account` record. The method returns a `String` value for the `Account` ID.

```
public class ChatterAnswersRegistration implements ChatterAnswers.AccountCreator {
    public String createAccount(String firstname, String lastname, Id siteAdminId) {
        Account a = new Account(name = firstname + ' ' + lastname, ownerId = siteAdminId);

        insert a;
        return a.Id;
    }
}
```

This example tests the code above.

```
@isTest
private class ChatterAnswersCreateAccountTest {
    static testMethod void validateAccountCreation() {
        User[] user = [SELECT Id, Firstname, Lastname from User];
        if (user.size() == 0) { return; }
        String firstName = user[0].FirstName;
        String lastName = user[0].LastName;
        String userId = user[0].Id;
        String accountId = new ChatterAnswersRegistration().createAccount(firstName, lastName,
        userId);
        Account acct = [SELECT name, ownerId from Account where Id =: accountId];
        System.assertEquals(firstName + ' ' + lastName, acct.name);
        System.assertEquals(userId, acct.ownerId);
    }
}
```

## New BusinessHours Methods

These new static methods have been added to the `BusinessHours` class.

Name	Arguments	Return Type	Description
isWithin	String	Boolean	Returns true if the specified target date occurs within business hours. Holidays are included in the calculation.
	<i>businessHoursId</i>		
	Datetime		The <i>businessHoursId</i> argument is the business hours ID.
	<i>targetDate</i>		The <i>targetDate</i> argument is the date to verify.
nextStartDate	String	Datetime	Starting from the specified target date, returns the next date when business hours are open. If the specified target date falls within business hours, this target date is returned.
	<i>businessHoursId</i>		
	Datetime		The <i>businessHoursId</i> argument is the business hours ID.
	<i>targetDate</i>		The <i>targetDate</i> argument is the date used as a start date to obtain the next date.

### Examples

The following example finds whether a given time is within the default business hours.

```
// Get the default business hours
BusinessHours bh = [SELECT Id FROM BusinessHours WHERE IsDefault=true];

// Create Datetime on May 28, 2013 at 1:06:08 AM in the local timezone.
Datetime targetTime = Datetime.newInstance(2013, 5, 28, 1, 6, 8);

// Find whether the time is within the default business hours
Boolean isWithin= BusinessHours.isWithin(bh.id, targetTime);
```

The following example finds the next date starting from the target date when business hours reopens. If the target date is within the given business hours, the target date is returned. The returned time is in the local time zone.

```
// Get the default business hours
BusinessHours bh = [SELECT Id FROM BusinessHours WHERE IsDefault=true];

// Create Datetime on May 28, 2013 at 1:06:08 AM in the local timezone.
Datetime targetTime = Datetime.newInstance(2013, 5, 28, 1, 6, 8);
// Starting from the targetTime, find the next date when business hours reopens. Return the
target time.

// if it is within the business hours. The returned time will be in the local time zone
Datetime nextStart = BusinessHours.nextStartDate(bh.id, targetTime);
```

## New QuickAction Methods

These new static methods have been added to the QuickAction class.

Name	Arguments	Return Type	Description
describeAvailableQuickActions	String <i>parentType</i>	List<QuickAction. DescribeAvailable QuickActionResult>	Returns the metadata information for the available quick actions of the provided parent object,  The <i>parentType</i> argument is the parent object type. This can be an object type name ('Account') or 'Global' (meaning that this method is called at a global level and not an entity level).
describeQuickActions	List<String> <i>sObjectNames</i>	List<QuickAction. DescribeQuick ActionResult>	Returns the metadata information for the provided quick actions.  The <i>sObjectNames</i> argument is the names of the quick actions. The quick action name can contain the entity name if it is at the entity level ('Account.QuickCreateContact'), or 'Global' if used for the action at the global level ('Global.CreateNewContact').

## QuickAction.QuickActionRequest Class Update

For Apex saved using Salesforce.com API version 28.0, a parent ID is associated with the QuickActionRequest instead of the context ID. In version 29.0 and above, it's context ID.

## 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](#).

[General Updates to Chatter in Apex](#)

[New and Changed Chatter in Apex Classes](#)

[New and Changed Chatter in Apex Input Classes](#)

[New and Changed Chatter in Apex Output Classes](#)

[New and Changed Chatter in Apex Enums](#)

## General Updates to Chatter in Apex

### 5000 character limit for feed items and comments

Feed item and comment input and output bodies can contain 5000 characters. The previous limit was 1000 characters. This change is available in all API versions.

## New and Changed Chatter in Apex Classes

### Get mention proposals

Two new `ConnectApi.Mentions.getMentionCompletions` methods return `ConnectApi.MentionCompletionPage` objects that represents a collection of possible users and groups to mention in a feed item body or comment body. A mention is an “@” character followed by a user or group name. When a user or group is mentioned, they receive a notification. Call these methods to generate a list of proposed mentions that a user can choose from when they enter 2 or more characters in a feed item body or a comment body.

You can specify a `contextId` argument to narrow the results, with more useful results listed first. To get mention proposals for a comment, specify the feed item ID so that other users in the thread are shown first in the results. To get mention proposals for a feed item post to a group, specify the group ID so that group members are shown first in the results.

### Validate mention proposals

The new `ConnectApi.Mentions.getMentionValidations` method returns a `ConnectApi.MentionValidations` object that represents information about whether the specified mention proposals are valid for the context user. Call this method to verify that the list of proposed mentions is valid before you present the proposals to the user.

### Moderate communities

The new `ConnectApi.CommunityModeration` class provides information about moderation flags on comments and feed items in a community. Add and remove one or more flags to and from comments and feed items. The class contains these methods:

- `ConnectApi.CommunityModeration.addFlagToComment`—Add a moderation flag to a comment.
- `ConnectApi.CommunityModeration.addFlagToFeedItem`—Add a moderation flag to a feed item
- `ConnectApi.CommunityModeration.getFlagsOnComment`—Get moderation flags added to a comment.
- `ConnectApi.CommunityModeration.getFlagsOnFeedItem`—Get moderation flags added to a feed item.
- `ConnectApi.CommunityModeration.removeFlagsOnComment`—Remove moderation flags from a comment.
- `ConnectApi.CommunityModeration.removeFlagsOnFeedItem`—Remove moderation flags from a feed item.

To see the moderation flags, use the new Moderation Feed. Pass the new `ConnectApi.FeedType.Moderation` enum value in a call to `ConnectApi.ChatterFeeds.getFeedItemsFromFeed`.

### Specify the number of comments to return

New variants of these methods take a `recentCommentCount` argument that specifies the maximum number of comments to return per feed item:

- `ConnectApi.ChatterFavorites.getFeedItems`
- `ConnectApi.ChatterFeeds.getFeedItemsFromFeed`
- `ConnectApi.ChatterFeeds.getFeedItemsFromFilterFeed`
- `ConnectApi.ChatterFeeds.searchFeedItems`
- `ConnectApi.ChatterFeeds.searchFeedItemsInFeed`
- `ConnectApi.ChatterFeeds.searchFeedItemsInFilterFeed`

Each method has an accompanying test method to use to register mock data for testing.

### Specify the feed density to return

A new density argument of data type `ConnectApi.FeedDensity` specifies whether feed items return:

- `AllUpdates`—Displays all posts and comments from people and records the user follows and groups the user is a member of.
- `FewerUpdates`—Displays all posts and comments from people and records the user follows and groups the user is a member of, but hides system-generated posts from records that nobody commented on.

New variants of these methods take the density argument:

- `ConnectApi.ChatterFeeds.getFeedItemsFromFeed`
- `ConnectApi.ChatterFeeds.getFeedItemsFromFilterFeed`
- `ConnectApi.ChatterFeeds.searchFeedItemsInFeed`
- `ConnectApi.ChatterFeeds.searchFeedItemsInFilterFeed`

### Create a group

`ConnectApi.ChatterGroups.createGroup` is a new method that creates a Chatter group.

### Delete a group

`ConnectApi.ChatterGroups.deleteGroup` is a new method that deletes a Chatter group.

### Set a group member's role

`ConnectApi.ChatterGroups.addGroupMemberWithRole` is a new method that adds a user to a Chatter group and assigns the member a role as a standard member or a group manager.

### Update a group membership

`ConnectApi.ChatterGroups.updateGroupMember` is a new method that updates a user's group membership role to either a standard member or a group manager.

### Get information about groups based on archive status

A new `archiveStatus` argument of data type `ConnectApi.GroupArchiveStatus` specifies a set of groups based on their archive status:

- `All`—All groups, including groups that are archived and groups that are not archived.
- `Archived`—Only groups that are archived.
- `NotArchived`—Only groups that are not archived.

These methods take the `archiveStatus` argument:

- `ConnectApi.ChatterGroups.getGroups`
- `ConnectApi.ChatterGroups.searchGroups`
- `ConnectApi.ChatterGroups.setTestSearchGroups`

### Search for a group with better results

The `ConnectApi.ChatterGroups.searchGroups` methods now search only the group name field. In earlier versions the search included other fields, such as the group description field, which caused too much noise in the search results.

### Crop photos

There are two new `ConnectApi.ChatterGroups.setPhotoWithAttributes` methods that let you set and crop a group photo. One method sets an existing file, and the other uploads and sets a binary input.

### Send, receive, and search Chatter Messages

`ConnectApi.ChatterMessages` is a new class that contains information about message and conversation data. It contains these static methods:



- `ConnectApi.ChatterMessages.getConversation` returns a conversation the context user has access to.
- `ConnectApi.ChatterMessages.getConversations` returns conversations the context user has access to.
- `ConnectApi.ChatterMessages.getMessage` returns a message the context user has access to.
- `ConnectApi.ChatterMessages.getMessages` returns a list of messages the context user has access to.
- `ConnectApi.ChatterMessages.getUnreadCount` returns the number of conversations the context user has marked unread.
- `ConnectApi.ChatterMessages.markConversationRead` marks a conversation as read for the context user.
- `ConnectApi.ChatterMessages.replyToMessage` adds the specified text as a response to a previous message the context user has access to.
- `ConnectApi.ChatterMessages.searchConversation` returns the conversation the context user has access to with a page of messages that matches the specified search.
- `ConnectApi.ChatterMessages.searchConversations` returns a page of conversations the context user has access to where member names and messages in the conversations match the specified search criteria.
- `ConnectApi.ChatterMessages.searchMessages` returns a page of messages the context user has access to that match the specified criteria.
- `ConnectApi.ChatterMessages.sendMessage` sends the specified text to the indicated recipients.

## Topics

`ConnectApi.Topics` is a new class that contains information about topics. It contains these static methods:

- `ConnectApi.Topics.assignTopic` assigns a topic to a feed item using the topic ID.
- `ConnectApi.Topics.assignTopicByName` assigns a topic to a feed item using the topic name.
- `ConnectApi.Topics.deleteTopic` deletes a topic. Only users with the “Delete Topics” or “Modify All Data” permission can delete topics.
- `ConnectApi.Topics.getGroupsRecentlyTalkingAboutTopic` returns up to five groups that most recently contributed to the topic.
- `ConnectApi.Topics.getRecentlyTalkingAboutTopicsForGroup` returns up to five topics most recently used in a group.
- `ConnectApi.Topics.getRecentlyTalkingAboutTopicsForUser` returns up to five topics most recently used by a user.
- `ConnectApi.Topics.getRelatedTopics` returns up to five topics most closely related to a topic.
- `ConnectApi.Topics.getTopic` returns information about a topic.
- Eight `ConnectApi.Topics.getTopics` methods that:
  - ◊ Return the first page of topics assigned to a feed item.
  - ◊ Return the first page of topics for the organization.
  - ◊ Return the first page of topics for the organization in a specified order.
  - ◊ Return the topics for a specified page.
  - ◊ Return the topics for a specified page in a specified order.
  - ◊ Return the topics that match specified search criteria in a specified order.
  - ◊ Return the topics that match specified search criteria for a specified page.
  - ◊ Return the topics that match specified search criteria for a specified page in a specified order.
- Two `ConnectApi.Topics.getTopicSuggestions` methods that return suggested topics for a feed item.
- Two `ConnectApi.Topics.getTopicSuggestionsForText` methods that return suggested topics for a string of text.
- Two `ConnectApi.Topics.getTrendingTopics` methods that return up to the top five trending topics for the organization.
- `ConnectApi.Topics.unassignTopic` removes a topic from a feed item.
- `ConnectApi.Topics.updateTopic` updates the description or spacing and capitalization of the name of a topic.

### Get information about a user profile

`ConnectApi.UserProfiles` is a new class used to access user profile data. It contains one static method, `getUserProfile`, which returns the user profile of the context user.

`ConnectApi.ChatterUsers.updateUser` is a new method that updates the “About Me” section for the specified user.

### Get information about Chatter Answers zones

`ConnectApi.Zones` is a new class that contains information about searches in zones. It contains these methods:

- `getZone` returns a specific zone based on the zone ID.
- `getZones` returns a paginated list of zones.
- `getZones` returns a paginated list of zones with the specified page and page size.
- `searchInZone` searches a zone by keyword. Specify whether to search articles or questions.
- `searchInZone` searches a zone by keyword. Specify whether to search articles or questions and specify the page of information to view and the page size.

## New and Changed Chatter in Apex Input Classes

### `ConnectApi.CanvasAttachmentInput`

Use this new class to attach a canvas app to a feed item. It's a subclass of `ConnectApi.FeedItemAttachmentInput` and has these properties:

- `description`—The description of the canvas app.
- `developerName`—The developer name (API name) of the canvas app.
- `height`—The height of the canvas app in pixels. Default height is 200 pixels.
- `namespacePrefix`—The namespace prefix of the Developer Edition organization in which the canvas app was created.
- `parameters`—Parameters passed to the canvas app in JSON format.
- `thumbnailUrl`—A URL to a thumbnail image for the canvas app. Maximum dimensions are 120x120 pixels.
- `title`—The title of the link used to call the canvas app.



**Note:** Support for Force.com Canvas apps in the publisher and in the Chatter feed is currently available through a pilot program and is available in all new Development Edition organizations. For information on enabling it for your organization, contact [salesforce.com](https://salesforce.com).

### `ConnectApi.ChatterGroupInput`

Use the new properties in this class to set the properties of a group.

- `canHaveChatterGuests`—`true` if this group allows Chatter customers, `false` otherwise. After this property is set to `true`, it cannot be set to `false`.
- `description`—The “Description” section of the group.
- `name`—The name of the group.
- `owner`—The ID of the group owner.
- `isArchived`—`true` if the group is archived, `false` otherwise. Defaults to `false`.
- `isAutoArchiveDisabled`—`true` if automatic archiving is turned off for the group, `false` otherwise. Defaults to `false`.
- `visibility`—Specifies whether a group is private or public.
  - ◊ `PrivateAccess`—Only members of the group can see posts to this group.
  - ◊ `PublicAccess`—All users within the internal community can see posts to this group.

**ConnectApi.MentionSegmentInput**

The `id` property can be a user ID or a group ID because you can now mention Chatter groups in posts and comments.

**ConnectApi.PhotoInput**

Use these new properties to specify how to crop a photo:

- `cropSize`—The length, in pixels, of any edge of the crop square.
- `cropX`—The position X, in pixels, from the left edge of the image to the start of the crop square. Top left is position (0,0).
- `cropY`—The position Y, in pixels, from the top edge of the image to the start of the crop square. Top left is position (0,0).

**ConnectApi.TopicAssignmentInput**

This new input class has these properties:

- `topicId`—ID of the existing topic. Required for existing topics if the `topicName` property isn't used.
- `topicName`—Name of the new or existing topic. Required for new topics; required for existing topics if the `topicId` property isn't used.

**ConnectApi.TopicInput**

This new input class has these properties:

- `description`—The description of a topic.
- `name`—The name of a topic. Pass this property in an argument to the `ConnectApi.Topic.updateTopic` to change the spacing of a topic name in addition to the capitalization.

**ConnectApi.UserInput**

This new input class has one property, `aboutMe`. Pass it as an argument to the `ConnectApi.ChatterUsers.updateUser` method. In the Chatter user interface, this property populates the “About Me” section of the user profile.

## New and Changed Chatter in Apex Output Classes

**ConnectApi.AbstractRecordField**

This new abstract output class represents a field on a record object. This class is a superclass of:

- `ConnectApi.BlankRecordField`—A record field displayed as a place holder in a grid of fields.
- `ConnectApi.LabeledRecordField`—A record field containing a label and a text value. This class is a superclass of:
  - ◊ `ConnectApi.CompoundRecordField`—A record field that is a composite of sub-fields.
  - ◊ `ConnectApi.CurrencyRecordField`—A record field containing a currency value.
  - ◊ `ConnectApi.DateRecordField`—A record field containing a date.
  - ◊ `ConnectApi.PercentRecordField`—A record field containing a percentage value.
  - ◊ `ConnectApi.PicklistRecordField`—A record field containing an enumerated value.
  - ◊ `ConnectApi.RecordField`—A generic record field containing a label and text value.
  - ◊ `ConnectApi.ReferenceRecordField`—A record field containing a reference to another object.
  - ◊ `ConnectApi.ReferenceWithDateRecordField`—A record field containing a referenced object that acted at a specific time, for example, “Created By...”.

**ConnectApi.AbstractRecordView**

This new abstract output class describes a view of a record, including a record on a custom object. It's a subclass of `ConnectApi.ActorWithId`.

It's a superclass of:

- `ConnectApi.RecordSummary`—As of API version 29.0, this class is a subclass of `ConnectApi.AbstractRecordView` in all API versions (including earlier versions). (In 28.0, it was a subclass of `ConnectApi.ActorWithId`.)
- `ConnectApi.RecordView`—A new class that describes a view of any record, including a record on a custom objects. Designed for rendering an object quickly and easily. This object is returned if a specialized object, such as `UserSummary` or `ChatterGroup` is not available for the record type. It has a `sections` property, which is a list of `ConnectApi.RecordViewSection` objects that make up the sections of the record view detail.

#### **`ConnectApi.CanvasTemplateAttachment`**

This new output class contains properties that describe a feed item attachment with type `CanvasPost`. It's a subclass of `ConnectApi.FeedItemAttachment` and has these properties:

- `description`—Description of the canvas app.
- `developerName`—Developer name (API name) of the canvas app.
- `height`—Height of the canvas app in pixels. Default is 200 pixels.
- `icon`—Canvas app icon.
- `namespacePrefix`—The namespace prefix of the Developer Edition organization in which the canvas app was created.
- `parameters`—Parameters passed to the canvas app in JSON format.
- `thumbnailUrl`—A URL to a thumbnail image for the canvas app. Maximum dimensions are 120x120 pixels.
- `title`—Title of the link used to call the canvas app.



**Note:** Support for Force.com Canvas apps in the publisher and in the Chatter feed is currently available through a pilot program and is available in all new Development Edition organizations. For information on enabling it for your organization, contact [salesforce.com](https://salesforce.com).

#### **`ConnectApi.CaseComment`**

This output class has a new `eventType` property which is a `ConnectApi.CaseCommentEventType` enum that describes the publishing event type for the case comment.

#### **`ConnectApi.ChatterConversation`**

This new output class contains these properties about a conversation:

- `conversationId`—The ID for the conversation.
- `conversationUrl`—Chatter REST API URL identifying the conversation.
- `members`—A list of `ConnectApi.UserSummary` objects identifying the users in the conversation.
- `messages`—A `ConnectApi.ChatterMessagePage` object containing the content of the conversation.
- `read`—Specifies whether the conversation has been read (`true`) or not (`false`)

#### **`ConnectApi.ChatterConversationPage`**

This new output class contains properties about a page of conversations:

- `conversations`—A list of `ConnectApi.ChatterConversation` objects.
- `currentPageToken`—Token identifying the current page.
- `currentPageUrl`—Chatter REST API URL identifying the current page.
- `nextPageToken`—Token identifying the next page or `null` if there isn't a next page.
- `nextPageUrl`—Chatter REST API URL identifying the next page or `null` if there isn't a next page.

#### **`ConnectApi.ChatterConversationSummary`**

This new output class contains properties about a conversation summary:

- `id`—The ID for the conversation summary.

- `latestMessage`—A `ConnectApi.ChatterMessage` object containing the content of the conversation.
- `members`—A list of `ConnectApi.UserSummary` objects identifying the users in the conversation.
- `read`—Specifies whether the conversation has been read (`true`) or not (`false`)
- `url`—Chatter REST API URL to the conversation summary.

#### **`ConnectApi.ChatterGroup`**

This output class has these new properties:

- `isArchived`—Specifies whether the group is archived (`true`) or not (`false`).
- `isAutoArchiveDisabled`—Specifies whether automatic archiving is disabled for the group (`true`) or not (`false`).

#### **`ConnectApi.ChatterGroupDetails`**

This output class has a new `pendingRequests` property, which is the number of requests to join a group that are in a pending state.

#### **`ConnectApi.ChatterGroupSummary`**

This new output class contains properties about a group. It's a subclass of `ConnectApi.ChatterGroup`

#### **`ConnectApi.ChatterGroupSummaryPage`**

This new output class contains paginated information about `ConnectApi.ChatterGroupSummary` objects. The properties are:

- `currentPageUrl`—Chatter REST API URL identifying the current page.
- `groups`
- `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.ChatterMessage`**

This new output class contains properties about a message.

- `body`—A `ConnectApi.MessageBody` class containing the message.
- `conversationId`—The ID for the conversation.
- `conversationUrl`—Chatter REST API URL identifying the message.
- `id`—The ID of the message.
- `recipients`—A list of `ConnectApi.UserSummary` objects to receive the message.
- `sender`—A `ConnectApi.UserSummary` object identifying who sent the message.
- `sentDate`—The date the message was sent.
- `url`—Chatter REST API URL identifying the current page.

#### **`ConnectApi.ChatterMessagePage`**

This new output class contains properties about a page of messages.

- `currentPageToken`—Token identifying the current page.
- `currentPageUrl`—Chatter REST API URL identifying the current page.
- `messages`—A list of `ConnectApi.Message` objects representing the messages on the current page.
- `nextPageToken`—Token identifying the next page or `null` if there isn't a next page.
- `nextPageUrl`—Chatter REST API URL identifying the next page or `null` if there isn't a next page.

#### **`ConnectApi.Comment`**

This output class has a new `moderationFlags` property, which contains a `ConnectApi.ModerationFlags` object that contains information about any moderation flags on the comment. If the `ConnectApi.Features.communityModeration` property is `false`, this property is `null`.

**ConnectApi.EmailAddress**

This new output class contains properties about an email address:

- `displayName`—The display name for the email address.
- `emailAddress`—The email address.

**ConnectApi.EmailMessage**

This new output class contains properties about an email message sent from a case record in Case Feed. This class is a subclass of `ConnectApi.FeedItemAttachment` and has these properties:

- `direction`—An `ConnectApi.EmailMessageDirection` enum with one of these values:
  - ◊ `Inbound`—An inbound message (sent by a customer).
  - ◊ `Outbound`—An outbound message (sent to a customer by a support agent).
- `emailMessageId`—The ID of the email message.
- `subject`—The subject of the email message.
- `textBody`—The body of the email message.
- `toAddress`—A list of `ConnectApi.EmailAddress` objects to send the message to.

**ConnectApi.Features**

This output class has these new properties:

- `chatterAnswers`—Specifies whether Chatter Answers is enabled.
- `communityModeration`—Specifies whether Community moderation is enabled.
- `ideas`—Specifies whether Ideas is enabled.

**ConnectApi.FeedFavorite**

This output class has a new property `target`, which is a reference to the topic if applicable, `null` otherwise.

**ConnectApi.FeedItem**

This output class has these new properties:

- `moderationFlags`—Information about the moderation flags on a feed item. If the `ConnectApi.Features.communityModeration` property is `false`, this property is `null`.
- `topics`—The topics for the feed item.

As of API version 29.0, the value of the `ConnectApi.FeedItem.body.text` property can be `null`, which means you can't use it as the default case for rendering text. Instead, use the `ConnectApi.FeedItem.preamble.text` property as the default case.

**ConnectApi.FeedItemTopicPage**

This new output class contains a `canAssignTopics` property that indicates if topics can be assigned to the feed item and a `topics` property that lists the topics for the feed item.

**ConnectApi.FieldChangeValueSegment**

This output class has a new `valueType` property that specifies whether the message segment contains the old value or the new value.

**ConnectApi.FileSummary**

This output class has these new properties:

- `publishStatus`—A `ConnectApi.FilePublishStatus` enum.
- `sharingRole`—A `ConnectApi.FileSharingType` enum.

**ConnectApi.MentionCompletion**

This new output class contains information about a record that could be used to mention a user or group. It has these properties:

- `additionalLabel`—An additional label (if one exists) for the record represented by this completion, for example, “(Customer)” or “(Acme Corporation)”.
- `description`—A description of the record represented by this completion.
- `name`—The name of the record represented by this completion. The name is localized, if possible.
- `photoUrl`—A URL to the photo or icon of the record represented by this completion.
- `recordId`—The ID of the record represented by this completion.

**ConnectApi.MentionCompletionPage**

This new output class contains a paginated list of the `ConnectApi.MentionCompletion` objects.

- `currentPageUrl`—Chatter REST API URL identifying the current page.
- `mentionCompletions`—A list of mention completion proposals. Use these proposals to build a feed post body.
- `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.MentionSegment**

This class has a new `record` property which is a `ConnectApi.ActorWithId` object that represents the mentioned user or group.

The `record` property was added because you can now mention groups in addition to users. As of version 29.0, use the `record` property instead of the `user` property, which is no longer available. In versions earlier than 29.0, if the mention is not a user, the mention is in a `ConnectApi.TextSegment` object.

**ConnectApi.MentionValidation**

This new output class represents mention validation information for a specific proposed mention. It contains these properties:

- `recordId`—The ID of the record to mention.
- `validationStatus`—Specifies the type of validation error for a proposed mention, if any.
  - ◊ `Disallowed`—The proposed mention is invalid and will be rejected because the context user is trying to mention something that is not allowed. For example a user who is not a member of a private group is trying to mention the private group.
  - ◊ `Inaccessible`—The proposed mention is allowed but the user or record being mentioned will not be notified because they don't have access to the parent record being discussed.
  - ◊ `Ok`—There is no validation error for this proposed mention.

**ConnectApi.MentionValidations**

This new output class represents a collection of mention validation information.

- `hasErrors`—Indicates whether at least one of the proposed mentions has an error (`true`), or not (`false`). For example, the context user can't mention private groups he doesn't belong to. If such a group were included in the list of mention validations, `hasErrors` would be `true` and the group would have a `validationStatus` of `Disallowed` in its mention validation.
- `mentionValidations`—A list of mention validation information in the same order as the provided record IDs.

**ConnectApi.ModerationFlags**

This new output class represents moderation flags. It has these properties:

- `flagCount`—The number of moderation flags on this feed item or comment. If the logged-in user is not a community moderator, the property is `null`.



- `flaggedByMe`—Specifies whether the context user had flagged the feed item or comment for moderation (`true`) or not (`false`).

#### **`ConnectApi.MoreChangesSegment`**

This output class has a new `moreChanges` property that contains the complete list of tracked changes for a feed item.

#### **`ConnectApi.Motif`**

`ConnectApi.Motif` has a new `color` property which contains the hex value of the record type's base color. Use this value behind the motif icons.

#### **`ConnectApi.RecordSnapshotAttachment`**

This new output class is a subclass of `ConnectApi.FeedItemAttachment`. It represents the fields of the record at the point in time when the record was created. It has one property, `recordView`, which is a `ConnectApi.RecordView` object.

#### **`ConnectApi.RecordViewSection`**

This new output class represents a section of a record fields on a record detail. It has these properties:

- `columnCount`—The number of columns to use to lay out the fields in a record section.
- `columnOrder`—The order of the fields to use in the `fields` property to lay out the fields in a record section. The data type is a `ConnectApi.RecordColumnOrder` enum.
- `fields`—The fields and values for the record contained in this section. The data type is a list of `ConnectApi.AbstractRecordField` objects.
- `heading`—A localized label to display when rendering this section of fields.
- `isCollapsible`—Indicates whether the section can be collapsed to hide all the fields (`true`) or not (`false`).

#### **`ConnectApi.Topic`**

This new output class contains properties about a topic.

- `createdDate`—ISO8601 date string, for example, 2011-02-25T18:24:31.000Z
- `description`—Description of the topic
- `id`—18-character ID of the topic
- `name`—
- `talkingAbout`—Number of people talking about this topic over the last two months, based on factors such as topic additions and comments on posts with the topic

#### **`ConnectApi.TopicPage`**

This new output class contains a list of `ConnectApi.Topic` objects.

#### **`ConnectApi.TopicSuggestion`**

This new output class contains properties about a topic suggestion:

- `existingTopic`—A `ConnectApi.Topic` object that already exists or null for a new topic.
- `name`—The topic name.

#### **`ConnectApi.TopicSuggestionPage`**

This new output class contains a list of `ConnectApi.TopicSuggestion` objects.

#### **`ConnectApi.TrackedChangeAttachment`**

This new output class is a subclass of `ConnectApi.FeedItemAttachment`. It has one property, `changes`, which is a list of `ConnectApi.TrackedChangeItem` objects.



**ConnectApi.TrackedChangeItem**

This new output class represents a change to a field on a record. It has these properties:

- `fieldName`—The name of the field that was updated.
- `newValue`—The new value of the field or `null` if the field length is long or empty.
- `oldvalue`—The old value of the field or `null` if the field length is long or empty.

**ConnectApi.UnreadConversationCount**

This new output class contains properties about unread conversations:

- `hasMore`—Specifies if there are more unread messages (`true`) or not (`false`).
- `unreadCount`—The number of unread messages.

**ConnectApi.UserCapabilities**

This new output class contains information about the capabilities associated with a user's profile.

- `canChat`—Specifies if the context user can use Chatter Messenger with the subject user (`true`) or not (`false`)
- `canDirectMessage`—Specifies if the context user can direct message the subject user (`true`) or not (`false`)
- `canEdit`—Specifies if the context user can edit the subject user's account (`true`) or not (`false`)
- `canFollow`—Specifies if the context user can follow the subject user's feed (`true`) or not (`false`)
- `canViewFeed`—Specifies if the context user can view the feed of the subject user (`true`) or not (`false`)
- `canViewFullProfile`—Specifies if the context user can view the full profile of the subject user (`true`) or only the limited profile (`false`)
- `isModerator`—Specifies if the subject user is a Chatter moderator or admin (`true`) or not (`false`)

**ConnectApi.UserDetail**

This output class has a new `thanksReceived` property containing the number of times the user has been thanked.

**ConnectApi.UserProfile**

This new output class contains information required to display a user's profile.

- `capabilities`—The context user's capabilities specific to the subject user's profile
- `id`—The ID of the user attached to the profile
- `tabs`—The tabs visible to the context user specific to the subject user's profile
- `url`—The URL of the user's profile
- `userDetail`—The details about the user attached to the profile

**ConnectApi.UserProfileTab**

This new output class contains properties about a user profile tab.

- `id`—The tab's unique identifier or 18-character ID
- `isDefault`—Specifies if the tab appears first when clicking the user profile (`true`) or not (`false`)
- `tabType`—Specifies the type of tab
- `tabUrl`—The current tab's content URL (for non built-in tab types)

**ConnectApi.UserSettings**

This output class has a new `hasRestDataApiAccess` property that indicates whether or not the user has access to REST API.

**ConnectApi.Zone**

This new output class contains information about a zone.

- `description`—The description of the zone.
- `id`—The ID of the zone.

- `isActive`—Indicates whether the zone is active.
- `isChatterAnswers`—Indicates whether the zone is available for Chatter Answers.
- `name`—The name of the zone.
- `visibility`—The zone visibility. A `ConnectApi.ZoneShowIn` enum value:
  - ◊ `Community`—Available in a community.
  - ◊ `Internal`—Available internally only.
  - ◊ `Portal`—Available in a portal.
- `visibilityId`—If the zone is available in a portal or a community, this property contains the ID of the portal or community. If the zone is available to all portals, this property contains the value `All`.

#### **`ConnectApi.ZonePage`**

This new output class contains information about a page of zones:

- `zones`—A list of `ConnectApi.Zone` objects.
- `currentPageUrl`—Chatter REST API URL identifying the current page.
- `nextPageUrl`—Chatter REST API URL identifying the next page or `null` if there isn't a next page.

#### **`ConnectApi.ZoneSearchPage`**

This new output class contains information about the search results within a zone:

- `currentPageToken`—Token identifying the current page.
- `currentPageUrl`—Chatter REST API URL identifying the current page.
- `items`—A list of `ConnectApi.ZoneSearchResult` objects.
- `nextPageToken`—Token identifying the next page or `null` if there isn't a next page.
- `nextPageUrl`—Chatter REST API URL identifying the next page or `null` if there isn't a next page.

#### **`ConnectApi.ZoneSearchResult`**

This new output class contains information about a search result within a zone:

- `hasBestAnswer`—Indicates if the search result has a best answer.
- `id`—ID of the search result. The search result can be a question or an article.
- `title`—Title of the search result.
- `type`—Type of the search result. A `ConnectApi.ZoneSearchResultType` enum:
  - ◊ `Article`—Search results contain only articles.
  - ◊ `Question`—Search results contain only questions.
- `voteCount`—Number of votes given to the search result.

## **New and Changed Chatter in Apex Enums**

#### **`ConnectApi.CaseCommentEventType`**

This new enum specifies the publishing event type of a case comment. It has these values:

- `NewInternal`—A case comment that has newly been marked Internal Only.
- `NewPublished`—A newly published case comment.
- `NewPublishedByCustomer`—A case comment by a customer that was newly published.
- `PublishExsiting`—An existing case comment that was re-published.



**Note:** Although this value appears to be a typo, it's not. Use this spelling in your code.

- `PublishExistingByCustomer`—An existing case comment by a customer that was re-published.
- `UnpublishExisting`—An existing case comment that was unpublished.
- `UnpublishExistingByCustomer`—An existing case comment by a customer that was unpublished.

#### **`ConnectApi.EmailMessageDirection`**

This new enum specifies the direction of an email message. It has these values:

- `Inbound`—An inbound message (sent by a customer).
- `Outbound`—An outbound message (sent to a customer by a support agent).

#### **`ConnectApi.FeedDensity`**

This new enum specifies the amount of content to display in a feed. It has these values:

- `AllUpdates`—Displays all posts and comments from people and records the user follows and groups the user is a member of.
- `FewerUpdates`—Displays all posts and comments from people and records the user follows and groups the user is a member of, but hides system-generated posts from records that nobody commented on.

#### **`ConnectApi.FeedItemAttachmentInputType`**

Specifies the feed item attachment type for input objects. This enum has one new value:

- `Canvas`—Indicates that the feed item contains the metadata to create a canvas app feed item.



**Note:** Support for Force.com Canvas apps in the publisher and in the Chatter feed is currently available through a pilot program and is available in all new Development Edition organizations. For information on enabling it for your organization, contact [salesforce.com](https://salesforce.com).

#### **`ConnectApi.FeedItemAttachmentType`**

Specifies the feed item attachment type for output objects. It has these values:

- `Canvas`—A feed item that contains the metadata to render a link to a canvas app.



**Note:** Support for Force.com Canvas apps in the publisher and in the Chatter feed is currently available through a pilot program and is available in all new Development Edition organizations. For information on enabling it for your organization, contact [salesforce.com](https://salesforce.com).

- `EmailMessage`—An email attached to a case record in Case Feed.
- `RecordSnapshot`—The feed item attachment contains a view of a record at a single `ConnectApi.FeedItemType.CreateRecordEvent`.
- `TrackedChange`—All changes to a record for a single `ConnectApi.FeedItemType.TrackedChange` event.

#### **`ConnectApi.FeedItemType`**

Specifies the feed item type. It has these values:

- `CanvasPost`—Feed item generated by a canvas app in the publisher or from Chatter REST API or Chatter in Apex. The post itself is a link to a canvas app.



**Note:** Support for Force.com Canvas apps in the publisher and in the Chatter feed is currently available through a pilot program and is available in all new Development Edition organizations. For information on enabling it for your organization, contact [salesforce.com](https://salesforce.com).

- `ReplyPost`—Feed item generated by a Chatter Answers reply.
- `TrackedChange`—All changes to a record for a single `ConnectApi.FeedItemType.TrackedChange` event.

**ConnectApi.FeedType**

This enum has a new `Moderation` value. The Communities Moderation Feed contains all feed items and comments that have been flagged for moderation in a community. This feed is available only to users with “Moderate Community Feeds” permissions.

**ConnectApi.FieldChangeValueType**

This new enum specifies the value type of a field change. It has these values:

- `NewValue`—A new value
- `OldValue`—An old value

**ConnectApi.FilePublishStatus**

This new enum specifies the publish status of the file. It has these values:

- `PendingAccess`—File is pending publishing.
- `PrivateAccess`—File is private.
- `PublicAccess`—File is public.

**ConnectApi.FileSharingType**

This new enum specifies the sharing role of the file. It has these values:

- `Admin`—Owner permission, but doesn’t own the file.
- `Collaborator`—Viewer permission, and can edit, change permissions, and upload a new version of a file.
- `Owner`—Collaborator permission, and can make a file private, and delete a file.
- `Viewer`—Can view, download, and share a file.
- `WorkspaceManaged`—Permission controlled by the library.

**ConnectApi.GroupArchiveStatus**

This new enum specifies a set of groups based on whether the groups are archived or not. It has these values:

- `All`—All groups, including groups that are archived and groups that are not archived.
- `Archived`—Only groups that are archived.
- `NotArchived`—Only groups that are not archived.

**ConnectApi.MentionCompletionType**

This new enum specifies the type of mention completion. It has these values:

- `All`—All mention completions, regardless of the type of record to which the mention refers.
- `Group`—Mention completions for groups.
- `User`—Mention completions for users.

**ConnectApi.MentionValidationStatus**

This new enum specifies the type of validation error for a proposed mention, if any. It has these values:

- `Disallowed`—The proposed mention is invalid and will be rejected because the context user is trying to mention something that is not allowed. For example a user who is not a member of a private group is trying to mention the private group.
- `Inaccessible`—The proposed mention is allowed but the user or record being mentioned will not be notified because they don't have access to the parent record being discussed.
- `Ok`—There is no validation error for this proposed mention.

**ConnectApi.RecordColumnOrder**

This new enum specifies the order in which to render record fields. It has these values:

- `LeftRight`—Fields are rendered from left to right.

- `TopDown`—Fields are rendered from the top down.

#### **`ConnectApi.RecordFieldType`**

This new enum specifies the type of a record field. It has these values:

- `Address`
- `Blank`
- `Boolean`
- `Compound`
- `CreatedBy`
- `Date`
- `DateTime`
- `Email`
- `LastModifiedBy`
- `Location`
- `Name`
- `Number`
- `Percent`
- `Phone`
- `Picklist`
- `Reference`
- `Text`
- `Time`

#### **`ConnectApi.SortOrder`**

This new enum specifies generic sort directions. It has these values:

- `Ascending`—Ascending order (A-Z).
- `Descending`—Descending order (Z-A).

#### **`ConnectApi.TopicSort`**

This new enum specifies the sort order for topics. It has these values:

- `popularDesc`—Sorts topics by popularity with the most popular first. This value is the default.
- `alphaAsc`—Sorts topics alphabetically.

#### **`ConnectApi.UserProfileTabType`**

This new enum specifies the type of profile tab. It has these values:

- `CustomVisualForce`—Tab that displays data from a Visualforce page.
- `CustomWeb`—Tab that displays data from any external Web-based application or Web page.
- `Feed`—Tab that displays the Chatter feed.
- `Overview`—Tab that displays user details.

#### **`ConnectApi.ZoneSearchResultType`**

This new enum specifies the search result type in a zone. It has these values:

- `Article`—Search results contain only articles.
- `Question`—Search results contain only questions.

#### **`ConnectApi.ZoneShowIn`**

This new enum specifies where the zone is available. It has these values:

- **Community**—Available in a community.
- **Internal**—Available internally only.
- **Portal**—Available in a portal.

## Changed Error Behavior

Winter '14 introduces these Apex error behavior changes.

[Updated Errors for Email Messaging Methods](#)

[Different Status Codes Returned by DML Exceptions for the User Object](#)

## Updated Errors for Email Messaging Methods

Errors have changed for the Apex Messaging methods `reserveMassEmailCapacity` and `reserveSingleEmailCapacity`, which are used when sending a mass or single email, respectively.

If the transaction would cause the organization to exceed its daily email limit, using either of these methods results in a `HandledException` error. (Previously it resulted in a `LimitException` error.) The error that appears is: `System.HandledException: The daily limit for the org would be exceeded by this request.`

In addition, if the organization doesn't have permission to send API or mass email, using either of these methods now results in the following error: `System.NoAccessException: The organization is not permitted to send email.`

## Different Status Codes Returned by DML Exceptions for the User Object

For the User object, we improved the behavior around simultaneous updates to the same record. However, `getDmlType` may now return different status codes. For details, see [User Object Save Behavior and Error Changes](#) on page 309.

## Code Coverage Information in the Developer Console Only

All code coverage information is now available in the Developer Console only. The following are no longer available from Setup:

- The **Clear Code Coverage** button was removed from the **Develop > Apex Classes** page.
- The Code Coverage column was removed from the list view on the **Develop > Apex Classes** page and the **Develop > Apex Triggers** page.



**Note:** The only code coverage information you can access from Setup is the code coverage estimate based on existing test results. You can obtain this estimate from the **Develop > Apex Classes** page by clicking **Estimate your organization's code coverage**.

## API

Use the API to create apps that integrate Salesforce with other services.

[New and Changed Objects](#)

[SOQL](#)

[SOSL](#)

**REST API**

**SOAP API**

**Streaming API**

**Metadata API**

**Tooling API**

**Analytics API**

New in version 29.0, the Analytics API lets you integrate Salesforce report data into your apps programmatically. For example, you can use the REST based API to build reporting into a third-party app to show a leaderboard of Dreamforce attendee registrations at your sessions. The API has several resources that let you query report metadata, and get report results dynamically at the summary or record detail level.

## New and Changed Objects

For information about new and changed Chatter objects, see [Chatter Objects](#).

### New Objects

These objects are new in API version 29.0.

- The `AcceptedEventRelation` object represents invitees with the status `Accepted` for a given event.
- The `AccountCleanInfo` object stores the metadata `Data.com Clean` uses to determine an account record's clean status.
- The `AllowedEmailDomain` object represents an allowed email domain for users in your organization.
- The `AppMenuItem` object represents an item in the app picker, exposing metadata for tab sets, service providers, and Connected Apps.
- The `AttachedContentDocument` object contains all `ContentDocument` objects associated with an object.
- The `AuthSession` object exposes session data and enables read and delete operations on that data.
- The `CombinedAttachment` object contains all notes, attachments, Google Docs, documents uploaded to libraries in Salesforce CRM Content, and files added to Chatter that are associated with an object.
- The `ContactCleanInfo` object stores the metadata `Data.com Clean` uses to determine a contact record's clean status.
- The `CronJobDetail` object provides the name and type of a scheduled job represented by a corresponding `CronTrigger` record.
- The `DeclinedEventRelation` object represents invitees with the status `Declined` for a given event.
- The `EventWhoRelation` object represents the relationship between an event and a lead or contacts. This derived object is a filtered version of the `EventRelation` object.
- The `FeedPollChoice` object represents a choice in a poll posted in a feed.
- The `FeedPollVote` object represents a vote in a poll.
- The `FieldHistoryArchive` object represents historical archived information about an object's changed field values. The object is currently available through a pilot program.
- The `LeadCleanInfo` object stores the metadata `Data.com Clean` uses to determine a lead record's clean status.
- The `LiveChatTranscriptOwnerSharingRule` object represents the rules for sharing a Live Agent chat transcript record with users other than the record owner.
- The `PermissionSetLicense` object represents a license that enables a user to receive a specified permission without changing their profile or reassigning profiles.
- The `PermissionSetLicenseAssign` object represents the association between a User and a `PermissionSetLicense`.
- The `TaskWhoRelation` object represents the relationship between a task and a lead or contacts. This derived object is a filtered version of the `TaskRelation` object.
- The `UndecidedEventRelation` object represents invitees with the status `Not Responded` for a given event.
- The `UserLogin` object represents the settings that affect a user's ability to log into an organization.

- The `UserProfile` object represents a Chatter user profile.

### Changed Objects

These objects have changed in API version 29.0 and affect earlier API versions.

- For the `User` object, we improved the behavior around simultaneous updates to the same record. Some error conditions now return different `ExceptionCode` and `StatusCode` values. See [User Object Save Behavior and Error Changes](#) on page 309.

These objects have changed in API version 29.0.

- In the `Account` object, the `CleanStatus` field now supports the `update()` call. The `CleanStatus` field also has a new picklist value: `Skipped`.
- In the `CaseMilestone` object, the `TimeSinceTargetInMins` field has been added.
- In the `CollaborationGroup` object, the `GroupEmail` field has been added.
- In the `CollaborationGroupMember` object, the `NotificationFrequency` field has a post notification limit. In Communities, the `Email on Each Post` option is disabled once a group exceeds 10,000 members. All members who had this option selected are automatically switched to `Daily digests`.
- In the `Contact` object, the `CleanStatus` field now supports the `update()` call. The `CleanStatus` field also has a new picklist value: `Skipped`.
- In the `Contact` object, the `IsEmailBounced` field has been added.
- In the `CronTrigger` object, the `CronJobDetailId` field has been added.
- In the `ForecastingAdjustment` object, the `ProductFamily` field has been added.
- In the `ForecastingFact` object, the `ForecastedObjectId` field has been added.
- In the `ForecastingItem` object, the `ProductFamily` field has been added.
- In the `ForecastingQuota` object, the `ProductFamily` field has been added.
- The `Group` object now supports the `search()` call.
- The `Dashboard` object now supports the `search()` call.
- In the `IdeaComments` object, the `UpVotes` field has been added.
- In the `IdeaReputation` object, the `CommentLikesReceivedCount` field has been added.
- In the `Lead` object, the `CleanStatus` field now supports the `update()` call. The `CleanStatus` field also has a new picklist value: `Skipped`.
- The `LiveAgentSession` object now supports the `create()`, `search()`, `undelete()`, and `delete()` calls. It also supports `create()` and `update()` on the following fields:

- ◊ `AgentId`
- ◊ `ChatReqAssigned`
- ◊ `ChatReqDeclined`
- ◊ `ChatReqEngaged`
- ◊ `ChatReqTimedOut`
- ◊ `LoginTime`
- ◊ `LogoutTime`
- ◊ `OwnerId`
- ◊ `TimeAtCapacity`
- ◊ `TimeIdle`
- ◊ `TimeInAwayStatss`
- ◊ `TimeInChats`
- ◊ `TimeInOnlineStatus`



- In the `LiveChatButton` object, the following fields have been added:

- ◊ `AutoGreeting`
- ◊ `CustomAgentName`

The `nillable()` property has been added to the `SkillId` field.

- In the `LiveChatDeployment` object, the `OptionsHasPrechatApi` field has been added.
- In the `LiveChatUserConfig` object, the following fields have been added:

- ◊ `CriticalWaitTime`
- ◊ `CustomAgentName`
- ◊ `OptionsHasAgentSneakPeek`
- ◊ `OptionsHasChatMonitoring`
- ◊ `OptionsHasWhisperMessage`
- ◊ `SupervisorDefaultAgentStatus`
- ◊ `SupervisorDefaultButtonId`
- ◊ `SupervisorDefaultSkillId`

- In the `MilestoneType` object, the `RecurrenceType` field has been added.
- In the `Network` object, the following fields have been added:

- ◊ `OptionsAllowMembersToFlag`
- ◊ `OptionsSiteAsContainerEnabled`
- ◊ `SelfRegProfileId`

- In the `NetworkMember` object, the `DisableItemFlaggedEmail` field has been added.
- In the `Organization` object, the `PreferencesS1BrowserEnabled` field has been added to control access to the Salesforce1 mobile browser app.
- The `PermissionSet` object now supports the `search()` call.
- The `Profile` object now supports the `search()` call, and the following fields have been added:

- ◊ `LastReferencedDate`
- ◊ `LastViewedDate`

- The `PushTopic` object has four new fields to support Streaming API delete and undelete events. See [Support for Delete and Undelete Events](#) on page 316.
- In the `SignupRequest` object, the following fields have been added:

- ◊ `AuthCode`
- ◊ `CreatedOrgInstance`
- ◊ `SuppressSignupEmails`

- The `User` object now supports the `describeLayout()` call, and the following fields have been added:

- ◊ `UserPreferencesDisableCoachingEmail`
- ◊ `UserPreferencesDisableFeedbackEmail`
- ◊ `UserPreferencesDisableRewardEmail`
- ◊ `UserPreferencesDisableWorkEmail`
- ◊ `UserPreferencesHideChatterOnboardingSplash`
- ◊ `UserPreferencesHideSecondChatterOnboardingSplash`

Also, the `UserPreferencesHideS1BrowserUI` has been added to control user redirection to the Salesforce1 mobile browser app.

- The `UserRole` object now supports the `search()` call.
- In the `Report` object, the `Format` field has been added. It indicates the format of a report whether `Tabular`, `Summary`, `Matrix`, or `Joined`.
- The `Description` field has been added to these objects:
  - ◇ `AccountOwnerSharingRule`
  - ◇ `AccountTerritorySharingRule`
  - ◇ `CampaignOwnerSharingRule`
  - ◇ `CaseOwnerSharingRule`
  - ◇ `ContactOwnerSharingRule`
  - ◇ `LeadOwnerSharingRule`
  - ◇ `LiveAgentSessionOwnerSharingRule`
  - ◇ `OpportunityOwnerSharingRule`
  - ◇ `QuickTextOwnerSharingRule`
  - ◇ `ServiceContractOwnerSharingRule`
  - ◇ `UserMembershipSharingRule`
- The `Type` field in these objects has a new `CanvasPost` option, which indicates a canvas app posting on a feed:
  - ◇ `AccountFeed`
  - ◇ `AssetFeed`
  - ◇ `CampaignFeed`
  - ◇ `CaseFeed`
  - ◇ `CollaborationGroupFeed`
  - ◇ `ContactFeed`
  - ◇ `ContentDocumentFeed`
  - ◇ `ContractFeed`
  - ◇ `DashboardComponentFeed`
  - ◇ `DashboardFeed`
  - ◇ `EntitlementFeed`
  - ◇ `EventFeed`
  - ◇ `FeedItem`
  - ◇ `LeadFeed`
  - ◇ `OpportunityFeed`
  - ◇ `Product2Feed`
  - ◇ `ReportFeed`
  - ◇ `ServiceContractFeed`
  - ◇ `SolutionFeed`
  - ◇ `UserFeed`

## New and Changed Chatter Objects

### New Objects

These objects are new in API version 29.0.

- The TopicFeed object represents a single feed tracked change for a topic.

### Changed Objects

These objects are changed in API version 29.0.

- In the CollaborationGroup object:

◊ The IsArchived, IsAutoArchiveDisabled, and GroupEmail (pilot) fields have been added.



**Note:** The ability to post to a Chatter group by email is currently available through a pilot program. For information on enabling this feature for your organization, contact salesforce.com.

◊ The field type for the FullPhotoUrl and the SmallPhotoUrl fields is now url (was string earlier).

- The EntitySubscription object's ParentId field can now be a topic ID.
- The Topic object now supports the create(), update(), and upsert() calls. The Description and Name fields now support the create and update properties. The NetworkId field now supports the create property. The TalkingAbout field no longer supports the nillable property.
- The TopicAssignment object now supports the create() call. The EntityId, NetworkId, and TopicId fields now support the create property.
- The TopicAssignment object now has these SOQL limits:

No SOQL limit if logged-in user has “View All Data” permission. If not, do one of the following:

- ◊ Specify a LIMIT clause of 1,100 records or fewer.
- ◊ Filter on Id or Entity when using a WHERE clause with "=".

## User Object Save Behavior and Error Changes

We improved the behavior around saving a user record when changed by multiple users, clients, or processes simultaneously. As part of the behavior changes, different ExceptionCode and StatusCode values are now returned for some error conditions when saving user records. We strongly recommend that you test your code and modify it accordingly if your clients rely on specific ExceptionCode and StatusCode values being returned.

The following table lists changes that take effect in API version 29.0. However, some implementations using API version 28.0 and earlier may also be affected.

Value Returned in Earlier Versions	Value Returned in API Version 29.0
INVALID_ID_FIELD	INVALID_CROSS_REFERENCE_KEY
INVALID_FIELD_FOR_INSERT_UPDATE	INSUFFICIENT_ACCESS_ON_CROSS_REFERENCE_ENTITY

The following table lists changes that affect API version 28.0 and earlier versions.

Old Value Returned in API Version 28.0 and Earlier	New Value Returned in API Version 28.0 and Earlier
INSUFFICIENT_ACCESS_ON_CROSS_REFERENCE_ENTITY	INVALID_FIELD_FOR_INSERT_UPDATE

## 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](#).

### OFFSET Use In Sub-queries – Pilot



**Note:** Using OFFSET in sub-queries is a pilot feature that is subject to change in future releases, and is not intended for use in a production setting. There is no support associated with this pilot feature. For more information, contact salesforce.com, inc.

The SOQL OFFSET clause is used to specify the starting row offset into the result set returned by a query. OFFSET can now be used in sub-queries. It is only allowed as part of a relationship query where the parent query has a LIMIT 1 clause. The following is a valid use of OFFSET in a subquery:

```
SELECT Name, Id
(
    SELECT Name FROM Opportunities LIMIT 10 OFFSET 2
)
FROM Account
ORDER BY Name
LIMIT 1
```

### Increased Number of Relationship Fields

You can now include up to 35 child-to-parent relationships in a SOQL query. The previous limit was 25.

An object can have up to 25 custom relationships. Since standard objects can also have standard relationships, this increase makes it easier to include all the child-to-parent relationships for a standard object in one SOQL query.

## SOSL

Use the Salesforce Object Search Language (SOSL) to perform text searches using Salesforce APIs.

### WITH NETWORK Supports Multiple Communities

The WITH NETWORK *NetworkIdSpec* clause now lets you filter user and feed search results by multiple communities, using the new syntax WITH NETWORK IN ( 'NetworkId1', 'NetworkId2', ... ). You can continue to use WITH NETWORK = 'NetworkId' to filter search results by a single community only.

## REST API

### AppMenu Resource

Returns a list of items in either the Salesforce app drop-down menu or the Salesforce1 navigation menu. To return a list of the Salesforce app drop-down menu items, the URI is: /vXX.X/appMenu/AppSwitcher/. To return a list of the Salesforce1 navigation menu items, the URI is: /vXX.X/appMenu/Salesforce1/.

### CompactLayouts Resource

Returns a list of compact layouts for a specific object. The resource uses a URI of the format /vXX.X/objects/*Object*/describe/compactLayouts/.

## FlexiPage Resource

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 resource uses a URI of the format `/vXX.X/flexiPage/ID of Flexible page`.

## Get Deleted Objects Resource

The SObject Get Deleted resource retrieves the list of records that have been deleted within a given timespan. The resource uses a URI of the format

`services/data/v29.0/objects/ObjectName/deleted/?start=StartDateAndTime&end=EndDateAndTime`. *StartDateAndTime* and *EndDateAndTime* should be provided in ISO 8601 format. Here's an example for getting a list of Merchandise\_\_c records that were deleted between May 5th, 2013 and May 10th, 2013:

```
/services/data/v29.0/objects/Merchandise__c/deleted/
?start=2013-05-05T00:00:00+00:00&end=2013-05-10T00:00:00+00:00
```

## Get Updated Objects Resource

The SObject Get Updated resource retrieves the list of records that have been updated (modified or added) within a given timespan. The resource uses a URI of the format

`services/data/v29.0/objects/ObjectName/updated/?start=StartDateAndTime&end=EndDateAndTime`. *StartDateAndTime* and *EndDateAndTime* should be provided in ISO 8601 format. Here's an example for getting a list of Merchandise\_\_c records that were updated between May 6th, 2013 and May 10th, 2013:

```
/services/data/v29.0/objects/Merchandise__c/updated/
?start=2013-05-06T00:00:00+00:00&end=2013-05-10T00:00:00+00:00
```

## 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.

The Limits resource returns limits information for your organization for these resources:

- Daily API calls
- Daily Batch Apex and future method executions
- Daily Bulk API calls
- Daily Streaming API events
- Streaming API concurrent clients

The resource uses a URI of the format `services/data/v29.0/limits` and takes no parameters.

- `Max` is the limit total for the organization.
- `Remaining` is the total number of calls or events left for the organization.

Here's an example of the response:

```
{
  "DailyApiRequests":
  {
    "Remaining": "4980",
    "Max": "5000"
  },
  "DailyAsyncApexExecutions":
  {
    "Remaining": "250000",
    "Max": "250000"
  },
  "DailyBulkApiRequests":
```

```

{
  "Remaining": "3000",
  "Max": "3000"
},
"DailyStreamingApiEvents":
{
  "Remaining": "1000",
  "Max": "1000"
},
"StreamingApiConcurrentClients":
{
  "Remaining": "10",
  "Max": "10"
}
}

```

## Limit Info Header

The Limit Info header is a response header that's returned from each call to the REST API. This header returns limit information for the organization. Use this header to monitor your API limits as you make calls against the organization.

### Field name

Sforce-Limit-Info

### Field values

- **api-usage**—Specifies the API usage for the organization against which the call was made in the format `nn/nnnn`. The first number is the number of API calls used, and the second number is the API limit for the organization.

### Example

Sforce-Limit-Info: api-usage=14/5000

This is an example of a response to a REST request for a Merchandise record.

```

HTTP/1.1 200 OK
Date: Mon, 20 May 2013 22:21:46 GMT
Sforce-Limit-Info: api-usage=14/5000
Last-Modified: Mon, 20 May 2013 20:49:32 GMT
Content-Type: application/json; charset=UTF-8
Transfer-Encoding: chunked

{
  "attributes" : {
    "type" : "Merchandise__c",
    "url" : "/services/data/v29.0/subjects/Merchandise__c/a00D00000008pQSNIA2"
  },
  "Id" : "a00D00000008pQSNIA2",
  "OwnerId" : "005D00000001QX8WIAW",
  "IsDeleted" : false,
  "Name" : "Phone Case - iPhone 4/4S",
  "CreatedDate" : "2013-05-20T20:49:32.000+0000",
  "CreatedById" : "005D00000001QX8WIAW",
  "LastModifiedDate" : "2013-05-20T20:49:32.000+0000",
  "LastModifiedById" : "005D00000001QX8WIAW",
  "SystemModstamp" : "2013-05-20T20:49:32.000+0000",
  "LastActivityDate" : null,
  "LastViewedDate" : "2013-05-20T22:19:56.000+0000",
  "LastReferencedDate" : "2013-05-20T22:19:56.000+0000",
  "Description__c" : "Phone Case for iPhone 4/4S",
  "Price__c" : 16.99,
  "Stock_Price__c" : 12.99,
  "Total_Inventory__c" : 108.0
}

```

## QueryAll Resource

The QueryAll resource executes a specified SOQL query. This resource behaves exactly like the Query resource, except that it will return results that include deleted records that are filtered out of regular Query requests. Here's an example that retrieves deleted Merchandise\_\_c records:

```
/services/data/v29.0/queryAll/?q=SELECT+Name+from+Merchandise__c+WHERE+isDeleted+=+TRUE
```

## SObject Describe Resource Support for If-Modified-Since Header

The SObject Describe resource now supports the If-Modified-Since HTTP header. When this header is used, if the object metadata has not changed since the provided date, a 304 Not Modified status code is returned, with no response body. This is an example If-Modified-Since header that could be used to request object metadata changes made since July 3, 2013:

```
If-Modified-Since: Wed, 3 Jul 2013 19:43:31 GMT
```

## SObject Quick Actions Resource

In API version 29.0, the SObject Quick Actions resource has a new URI to evaluate the default values for an action. The resource uses a URI of the format `vXX.X/objects/object/quickActions/{action name}/defaultValues/{context id}`. If you use API version 28.0, continue to use `vXX.X/objects/object/quickActions/{action name}/defaultValues/{parent id}`.

## Themes Resource

The Themes resource returns information on icons and colors used by themes in the Salesforce UI. Here's a GET example request that retrieves the theme icons and colors used for objects in the organization:

```
/services/data/v29.0/theme
```

# SOAP API

## New and Updated Calls

### New Calls

These calls are new in API version 29.0.

- `describeAppMenu()`: Retrieves metadata about items either in the Salesforce1 navigation menu or the Salesforce drop-down app menu. This information is returned via a `DescribeAppMenuResult`.
- `describeCompactLayouts()`: Retrieves metadata details about compact layouts for the specified object type. This information is returned via a `DescribeCompactLayoutsResult`.
- `describeFlexiPages()`: Retrieves metadata details about a set of Flexible Pages. A Flexible Page is the home page for a mobile app that appears as a menu item in the Salesforce1 navigation menu. This information is returned via a `DescribeFlexiPageResult`.
- `describeGlobalTheme()`: Returns information about both objects and themes available to the current logged-in user. Information is returned via `DescribeGlobalTheme`, which contains `DescribeGlobalResult` and `DescribeThemeResult`.
- `describeTheme()`: Returns information about themes available to the current logged-in user. Information is returned via `DescribeThemeResult`.

### Updated Calls

These calls have been updated in API version 29.0.

- `describeAvailableQuickActions():contextType` is a new field used in API version 29.0 and greater and replaces `parentType`. If you use API version 28.0, continue to use `parentType`—no action required.
- `describeAvailableQuickActions():DescribeAvailableQuickActionResult` has been updated. In API version 29.0 and greater, each `DescribeAvailableQuickActionResult` object represents details about publisher actions available for a specified context. In API version 28.0, the object represents details for a specified parent. If you use API version 28.0, continue to use `parentType`—no action required.

Also, the `type` field supports additional types:

- ◊ `LogACall`
- ◊ `SocialPost`
- ◊ `Canvas`
- ◊ `Create`
- ◊ `Update`

- `describeLayout():relatedContent` is a new field that represents the new Related Content section on a page layout.
- `describeLayout():ExpandedLookup` added as a new value for `LayoutComponentType`.
- `describeLayout():As part of the DescribeLayoutResult metadata returned, Highlights Panel section details are provided.`
- `describeLayout():As part of the DescribeLayoutResult metadata returned, Related Content section details are provided in two new types:`
  - ◊ `RelatedContent`—Represents the Related Content section of a page layout, containing an array of items.
  - ◊ `DescribeRelatedContentItem`—Represents an individual item in the `DescribeRelatedContentItem` list.
- `describeLayout():DescribeLayoutButton` now contains information on theme icons used for the button.
- `describeLayout():DescribeQuickActionListItemResult` now contains information on theme icons and colors used for the quick action.
- `describeQuickActions():In API version 29.0 and greater, describeQuickActions() takes the action name in the form of ContextEntity.ActionName. In API version 28.0, ParentEntity.ActionName is used. If you use API version 28.0, continue to use parentType—no action required.`
- `describeQuickActions():DescribeQuickActionResult` contains information on theme icons and colors used for the quick action as well as a field to identify a Force.com Canvas application.
- `DescribeQuickActionResult` also has information on default values contained in `DescribeQuickActionDefaultValue`.
- `DescribeQuickActionResult's type` field supports additional types:
  - ◊ `LogACall`
  - ◊ `SocialPost`
  - ◊ `Canvas`
  - ◊ `Create`
  - ◊ `Update`
- `describeTabs():DescribeTab` now contains theme color and theme icon information used for the tab.
- `performQuickActions():contextId` is a new field used in API version 29.0 and greater and replaces `parentId`. If you use API version 28.0, continue to use `parentType`—no action required.
- `describeSObjects():As part of the DescribeSObjectResult metadata returned, compactLayoutable` is a new property that indicates whether the object can be used in `describeCompactLayouts()`.

## LimitInfoHeader

This new SOAP API response header returns limit information for the organization. Use this header to monitor your API limits as you make calls against the organization.



Element Name	Type	Description
current	string	The number of calls for the specified limit type that have already been used in the organization.
limit	string	The organization's limit for the specified limit type.
type	string	The type of limit information specified in the header. <ul style="list-style-type: none"> <li>API REQUESTS—contains limit information about API calls for the organization.</li> </ul>

This is an example of a response to a SOAP request for a Merchandise record.

```
<?xml version="1.0" encoding="UTF-8"?>
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
  xmlns="urn:partner.soap.sforce.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xmlns:sf="urn:object.partner.soap.sforce.com">
  <soapenv:Header>
    <LimitInfoHeader>
      <limitInfo>
        <current>5</current>
        <limit>5000</limit>
        <type>API REQUESTS</type>
      </limitInfo>
    </LimitInfoHeader>
  </soapenv:Header>
  <soapenv:Body>
    <queryResponse>
      <result xsi:type="QueryResult">
        <done>true</done>
        <queryLocator xsi:nil="true"/>
        <records xsi:type="sf:sObject">
          <sf:type>dev_ns__Merchandise__c</sf:type>
          <sf:Id>a00D00000008pQSNIA2</sf:Id>
          <sf:dev_ns__Description__c>Phone Case for iPhone
            4/4S</sf:dev_ns__Description__c>
          <sf:dev_ns__Price__c>16.99</sf:dev_ns__Price__c>
          <sf:dev_ns__Stock_Price__c>12.99</sf:dev_ns__Stock_Price__c>
          <sf:dev_ns__Total_Inventory__c>108.0</sf:dev_ns__Total_Inventory__c>
          <sf:Id>a00D00000008pQSNIA2</sf:Id>
        </records>
        <size>1</size>
      </result>
    </queryResponse>
  </soapenv:Body>
</soapenv:Envelope>
```

## Streaming API

Performance and functionality improvements have been made to Streaming API.

***Increased Limits for Performance, Unlimited, and Enterprise Edition Organizations***

***Filtered Subscriptions***

***Support for Delete and Undelete Events***

***Generic Streaming — Pilot***

***New Supported Objects for PushTopic Queries — Pilot***

## Increased Limits for Performance, Unlimited, and Enterprise Edition Organizations

Streaming API now has increased limits for Performance Edition, Unlimited Edition and Enterprise Edition organizations. The new limits are:

- The maximum number of events per day has been increased to 1,000,000 for Performance Edition and Unlimited Edition organizations (previously 100,000), and 200,000 for Enterprise Edition organizations (previously 20,000).
- The maximum number of concurrent clients across all topics has been increased to 1000 for Performance Edition and Unlimited Edition organizations (previously 100), and 500 for Enterprise Edition organizations (previously 20).
- The maximum number of topics has been increased to 50 for Performance Edition and Unlimited Edition organizations (previously 20), and 25 for Enterprise Edition organizations (previously 20).

## Filtered Subscriptions

When you subscribe to a channel, you can reduce the number of event notifications by adding an expression containing logical AND or OR operators to the subscription URL.

Use this syntax in a subscription URL:

```
/topic/myChannel?<expression>
```

`myChannel` is the channel and `<expression>` is the expression containing logical AND or OR operators.

The expression engine uses MVEL, which is an expression language. See [MVEL Operators](#) for the expression grammar. We currently support only the logical AND (&&) and logical OR (||) operators.



**Note:** If you use an ID in filter criteria, you must use the 18-character ID format; 15-character IDs aren't supported.

### Logical AND Operator Example

This logical AND expression filters for events with `Company=='Acme'` and `City=='Timbuktu'`:

```
Company=='Acme'&&City=='Timbuktu'
```

The `SELECT` clause of the SOQL query in the channel's `PushTopic` must include the fields used in the left operands of the comparison operators; in this case, the `SELECT` clause must include `Company` and `City` fields.

### Logical OR Operator Example

This logical OR expression filters for events with `UnitPrice > 50` or `Amount >= 10`:

```
UnitPrice>50||Amount>=10
```

## Support for Delete and Undelete Events

Streaming API now supports notifications for deleted and undeleted records. The `PushTopic` object uses the new `NotifyForOperationCreate`, `NotifyForOperationUpdate`, `NotifyForOperationDelete`, and

`NotifyForOperationUndelete` boolean fields to determine which events generate a notification. The following example Apex code creates a `PushTopic` that generates notifications when `Invoice_Statement` records are deleted or undeleted:

```
PushTopic pushTopic = new PushTopic();
pushTopic.Name = 'InvoiceStatementUpdates';
pushTopic.Query = 'SELECT Id, Name, Status__c, Description__c FROM Invoice_Statement__c';
pushTopic.ApiVersion = 29.0;
pushTopic.NotifyForOperationCreate = false;
pushTopic.NotifyForOperationUpdate = false;
pushTopic.NotifyForOperationUndelete = true;
pushTopic.NotifyForOperationDelete = true;
pushTopic.NotifyForFields = 'Referenced';
insert pushTopic;
```

Note that your client must connect using the `cometd/29.0` Streaming API endpoint to get delete and undelete event notifications. A new `Extended` value has been added to `NotifyForOperations` that is set whenever `Create` or `Update` notifications are not enabled.

## Generic Streaming — Pilot

You can now use the Streaming API to send custom event notifications that are not tied to Salesforce data changes. To use generic streaming, you need:

- A `StreamingChannel` that defines the channel. You can create this through the Salesforce UI or using any data API.
- One or more clients subscribed to the channel via Bayeux.
- The Streaming Channel Push REST API resource. This new resource lets you monitor channels and push event notifications on channels to clients.

Generic streaming is currently available through a pilot program. For information on enabling generic streaming for your organization, contact [salesforce.com](mailto:salesforce.com), inc.

## New Supported Objects for PushTopic Queries — Pilot

The following standard objects are now supported in `PushTopic` queries: `ContractLineItem`, `Entitlement`, `LiveChatTranscript`, `Quote`, `QuoteLineItem`, and `ServiceContract`.

Support for these objects is currently available through a pilot program. For more information, contact [salesforce.com](mailto:salesforce.com).

## Chatter REST API

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](#).

**[General Updates](#)**

**[New and Changed Resources](#)**

**[New and Changed Request Bodies](#)**

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## General Updates

### Specify response size

Use the `filterGroup` parameter in a request URL or in a request body to specify whether to return a small, medium, or big group of properties. Every property in every response body is tagged with a group size:

- `Big`—The default size. Includes every property in a response body, including those marked `Big`, `Medium`, and `Small`.
- `Medium`—Includes properties marked `Medium` and `Small`.
- `Small`—The smallest response size. Includes only properties marked `Small`.

When a request URL includes a `filterGroup` query parameter, only the properties included in the specified size are returned to the client. Things to know about filter groups:

- The default `filterGroup` size is `Big`.
- Each filter group size assigned to a property has an API version. In future API versions properties may move to different filter groups.
- Filter groups affect all HTTP verbs except `DELETE`.
- You can use a `filterGroup` parameter on any request URL, including subrequests in a batch request body, unless otherwise stated.
- You can use a `filterGroup` parameter in conjunction with either an `include` or an `exclude` filter parameter to change the set of properties returned. The resulting set is a union of the two sets.

### Expanded bearer token support

If you pass the request header `X-Connect-Bearer-Urls: true`, these response body properties now contain bearer token URLs:

- `File Detail`—`renditionUrl240By180`, `renditionUrl1720By480`
- `File Summary`—`renditionUrl240By180`, `renditionUrl1720By480`
- `File Summary Page`—`currentPageUrl`
- `Icon`—`url`
- `Mention Completion`—`photoUrl`

Request bearer token URLs to display images on HTML pages that aren't hosted by Salesforce.com.

### 5000 character limit for feed items and comments

Feed item and comment request and response bodies can contain 5000 characters. The previous limit was 1000 characters. This change is available in all API versions. The only exception is for posts to the User Profile Feed Items resource (`/chatter/feeds/user-profile/userId/feed-items`) in API versions 23.0 and 24.0. In those versions, posts to that resource created user status updates, not feed items, so the 1000 character limit is still in place.

### Accept-Language HTTP header support

Chatter REST API now supports the `Accept-Language` HTTP header. Chatter REST API localizes names to the locale setting of the user. If the user hasn't set their locale, Chatter REST API uses the default locale of the organization. However, individual clients may want to override the locale. Clients can use any locale available in the organization to override the locale. Use the `Accept-Language` HTTP header to override the locale for any API request.

### X-Connect-Theme HTTP header support

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`.

### No post notifications for large Communities groups

In Communities, the `Email on Each Post` option is disabled once a group exceeds 10,000 members. All members who had this option selected are automatically switched to `Daily Digest`.

## New and Changed Resources

### Get mention proposals

Mentions Completions is a new resource (`/chatter/mentions/completions`) that represents a collection of possible users and groups to mention in a feed item body or comment body. A mention is an “@” character followed by a user or group name. When a user or group is mentioned, they receive a notification. Use this resource to generate a list of proposed mentions that a user can choose from when they enter 2 or more characters in a feed item body or a comment body. The Mention Completions resource has the following parameters:

- `contextId`—A feed item ID (for a mention in a comment) or a feed subject ID (for a mention in a feed item) that narrows search results, with more useful results listed first.
- `page`—The number of the page you want returned. Numbering starts at 0. The default value is 0.
- `pageSize`—The number of items per page. Valid values are between 1 and 100. The default size is 25. Attempting to retrieve more than 500 results returns an HTTP 400 status code.
- `q`—A search term. Searches for matching user and group names. To search for a user, a minimum of 1 character is required. To search for a group, a minimum of 2 characters is required. This parameter does not support wildcards.
- `type`—The mention completion type:
  - ◊ `All`—All mention completions, regardless of the type of record to which the mention refers.
  - ◊ `Group`—Mention completions for groups.
  - ◊ `User`—Mention completions for users.

### Validate mention proposals

Mentions Validations is a new resource (`/chatter/mentions/validations`) that represents information about whether the specified mention proposals are valid for the context user. Use this resource to verify that the list of proposed mentions is valid before you present the proposals to the user. The Mentions Validations resource has the following parameters:

- `parentId`—The feed item parent ID (for new feed items) or feed item ID (for comments).
- `recordIds`—A comma separated list of IDs to be mentioned. The maximum value is 25.
- `visibility`—Specifies the type of users who can see a feed item.
  - ◊ `AllUsers`—Visibility is not limited to internal users.
  - ◊ `InternalUsers`—Visibility is limited to internal users.

### Moderate communities

Community Moderation introduces these new resources:

- **Moderate Flags on Feed Items**  
(`/connect/communities/communityId/chatter/feed-items/feedItemId/moderation-flags/`)—Flag posts in a community as inappropriate. Community members that aren’t moderators can also use these resources to remove a flag they previously set. Community moderators can view the number of flags on a post, and remove all flags if needed.
- **Moderate Flags on Comments**  
(`/connect/communities/communityId/chatter/comments/commentId/moderation-flags`)—Flag comments in a community as inappropriate. Community members that aren’t moderators can also use these resources to remove a flag they previously set. Community moderators can view the number of flags on a comment, and remove all flags if needed.
- **Communities Moderation Feed**  
(`/connect/communities/communityId/chatter/feeds/moderation/feed-items`)—A feed containing all flagged posts and comments. The feed is available to users with “Moderate Community Feeds” permissions to view and take action on flagged posts and comments.

### Specify the number of comments to return

These resources have a new `recentCommentCount` parameter for GET requests that specifies the maximum number of comments to return for each feed item, the default value is 3:

- Feed Items Query resource (`/chatter/feed-items`)
- Bookmarks Feed Items resource (`/chatter/feeds/bookmarks/userId/feed-items/`)
- Favorites Feed Items resource (`/chatter/feeds/favorites/userId/favoriteId/feed-items/`)
- Files Feed Items resource (`/chatter/feeds/files/userId/feed-items/`)
- Filter Feed Items resource (`/chatter/feeds/filter/userId/keyPrefix/feed-items/`)
- Groups Feed Items resource (`/chatter/feeds/groups/userId/feed-items/`)
- News Feed Items resource (`/chatter/feeds/news/userId/feed-items/`)
- People Feed Items resource (`/chatter/feeds/people/userId/feed-items/`)
- Records Feed Items resource (`/chatter/feeds/records/recordId/feed-items/`)
- To Feed Items resource (`/chatter/feeds/to/userId/feed-items/`)
- Topics Feed Items resource (`/chatter/feeds/topics/topicId/feed-items/`)
- User Profile Feed Items resource (`/chatter/feeds/user-profile/userId/feed-items/`)

### Specify the feed density to return

A new `density` parameter for GET requests specifies the density of feed items in a feed. Possible values are:

- `AllUpdates`—Displays all posts and comments from people and records the user follows and groups the user is a member of.
- `FewerUpdates`—Displays all posts and comments from people and records the user follows and groups the user is a member of, but hides system-generated posts from records that nobody commented on.

These resources take the `density` parameter:

- Bookmarks Feed Items resource (`/chatter/feeds/bookmarks/userId/feed-items/`)
- Files Feed Items resource (`/chatter/feeds/files/userId/feed-items/`)
- Filter Feed Items resource (`/chatter/feeds/filter/userId/keyPrefix/feed-items/`)
- Groups Feed Items resource (`/chatter/feeds/groups/userId/feed-items/`)
- News Feed Items resource (`/chatter/feeds/news/userId/feed-items/`)
- People Feed Items resource (`/chatter/feeds/people/userId/feed-items/`)
- Records Feed Items resource (`/chatter/feeds/records/recordId/feed-items/`)
- To Feed Items resource (`/chatter/feeds/to/userId/feed-items/`)
- Topics Feed Items resource (`/chatter/feeds/topics/topicId/feed-items/`)
- User Profile Feed Items resource (`/chatter/feeds/user-profile/userId/feed-items/`)

### Get information about multiple feed items

The new Feed Items Batch resource (`/chatter/feed-items/batch/feedItemIds`) represents a batch of feed items. Specify a comma-separated string of feed item IDs to get information about multiple feed items in one request.

### Create a group

The Groups resource (`/chatter/groups`) can now be used to create a group. Make a POST request and pass request parameters.

### Delete a group

The Groups Information resource can now be used to delete a group. Make a DELETE request to `/chatter/groups/groupId`.

### Set a group member's role

The Groups Members resource (`/chatter/groups/groupId/members`) has a new `role` parameter for POST requests. It can have one of these values: `GroupManager` or `StandardMember`.

### Update a group membership

The Groups Memberships resource (`/chatter/group-memberships/membershipId`) now supports PATCH requests. To update a group member's role, make a PATCH request and pass either the new `role` parameter or a Group Member Input request body, which also has a new `role` property.

### Get information about groups based on archive status

The List of Groups resource (`/chatter/groups`) has a new `archiveStatus` parameter for GET requests. Use it to retrieve a list of archived groups, active groups, or all groups (both active and archived).

### Search for a group with better results

When you search using the List of Groups resource (`/chatter/groups?q=someGroupName`) the search only looks at the group name field. In earlier versions the search included other fields, such as the group description field, which caused too much noise in the search results.

### Crop photos

The Groups Photo resource (`/chatter/groups/groupId/photo`) and the Users Photo resource (`/chatter/users/userId/photo`) have new parameters that let you crop a photo:

- `cropSize`—The length, in pixels, of any edge of the crop square.
- `cropX`—The position X, in pixels, from the left edge of the image to the start of the crop square. Top left is position (0,0).
- `cropY`—The position Y, in pixels, from the top edge of the image to the start of the crop square. Top left is position (0,0).

### Topics URI changes

All Topics resource URIs now begin with `/connect` instead of `/chatter`:

- `/connect/topics`
- `/connect/topics/topicId`
- `/connect/topics/topicId/files`
- `/connect/topics/topicId/groups`
- `/connect/topics/topicId/related-topics`
- `/connect/topics/topicId/suggestions`
- `/connect/topics/topicId/trending`

The Related Topics resource is now `/connect/topics/topicId/related-topics`, with a hyphen between `related` and `topics`.

### Change a topic name

Make a PATCH request to the Topic resource (`/connect/topics/topicId`) and pass the `name` parameter to change the spacing of a topic name in addition to the capitalization.

### Follow and unfollow a topic

The Following resource can now be used to follow a topic. The resource is `/chatter/users/userId/following`.

Use the Subscriptions Resource to unfollow a topic. The resource is `/chatter/subscriptions/subscriptionId`.

### Get information about a topic

The Records resources can now return information about a topic, including its followers. The resources are `/chatter/records/recordId` and `/chatter/records/recordId/followers`.

### Get information about a user profile

The new User Profiles resource (`/chatter/user-profiles/userId`) represents a user's profile, which contains user information, a set of capabilities (permissions), and the set of configured profile subtab apps for the given user.



Make a PATCH request to the User Profile Information resource (`/chatter/users/userId`) to update the new `aboutMe` property. In the Chatter user interface, this property populates the “About Me” section of the user profile.

### Get information about Chatter Answers zones

The new Zones resources contain information about zones, including Chatter Answers questions. The resources are:

- `/connect/zones`—Get information about zones available to the context user.
- `/connect/zones/zoneId`—Get information about a specified Chatter Answers zone.
- `/connect/zones/zoneId/search-results`—Search a Chatter Answers zone.

### Post a canvas app to a feed

You can now post a feed item with a canvas app attachment to the News Feed, Record Feed, and User Profile Feed. Use these new POST parameters:

- `attachmentType`—The attachment type. Must contain the value `Canvas`.
- `description`—Description of the canvas app.
- `developerName`—Specifies the developer name (API name) of the canvas app.
- `height`—The height of the canvas app in pixels. Default height is 200 pixels.
- `namespacePrefix`—The namespace prefix of the Developer Edition organization in which the canvas app was created.
- `parameters`—Parameters passed to the canvas app in JSON format. The JSON must be URL-encoded.
- `thumbnailUrl`—The URL to a thumbnail image for the canvas app. Maximum dimensions are 120x120 pixels.
- `title`—The title of the link to the canvas app.



**Note:** Support for Force.com Canvas apps in the publisher and in the Chatter feed is currently available through a pilot program and is available in all new Development Edition organizations. For information on enabling it for your organization, contact [salesforce.com](mailto:salesforce.com).

### Delete a list of files

To delete a list of files, make a DELETE request to the File Information, Batch resource (`/chatter/files/batch/fileIds`). The DELETE method has been available since API version 26.0 but was undocumented.

## New and Changed Request Bodies

### Attachment Input: Canvas App

This new request body describes a canvas app. Use it to attach a canvas app to a feed item. It has these properties:

- `attachmentType`—The attachment type. Must contain the value `Canvas`.
- `description`—The description of the canvas app.
- `developerName`—The developer name (API name) of the canvas app.
- `height`—The height of the canvas app in pixels. Default height is 200 pixels.
- `namespacePrefix`—The namespace prefix of the Developer Edition organization in which the canvas app was created.
- `parameters`—Parameters passed to the canvas app in JSON format.
- `thumbnailUrl`—A thumbnail image for the canvas app. Maximum dimensions are 120x120 pixels.
- `title`—The title of the link used to call the canvas app.



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### Feed Item Input

The `attachment` property value can now hold a Attachment Input: Canvas App. Use this value to attach a canvas app to a feed item.

### Feed Item Topics Input

This new request body describes a topic. Use it in a POST request to `/chatter/feed-items/feedItemId/topics` to associate a new or existing topic with the specified feed item. It has these properties:

- `topicId`—ID of an existing topic
- `topicName`—Name of a new or existing topic, up to 150 characters

### Following Input

The `subjectId` property can now be a topic ID. Use this request body with the `/chatter/users/userId/following` resource.

### Group Input

This request body has new properties that you can use in a PATCH request to `/chatter/groups/groupId` to update the group. The properties are:

- `canHaveChatterGuests`—true if this group allows Chatter customers, false otherwise. After this property is set to true, it cannot be set to false..
- `description`—The “Description” section of the group.
- `name`—The name of the group.
- `owner`—The ID of the group owner.
- `isArchived`—true if the group is archived, false otherwise. Defaults to false.
- `isAutoArchiveDisabled`—true if automatic archiving is turned off for the group, false otherwise. Defaults to false.
- `visibility`—Specifies whether a group is private or public.
  - ◊ `PrivateAccess`—Only members of the group can see posts to this group.
  - ◊ `PublicAccess`—All users within the internal community can see posts to this group.

### Group Member Input

This request body has a new `role` property that has one of these values:

- `GroupManager`—User is the manager of the group.
- `StandardMember`—User is a standard member of the group.

To update this property for an existing group member, pass it in a PATCH request to `/chatter/group-memberships/membershipId`. To set this property when you add a member to a group, pass it in a POST request to `/chatter/groups/groupId/members`.

### Message Segment Input: Mention

This request body can now take a group ID for the `id` property. Use a group ID to mention a group in a feed item or comment.

### Photo Input

This request body has new properties that specify how to crop a photo:

- `cropSize`—The length, in pixels, of any edge of the crop square.
- `cropX`—The position X, in pixels, from the left edge of the image to the start of the crop square. Top left is position (0,0).
- `cropY`—The position Y, in pixels, from the top edge of the image to the start of the crop square. Top left is position (0,0).

To update a user photo, pass the request body to `/chatter/users/userId/photo`. To update a group photo, pass the request body to `/chatter/groups/groupId/photo`.

### Topic Input

This request body has a new `name` property that allows you to change the spacing of a topic name in addition to the capitalization. Use this request body with the `/connect/topics/topicId` resource.

### User Input

This new request body has one property, `aboutMe`. Use it in a PATCH request to `/chatter/users/userId`. In the Chatter user interface, this property populates the “About Me” section of the user profile.

## New and Changed Response Bodies

### Comment

This response body has a new `moderationFlags` property, which contains a Moderation Flags response body that contains information about any moderation flags on the comment. If the `communityModeration` property of the Features response body is `false`, this property is `null`.

### Email Address

This new response body represents an email address for an email message. It has these properties:

- `displayName`—The display name for the email address.
- `emailAddress`—The email address.

### Features

The Features response body has these new properties:

- `chatterAnswers`—Specifies whether Chatter Answers is enabled.
- `communityModeration`—Specifies whether Community moderation is enabled.
- `ideas`—Specifies whether Ideas is enabled.

### Feed Body

In API versions 29.0 and later, the `text` property of the Feed Body response body can be `null`, which means you can't use it as the default case for rendering text. Instead, use the `text` property of the Feed Item Preamble Message Body response body because it can't be `null`.

### Feed Item

The Feed Item attachment property has these new values:

- `Canvas`—A feed item that contains the metadata to render a link to a canvas app.



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- `EmailMessage`—An email attached to a case record in Case Feed.
- `RecordSnapshot`—The feed item attachment contains a view of a record at a single `ConnectApi.FeedItemType.CreateRecordEvent`.
- `TrackedChange`—All changes to a record for a single `ConnectApi.FeedItemType.TrackedChange` event.

Feed Item has a new `moderationFlags` property that contains a Moderation Flags response body, which contains information about any moderation flags on the feed item. If the `communityModeration` property of the Features response body is `false`, this property is `null`.

The Feed Item type property has these new values:

- **CanvasPost**—Feed item generated by a canvas app in the publisher or from Chatter REST API or Chatter in Apex. The post itself is a link to a canvas app.



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- **ReplyPost**—Feed item generated by a Chatter Answers reply.
- **TrackedChange**—All changes to a record for a single `ConnectApi.FeedItemType.TrackedChange` event.

### Feed Item Attachment: Canvas Template

The Feed Item Attachment: Canvas Template is a new response body that represents a canvas app attached to a feed item. It has these properties:

- **description**—Description of the canvas app.
- **developerName**—Developer name (API name) of the canvas app.
- **height**—Height of the canvas app in pixels. Default is 200 pixels.
- **icon**—Canvas app icon.
- **namespacePrefix**—The namespace prefix of the Developer Edition organization in which the canvas app was created.
- **parameters**—Parameters passed to the canvas app in JSON format.
- **thumbnailUrl**—A URL to a thumbnail image for the canvas app. Maximum dimensions are 120x120 pixels.
- **title**—Title of the link used to call the canvas app.



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### Feed Item Attachment: Case Comment

Feed Item Attachment: Case Comment response body has a new `eventType` property that specifies the event type of the case comment. It has these values:

- **NewInternal**—A case comment that has newly been marked Internal Only.
- **NewPublished**—A newly published case comment.
- **NewPublishedByCustomer**—A case comment by a customer that was newly published.
- **PublishExisting**—An existing case comment that was re-published.



**Note:** Although this value appears to be a typo, it's not. Use this spelling in your code.

- **PublishExistingByCustomer**—An existing case comment by a customer that was re-published.
- **UnpublishExisting**—An existing case comment that was unpublished.
- **UnpublishExistingByCustomer**—An existing case comment by a customer that was unpublished.

### Feed Item Attachment: Email Message

This new response body represents an email message sent from a case record in Case Feed. It has these properties:

- **direction**—An `ConnectApi.EmailMessageDirection` enum with one of these values:
  - ◊ **Inbound**—An inbound message (sent by a customer).
  - ◊ **Outbound**—An outbound message (sent to a customer by a support agent).
- **emailMessageId**—The ID of the email message.
- **subject**—The subject of the email message.

- `textBody`—The body of the email message.
- `toAddress`—A list of `ConnectApi.EmailAddress` objects to send the message to.

### Feed Item Attachment: Record Snapshot

The Feed Item Attachment: Record Snapshot is a new response body that represents a view of a record when it was created. It has these properties:

- `recordView`—A view of the record when it was created.
- `type`—`RecordSnapshot`.

### Feed Item Attachment: Tracked Change

Feed Item Attachment: Tracked Change is a new response body that represents the changes made to a field of a record attached to a feed item. It has these properties:

- `changes`—A collection of Feed Tracked Change response bodies.
- `type`—The String `TrackedChange`.

### Feed Tracked Change

Feed Tracked Change is a new response body that represents a change to a field on a record. It has these properties:

- `fieldName`—The name of the field that was updated.
- `newValue`—The new value of the field or `null` if the field length is long or empty.
- `oldvalue`—The old value of the field or `null` if the field length is long or empty.

### File

The File response body has these new properties:

- `publishStatus`—The publish status of the file. One of these values:
  - ◊ `PendingAccess`—File is pending publishing.
  - ◊ `PrivateAccess`—File is private.
  - ◊ `PublicAccess`—File is public.
- `sharingRole`—The sharing role of the file. One of these values:
  - ◊ `Admin`—Owner permission, but doesn't own the file.
  - ◊ `Collaborator`—Viewer permission, and can edit, change permissions, and upload a new version of a file.
  - ◊ `Owner`—Collaborator permission, and can make a file private, and delete a file.
  - ◊ `Viewer`—Can view, download, and share a file.
  - ◊ `WorkspaceManaged`—Permission controlled by the library.

### Following Count

The Following Count response body's `records` property now includes the number of topics a user is following.

### Group

The Group response body has these new properties:

- `isArchived`—Specifies whether the group is archived (`true`) or not (`false`).
- `isAutoArchiveDisabled`—Specifies whether automatic archiving is disabled for the group (`true`) or not (`false`).

### Group Details

The Group Details response body has a new `pendingRequests` property. The value is an integer specifying the number of pending requests to a private group.

## Mention Completion

Mention Completion is a new response body with properties that represent a record to be used as a mention. A mention is an “@” character followed by a user or group name. It has these properties:

- `additionalLabel`—An additional label (if one exists) for the record represented by this completion, for example, “(Customer)” or “(Acme Corporation)”.
- `description`—A description of the record represented by this completion.
- `name`—The name of the record represented by this completion. The name is localized, if possible.
- `photoUrl`—A URL to the photo or icon of the record represented by this completion.
- `recordId`—The ID of the record represented by this completion.

## Mention Completion Page

Mention Completion Page is a new response body that contains a paginated list of the Mention Completion response bodies. It contains these properties:

- `currentPageUrl`—Chatter REST API URL identifying the current page.
- `mentionCompletions`—A list of mention completion proposals. Use these proposals to build a feed post body.
- `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.

## Mention Validation

Mention Validation is a new response body that represents validation information for a proposed mention. It has these properties:

- `recordId`—The ID of the record to mention.
- `validationStatus`—Specifies the type of validation error for a proposed mention, if any.
  - ◊ `Disallowed`—The proposed mention is invalid and will be rejected because the context user is trying to mention something that is not allowed. For example a user who is not a member of a private group is trying to mention the private group.
  - ◊ `Inaccessible`—The proposed mention is allowed but the user or record being mentioned will not be notified because they don't have access to the parent record being discussed.
  - ◊ `Ok`—There is no validation error for this proposed mention.

## Mention Validations

Mention Validations is a new response body that represents a collection of mention validation information. It has these properties:

- `hasErrors`—Indicates whether at least one of the proposed mentions has an error (`true`), or not (`false`). For example, the context user can’t mention private groups he doesn’t belong to. If such a group were included in the list of mention validations, `hasErrors` would be `true` and the group would have a `validationStatus` of `Disallowed` in its mention validation.
- `mentionValidations`—A list of mention validation information in the same order as the provided record IDs.

## Message Segment: Field Change Value

The Message Segment: Field Change Value response body has a new `valueType` property that specifies whether the message segment contains a `NewValue` or an `OldValue`.

## Message Segment: Mention

The Message Segment: Mention response body has a new `record` property that can be a Group response body or a User Summary response body.

The `record` property was added because you can now mention groups in addition to users. As of version 29.0, use the `record` property instead of the `user` property, which is no longer available. In versions earlier than 29.0, if the mention is not a user, the mention is in a Message Segment: Text response body.

### Message Segment: More Changes

The Message Segment: More Changes response body has a new `moreChanges` property that contains the complete collection of tracked changes for a feed item.

### Moderation Flags

Moderation Flags is a new response body that represents information about moderation flags. It has these properties:

- `flagCount`—The number of moderation flags on this feed item or comment. If the logged-in user is not a community moderator, the property is `null`.
- `flaggedByMe`—Specifies whether the context user had flagged the feed item or comment for moderation (`true`) or not (`false`).

### Motif

The Motif response body has a new `color` property which contains the hex value of the record type's base color. Use this value behind the motif icons.

### Record Field

These new response bodies represent fields on record objects:

- Record Field—A generic record field containing a label and text value.
- Record Field: Blank—A record field displayed as a place holder in a grid of fields.
- Record Field: Compound—A record field that is a composite of sub-fields.
- Record Field: Currency—A record field containing a currency value.
- Record Field: Date—A record field containing a date.
- Record Field: Percent—A record field containing a percentage value.
- Record Field: Picklist—A record field containing an enumerated value.
- Record Field: Reference—A record field containing a reference to another object.
- Record Field: Reference with Date—A record field containing a referenced object that acted at a specific time, for example, "Created By..."

### Record View

These new response bodies represent a view of a record object:

- Record View—A view of any record in the organization, including a record on a custom object. This object is used if a specialized object, such as `User` and `ChatterGroup`, is not available for the record type. Designed for rendering an object quickly and easily.
- Record View Section—A section of record fields on a record detail.

### Related List

These new response bodies represent a related list view on a record object:

- Related List—Defines a related list structure on a record view. There is no data in the list.
- Related List Column—A single column in a table of a record's related list. Describes the shape of the data only.
- Related List Object—Defines the type of object displayed in the rows of a related list.
- Related List Sort—Defines an ordinal of a sort order in a related list.

### Subscription

The Subscription response body's `subject` property can now include a `Topic` response body.

### Topic

The Topic response body has a new `url` property that points to the topic detail page.

### Topic Collection

The Topic Collection response body has these new properties:

- `currentPageUrl`—Returns the current page of topics
- `nextPageUrl`—Returns the next page of topics

### Tracked Change Item

The Topic response body has a new `url` property that points to the topic detail page.

### User Capabilities

User Capabilities is a new response body that describes the capabilities the context user may use with the subject user. It has these properties:

- `canChat`—Specifies if the context user can use Chatter Messenger with the subject user (`true`) or not (`false`)
- `canDirectMessage`—Specifies if the context user can direct message the subject user (`true`) or not (`false`)
- `canEdit`—Specifies if the context user can edit the subject user's account (`true`) or not (`false`)
- `canFollow`—Specifies if the context user can follow the subject user's feed (`true`) or not (`false`)
- `canViewFeed`—Specifies if the context user can view the feed of the subject user (`true`) or not (`false`)
- `canViewFullProfile`—Specifies if the context user can view the full profile of the subject user (`true`) or only the limited profile (`false`)
- `isModerator`—Specifies if the subject user is a Chatter moderator or admin (`true`) or not (`false`)

### User Detail

The User Detail response body has a new `thanksReceived` property that contains the number of times the user has been thanked.

### User Profile

User Profile is a new response body that describes the details necessary to render a view of a user profile. It has these properties:

- `capabilities`—The context user's capabilities specific to the subject user's profile
- `id`—The ID of the user attached to the profile
- `tabs`—The tabs visible to the context user specific to the subject user's profile
- `url`—The URL of the user's profile
- `userDetail`—The details about the user attached to the profile

### User Profile Tab

User Profile Tab is a new response body that describes information about a profile tab. It has these properties:

- `id`—The tab's unique identifier or 18-character ID
- `isDefault`—Specifies if the tab appears first when clicking the user profile (`true`) or not (`false`)
- `tabType`—Specifies the type of tab
- `tabUrl`—The current tab's content URL (for non built-in tab types)

### User Settings

User Settings has a new `hasRestDataApiAccess` property that indicates whether or not the user has access to REST API.

### Zone

Zone is a new response body that describes a Chatter Answers zone. It has these properties:

- `description`—The description of the zone.
- `id`—The ID of the zone.
- `isActive`—Indicates whether the zone is active.
- `isChatterAnswers`—Indicates whether the zone is available for Chatter Answers.
- `name`—The name of the zone.



- `visibility`—The zone visibility. A `ConnectApi.ZoneShowIn` enum value:
  - ◊ `Community`—Available in a community.
  - ◊ `Internal`—Available internally only.
  - ◊ `Portal`—Available in a portal.
- `visibilityId`—If the zone is available in a portal or a community, this property contains the ID of the portal or community. If the zone is available to all portals, this property contains the value `All`.

### Zone Page

Zone Page is a new response body that describes a page of Zone response bodies. It has these properties:

- `zones`—A list of `ConnectApi.Zone` objects.
- `currentPageUrl`—Chatter REST API URL identifying the current page.
- `nextPageUrl`—Chatter REST API URL identifying the next page or `null` if there isn't a next page.

### Zone Search Page

Zones Search Page is a new response body that describes a page of Zone Search Result response bodies. It has these properties:

- `currentPageToken`—Token identifying the current page.
- `currentPageUrl`—Chatter REST API URL identifying the current page.
- `items`—A list of `ConnectApi.ZoneSearchResult` objects.
- `nextPageToken`—Token identifying the next page or `null` if there isn't a next page.
- `nextPageUrl`—Chatter REST API URL identifying the next page or `null` if there isn't a next page.

### Zone Search Result

Zone Search Result is a new response body that describes the result of a search within a zone. It has these properties:

- `hasBestAnswer`—Indicates if the search result has a best answer.
- `id`—ID of the search result. The search result can be a question or an article.
- `title`—Title of the search result.
- `type`—Type of the search result. A `ConnectApi.ZoneSearchResultType` enum:
  - ◊ `Article`—Search results contain only articles.
  - ◊ `Question`—Search results contain only questions.
- `voteCount`—Number of votes given to the search result.

## Metadata API

### Metadata Deployment Changes

This release introduces the following changes to the deployment process:

#### Improved workflow and status messages

When deploying components using Java, the deployment process steps have been reduced to two:

1. Issue a `deploy()` call to start the asynchronous deployment. An `AsyncResult` object is returned. Note the value in the `id` field and use it for the next step.
2. Issue a `checkDeployStatus()` call using the `id` value returned in the `AsyncResult` object from the first step to obtain a `DeployResult` object containing the results of the `deploy()` call.

The [DeployResult](#) object has new fields to give detailed real-time error messages, test failures and deployment status.



## Profile Settings for Managed Package Installed Components

In profiles and permission sets, you can now retrieve and deploy access settings for the following managed components:

- Apex classes
- Custom apps
- Custom field permissions
- Custom object permissions
- Custom tab settings
- External data sources
- Record types
- Visualforce pages

For example, let's say you install a managed package with the namespace `MyNamespace` and the custom object `JobRequest__c`. You can now set object permissions for `JobRequest__c` in the package to a custom profile or a permission set.

For changes to monitoring the deployment process, see [Improvements to Deployment Monitoring](#).

## New Metadata Types

These metadata types are new in API version 29.0.

### AccountSettings

Represents an organization's account settings for account teams, account owner report, and the **View Hierarchy** link.

### BusinessHoursSettings

Represents the metadata used to manage settings for business hours and holidays in entitlements, entitlement templates, campaigns, and cases.

### CompactLayout

Represents the metadata associated with a compact layout.

### ConnectedApp

Represents a Connected App application. A connected app is an application that integrates with salesforce.com using APIs. Connected apps use standard SAML and OAuth protocols to authenticate, provide Single Sign-On, and provide tokens for use with Salesforce APIs. In addition to standard OAuth capabilities, connected apps allow administrators to set various security policies and have explicit control over who may use the applications.

### FlexiPage

Represents the metadata associated with a Flexible Page. A Flexible Page is the home page for an app that appears as a menu item in the Salesforce1 navigation menu.

### PostTemplate

Represents the metadata associated with an approval post template for Approvals in Chatter. With approval post templates, you can customize the information included in approval request posts that appear in Chatter feeds.

### UserSharingRules

Represents the sharing rules for users. With user sharing rules, you can share members of a group with members of another group.

## Updated Calls

The following API call in version 29.0 supports a new argument.

**checkDeployStatus()**

A boolean argument, `includeDetails`, sets the [DeployResult](#) object to populate the `details` field with information about the deployment.

## Updated Metadata Types and Fields

These metadata fields have been added or changed in API version 29.0.

### ApprovalProcess

Salesforce Knowledge article approval actions and workflow rules are now supported in the Metadata API on deployed article types. For article version (`_kav`) in approval processes, the supported action types are:

- Knowledge Action
- Email Alert
- Field Update
- Outbound Message

### ArticleType CustomField

The following fields have been added:

**defaultValue**

If specified, represents the default value of the field.

**deleteConstraint**

Provides deletion options for lookup relationships. Valid values are:

**SetNull**

This is the default. If the lookup record is deleted, the lookup field is cleared.

**Restrict**

Prevents the record from being deleted if it's in a lookup relationship.

**Cascade**

Deletes the lookup record as well as associated lookup fields.

**formula**

If specified, represents a formula on the field.

**formulaTreatBlankAs**

Indicates how to treat blanks in a formula. Valid values are `BlankAsBlank` and `BlankAsZero`.

**referenceTo**

If specified, indicates a reference this field has to another object.

**relationshipLabel**

If specified, indicates a reference this field has to another object.

**relationshipName**

If specified, indicates the value for one-to-many relationships. For example, in the object `MyObject` that had a relationship to `YourObject`, the relationship name might be `YourObjects`.

The following field has been updated:

**type**

The following field types were added.

- Currency
- ArticleCurrency
- Email
- Formula
- Lookup
- Number
- Percent
- Phone
- DependentPicklist
- URL

## AuthProvider

The following fields have been added:

### **authorizeUrl**

The OAuth authorization endpoint URL. Used only with OpenID Connect authentication providers.

### **defaultScopes**

The scopes to be sent with the authorization request, if not specified when a flow is started. Used only with OpenID Connect authentication providers.

### **tokenUrl**

The OAuth token endpoint URL. Used only with OpenID Connect authentication providers.

### **userInfoUrl**

The OpenID Connect endpoint URL. Used only with OpenID Connect authentication providers.

## AsyncResult

Many fields moved to the [DeployResult](#) object as part of improving the status reporting of a deployment. The AsyncResult object now contains:

### **done**

Indicates whether the call has completed (`true`) or not (`false`).

### **id**

ID of the component being created, updated, deleted, deployed, or retrieved.

### **message**

Message corresponding to the `statusCode` field returned, if any.

### **state**

One of four possible values.

- `Queued`: This call has not started. It is waiting in a queue.
- `InProgress`: This call has started, but has not completed yet.
- `Completed`: This call has completed.
- `Error`:

### **statusCode**

If an error occurred, a status code is provided and a corresponding status message in the `message` field.

### ChatterAnswersSettings

The following field has been added:

#### **enableAnswerViaEmail**

Indicates whether users can post answers by replying to email notifications (`true`) or not (`false`).

The following field has been renamed:

**enableOptimizeQuestionFlow** has been renamed to **enableInlinePublisher**.

### CriteriaBasedSharingRule

For all child components, the following field has been added:

#### **description**

Represents the description of the criteria-based sharing rule.

### CustomField

The following field has been added:

#### **trackTrending**

An object is enabled for historical trending if this attribute is `true` for at least one field. Historical trending allows you to capture and analyze changes to fields.

### CustomFieldTranslation

The following fields have been added to provide language support for renaming standard fields:

#### **caseValues**

Different combinations of the custom object with regard to article, plural, possessive, and case. See the `ObjectNameCaseValue` documentation for details.

#### **gender**

Indicates the gender of the noun. This is used for languages where words need different treatment depending on their gender. Valid values are:

- Masculine
- Feminine
- Neuter
- Euter (Swedish)
- Common (Dutch)

#### **startsWith**

Indicates whether the noun starts with a vowel, consonant, or is a special character. This is used for languages where words need different treatment depending on the first character. Valid values are:

- Consonant
- Vowel
- Special (for nouns starting with `z`, or `s` plus consonants)

### CustomObject

The following fields have been added:

#### **compactLayouts**

A list of compact layouts associated with the object.

**compactLayoutAssignment**

The compact layout assigned to this custom object.

The following field has been updated:

**enableHistory**

The `enableHistory` field is supported on standard objects (was previously custom objects, only).

**CustomObjectTranslation**

The following field has been added:

**quickActions**

A list of translations for publisher actions.

**CustomTab**

The following field has been added:

**flexipage**

The name of the Flexible Page to display in this tab.

**DeployResult**

Many fields have been added as part of improving the status reporting of a deployment. The `DeployResult` object now contains::

**checkOnly**

Indicates whether this deployment is being used to check the validity of the deployed files without making any changes in the organization (`true`) or not (`false`). A check-only deployment does not deploy any components or change the organization in any way.

**completedDate**

Timestamp for when the deployment process ended.

**createdDate**

Timestamp for when the `deploy()` call was received.

**details**

Provides the details of a deployment that is in-progress or ended, if the `includeDetails` parameter is set to `true` in the `checkDeployStatus()` call.

**done**

Indicates whether the server finished processing the `deploy()` call for the specified `id`.

**errorMessage**

Message corresponding to the values in the `errorStatusCode` field, if any.

**errorStatusCode**

If an error occurred during the `deploy()` call, a status code is returned, and the message corresponding to the status code is returned in the `errorMessage` field.

**ignoreWarnings**

Optional. Defaults to `false`. Specifies whether a deployment should continue even if the deployment generates warnings. Do not set this argument to `true` for deployments to production organizations.

**lastModifiedDate**

Timestamp of the last update for the deployment process.

**numberComponentErrors**

The number of components that generated errors during this deployment.

**numberComponentsDeployed**

The number of components deployed in the deployment process. Use this value with the `numberComponentsTotal` value to get an estimate of the deployment's progress.

**numberComponentsTotal**

The total number of components in the deployment. Use this value with the `numberComponentsDeployed` value to get an estimate of the deployment's progress.

**numberTestErrors**

The number of Apex tests that have generated errors during this deployment.

**numberTestsCompleted**

The number of completed Apex tests for this deployment. Use this value with the `numberTestsTotal` value to get an estimate of the deployment's test progress.

**numberTestsTotal**

The total number of Apex tests for this deployment. Use this value with the `numberTestsCompleted` value to get an estimate of the deployment's test progress.

**rollbackOnError**

Optional. Defaults to `true`. Indicates whether any failure causes a complete rollback (`true`) or not (`false`). If `false`, whatever set of actions can be performed without errors are performed, and errors are returned for the remaining actions. This parameter must be set to `true` if you are deploying to a production organization.

**startDate**

Timestamp for when the deployment process began.

**status**

Indicates the current state of the deployment.

**success**

Indicates whether the deployment was successful (`true`) or not (`false`).

**FolderShare**

The following fields have been added to `FolderSharedToType`:

**managers**

A list of users whose direct and indirect managers receive sharing access. This field is available if your organization has [Manager Groups](#).

**managerSubordinates**

A list of users whose direct and indirect subordinates receive sharing access. This field is available if your organization has [Manager Groups](#).

**IdeasSettings**

The following fields have been added:

**enableChatterProfile**

Indicates that the Chatter user profile is used for Ideas user profiles.

**ideasProfilePage**

The name of the Visualforce page to use for a custom Ideas user profile, if `enableChatterProfile` is `false`.

**Layout**

The following field has been added:

**relatedContent**

Represents the Related Content section of the page layout.

The following field has been added to `LayoutItem`:

**reportChartComponent**

Refers to a report chart that you can add to a standard or custom object page.

**LiveChatAgentConfig**

The following fields have been added:

**criticalWaitTime**

Specifies the number of seconds an agent can wait to answer an engaged chat before the chat tab flashes to alert the agent to answer it.

**enableAgentSneakPeek**

Specifies whether an agent can see the content of a customer's message before they send it (`true`) or not (`false`).

**supervisorDefaultAgentStatusFilter**

Specifies the Live Agent status for filtering the Agent Status list in the Supervisor Panel.

**supervisorDefaultButtonFilter**

Specifies the default button for filtering the Agent Status list in the Supervisor Panel.

**supervisorDefaultSkillFilter**

Specifies the default skill for filtering the Agent Status list in the Supervisor Panel.

**supervisorSkills**

Specifies the list of agent skills that are assigned to a supervisor, as specified in their assigned Live Agent configuration.

**LiveChatDeployment**

The following field has been added:

**enablePrechatApi**

Indicates whether or not the pre-chat API is enabled for the deployment (`true`) or not (`false`).

**MilestoneType**

The following field has been added:

**RecurrenceType**

The type of recurrence for the milestone.

**Network**

The following fields have been added:

**allowMembersToFlag**

Determines whether users in the community can flag posts or comments as inappropriate. Flagged items are sent to a community moderator for review.

**selfRegProfile**

The profile assigned to users who self register. This value is used only if `selfRegistration` is enabled for the community.

**OwnerSharingRule**

For all child components, the following field has been added:

**description**

Represents the description of the criteria-based sharing rule.

**PermissionSet**

The following fields have been added:

**applicationVisibilities**

Indicates which custom apps are visible to users assigned to the permission set.

**recordTypeVisibilities**

Indicates which record types are visible to users assigned to the permission set. This field is never retrieved or deployed for inactive record types.

The following fields have changed:

**userPermissions**

In API version 28.0 and earlier, this field retrieves all user permissions, enabled or disabled. In API version 29.0 and later, this field retrieves only enabled user permissions. For example, if you have a permission set where “View Setup and Configuration” is enabled and all other user permissions are disabled, in API version 29.0 and later, the retrieved `.permissionset` file includes an entry for `ViewSetup` only.

```
<userPermissions>
  <enabled>true</enabled>
  <name>ViewSetup</name>
</userPermissions>
```

**objectPermissions**

Object permissions for Documents and Pricebooks can now be both retrieved and deployed.

**Profile**

The following field has been added:

**userPermissions**

Specifies a user permission (such as “API Enabled”) and whether it’s enabled for this profile.

The following fields have changed:

**objectPermissions**

Object permissions for Documents and Pricebooks can now be both retrieved and deployed.

**recordTypeVisibilities**

This field is no longer retrieved or deployed for inactive record types.

**QuickAction**

The following fields have been added:



**canvas**

If a custom action is created using a canvas app, this identifies the app. Returns the fully-qualified name of the canvas app in the format <namespace>\_\_<dev\_name>, if the quick action type is Canvas; otherwise, returns null.

**standardLabel**

Specifies the standard label to use for the action. The valid values are:

- LogACall
- LogANote
- New
- NewRecordType (For example, a label with something like “New Idea”)
- Update
- UpdateRecordType
- NewChild
- NewChildRecordType
- CreateNew
- CreateNewRecordType (For example, a label with something like “Create New Idea”)
- QuickRecordType
- Quick (a quick record)

The following field includes new values:

**type**

LogACall  
 SocialPost  
 Canvas  
 Create  
 Update

**RecordType**

The following field has been added:

**compactLayoutAssignment**

Represents the compact layout that is assigned to the record type.

**Report**

The following fields have been added:

**historicalSelector**

Defines a date range for which historical trend reporting data is to be captured. Default is “Any Historical Date.”

**showCurrentDate**

Can be set to `true` for historical trending reports in matrix format.

The following fields have been added to ReportColumn:

**reverseColors**

In historical trend reports, displays greater Date values as green and greater Amount values as red, reversing the default colors.

**showChanges**

In historical trend reports, adds a column displaying the difference between current and historical Date and Amount values.

The following fields have been added to ReportFilterItem:

**columnToColumn**

Indicates that the field contains data from a historical snapshot.

**snapshot**

Represents the date value, either relative (in the format `N_DAYS_AGO:2`) or absolute (in the format `yyyy-MM-dd`).

**ReportType**

The following field has been added:

**autogenerated**

Indicates that the report type was automatically generated when historical trending was enabled for an entity.

**Translations**

The following field has been added:

**quickActions**

A list of global (rather than object-specific) quick actions.

## Bulk API

You can now submit up to 3,000 batches per rolling 24-hour period. The previous limit was 2,000 batches.

## Tooling API

In version 29.0, Tooling API includes:

- Support for executing anonymous Apex.
- Expanded query functionality.
- Access to code coverage results.
- A new StaticResource object, and support for static resource deployment.
- A new FieldHistoryRetentionJob object, which lets you specify date ranges for the retention of field history data. The object is currently available through a pilot program.

For details, see the [Force.com Tooling API Developer's Guide](#).

## Analytics API

New in version 29.0, the Analytics API lets you integrate Salesforce report data into your apps programmatically. For example, you can use the REST based API to build reporting into a third-party app to show a leaderboard of Dreamforce attendee registrations at your sessions. The API has several resources that let you query report metadata, and get report results dynamically at the summary or record detail level.

Available in: <b>All</b> editions that have API enabled except <b>Database.com</b>
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For more information, see [Analytics API](#) in the release notes Analytics section.

# ISVforce

Winter '14 includes several features that make it easier for partners to develop and distribute applications.

[Environment Hub](#)

[Signup API Enhancements](#)

[Compact Layouts Available in Packages](#)

[Flexible Pages Available in Packages](#)

## Environment Hub

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

User Permissions Needed	
To set up and configure the Environment Hub:	"Manage Environment Hub"
To connect an organization to the Environment Hub:	"Connect Organization to Environment Hub"

The Environment Hub lets you view, connect, create, and log into multiple Salesforce organizations from one location. This can be especially convenient if you use a large number of organizations for business, development, and testing.

You must choose one organization as the Environment Hub (or hub organization), and can then connect all your other organizations (or member organizations) to the hub. You can establish single sign-on between the hub and member organizations, enabling users to seamlessly switch between them without having to provide login credentials.

When you connect an organization to the hub, related organizations are automatically discovered so you don't have to manually connect them. The following types of related organizations are auto-discovered.

- For any organization, all sandbox organizations created from it.
- For a release organization, all its related patch organizations.
- For a Trialforce Management Organization, all Trialforce Source Organizations created from it.
- For a License Management Organization (LMO), that is, an organization with the License Management App installed, any release organization (and therefore all its associated patch organizations) that has a managed package registered in the LMO.

To access the Environment Hub:

1. In the Force.com App menu, click **Environment Hub**.
2. Click the **Environment Hub** tab.



**Note:** To find the hub organization for any member organization, from Setup, click **Company Profile > Company Information**. The organization ID of the hub organization is listed in the Organization Details section.

The Environment Hub main page displays a list of all member organizations connected to the hub. For each organization, its name, description, edition, organization ID, single sign-on status, and other details are displayed. From the Environment Hub tab, you can perform these actions.

- Click **Connect Organization** to add another organization.
- Click **Create Organization** to create a new organization.

- Click the name of any organization to view details about it, including other organizations related to it.
- Click **Edit** next to an organization to update its details.
- Click **Del** next to an organization to delete it from the Environment Hub.
- Click **Login** next to an organization to log into it. If you've previously enabled single sign-on for that organization, you'll be logged in without providing login credentials.

If you've added a large number of organizations to the Environment Hub, you can zero in on organizations of a specific type, for example, development organizations, or organizations created after a certain date. To create a custom view, click **Create New View** at the top of the page. You can filter organizations based on multiple criteria such as edition, creation date, instance, origin, SSO status, and so on.

Each member organization corresponds to an EnvironmentHubMember object. This is a standard object, similar to Accounts or Contacts. Hence, you can use the full functionality of the Force.com platform to extend or modify the Environment Hub, both via the user interface or the API. For example, you can create custom fields, set up workflow rules, or define user mappings and enable single sign-on using the API, for any member organization.

### [Setting up Environment Hub](#)

#### [Setting up My Domain for the Environment Hub](#)

#### [Environment Hub Best Practices](#)

#### [Connecting an Organization to the Environment Hub](#)

#### [Viewing an Environment Hub Member's Details](#)

#### [Editing an Environment Hub Member's Details](#)

#### [Creating a New Organization from the Environment Hub](#)

#### [Enabling Single Sign-On in the Environment Hub](#)

#### [Disabling Single Sign-On in the Environment Hub](#)

#### [Mapping Users for Single Sign-On in the Environment Hub](#)

## Setting up Environment Hub

Available in: <b>Professional, Enterprise, Performance, Unlimited, and Developer</b> Editions
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User Permissions Needed	
To set up and configure the Environment Hub:	"Manage Environment Hub"

Follow these steps to set up Environment Hub for the first time.

1. Choose which organization you want to use as your hub organization. This should be the organization most employees log into regularly.
2. [Set up and deploy My Domain](#) for your hub organization. This is a requirement for enabling Environment Hub.
3. Contact salesforce.com support to get Environment Hub enabled for your hub organization.
4. Once the feature is enabled, log into your hub organization via the new My Domain URL.
5. Edit profiles or permission sets to assign users access to specific features of Environment Hub..
  - a. From Setup, click **Manage Users > Profiles**.
  - b. Click **Edit** next to the appropriate profile.
  - c. Select the settings you want to enable, on the profile editing page.
  - d. Click **Save**.

This table summarizes the settings for Environment Hub in the profile editing page.

Section of Profile	Settings for Environment Hub
<b>Custom App Settings</b>	Enable the Environment Hub custom app, so it's available in the Force.com App menu.
<b>Connected App Access</b>	The Environment Hub connected app is for internal use only, and doesn't need to be enabled for any profiles.
<b>Service Provider Access</b>	A new entry appears here automatically here whenever single sign-on is enabled in a member organization. Enabling access to a service provider allows single sign-on login access to the corresponding member organization. The service provider is named "[OrganizationID] Service Provider" where [OrganizationID] is the organization ID of the member organization. Users who don't have access to the service provider may see this message when attempting to log in via single sign-on: "User [UserID] does not have access to sp [ServiceProviderID]."
<b>Administrative Permissions</b>	The "Manage Environment Hub" permission controls which profiles can enable, create, and edit single sign-on configuration for member organizations. It also controls which profiles can create new organizations from the hub (via the <b>Create Organization</b> button).
<b>General User Permissions</b>	The "Connect Organization to Environment Hub" permission controls which profiles can connect existing organizations to the Environment Hub.
<b>Standard Object Permissions</b>	<p>The "Hub Members" settings are used to control access to the Environment Hub Member entities as follows:</p> <ul style="list-style-type: none"> <li>• <b>Read:</b> The ability to view existing Hub Member records.</li> <li>• <b>Create:</b> This setting has no impact on the ability to create Hub Member records. That's because record creation is handled either by connecting an existing organization or creating a new organization from the Environment Hub.</li> <li>• <b>Edit:</b> The ability to edit various fields on existing Hub Member records (Organization, Description, etc.). Note that not all fields are editable, as most are managed internally.</li> <li>• <b>Delete:</b> The ability to "disconnect" an organization from the Hub, and delete its corresponding Environment Hub Member record and Service Provider record (if SSO was enabled on the Member).</li> <li>• <b>View All:</b> The administrative ability to read all Hub Member records, regardless of who created them.</li> <li>• <b>Modify All:</b> The administrative ability to read, edit and delete all Hub Member records, regardless of who created them.</li> </ul> <p>Also, the "Hub Invitations" settings are used to manage connecting organizations to the Environment Hub. When enabling the "Connect Organization to Environment Hub" permission, Create, Read, Update, and Delete should also be enabled for the "Hub Invitations" object. Otherwise, it can safely be disabled.</p>

6. Define user mappings to configure which users should have single sign-on access to specific member organizations. For details, see: [Enabling Single Sign-On](#) and [Defining a SSO User Mapping](#).

Once you've completed the above steps, any user with the appropriate profile can access the Environment Hub by clicking **Environment Hub** in the App menu. The types of actions a user can perform in the Environment Hub will depend on the settings in that user's profile.

## Setting up My Domain for the Environment Hub

User Permissions Needed	
To set up a domain name:	"Customize Application"

My Domain must be fully functional in your organization before Environment Hub can be enabled. Follow these steps to set up and deploy My Domain.

1. Find a domain name that's available and sign up for it.

- a. From Setup, click **Domain Management > My Domain**.
- b. Enter the subdomain name you want to use within the sample URL. You can use up to 40 characters.
- c. Click **Check Availability**. If your name is already taken, choose a different one.
- d. Click **Terms and Conditions** to review your agreement, then select the checkbox.
- e. Click **Register Domain**.

You'll receive an email when your domain name is ready for testing. It can take from 10 minutes to 24 hours.

2. Test your domain name and deploy it to your entire organization.

- a. From Setup, click **Domain Management > My Domain**, then click **Click here to login**, or click the URL in the confirmation email, to login to Salesforce using your new domain name.
- b. Test the new domain name by clicking tabs and links within your application. You'll notice that all pages show your new domain name. If you've customized your Salesforce UI with features such as custom buttons or Visualforce pages, make sure you test custom elements thoroughly before deploying your domain name. Your customizations should not use instance-based URLs.
- c. To roll out the new domain name to your organization, from Setup, click **Domain Management > My Domain** and then click **Deploy to Users**.

The domain is activated immediately and all users are redirected to pages with new domain addresses.

3. Set the domain login policy for users accessing your pages.

- a. From Setup, click **Domain Management > My Domain**.
- b. Under My Domain Settings, click **Edit**.
- c. To turn off authentication for users who do not use your domain-specific login page, select the login policy. For example, this will prevent users from logging in at the generic `https://<instance>.salesforce.com/` login page, and being redirected to your pages after login. This option enhances security by preventing login attempts by anyone who does not know your domain name.
- d. Choose a redirect policy, based on the level of security desired. You have three options, in order of increasing security:
  - Redirect users to the same page within the domain.
  - Redirect users with a warning.
  - Prevent redirecting, so users have to enter the new domain name.

4. Optionally, customize your login page and add or change identity providers available on your login page. For details, see the Salesforce online help.

## Environment Hub Best Practices

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

These guidelines can help you use Environment Hub effectively.

- Choose the organization that most employees log into regularly, as your hub organization.
- You should have only one hub organization.
- Set up My Domain for each member organization, in addition to the hub organization.
- Edit profiles or permission sets to assign users access to specific features of Environment Hub. Some key settings are listed below.
  - ◇ The Environment Hub custom app must be enabled for it to appear in the Force.com App menu.
  - ◇ "Manage Environment Hub" is required to create new organizations or configure single sign-on access. This is powerful functionality and should only be assigned to admin users
  - ◇ "Connect Organization to Environment Hub" is required to add new member organizations to the hub.
  - ◇ Service Provider Access must be enabled for each member organization to which you want to allow single sign-on access.

For details of all the profile settings, see: [Setting up the Environment Hub](#).

- Decide on a strategy for enabling single sign-on access based on your organization's security requirements. You can then choose which combination of the three SSO methods (explicit mapping, Federation ID, or custom formula) to use for your specific needs. For details, see: [Enabling Single Sign-On](#).
- Since each member organization is a standard object (of type EnvironmentHubMember), you can modify its behavior or access it programmatically. For example, you can create custom fields, set up workflow rules, or define user mappings and enable single sign-on using the API, for any member organization.
- Single sign-on won't work for newly added users or for SSO user mappings defined in a sandbox organization. You should only add users, edit user information, or define SSO user mappings in the parent organization for the sandbox.

## Connecting an Organization to the Environment Hub

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

User Permissions Needed	
To connect an organization to the Environment Hub:	"Connect Organization to Environment Hub"

To connect an organization to the Hub:

1. On the Environment Hub main page, click **Connect Organization**.
2. Enter the admin username for the member organization, that is, the organization you want to connect to the hub.
3. Click **Connect Organization**.
4. Enter the admin username and password of the member organization in the popup window.
5. Click **Log in to Salesforce**.
6. Click **Allow** in the next popup window.

The organization is now connected to the hub and appears in the list of member organizations in the Environment Hub.

## Viewing an Environment Hub Member's Details

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

Click the name of any organization in the Environment Hub to view details about it, such as its name, description, organization ID, related organizations, and linked users.

The detail page has the following sections.

- [Hub Member Detail](#)
- [Parent Organizations](#)
- [Child Organizations](#)
- [Single Sign-On User Mappings](#)

From the Hub Member Detail page, you can do any of the following.

- Click **Edit** to edit information about this organization.
- Click **Delete** to remove this organization from the Environment Hub.
- Click **Enable SSO** to enable single sign-on for this organization. This lets linked users log into this organization from the Environment Hub without providing credentials.
- Click **Log into Organization** to log in. If you've enabled SSO for this organization, you'll be logged in without entering login credentials.
- Click **New SSO User Mapping** to link a username in the member organization with a username in the hub organization for single sign-on access.

### Hub Member Detail

This section displays the following attributes (in alphabetical order).

Attribute	Description
Description	A brief description of this organization.
Edition	The organization's edition, for example, DE or EE.
Origin	The method by which this organization was added to the Environment Hub. Possible values are <code>Auto Discovered</code> and <code>User Added</code> .
Organization	The name of this organization.
Organization ID	The organization ID of this organization.
Sandbox	If this is a sandbox organization.
Service Provider	A Details link here indicates that the organization has been activated for Environment Hub single sign-on by salesforce.com support. You need to enable service provider access for this organization in all profiles that will be using it for single sign-on.
Status	The licensing or creation status of this organization. Possible values include <code>Trial</code> , <code>Free</code> , <code>Active</code> , <code>Suspended</code> , and <code>Deleted</code> .



Attribute	Description
SSO	<p>If single sign-on has been enabled for this organization. Possible values are:</p> <ul style="list-style-type: none"> <li>On—Single sign-on is enabled.</li> <li>Off—Single sign-on is disabled.</li> <li>Pending—Single sign-on is in the process of being enabled.</li> <li>Failed—Single sign-on enablement failed. Contact salesforce.com support for assistance.</li> </ul>
SSO Method 1 – Mapped Users	The number of SSO user mappings defined between this organization and the environment hub.
SSO Method 2 – Federation ID	If single sign-on has been enabled based on matching Federation ID.
SSO Method 3 – User Name Formula	If single sign-on has been enabled using a custom formula to match usernames.

### Parent Organizations and Child Organizations

When you connect an organization to the Environment Hub, the following types of related organizations are automatically discovered and connected.

- For any organization, all sandbox organizations created from it.
- For a release organization, all its related patch organizations.
- For a Trialforce Management Organization, all Trialforce Source Organizations created from it.
- For a License Management Organization (LMO), that is, an organization with the License Management App installed, any release organization (and therefore all its associated patch organizations) that has a managed package registered in the LMO.

These sections display a list of the organizations related to this organization. For each organization in the list, its name and relationship to this organization are displayed.

### Single Sign-On User Mappings

This section displays a list of mapped users, that is, users in the hub organization who are associated with a corresponding user in the member organization. If single sign-on has been enabled for the member organization, all mapped users can log into it from the Environment Hub without needing to provide credentials.

From this section, you can do any of the following:

- Click **New SSO User Mapping** to define a new user mapping.
- Click **Del** next to a user to disable single sign-on access.

User mappings can be many-to-one (but not one-to-many). This means you can associate multiple users in the hub organization to the same user in a member organization. This can be useful, for example, if you want a group of users to log into a test organization as the same user, so they experience exactly the same configuration.



#### Note:

- If a user mapping has been defined and the user is still unable to use single sign-on, check that the user's profile has the appropriate permissions enabled. For details, see: [Setting up Environment Hub](#).
- Single sign-on won't work for newly added users or for SSO user mappings defined in a sandbox organization. You should only add users, edit user information, or define SSO user mappings in the parent organization for the sandbox.

## Editing an Environment Hub Member's Details

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

To edit details of a member organization in the Environment Hub:

1. Click **Edit** next to the organization's name in the Environment Hub main page, or on its detail page.
2. In the page that displays, edit the name and description for the organization. It's helpful to specify a meaningful name and description. This lets you easily recognize the organization in the list of members in the Environment Hub.
3. Optionally, specify one or more single sign-on methods (see below for details).
4. Click **Save**.

To match users in the member and hub organizations for single sign-on, you can use any of three methods.

SSO Method	Description
<b>Mapped Users</b>	Match users in the hub organization to users in a member organization manually. This method is on by default if you've defined any SSO user mappings from the member detail page. For details, see: <a href="#">Defining a SSO User Mapping</a> .
<b>Federation ID</b>	Match users who have the same Federation ID in both organizations. To enable this method, select the checkbox next to it.
<b>User Name Formula</b>	Define a custom formula for matching users in the hub and member organizations. This allows you the most flexibility. To enable this method, type a custom formula into the text box provided. For example, the following formula matches the first part of the user name (the part before the "@" sign) with an explicit domain name.  <code>LEFT(\$User.Username, FIND("@", \$User.Username)) &amp; ("mydev.org")</code>

If you specify more than one single sign-on method, they're evaluated in the order of precedence listed above at the time a user tries to log in. The first method that results in a match is used to log the user in, and the other methods are ignored. If no matching user can be identified, you're directed to the standard salesforce.com login page.

## Creating a New Organization from the Environment Hub

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

User Permissions Needed	
To set up and configure the Environment Hub:	"Manage Environment Hub"

To create a new organization in the Environment Hub:

1. On the Environment Hub, click **Create Organization**.
2. From the pulldown menu, choose the type of organization you want to create. Possible choices are: Development, Test, and Release.

3. On the page that appears, enter the organization's name and My Domain, as well as the name, user name, and email address of the admin user. If you're creating a test organization, you must also specify either its edition or a Trialforce template ID.
4. Click **Create**.

Here's a comparison of the different types of organizations used for development.

- Development organization — a standard Developer Edition (DE) organization.
- Release organization — A DE organization used for creating and uploading a managed package.
- Test organization — a trial organization created for test and demonstration purposes, similar to an organization created from [www.salesforce.com/trial](http://www.salesforce.com/trial). Partners can specify a Trialforce template for creating trial organizations. This enables them to configure and test exactly how their prospects experience the trial.

## Enabling Single Sign-On in the Environment Hub

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

User Permissions Needed	
To set up and configure the Environment Hub:	"Manage Environment Hub"

To enable single sign-on for an organization:

1. On the Environment Hub main page, click the name of the organization.
2. Click **Enable SSO** on the organization's detail page.
3. On the page that displays, click **Enable SSO**.

You're taken to the detail page of the organization. Its single sign-on status displays both at the top of the page, and next to the SSO field in the Hub Member Details section.

To match users in the member and hub organizations for single sign-on, you can use any of three methods.

SSO Method	Description
<b>Mapped Users</b>	Match users in the hub organization to users in a member organization manually. This method is on by default if you've defined any SSO user mappings from the member detail page. For details, see: <a href="#">Defining a SSO User Mapping</a> .
<b>Federation ID</b>	Match users who have the same Federation ID in both organizations. To enable this method, select the checkbox next to it.
<b>User Name Formula</b>	Define a custom formula for matching users in the hub and member organizations. This allows you the most flexibility. To enable this method, type a custom formula into the text box provided. For example, the following formula matches the first part of the user name (the part before the "@" sign) with an explicit domain name.  <code>LEFT(\$User.Username, FIND("@", \$User.Username)) &amp; ("mydev.org")</code>

If you specify more than one single sign-on method, they're evaluated in the order of precedence listed above at the time a user tries to log in. The first method that results in a match is used to log the user in, and the other methods are ignored. If no matching user can be identified, you're directed to the standard salesforce.com login page.

**Note:**

- If a user mapping has been defined and the user is still unable to use single sign-on, check that the user's profile has the appropriate permissions enabled. For details, see: [Setting up Environment Hub](#).
- Single sign-on won't work for newly added users or for SSO user mappings defined in a sandbox organization. You should only add users, edit user information, or define SSO user mappings in the parent organization for the sandbox.

## Disabling Single Sign-On in the Environment Hub

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

User Permissions Needed	
To set up and configure the Environment Hub:	"Manage Environment Hub"

To disable single sign-on for an organization:

1. On the Environment Hub main page, click the name of the organization.
2. Click **Disable SSO** on the organization's detail page.
3. On the page that displays, click **Disable SSO**.

You're taken to the detail page of the organization. Its single sign-on status displays both at the top of the page, and next to the SSO field in the Hub Member Details section.

## Mapping Users for Single Sign-On in the Environment Hub

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

User Permissions Needed	
To set up and configure the Environment Hub:	"Manage Environment Hub"

You can define a mapping between a user in the hub organization and one or more users in a member organization. If single sign-on has been enabled for the member organization, all mapped users can log into it from the Environment Hub without needing to provide credentials.

User mappings can be many-to-one (but not one-to-many). This means you can associate multiple users in the hub organization to the same user in a member organization. This can be useful, for example, if you want a group of users to log into a test organization as the same user, so they experience exactly the same configuration.

To define a new single sign-on user mapping in Environment Hub:

1. On the Environment Hub main page, click the name of the organization.
2. Click **New SSO User Mapping** on the hub member detail page.
3. In the page that appears, enter the username for the member organization and specify the corresponding user for the hub organization using the lookup field.
4. Click **Save** (or **Save & New** to save and add a new mapped user).

**Note:**

- If a user mapping has been defined and the user is still unable to use single sign-on, check that the user's profile has the appropriate permissions enabled. For details, see: [Setting up Environment Hub](#).
- Single sign-on won't work for newly added users or for SSO user mappings defined in a sandbox organization. You should only add users, edit user information, or define SSO user mappings in the parent organization for the sandbox.

## Signup API Enhancements

Available in: **Developer** Edition

In Winter '14, the following fields have been added to the SignupRequest object. They expand your options for signing up new trial organizations using the API.

Field Name	Details
AuthCode	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Sort</p> <p><b>Description</b></p> <p>A one-time authorization code that can be exchanged for an OAuth access token and refresh token using standard Salesforce APIs. It's used in conjunction with <code>ConnectedAppCallbackUrl</code> and <code>ConnectedAppConsumerKey</code>, when the specified Connected App hasn't been configured with an X.509 certificate. This is a read-only field provided by the system once the signup request has been processed. This field is available in API version 29.0 and later.</p>
CreatedOrgInstance	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Sort</p> <p><b>Description</b></p> <p>The server instance of the new trial organization, for example, "na8." This field is available in API version 29.0 and later.</p>
SuppressSignupEmails	<p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Sort</p>

Field Name	Details
	<b>Description</b> When set to <code>true</code> , no signup emails are sent when the trial organization is created. This field is used for the Proxy Signup feature, and is available in API version 29.0 and later.

## Compact Layouts Available in Packages

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

Compact layouts—the new mobile-optimized record layouts for Salesforce1—are supported in both managed and unmanaged packages.

## Flexible Pages Available in Packages

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

Flexible Pages—the new mobile app home pages for Salesforce1—are available in managed and unmanaged packages.

# Other salesforce.com Products

## **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](#).

## **do.com**

Do.com is a social productivity platform for organizing, tracking, and creating project-based tasks.

For information on new features, go to the [do.com New Features Help page](#).

## **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](#).

# Help and Training

## Release Notes

The [Salesforce.com Release Notes](#) are now available in HTML format. See [HTML Release Notes—Beta](#) on page 1.

## Videos

-  [Who Sees Whom: User Sharing](#) (6:05 minutes)  
Learn how you can control visibility among users in your organization.
-  [Connecting Social Networks to Accounts, Contacts, and Leads](#) (3:29 minutes)  
Gain insights to your current and prospective customers by adding social data to your Salesforce accounts, contacts, and leads.
-  [Updating Entitlement Processes with Entitlement Versioning](#) (2:20 minutes)  
Learn how to create a new version of an entitlement process, change the milestone in the new version of the entitlement process, and apply the new version of the entitlement process to an entitlement and its associated cases.

## Tip Sheets and Implementation Guides

- The [Using Date and Date/Time in Formulas](#) tip sheet contains a myriad of Date and Date/Time formula examples, as well as providing an overview of how they work.
- The [Customizing Chatter Profile Pages](#) tip sheet contains information about deploying custom content on Chatter profiles.

## Developer Guides

- The *Force.com Apex Code Developer's Guide* ([PDF](#) | [HTML](#)) has been restructured. The topics in the guide have been reorganized—they're grouped into logical parts, and the order of some topics has changed. For example, to learn about everything that's related to data in Apex, including DML, SOQL, and dynamic Apex, refer to the Working with Data in Apex chapter. Fundamental concepts are presented first, and are followed by more complex concepts that build on them, which makes it easier to learn the Apex language. The documentation about Apex governor limits and transactions has been enhanced. The reference section has been reorganized to list classes by namespace, and method documentation has been reformatted. Finding and consuming Apex documentation is faster and easier than ever.
- In the [SOAP API Developer's Guide](#), the following changes have been made to the documentation for `DescribeLayoutResult` to bring it in line with what's already in the API.
  - ◇ `DescribeButtonSection` has been updated to `DescribeLayoutButtonSection`, and information about its field `detailButtons` has been added.
  - ◇ A description for `DescribeLayoutButton` was added, as well as information for its three fields: `custom`, `label`, and `name`.
- In the *Force.com Apex Code Developer's Guide*, the query cursor limits were incorrectly documented as 50 query cursors per user for all Apex features and Visualforce, except for the Batch Apex `start` method that was documented to have 5 query cursors. The Winter '14 documentation has been updated with the correct per-user query cursor limits—namely 50 for Apex with the exception of 15 for the Batch Apex `start` method, and 5 for the Batch Apex `execute` and `finish` methods each. Visualforce has 5 query cursors.
- The Live Agent REST API is now generally available, supported by the new [Live Agent REST API Developer's Guide](#). The Live Agent REST API allows developers to customize and extend the functionality of Live Agent chat windows in mobile



and web applications. This guide provides a comprehensive reference of the REST API resources that are available to Live Agent developers.