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# Salesforce CRM Content Implementation Guide

Salesforce, Winter '16





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# INTRODUCTION TO SALESFORCE CRM CONTENT

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

## What is Salesforce CRM Content?

Salesforce CRM Content simplifies content management by incorporating user-friendly features into the following tasks:

### Organizing

Rather than keep files in folders that make content difficult to find, Salesforce CRM Content stores files in fully searchable file repositories known as libraries. Administrators can create multiple libraries based on any classification, such as department name, job function, or team, then configure user permissions within the library to balance content access with security. Authors assign descriptive labels called tags to help classify and organize content across libraries. You can view a list of all content that belongs to a particular tag or filter search results based on a tag or tags. Salesforce CRM Content also provides private libraries, which allow users to reduce the clutter on their desktops while using content-management benefits such as document search and version control.

### Searching

The powerful Salesforce CRM Content search engine scans the entire body of the document as well as content properties such as the title, description, tags, categorization data, and author name. You can filter searches by featured content, file format, author, tags, libraries, or custom fields and then view the results with various levels of detail, providing an easy way to find relevant content quickly. If Chatter is enabled for your organization, you can also filter your search results by Chatter files. The “smart bar” graphic for downloads, comments, ratings, and subscribers allows you to compare documents within a search result set.

### Subscribing

Once a file is located, subscribing to it ensures that you receive an email notification when new versions are published or changes are made to the file's properties. You can also subscribe to authors, tags, and libraries, thus reducing the time spent searching for new or updated content. Notification emails will arrive real-time or once daily, depending on your preferences.

### Previewing

In Salesforce CRM Content you do not need to download a large document to determine if its content is relevant to you. The content details page provides document details at a glance, including document title, author, description, tags, libraries, comments, votes, versions, subscribers, and downloads. If the document is a Microsoft PowerPoint, Word, Excel, or Adobe® PDF file, you can preview the entire file in your browser without downloading it. Some aspects of files may not be displayed in previews. Copy-protected PDFs can't be previewed.

### Contributing

Uploading new or revised files in Salesforce CRM Content is fast and easy. During the upload process you choose a library and record type for your file or Web link, write a description, assign one or more tags, and fill out any customized fields that help categorize and define your content. Version management does not require checking files in and out, rather, you simply upload a new version of the file and Salesforce CRM Content maintains a version list accessible from the content details page. You can download past versions of a file and read all reason-for-change comments that an author may have included with a new version.

### EDITIONS

Available in: Salesforce Classic

Available in:

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

**Reviewing Usage and Providing Feedback**

Salesforce CRM Content provides several methods for determining whether content is valuable to readers. Featuring a piece of content increases its visibility in search results. Voting thumbs up or thumbs down on a file, Web link, or Google doc and adding comments allow you to participate directly in content improvement. You can also see who has subscribed to a file, link, or doc and how many times files have been downloaded. The Reports tab allows you to create standard or custom reports on Salesforce CRM Content data. If the content delivery feature is enabled, you can send content to colleagues, leads, and contacts and then track how often the content has been previewed or downloaded.

**Sharing Content in Salesforce**

Salesforce CRM Content is also integrated with leads, accounts, contacts, opportunities, cases, products, and custom objects. If Salesforce CRM Content functionality is enabled on the Opportunity tab, for example, Salesforce CRM Content uses the fields on the opportunity detail page to search for files that may be relevant to that opportunity. You can drill down in the search results as needed or run your own search and then attach one or more files to the opportunity. The most current version of the file will be available on the detail page for the life of the opportunity.

**Sharing Content in Salesforce Classic Mobile**

Salesforce CRM Content is available in Salesforce Classic Mobile. Users can share content with customers and colleagues from the mobile application when they're away from their desks. Ask your administrator to set up mobile Content.

## How Do I Access Salesforce CRM Content?

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The sections in this guide explain how to create Salesforce CRM Content users, define administrative settings in the Setup area, and configure libraries so contributors can begin publishing content. Licensed users can access Salesforce CRM Content by choosing **Content** from the Force.com Apps drop-down list. The Salesforce CRM Content application has three tabs:

**Libraries tab**

Clicking the Libraries tab opens the Libraries home page where you can access your personal library, choose a specific shared library to view or edit, analyze library usage and activity and, if applicable, create new libraries. The top of the page has several publishing-related options with which you can publish files, Web links, and Google docs as well as create custom content packs. See "Manage Libraries" in the Salesforce Help for more information.

**Content tab**

Clicking the Content tab displays files, content packs, Web links, and Google docs published in your Salesforce CRM Content libraries. If Chatter is enabled, files posted to Chatter groups and public Chatter files are also displayed on the Content tab. The top twenty most recently modified items are listed by default. You can search for content and then filter your results using several criteria. Click on a content item to open its content details page. See "Search for Content" in the Salesforce Help for more information.

**Subscriptions tab**

Clicking the Subscriptions tab displays the Subscriptions home page, where you can view your Salesforce CRM Content subscriptions and toggle them off or on. Click the Content, Tags, Authors, or Libraries subtabs to view your subscriptions. Depending on your notification settings, you are notified of changes to your subscribed content via real-time emails or a once-daily email. See "View and Edit Content Subscriptions" in the Salesforce Help for more information.

# PLANNING YOUR SALESFORCE CRM CONTENT IMPLEMENTATION

Before you can begin setting up Salesforce CRM Content, it is important that you consider the following questions. The answers to these questions are necessary prerequisites to completing the tasks in this guide.

## Who will have access to your Salesforce CRM Content organization?

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Each user must have a Salesforce CRM Content user license and certain user permissions. See [Creating Salesforce CRM Content Users](#) for more information.



**Note:** Customer Portal and partner portal users can have view-only access to your organization without a Salesforce CRM Content user license. See [Enabling Salesforce CRM Content in Portals](#) for more information.

## How many libraries do you need?

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Review the files you plan to store in Salesforce CRM Content to help you determine how many libraries you need and what content belongs to each library. Users are given access to content based on their library permissions. Note that every user has one personal library where he or she can store private or in-progress content. See [Creating Libraries and Adding Members](#) for more information.

## What library permissions do you want to grant to different users?

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A library permission is a group of privileges assigned to each Salesforce CRM Content library member. It determines which tasks a member can perform in a particular library. The same user can have a different library permission in each of his or her libraries. All Salesforce CRM Content organizations include three library permissions by default: Viewer, Author, and Administrator. You can customize these library permissions or create new ones. Note that library permissions do not apply to personal libraries; all users can save content in their personal library. See [Creating Library Permissions](#) for more information.

## Do you need custom content fields?

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All page layouts contain three default fields: `Description`, `Tags`, and `Title`. You can create additional fields and assign them to one or more page layouts. If you want to create a field named, for example, `Reviewed By`, your custom page layout would be a picklist with the names of possible reviewers. See [Creating Custom Fields](#) for more information.

## Do you want to restrict the record types available in particular libraries?

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If you create record types, you can choose to restrict record types to certain libraries. For example, if your sales teams use record types that are exclusive to sales collateral, you can ensure that these record types do not appear as options when users of the Marketing or Support libraries contribute content. See [Restricting Record Types in a Library](#) for more information.

## Which tagging rule do you want to apply per library?

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In Salesforce CRM Content, tags are descriptive labels that help classify and organize content. Contributors can assign tags to their files, content packs, Google docs, or Web links, thus enabling all library members to browse for content by tag. The tagging rule in a library determines how contributors can tag content; for example, the restricted-tagging rule does not allow contributors to create new tags. Library tagging rules are optional. By default, library contributors can enter any tag. The tagging rule options are open tagging, guided tagging, and restricted tagging. See [Defining Tagging Rules](#) for more information.

## Do you want to add Google docs to Salesforce CRM Content?

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Including Google docs in Salesforce CRM Content allows users to access all types of content from a single location and apply Salesforce CRM Content functionality, such as votes, comments, and subscriptions, to Google docs. To associate Google docs with a library, the Add Google Docs to Salesforce service must be activated for your organization. See [Enabling Google Docs](#) for more information.

## Do you want to enable content deliveries?

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A *content delivery* allows you to easily convert documents such as Microsoft® PowerPoint and Word files into an optimized web-based version for easy online viewing. Once you create your delivery, you can send its encrypted URL to any recipient, such as leads, customers, partners, and colleagues, and then track how often the content is viewed or downloaded. Content deliveries are available in Salesforce Classic only. However, Lightning Email generates delivery-based links as email attachments for Lightning Experience users who have access to the Content Deliveries feature. On the content details page in Salesforce CRM Content, you can create a new delivery or view all the deliveries associated with that piece of content. See [Enabling Content Deliveries](#) for more information.

## Do you want to enable multilanguage support?

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You can allow users to publish, edit, and search for content in any of the Salesforce-supported languages. Users can choose a language or publish in their personal language by default. See [Enabling Multilanguage Support](#) for more information.

## Do you want to enable content packs?

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Content packs are powerful tools that help users efficiently share, customize, and reuse content. A content pack is a collection of related documents or files that are stored as a group in Salesforce CRM Content. Any file in Salesforce CRM Content can be added to a content pack, from traditional business documents such as Microsoft® PowerPoint presentations and Adobe® PDF files, to audio files, video files, and Google docs. See [Enabling Content Packs](#) for more information.

## Do you want to make Salesforce CRM Content accessible from standard and custom objects?

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You can enable Salesforce CRM Content functionality for leads, accounts, contacts, opportunities, cases, products, or custom objects by adding the Related Content related list to the appropriate page layout. From the Related Content related list, users can search for and attach content that is relevant to the record. See [Associating Content with Standard and Custom Objects](#) for more information.

## Do you want to enable Salesforce CRM Content in the Customer Portal and partner portal?

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You can provide portal users with different levels of access to your Salesforce CRM Content organization. See [Enabling Salesforce CRM Content in Portals](#) for more information.

# SETTING UP SALESFORCE CRM CONTENT

Implementing Salesforce CRM Content for your organization includes creating licensed users; defining organization-level settings such as content fields, record types, and page layouts; customizing the libraries where contributors will add and view content; and, if applicable, enabling Salesforce CRM Content in your customer or partner portals.

For information about contributing content, see “Upload and Publish Content” in the Salesforce Help. If you have a large volume of content that cannot be uploaded manually, contact Salesforce for assistance.

## Creating Salesforce CRM Content Users

To create a Salesforce CRM Content user:

1. From Setup, enter *Users* in the *Quick Find* box, then select **Users**.
2. Click **Edit** next to the user's name, and then select the *Salesforce CRM Content User* checkbox.
3. Optionally, select the *Receive Salesforce CRM Content Emails as Alerts* checkbox or the *Receive Salesforce CRM Content Alerts as Daily Digest* checkbox.

If *Receive Salesforce CRM Content Emails as Alerts* is selected, the user receives email notifications if activity occurs on his or her subscribed content, libraries, tags, or authors. To receive real-time email alerts, select this checkbox and do not select the *Receive Salesforce CRM Content Alerts as Daily Digest* checkbox. If *Receive Salesforce CRM Content Alerts as Daily Digest* is selected, the user receives a once-daily email summary if activity occurs on his or her subscribed content, libraries, tags, or authors. Users can modify these preferences themselves.

4. Verify that the Salesforce CRM Content user has the appropriate Salesforce CRM Content user permissions enabled:

| User Permission                           | Function Controlled                                                                                                                                                                      |
|-------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Manage Salesforce CRM Content             | The user can create, edit, and delete libraries and edit library membership. This administrative user permission is inclusive of the other four Salesforce CRM Content user permissions. |
| Create Libraries                          | The user can create Salesforce CRM Content libraries.                                                                                                                                    |
| Manage Content Permissions                | The user can create, edit, and delete library permissions in Salesforce CRM Content.                                                                                                     |
| Manage Content Properties                 | The user can create, edit, and delete custom fields in Salesforce CRM Content.                                                                                                           |
| Manage record types and layouts for Files | The user can create, edit, and delete record types and page layouts in Salesforce CRM Content.                                                                                           |

 **Note:** By default, the System Administrator user profile contains all Salesforce CRM Content user permissions.

5. When you are finished editing the user record, click **Save**.

## Configuring Organization Settings

Before creating and configuring libraries in Salesforce CRM Content, complete the following optional administrative tasks.

### Creating Custom Fields

You can create custom fields and assign them to a page layout. The default fields are *Description*, *Tags*, and *Title*. If you want to create a field named, for example, *Reviewed By*, your custom content field would be a picklist with the names of possible reviewers.

To create, modify, and delete Salesforce CRM Content custom fields for categorizing and defining your content, go to the object management settings for content. If you're using Lightning Experience, go to the Object Manager, select **Content Version**, then scroll to the fields area. If you're using Salesforce Classic, enter *Salesforce Files* in the *Quick Find* box, then select **Fields**. The data assigned to these fields during upload is available on the content details page for the life of the file. After creating custom content fields, you must assign them to a page layout. The page layout determines which fields appear when a user uploads or revises files in Salesforce CRM Content.

#### To create a custom content field:

1. Click **New**.
2. Choose the type of field to create, and click **Next**.
3. For relationship fields, associate an object with the field and click **Next**.
4. Enter a field label. The field name is automatically populated based on the field label you enter. This name can contain only underscores and alphanumeric characters, and must be unique in your organization. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. Ensure the custom field name is not identical to any standard field name for that object.
5. Choose the page layout that should display the field as an editable field.

#### USER PERMISSIONS

To create, edit, or delete custom fields:

- "Manage Salesforce CRM Content"
- OR
- "Manage Content Properties"

### Creating Library Permissions

To create a library permission in Salesforce CRM Content, from Setup, enter *Content Permissions* in the *Quick Find* box, select **Content Permissions**, and then click **Add a Library Permission**.

1. Assign a name to the library permission.
2. Optionally, enter a description of the library permission. If your organization has several library permissions, consider describing each by its function or with a summary of its privileges. For example, for a "Marketing Reviewer" permission you might include a description that reads, "Reviews all content used in outbound marketing campaigns" or "This user can view and comment on documents."
3. In the Permissions section, select the checkboxes that correspond to the privileges you want to grant to users with this library permission.

#### USER PERMISSIONS

To create library permissions:

- "Manage Salesforce CRM Content"
- OR
- "Manage Content Permissions"

| Library Privilege                      | Description                                                                                                                                                                                                                                                                       |
|----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Manage Library                         | Perform any action in the library. This privilege is required to edit the libraries' name and description, add or remove library members, or delete a library.<br><br>Creating a new library requires the "Manage Salesforce CRM Content" or "Create Libraries" user permissions. |
| Add Content                            | Publish new content to the library, upload new content versions, or restore archived (deleted) content. Content authors can also change any tags associated with their content and archive or delete their own content.                                                           |
| Add Content on Behalf of Others        | Choose an author when publishing content in the library.                                                                                                                                                                                                                          |
| Archive Content                        | Archive and restore any content in the library.                                                                                                                                                                                                                                   |
| Delete Content                         | Delete any content in the library. Authors can undelete their own content from the Recycle Bin.                                                                                                                                                                                   |
| Feature Content                        | Identify any content in the library as "featured."                                                                                                                                                                                                                                |
| View Comments                          | Read comments posted to any content in the library.                                                                                                                                                                                                                               |
| Add Comments                           | Post comments to any content in the library and view all comments in the library. Users can edit or delete their own comments.                                                                                                                                                    |
| Modify Comments                        | Edit or delete comments made to any content in the library.                                                                                                                                                                                                                       |
| Tag Content                            | Add tags when publishing content or editing content details in the library.                                                                                                                                                                                                       |
| Deliver Content                        | Create a content delivery using any files in the library.                                                                                                                                                                                                                         |
| Attach or Share Content within Chatter | Make content from this library accessible in Chatter. Within Chatter, select a file from the library and attach it to a post or share it.                                                                                                                                         |

#### 4. Click **Save**.

## Enabling Multilanguage Support

If the **Enable Multilanguage search and contribute** checkbox is selected, a **Language** drop-down list is available on the Salesforce CRM Content page in Setup when users publish, edit, or search for content. The **Language** drop-down list contains all twenty languages that Salesforce supports.

If a user does not choose a language when publishing content, that content is associated with the user's personal language by default. If the user's personal language setting is different from the organization's language, content published by that user is associated with the user's language, not the organization's language.

### USER PERMISSIONS

To modify Salesforce CRM Content settings:

- "Manage Salesforce CRM Content"

## Enabling Content Packs

You can enable or disable the content pack features by toggling the `Enable content pack creation` checkbox on the Salesforce CRM Content page in Setup. By default, this setting is enabled in all organizations.

When this setting is enabled, the **Create New > Content Pack** option displays on the Libraries tab. Also, from the content details page, users can clone and customize these documents or create new versions. If you disable `Enable content pack creation` after users in your organization have already created content packs, no content is deleted and users can continue to modify metadata such as description, title, and custom fields. However, once content pack creation is no longer enabled, users cannot customize or modify existing packs. Specifically, the **Clone & Customize** button and the **Edit > Content Pack** options on the content details page is unavailable.

For more information and a description of content packs, see “Create and Modify Content Packs in Salesforce CRM Content” in the Salesforce Help.

### USER PERMISSIONS

To modify Salesforce CRM Content settings:

- “Manage Salesforce CRM Content”

## Enabling Content Deliveries

To enable or disable content deliveries for your organization:

1. From Setup, enter `Content Deliveries` in the Quick Find box, then select **Content Deliveries** and select or deselect the `Enable Creation of Content Deliveries for Chatter Files` checkbox. If you don't have access to the Content Deliveries feature, contact Salesforce Customer Support to activate it.
2. To let users create and share links to Chatter files, click `Enable Creation of Content Deliveries for Chatter Files`.
3. Choose a default option for content-delivery passwords. Because content-delivery URLs can be sent to leads, customers, or any unauthenticated user, Salesforce recommends requiring password protection if your users will send confidential documents via content delivery. The options below allow you to select an organization-wide default for content-delivery password protection.
  - **Password protection is optional and defaults to OFF**—If this option is selected, users can choose to require a password when they create a content delivery, but the `Require Password to Access Content` field on the create-delivery wizard is not checked by default.
  - **Password protection is optional and defaults to ON**—If this option is selected, the `Require Password to Access Content` field on the create delivery wizard is checked by default. Users can uncheck the option if they do not want to require a password.
  - **Password protection is required**—If this option is selected, a password is generated each time a content delivery is created. Users cannot opt out of the password requirement.



### Note:

- If you choose to require a password, users who create a content delivery will receive a password when the delivery is generated; users must send the password and the delivery URL to delivery recipients. Delivery recipients are prompted for the password when they click the content delivery URL.
- Content delivery passwords display with the content-delivery URL when the delivery is created. You can also access the password on the delivery detail page for the life of the content delivery.

When content delivery is enabled, all users should add the Content Deliveries related list to their page layouts for leads, business accounts, contacts, opportunities, cases, campaigns, or custom objects. All Salesforce CRM Content users will see a **Deliver Content** option on each content details page.

## Implementation Tips

- To ensure quality of service, the total number of content-delivery views allowed within a 24-hour period is limited to 20,000. Also, the amount of bandwidth allocated to content deliveries is limited to 10 GB within a 24-hour period. If a recipient tries to view a delivery when a rate limit has been exceeded, a notification displays that asks the viewer to try again later. Salesforce may be able to increase rate limits on an exception basis. For more information, contact your sales representative.
- When you create a content delivery, Salesforce copies the original file and creates a new version of that file specifically for online viewing. Note the following information concerning supported file types:
  - Microsoft® Office 97 through Microsoft Office 2007 Word, Excel, and PowerPoint files are supported for online views.
  - Adobe® PDF files are supported for online views, but copy-protected PDFs are not.
  - JPG, BMP, GIF, and PNG are supported for online views.
  - Any document over 25 MB is not supported for online views.

You can create a content delivery with any file type, but if the file type is not supported for online viewing, your recipient can only download the document in its original file format.

- Always preview your content delivery before sending the URL to recipients. In some cases, formatting in the original file, such as colors and non-standard fonts, may not display properly in the online version. If you are not happy with the quality of the online version, the content delivery wizard gives you the option of making your content available for download in its original file format.
- Content deliveries require Adobe Flash version 9.0.115. If a recipient does not have Flash installed, a download option displays.
- Customer Portal and partner portal users cannot create content deliveries.
- Only the creator of a content delivery can delete the delivery record or edit details such as the expiration date.
- Each time a content delivery's URL is clicked, Salesforce records the click as one view and distinguishes between internal and external views. An internal view is a view by a Salesforce user, for example, clicking the delivery URL on the delivery detail page or the View option on the Content Deliveries related list is an internal view. The Content Deliveries related list provides a count of all views for each delivery. Open the delivery details page to see information about a specific view.



**Note:** For password-protected content deliveries, a view is recorded when the recipient clicks on the delivery URL regardless of whether he or she enters the password and views the delivery.

- Salesforce CRM Content users can deliver content from shared libraries or a personal library.

## Best Practices

- After creating a content delivery, always preview it before sending the URL to your recipients to ensure that the formatting in the original file displays properly in the online version. For example, colors and non-standard fonts may not display properly in the preview player. If you are not happy with the quality of the online version, click **Previous** and choose to make your content available in its original file format or as a PDF file only. Your recipients will be able to download the file, and you can track whether the file was downloaded on the delivery detail page.
- Animation and timings in PowerPoint files are not supported in the content delivery's online version. Hyperlinks in all file types are also unsupported. See the implementation tips for a complete list of supported file types.
- If you are a Salesforce CRM Content user and want recipients of your content delivery to always see the latest version of a file rather than the version available on the delivery-creation date, open the delivery detail page and click **Edit**. Select the **Content Delivery Opens Latest Version** checkbox.
- If you select **Notify Me of First View or Download**, you will receive an email when the content delivery is viewed for the first time.

## Enabling Google Docs

If the Add Google Docs to Salesforce service is enabled for your organization, an Add Google Doc drop-down list on the Libraries tab allows users to add Google documents, spreadsheets, and presentations to their Salesforce CRM Content libraries.

 **Note:** Before you can enable any Salesforce for Google Apps services, you must create a Google Apps account and configure that account's domain settings. From Setup, enter *Google Apps Settings* in the *Quick Find* box, then select **Google Apps Settings**. For details about these prerequisites, see “Getting Started with Salesforce and Google Apps” in the Salesforce Help.

### USER PERMISSIONS

Activating the Add Google Docs to Salesforce service:

- “Customize Application”

To activate or deactivate the Add Google Docs to Salesforce service:

1. From Setup, enter *Google Apps Settings* in the *Quick Find* box, then select **Google Apps Settings**.
2. Click **Edit** next to the Add Google Docs to Salesforce option in the Activate Google Apps Services list.
3. Select or deselect the *Activate* checkbox.
4. If you are activating the Add Google Docs to Salesforce service, read the Terms of Use and select the checkbox indicating you agree to the Terms of Use.
5. Click **Save**.

For information about using Google Docs with Salesforce CRM Content, see “Contribute Google Docs to Salesforce CRM Content” in the Salesforce Help.

## Associating Content with Standard and Custom Objects

The Related Content related list allows users to search for content in Salesforce CRM Content and attach it to leads, accounts, contacts, opportunities, products, cases, and custom objects. To use the related list, each user must add it to his or her page layouts for these objects. For instructions on modifying page layouts, see “Page Layouts” in the Salesforce Help.

To search for content using the Related Content related list:

1. Click **Find Content** or **Search All**. In both cases, Salesforce CRM Content searches within the libraries that you have access to. If you click **Search All**, the search results display all the content in your libraries. For the Find Content search, your search results contain content that is relevant to the record; Salesforce CRM Content searches for content with text or attributes that match the following fields:
  - On an opportunity, the *Opportunity Name*, *Account Name*, and all competitors and products.
  - On an account, the *Account Name* and *Industry*.
  - On a case, the *Case Reason*, *Subject*, *Account Name*, and *Industry*.
  - On a lead, the *Name*, *Company*, *Industry*, and *Title*.

 **Note:** On a custom object, clicking **Find Content** returns search results that contain the full custom object name in the document's text or attributes. If no content meets this criterion, the search results will be empty and a Search All search should be used instead.
2. On the search results page, filter your results as needed by entering search terms or selecting filter criteria from the sidebar.
3. Click **Attach** for any file that you want to attach to the record.
4. Click the **Back** link to return to the detail page.

## Configuring Libraries

After completing the tasks in [Configuring Organization Settings](#), you can create libraries and customize them by restricting record types or selecting a tagging model.

### Creating Libraries and Adding Members

#### Step 1: Create a New Library

1. Click **New** in the My Libraries section of the Libraries tab home page.
2. Enter a unique library name.
3. If you want, add a description.
4. Click **Save and Add Members** or, if you want to add members later, click the **Save and Close** button.

#### Step 2: Add Library Members

1. On the **Libraries** tab, click the library name if the library isn't already open.
2. In the **Members** section, click **Add Members**.
3. If the member you want to add isn't listed, start to enter their first name in the search box and click **Find**.
4. Select members from the Available Members box. Members can include individual Salesforce CRM Content users or public groups containing Salesforce CRM Content users.



**Tip:** If you have many Salesforce CRM Content users, create a public group and add it to a library rather than adding users to the library individually.

5. Click **Add** to add the members to the library.
6. Click **Next**.

#### Step 3: Assigning Library Permissions to Members

Select a library permission for each user or public group and click **Save**. For more information, see "Manage Library Permissions" in the Salesforce Help.

### Restricting Record Types in a Library

**To restrict the record types allowed in a library:**

1. On the Libraries tab, select a library from the **My Libraries** area.
2. Click **Record Types**.
3. Optionally, change the default record type for the library.
4. Select the **Restrict the record types available in the library** checkbox.

#### USER PERMISSIONS

To create libraries:

- "Manage Salesforce CRM Content"

OR

"Create Libraries"

To add members to a library:

- "Manage Salesforce CRM Content"

OR

Manage Library  
checked in your library  
permission definition

To assign library permissions to members:

- "Manage Salesforce CRM Content"

OR

Manage Library  
checked in your library  
permission definition

#### USER PERMISSIONS

To restrict record types:

- "Manage record types and layouts for Files"

OR

"Manage Salesforce CRM Content"

5. Select one or both of the following options:
  - `Allow content with any record type to be linked to this library`—Select this option if you want to enable content published in other libraries to be shared to the library where you have restricted record types. The content in other libraries can be shared regardless of the record types used.
  - `Do not apply record type restrictions to existing content`—Select this option if you do not want to receive warnings regarding existing content in the library. You will not be alerted if existing content uses record types that you exclude from the library. This option refers to notifications only; existing content is not affected by restricted record types.
6. For each record type that you want to allow in the library, move it from the Available Record Types list to the Selected Record Types list.
7. Click **Save**.

## Notes on Restricting Record Types

- If the library already contains published content, selecting the `Restrict the record types available in the library` option automatically moves all the record types used by the published content to the Selected Record Types list.
- Deselecting the `Restrict the record types available in the library` option automatically moves any record types in the Selected Record Types list to the Available record Types list.
- When changing a file's managing library, the file's record type must be permitted in the new managing library.
- When sharing a file with a library, the file's record type must be permitted in the shared library unless the `Allow content with any record type to be linked to this library` option is selected for the shared library.
- When the default record type for a user's profile differs from the default record type for a library, the user profile default takes priority when a user with that profile shares a file with the library. *General* is used as the default record type when no default is set for the user profile.
- When there are no record types in common between a user profile and a library, the default record type for a library is available to users with that user profile who are sharing files with the library.

## Defining Tagging Rules

In Salesforce CRM Content, tags are descriptive labels that help classify and organize content. Contributors can assign tags to their files, content packs, Google docs, or Web links, thus enabling all library members to browse for content by tag. The tagging rule in a library determines how contributors can tag content; for example, the restricted-tagging rule does not allow contributors to create new tags. Library tagging rules are optional. By default, library contributors can enter any tag.

To assign a tagging rule to a library:

1. On the Libraries tab, select a library from the **My Libraries** area.
2. Click **Tagging Rules** and choose one of the following options:

| Library Tagging Rule | Description                                                                                                                                                               |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Open Tagging         | This rule places no restrictions on tagging. Contributors can enter any tag when publishing or editing content. While a tag is typed, Salesforce CRM Content autosuggests |

### USER PERMISSIONS

To assign a tagging rule to a library:

- "Manage Salesforce CRM Content"

OR

Manage Libraries checked in your library permission definition

| Library Tagging Rule | Description                                                                                                                                                                                                                                                                                  |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                      | tags based on the contributor's recently used tags and the Popular Tags list.                                                                                                                                                                                                                |
| Guided Tagging       | This rule also enables contributors to enter any tag when publishing or editing content, but contributors are also offered a list of suggested tags. If you select Guided Tagging, the next step prompts you to enter the suggested tags that you want to recommend to library contributors. |
| Restricted Tagging   | This rule requires contributors to choose from the list of suggested tags. If you select Restricted Tagging, the next step prompts you to enter the list of suggested tags.                                                                                                                  |

- If you chose **Guided Tagging** or **Restricted Tagging**, click the link for auto-populating the `Suggested Tags` field and then edit, add, or remove tags as needed. If you do not auto-populate the `Suggested Tags` field, any new tags you enter in the field are added to the existing list of suggested tags in the library.
- Click **Save**.

## Notes on Library Tagging Rules

- `Open Tagging` is the default tagging rule.
- If you publish, share, or move content to a library that uses restricted tags, you will receive an error if your content contains unsupported tags.
- When you share content from one library to another, the most restrictive tagging rule applies. For example:
  - When content is shared between a restricted-tagging library and a guided- or restricted-tagging library, you can only choose tags that are common to both libraries.
  - When content is shared between an open tagging library and a restricted-tagging library, you can only choose tags suggested in the restricted-tagging library.
- If a restricted tagging rule is applied after content has already been published in the library and the existing content contains tags that are no longer permitted by the rule, the tags remain assigned to the content until it is edited or revised. For example, if the `Q3Forecast` document has a `market indicators` tag and `market indicators` is not a suggested tag according to the new restricted-tagging rule, `market indicators` is removed from `Q3Forecast` only when a user publishes a new version of the file or edits the file's tags on the content details page.
- Avoid using too many tags. The search engine helps users find specific content, whereas tags enable users to browse and subscribe. Therefore, excessive tagging creates unnecessary clutter.
- You can't change or delete tag names. You can remove tags from a document, but that doesn't delete the tag.
- Tags are case insensitive. You can't have two tags with the same name even if they use different upper and lowercase letters. The case of the original tag is always used.

## Enabling Salesforce CRM Content in Portals

Salesforce CRM Content is available in the Customer Portal and partner portal. Two levels of access to Salesforce CRM Content can be granted to portal users:

- Portal users without a Salesforce CRM Content feature license can download, rate, comment on, and subscribe to content if they have the “View Content on Portals” user permission. They cannot view potentially sensitive data such as usernames and download, version, and subscriber history. The content delivery feature is not available to portal users.
- Portal users with a Salesforce CRM Content feature license can access all Salesforce CRM Content features granted by their library permission(s), including contributing content, moving and sharing content among libraries, and deleting content. They can also view Salesforce CRM Content reports. The content delivery feature is not available to portal users.

## Enabling Salesforce CRM Content in the Customer Portal

### USER PERMISSIONS

|                                                       |                                                                                                       |
|-------------------------------------------------------|-------------------------------------------------------------------------------------------------------|
| To set up and update the Customer Portal:             | “Customize Application”                                                                               |
| To create and edit profiles:                          | “Manage Profiles and Permission Sets”                                                                 |
| To manage Customer Portal users:                      | “Edit Self-Service Users”                                                                             |
| To create Salesforce CRM Content library permissions: | “Manage Salesforce CRM Content” OR<br>“Manage Content Permissions”                                    |
| To add users to a Salesforce CRM Content library:     | “Manage Salesforce CRM Content”<br>OR<br>Manage Library checked in your library permission definition |

Before enabling Salesforce CRM Content in the Customer Portal, you must create and enable a Customer Portal. For instructions, see “Setting Up Your Customer Portal” in the Salesforce Help.

## Enabling Salesforce CRM Content for Non-Licensed Users

After you have enabled your Customer Portal, complete the following steps to enable Salesforce CRM Content in your portals. Use these steps if you have not purchased Salesforce CRM Content feature licenses for your portal users.

1. Update Customer Portal profiles:
  - a. Clone the Customer Portal User or Customer Portal Manager profile.
  - b. In the cloned profiles, add the “View Content in Portals” user permission.
  - c. Change the tab visibility for the Libraries, Content, and Subscriptions tabs from Tab Hidden to Default On.
  - d. Assign the cloned profiles to your Customer Portal users.
2. Determine what privileges your portal users will have in each Salesforce CRM Content library by creating one or more library permissions.
 

 **Note:** A library permission can only grant privileges that a user’s feature license or profile permits. For example, even though Tag Content is a library permission option, selecting it does not allow portal users without a Salesforce CRM Content feature license to tag content.
3. Determine which libraries you want your portal users to have access to. Ensure that confidential content is not available in these libraries.

4. Add portal users to libraries. Portal users with the Customer Portal User profile or a clone of that profile can only be added to a library as part of a public group. Portal users with the Customer Portal Manager profile or a clone of that profile can be added to a library individually.
5. Add the Salesforce CRM Content tabs to each Customer Portal.

 **Note:** The Documents tab is not part of Salesforce CRM Content.

## Enabling Salesforce CRM Content for Licensed Users

After you have enabled your Customer Portal, complete the following steps to enable Salesforce CRM Content in your portals. Use these steps if you have purchased Salesforce CRM Content feature licenses for your portal users.

1. Update Customer Portal profiles:
  - a. Optionally, clone the Customer Portal User and Customer Portal Manager profile to include the “Create Libraries” user permission if you want to allow portal users to create and administer new libraries.
  - b. In your standard or cloned Customer Portal profiles, change the tab visibility for the Libraries, Content, and Subscriptions tabs from Tab Hidden to Default On.
  - c. Assign the cloned profiles to your Customer Portal users as needed.
2. Select the `Salesforce CRM Content User` checkbox on the user detail page for each Customer Portal user.
3. Determine what privileges your portal users will have in each Salesforce CRM Content library by creating one or more library permissions.

 **Note:** A library permission can only grant privileges that a user's feature license or profile permits. For example, even though `Tag Content` is a library permission option, selecting it does not allow portal users without a Salesforce CRM Content feature license to tag content.

4. Determine which libraries you want your portal users to have access to. Ensure that confidential content is not available in these libraries.
5. Add portal users to libraries. Portal users with the Customer Portal User profile or a clone of that profile can only be added to a library as part of a public group. Portal users with the Customer Portal Manager profile or a clone of that profile can be added to a library individually.
6. Add the Salesforce CRM Content tabs to each Customer Portal.

 **Note:** The Documents tab is not part of Salesforce CRM Content.

## Enabling Salesforce CRM Content in the Partner Portal

### USER PERMISSIONS

|                                                       |                                       |
|-------------------------------------------------------|---------------------------------------|
| To set up and update the partner portal:              | “Customize Application”               |
| To create and edit profiles:                          | “Manage Profiles and Permission Sets” |
| To manage partner portal users:                       | “Manage External Users”               |
| To create Salesforce CRM Content library permissions: | “Manage Salesforce CRM Content”       |
|                                                       | OR                                    |

|                                                   |                                                              |
|---------------------------------------------------|--------------------------------------------------------------|
|                                                   | "Manage Content Permissions"                                 |
| To add users to a Salesforce CRM Content library: | "Manage Salesforce CRM Content"                              |
|                                                   | OR                                                           |
|                                                   | Manage Library checked in your library permission definition |

Before enabling Salesforce CRM Content in the partner portal, you must create and enable a partner portal. For instructions, see "Setting Up Your Partner Portal" in the Salesforce Help.

## Enable Salesforce CRM Content for Non-Licensed Users

After you have enabled the partner portal, complete the following steps to enable Salesforce CRM Content in your portals. Use these steps if you have not purchased Salesforce CRM Content feature licenses for your portal users.

1. Update your cloned Partner User profiles:
  - a. Include the "View Content on Portals" user permission.
  - b. Change the tab visibility for the Libraries, Content, and Subscriptions tabs from Tab Hidden to Default On.
  - c. Assign the updated profile to partner portal users as needed.
2. Determine what privileges your portal users will have in each Salesforce CRM Content library by creating one or more library permissions.



**Note:** A library permission can only grant privileges that a user's feature license or profile permits. For example, even though `Tag Content` is a library permission option, selecting it does not allow portal users without a Salesforce CRM Content feature license to tag content.

3. Determine which libraries you want your portal users to have access to. Ensure that confidential content is not available in these libraries.
4. Add portal users to libraries. Portal users with the Partner User profile or a clone of that profile can only be added to a library as part of a public group.
5. Add the Salesforce CRM Content tabs to each partner portal.



**Note:** The Documents tab is not part of Salesforce CRM Content.

## Enable Salesforce CRM Content for Licensed Users

After you have enabled the partner portal, complete the following steps to enable Salesforce CRM Content in your portals. Use these steps if you have purchased Salesforce CRM Content feature licenses for your portal users.

1. Update your cloned Partner User profiles:
  - a. Optionally, add the "Create Libraries" user permission if you want to allow portal users to create and administer new libraries.
  - b. Change the tab visibility for the Libraries, Content, and Subscriptions tabs from Tab Hidden to Default On.
  - c. Assign the updated profile to partner portal users as needed.
2. Select the `Salesforce CRM Content User` checkbox on the user detail page for each partner portal user.

3. Determine what privileges your portal users will have in each Salesforce CRM Content library by creating one or more library permissions.



**Note:** A library permission can only grant privileges that a user's feature license or profile permits. For example, even though `Tag Content` is a library permission option, selecting it does not allow portal users without a Salesforce CRM Content feature license to tag content.

4. Determine which libraries you want your portal users to have access to. Ensure that confidential content is not available in these libraries.
5. Add portal users to libraries. Portal users with the Partner User profile or a clone of that profile can only be added to a library as part of a public group.
6. Add the Salesforce CRM Content tabs to each partner portal.



**Note:** The Documents tab is not part of Salesforce CRM Content.