
Set Up and Maintain Collaboration Tools

User Guide, Spring '16



CONTENTS

- SET UP AND MAINTAIN COLLABORATION TOOLS 1**
 - Welcome, Collaboration Tool Administrators 1
 - Salesforce Chatter 1
 - Salesforce Files 33
 - Salesforce Files Sync 34
 - Salesforce Files Connect 38
 - Chatter Desktop 60
 - Chatter Licenses 64
 - Salesforce CRM Content 66
 - Google Apps 87
- INDEX 97**

SET UP AND MAINTAIN COLLABORATION TOOLS

Welcome, Collaboration Tool Administrators

This documentation contains everything you need to help your users collaborate with each other, or even with people outside your organization. Learn how to set up and extend Chatter, or enable users to create, package and send files outside your organization using Salesforce CRM Content. For help with basic Salesforce administration, see *Set Up Your Organization*.

Salesforce Chatter

Chatter

Chatter is a Salesforce collaboration application that connects, engages, and motivates users to work efficiently across the organization regardless of role or location. Chatter lets users collaborate on sales opportunities, service cases, campaigns, and projects with embedded apps and custom actions.

Salesforce organizations created after June 22, 2010 have Chatter already enabled for all users by default. However, if you only want certain parts of your organization to use Chatter, you can do a profile-based rollout of Chatter instead. With a profile-based rollout, only the users that have been assigned the required user profile or permission sets have access to Chatter. Profile-based rollout of Chatter is useful for larger companies and companies or government agencies with regulatory constraints. It allows them to plan a controlled rollout and deploy Chatter on a department-by-department basis.

We recommend rolling out Chatter for all users in your organization, unless your company doesn't want all users to have full access to Chatter. Chatter is secure and works in accordance with all the security and permission settings in your Salesforce organization.

SEE ALSO:

[Profile-Based Chatter Rollout Overview](#)

Profile-Based Chatter Rollout Overview

Profile-based rollout of Chatter enables Chatter for a subset of users instead of all users in the organization.

Profile-based rollout of Chatter makes Chatter available for a part of your organization, but not for all users. Once profile-based rollout of Chatter is enabled for your organization, you can turn on Chatter for the users with the required user profile or permission sets. All other users in your organization don't have access to Chatter.



Example: Let's say you assign a profile or permission set that excludes Chatter access to a subset of users. These users still have access to Salesforce objects, but they don't see the record feed and they can't make posts.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable Chatter:

- "Customize Application"

EDITIONS

Available in: Salesforce Classic

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

IN THIS SECTION:

[Get Ready for Profile-Based Rollout of Chatter](#)

If you're rolling out Chatter to just a subset of your users, prepare your organization to control Chatter access with custom user profiles and permission sets.

[Control Chatter Access through User Profiles](#)

Modify existing custom user profiles to allow or deny access to Chatter.

[Control Chatter Access through Permission Sets](#)

Modify existing and create new permission sets to handle Chatter access.

[Profile-Based Rollout Considerations](#)

In organizations that use profile-based rollout of Chatter, certain limitations apply to user profiles, permissions sets, and the interaction between users with and users without Chatter access.

Get Ready for Profile-Based Rollout of Chatter

If you're rolling out Chatter to just a subset of your users, prepare your organization to control Chatter access with custom user profiles and permission sets.

From a high-level perspective, a profile-based rollout of Chatter consists of these steps:

1. Salesforce enables the profile-based rollout of Chatter feature for your organization.
2. You determine which users get access to Chatter.
3. You review and modify existing custom user profiles and permissions sets.
4. Verify that the Enable Chatter permission in a custom user profile or permission set has the desired setting.
5. To allow or restrict Chatter access, assign the associated profile or permission set to users.
6. You turn on Chatter for your organization.

SEE ALSO:

[Profile-Based Chatter Rollout Overview](#)[Control Chatter Access through User Profiles](#)[Control Chatter Access through Permission Sets](#)

EDITIONS

Available in: Salesforce
Classic

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

Control Chatter Access through User Profiles

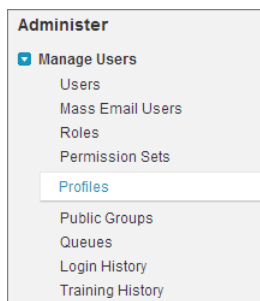
Modify existing custom user profiles to allow or deny access to Chatter.

When Salesforce turns on profile-based rollout of Chatter for your organization, the Enable Chatter permission is added to all of your existing user profiles and permissions sets. This permission is automatically enabled for all standard profiles. It is also automatically enabled for all custom profiles, if any of the following user-level permissions were already enabled, either manually or as part of a license:

- "Create and Own New Chatter Groups" (ChatterOwnGroups)
- "Create and Share Content Deliveries for Chatter Files" (ChatterFileLink)
- "Invite Customers To Chatter" (ChatterInviteExternalUsers)
- "Manage Chatter Messages" (ManageChatterMessages)
- "Moderate Chatter" (ModerateChatter)
- "Moderate Chatter Feeds" (ModerateNetworkFeeds)
- "Use Case Feed" (ViewCaseInteraction)
- "View All Data" (ViewAllData)

Modify your existing custom profiles with the desired permissions to control access to Chatter and create new custom profiles, if required.

1. Log in as a Salesforce administrator.
2. From Setup, enter *Profiles* in the Quick Find box, then select **Profiles**.



3. For each of your existing custom user profiles:
 - a. Click **Edit**.
 - b. In the Administrative Permissions section, select or deselect **Enable Chatter**, depending on whether you want users with this profile to have Chatter access or not.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable Chatter:

- "Customize Application"

Administrative Permissions	
API Enabled	<input type="checkbox"/>
Api Only User	<input type="checkbox"/>
Author Apex	<input type="checkbox"/>
Bulk API Hard Delete	<input type="checkbox"/>
Manage Data Categories	<input type="checkbox"/>
Manage Data Integrations	<input type="checkbox"/>
Manage Dynamic Dashboards	<input type="checkbox"/>
Manage Email Client Configurations	<input type="checkbox"/>
Edit My Dashboards	<input type="checkbox"/>
Edit My Reports	<input type="checkbox"/>
Edit Read Only Fields	<input type="checkbox"/>
Enable Chatter	<input checked="" type="checkbox"/>
Invite Customers To Chatter	<input type="checkbox"/>
IP Restrict Requests	<input type="checkbox"/>
Manage Analytic Snapshots	<input type="checkbox"/>
Reset User Passwords and Unlock Users	<input type="checkbox"/>
Schedule Dashboards	<input type="checkbox"/>
Schedule Reports	<input type="checkbox"/>
Send Outbound Messages	<input type="checkbox"/>
Transfer Record	<input type="checkbox"/>
Use Identity Features	<input type="checkbox"/>
Use Team Reassignment	<input type="checkbox"/>

The Enable Chatter permission is only available if profile-based rollout of Chatter is enabled for your organization.

c. Save your changes.

4. If applicable, create new custom user profiles with the desired permissions and assign them to users.



Note: Selecting the Enable Chatter permission in a person's user profile doesn't automatically turn on Chatter for that person. People can't use Chatter until actually you turn [on Chatter](#) for your organization.

SEE ALSO:

[Get Ready for Profile-Based Rollout of Chatter](#)

[Control Chatter Access through Permission Sets](#)

[Chatter Settings](#)

[Profile-Based Rollout Considerations](#)

Control Chatter Access through Permission Sets

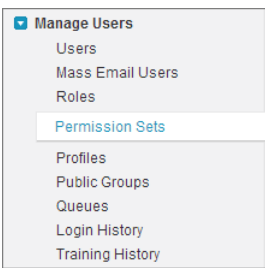
Modify existing and create new permission sets to handle Chatter access.

When you enable or disable Chatter through permission sets, consider that:

- Permission sets persist over user profile settings when you enable Chatter. All users with a Chatter-enabled permission set have access to Chatter, even if Chatter isn't enabled in their user profile.
- Permission sets don't persist over user profile settings when you disable Chatter. All users with a Chatter-enabled user profile have access to Chatter, even if Chatter is disabled in their permission set. To prevent that person from accessing Chatter, disable Chatter in both, the person's user profile and permission set.

For your existing permission sets, you need to verify that they include the correct and required Chatter permissions for the desired subset of users.

1. Log in as a Salesforce administrator.
2. From Setup, enter *Permission Sets* in the *Quick Find* box, then select **Permission Sets**.



3. For each existing user-level permission set:
 - a. In the System section, click **System Permissions**.
 - b. Click **Edit** and select **Enable Chatter**. This permission is only available, if profile-based rollout of Chatter has been enabled for your organization.

EDITIONS

Available in: Salesforce Classic

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


USER PERMISSIONS

To enable Chatter:

- "Customize Application"

System Permissions Edit		
▼ System		
Permission Name	Enabled	Description
Access Custom Mobile Apps	<input type="checkbox"/>	Allow user to run custom mobile apps.
API Enabled	<input type="checkbox"/>	Access any Salesforce.com API.
Api Only User	<input type="checkbox"/>	Access Salesforce.com only through a Salesforce.com API.
Assign Topics	<input type="checkbox"/>	Assign existing topics to feed items. Remove topics from feed items.
Author Apex	<input type="checkbox"/>	Create Apex classes and triggers.
Bulk API Hard Delete	<input type="checkbox"/>	Delete records in the Bulk API without storing them in the Recycle Bin.
Chatter Internal User	<input type="checkbox"/>	Use all Chatter features.
Connect Organization to Environment Hub	<input type="checkbox"/>	Allows a user to connect this organization to an Environment Hub.
Edit Tasks	<input type="checkbox"/>	Create, edit, and delete tasks.
Edit Topics	<input type="checkbox"/>	Edit topic names and descriptions.
Email-Based Identity Confirmation Option	<input type="checkbox"/>	Provides an option to use email to confirm identity, even if the user has a verified phone number.
Enable Chatter	<input checked="" type="checkbox"/>	Use Chatter.
Enable Work.com	<input type="checkbox"/>	Allow Work.com only users to access Work.com functionality.
Export Reports	<input type="checkbox"/>	Use Export Details and Printable View to export reports.
Insert System Field Values for Chatter Feeds	<input type="checkbox"/>	Set the author or creation date for a Chatter post or comment.
Invite Customers To Chatter	<input type="checkbox"/>	Invite Customers To Chatter
Manage Analytic Snapshots	<input type="checkbox"/>	Create, edit, and delete analytic snapshots.

- c. Save your changes.
4. If applicable, create new permission sets with the desired permissions and assign them to users. By default, all permissions in a new permission set are disabled. The following Chatter permissions have to be enabled in a new permission set, if you want the users to whom you are assigning this permission set to have these permissions.
- "Create and Own New Chatter Groups" (ChatterOwnGroups)
 - "Create and Share Content Deliveries for Chatter Files" (ChatterFileLink)
 - "Invite Customers To Chatter" (ChatterInviteExternalUsers)
 - "Manage Chatter Messages" (ManageChatterMessages)
 - "Moderate Chatter" (ModerateChatter)
 - "Moderate Chatter Feeds" (ModerateNetworkFeeds)
 - "Use Case Feed" (ViewCaseInteraction)
 - "View All Data" (ViewAllData)

 **Note:** Selecting the Enable Chatter permission in a person's permission set doesn't automatically turn on Chatter for that person. People can't use Chatter until you actually [turn on Chatter](#) for your organization.

SEE ALSO:

[Get Ready for Profile-Based Rollout of Chatter](#)

[Control Chatter Access through User Profiles](#)

[Chatter Settings](#)

[Profile-Based Rollout Considerations](#)

Profile-Based Rollout Considerations

In organizations that use profile-based rollout of Chatter, certain limitations apply to user profiles, permissions sets, and the interaction between users with and users without Chatter access.

- The Enable Chatter option isn't available unless profile-based rollout of Chatter has been enabled for the organization.
- Permission sets persist over user profile settings when you enable Chatter. All users with a Chatter-enabled permission set have access to Chatter, even if Chatter isn't enabled in their user profile.
- Permission sets don't persist over user profile settings when you disable Chatter. All users with a Chatter-enabled user profile have access to Chatter, even if Chatter is disabled in their permission set. To prevent that person from accessing Chatter, disable Chatter in both, the person's user profile and permission set.
- Selecting the Enable Chatter permission in a person's user profile or permission set doesn't automatically turn on Chatter for the organization. Turn on Chatter for your organization after you modified user profiles and permission sets.
- Standard Salesforce user profiles have Chatter enabled by default. You can't disable Chatter for these standard profiles.
- Don't deselect Enable Chatter permission on a cloned Chatter External user profile. The user sees an error message and can't log in.
- Don't deselect the Enable Chatter permission on a cloned Chatter Free or Chatter Moderator profile. You get an error message and can't save the profile.
- Enabling profile-based rollout of Chatter and Chatter for an organization also enables a set of dependent Chatter user permissions. If Chatter is disabled for the organization, these permissions are also disabled at the same time. However, if Chatter is then enabled again, these permissions aren't automatically re-enabled and the administrator must enable them explicitly.
- When profile-based rollout of Chatter is enabled for an organization, Chatter is automatically enabled for standard profiles. For all custom profiles and permission sets, Chatter is automatically enabled, if any of the following user-level permissions were already enabled, either manually or as part of a license:
 - “Create and Own New Chatter Groups” (ChatterOwnGroups)
 - “Create and Share Links to Chatter Files” (ChatterFileLink)
 - “Invite Customers To Chatter” (ChatterInviteExternalUsers)
 - “Manage Chatter Messages” (ManageChatterMessages)
 - “Moderate Chatter” (ModerateChatter)
 - “Moderate Chatter Feeds” (ModerateNetworkFeeds)
 - “Use Case Feed” (ViewCaseInteraction)
 - “View All Data” (ViewAllData)
- In organizations that have Work.com enabled, users with access to Chatter can't thank users who don't have access to Chatter.

- If your organization already has Chatter enabled and switches to profile-based rollout of Chatter, manually enable Chatter in all existing custom profiles and permission sets. Otherwise, users that are assigned these custom profiles and permission sets lose access to Chatter.

Chatter Settings

Chatter is enabled by default in Salesforce and the Salesforce1 app. Configure various Chatter features and customize the Chatter experience for your users on the Chatter Settings page in Setup.

- To access the Chatter Settings page, enter *Chatter* in the **Quick Find** box and select *Chatter Settings*.
- To disable Chatter for your entire organization, deselect **Enable** in the Chatter Settings section.

IN THIS SECTION:

[Chatter Group Settings](#)

Configure group features like group archiving, records in groups, and unlisted groups. Chatter groups are the main collaboration space in Chatter where people share information, post updates and ask questions.

[Enable Emoticons in the Feed](#)

Emoticons let your users add expressions like a smiley face to their posts and comments by typing a character combination.

[Customer Invitations](#)

Allow users to invite customers to private groups that they own or manage. Customers are users outside of your company's email domains. They have limited Chatter access and can only see groups they're invited to and interact with members of those groups.

[Coworker Invitations](#)

Allow Salesforce users to invite coworkers without Salesforce licenses to Chatter. Invited users can access Chatter people, profiles, groups, and files but can't see record data unless they have a Salesforce license.

[Enable Actions in the Publisher](#)

To add global actions to the publisher, you must first enable the Actions in the Publisher feature in Chatter Settings. Actions add functionality to the Chatter publisher and let your users do more in Salesforce and in Salesforce1.

[Feed Post and Comments Editing Overview](#)

With feed post editing, users can edit their own feed posts. Record owners can also edit any post on records they own, no matter who created the post.

SEE ALSO:

[Chatter](#)

EDITIONS

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

Chatter Group Settings

Configure group features like group archiving, records in groups, and unlisted groups. Chatter groups are the main collaboration space in Chatter where people share information, post updates and ask questions.

IN THIS SECTION:

[Chatter Group Archiving](#)

Group archiving is enabled by default for your organization. If a group has no new feed posts or comments for 90 consecutive days, the group is archived automatically. When group archiving is enabled, feed activity in groups is reviewed on a weekly basis.

[Enable Records in Chatter Groups](#)

Records are allowed in groups by default. Customize the group publisher to include the Add Record action, so users can add records to groups.

[Enable Unlisted Chatter Groups](#)

Enable unlisted groups for your organization to allow users to collaborate more privately in Chatter.

[Unlisted Group Limitations](#)

Consider the limitations of unlisted groups before you decide to enable them in your organization.

EDITIONS

Available in: Salesforce Classic

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

Chatter Group Archiving

Group archiving is enabled by default for your organization. If a group has no new feed posts or comments for 90 consecutive days, the group is archived automatically. When group archiving is enabled, feed activity in groups is reviewed on a weekly basis.

Mentioning a group doesn't count as feed activity and doesn't delay group archiving. Archived groups count toward your organization's group limits (30,000), but not toward a user's group membership limits (300).

There are more group archiving settings on the group settings page. That's where group owners and managers can archive, activate, or edit the automatic archiving settings. To change the archiving settings for multiple groups at once, use the Salesforce API.

If your organization doesn't want to use group archiving, disable this feature in Setup. Enter *Chatter* in the **Quick Find** box, select **Chatter Settings**, and deselect **Allow Group Archiving** in the Groups section.



Note: To allow group owners and managers to archive, activate, or disable automatic archiving in the Salesforce1 apps and in the Lightning Experience, customize the group layout and add the necessary fields.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

SEE ALSO:

[Group Layouts](#)

Enable Records in Chatter Groups

Records are allowed in groups by default. Customize the group publisher to include the Add Record action, so users can add records to groups.

The Add Record action on the group publisher lets users add account, contact, lead, opportunity, contract, campaign, case, and custom object records to groups. The Add Record action isn't available by default, so you must configure the group publisher to include this action.



Walk Through It: Allow Users to Add Records to Chatter Groups

We recommend that you also customize object layouts to include the Groups related list on record detail pages. Customize the layout of all the standard and custom objects in your organization that support group-record relationships. The Groups related list shows users the list of groups associated with the record.



Walk Through It: Add the Groups Related List to Records

If you don't want to allow users to add records to groups, enter *Chatter* in the *Quick Find* box in Setup, then select *Chatter Settings*, and deselect **Allow records in groups in the Groups** section. Disabling the feature hides the Group Records list on the group detail page and the **Add Record** action in the group publisher.

SEE ALSO:

[Customize the Chatter Group Layout and Publisher](#)

Enable Unlisted Chatter Groups

Enable unlisted groups for your organization to allow users to collaborate more privately in Chatter.

Unlisted groups offer more privacy for compared to private groups. Only group members and users with the "Manage Unlisted Groups" permission can access unlisted groups in list views, feeds, and search results. By default, unlisted groups aren't enabled for your organization. Review the limitations of unlisted groups, before you enable this feature in your organization.

1. From Setup, enter *Chatter* in the *Quick Find* box, then select **Chatter Settings**.
2. Click **Edit**.
3. Select **Enable Unlisted Groups**.
A message displays with important information about enabling unlisted groups in your organization.
4. In the highlighted message, select the checkbox next to **I want to enable unlisted groups and understand that I may need to update Apex/Visualforce code in my organization**.
5. Click **Save**.

Any user can create an unlisted group. Unlike private groups, users with the "View All Data" or "Modify All Data" permission can't view or update unlisted groups unless they're members. To allow non-members to view and modify unlisted groups, assign the "Manage Unlisted Groups" permission to them via their profile or a permission set.

SEE ALSO:

[Unlisted Group Limitations](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable permission for profiles:

- "Customize Application"

Unlisted Group Limitations

Consider the limitations of unlisted groups before you decide to enable them in your organization.

For Administrators

- Only users with the “Manage Unlisted Groups” permission can access or modify unlisted groups and its files and feed content without membership.
- Users with the “Modify All Data” permission can’t delete feed content from unlisted groups, unless they are group members.
- Users with the “Data Export” permission can export all Chatter data and view the exported posts and comments from any group, regardless of whether they have the “Manage Unlisted Groups” permission.
- You can’t grant the “Manage Unlisted Groups” permission to users with these profiles Chatter External, High Volume Portal, or High Volume Customer Portal.
- Unlisted groups count toward a user’s group limit, but they don’t appear in the Groups list on a user’s profile page unless the person who’s viewing the list is a member of those groups or has permission to manage unlisted groups. When unlisted groups are hidden, the count that’s shown next to the Groups list might not be accurate, depending on the permissions of the person viewing the list.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

For Developers

Apex code runs in system mode, which means that the permissions of the current user aren’t taken into account. This limitation has implications for pages that are written in Apex.

- Visualforce pages that display groups might expose unlisted groups to users who aren’t members.
- Because system mode disregards the user’s permissions, all users who are accessing a Visualforce page that’s showing an unlisted group can act as an owner of that group.
- AppExchange apps that are written in Apex and that access all groups will expose unlisted groups to users who aren’t members.

To limit and manage access to the unlisted groups in your organization:

- Explicitly filter out unlisted groups from SOQL queries in all Apex code.
- Use permission sets, profile-level permissions, and sharing checks in your code to further limit unlisted group access.
- Use Apex triggers on the CollaborationGroup object to monitor and manage the creation of unlisted groups. In Setup, enter *Group Triggers* in the **Quick Find** box, then select **Group Triggers** to add triggers.

SEE ALSO:

[Enable Unlisted Chatter Groups](#)






Enable Emoticons in the Feed

Emoticons let your users add expressions like a smiley face to their posts and comments by typing a character combination.

Emoticons aren't supported in Salesforce1.

- 1. From Setup, enter *Chatter Settings* in the Quick Find box, then select **Chatter Settings**.
- 2. In the Emoticons in Feed section, select **Allow Emoticons**.

Salesforce supports these character combinations in posts and comments.

Character Combinations	Emoticon
<ul style="list-style-type: none">• :) • :-) 	 (smile)
<ul style="list-style-type: none">• :P • :-P • :p • :-p 	 (tongue)
<ul style="list-style-type: none">• :(• :-( (frown)
<ul style="list-style-type: none">• >:(• >:-( (angry)
<ul style="list-style-type: none">• :((• :'(• :'-( (crying)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable emoticons:

- "Customize Application"

Customer Invitations

Allow users to invite customers to private groups that they own or manage. Customers are users outside of your company's email domains. They have limited Chatter access and can only see groups they're invited to and interact with members of those groups.

Customer invitations don't support custom domains created using My Domain, single sign-on, and IP restrictions. To allow customer invitations with these features enabled, we recommend one of the following approaches:

- Customize the single sign-on page for your organization with an extra link redirecting users to <https://login.salesforce.com>.
- Enable single sign-on for your customers.

Customer invitations are enabled by default. To disable customer invitations, enter *Chatter* in the **Quick Find** box in Setup, select *Chatter Settings*, and deselect **Allow Customer Invitations** in the Chatter Settings section. Disabling this feature doesn't delete existing customers or groups that allow customers.

SEE ALSO:

[Coworker Invitations](#)

[Can I connect multiple Salesforce organizations using Chatter?](#)

Coworker Invitations

Allow Salesforce users to invite coworkers without Salesforce licenses to Chatter. Invited users can access Chatter people, profiles, groups, and files but can't see record data unless they have a Salesforce license.

Coworker invitations are automatically enabled for new Salesforce organizations. The email domain of the first Salesforce user that is added to the organization is used as the company domain in the **Company Email Domains** field. Invitations aren't turned on if the user's domain is a free public email provider such as yahoo.com or gmail.com.

You can add up to 200 domains. Enter the domains that are used in email addresses for your company. We recommend that you don't enter public email domains such as hotmail.com, yahoo.com, or gmail.com. If invited, anyone with an email address in these domains can join and see user profiles, feeds, and Chatter groups.

To disable coworker invitations, enter *Chatter* in the **Quick Find** box in Setup, select *Chatter Settings*, and deselect **Allow Coworker Invitations** in the Coworker Invitations section. If you deselect this feature, users can't accept outstanding invitations. Similarly, if you remove an email domain, users can't accept outstanding invitations from that domain.

SEE ALSO:

[Customer Invitations](#)

EDITIONS

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

Salesforce CRM, Approvals, Chatter email notifications, Chatter Invitations, and customer invitations are not available in **Database.com**.

EDITIONS

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

Salesforce CRM, Approvals, Chatter email notifications, Chatter Invitations, and customer invitations are not available in **Database.com**.

Enable Actions in the Publisher

To add global actions to the publisher, you must first enable the Actions in the Publisher feature in Chatter Settings. Actions add functionality to the Chatter publisher and let your users do more in Salesforce and in Salesforce1.

1. From Setup, enter *Chatter Settings* in the **Quick Find** box, then select **Chatter Settings**.
2. Click **Edit**.
3. In the Actions in the Publisher section, select **Enable actions in the publisher**.
4. Save your changes.

SEE ALSO:

[Publisher Actions and Layouts](#)

EDITIONS

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

USER PERMISSIONS

To enable actions:

- “Customize Application”

Feed Post and Comments Editing Overview

With feed post editing, users can edit their own feed posts. Record owners can also edit any post on records they own, no matter who created the post.

A Chatter Settings option and two user permissions control the feed post editing feature.

The *Allow users to edit posts and comments* option in Chatter Settings enables or disables the Edit Feed Post feature for your organization. This option is enabled by default in existing and new organizations. All users that are assigned a standard profile can edit their own posts and comments immediately, except for Chatter Free, Chatter External, and Customer Portal users. For users that are assigned custom profiles, administrators must specifically enable the permissions in the users' custom profiles or permission sets.

The “Edit My Own Posts” permission allows users to edit their own posts. This permission is available and automatically enabled on standard profiles, except Chatter External, Chatter Free, and Customer Portal User profiles. To allow Chatter External, Chatter Free, or Custom Portal users to edit their own posts, clone the profiles and enable the “Edit My Own Posts” permission in the cloned profiles. Assign the cloned profiles to the users.

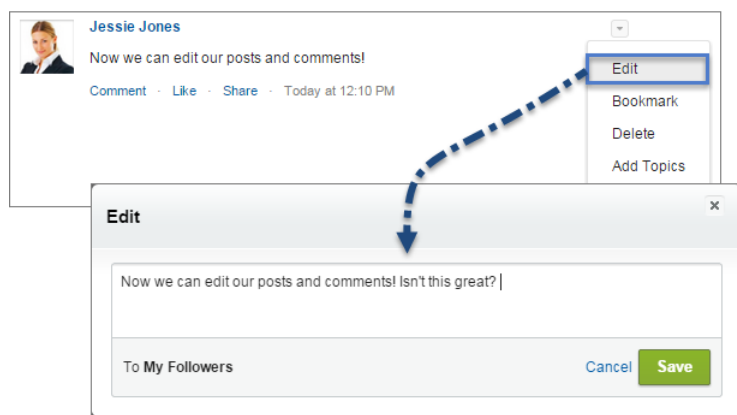
The “Edit Posts on Records I Own” permission allows users to edit posts and comments on records they own, including other people's posts and comments. For example, a group owner or manager can edit all posts on the group's feed. A manager for a particular record type can edit all posts on the record. This permission is available on standard and custom profiles, but it is disabled by default.

This table summarizes the permissions and their default settings.

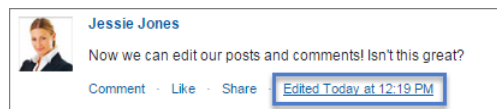
User Permission	Description	Available in	Default Setting
Edit My Own Posts	Allows users to edit their own posts	Standard profiles, except <ul style="list-style-type: none"> • Chatter External User • Chatter Free User • High Volume Customer Portal User • Partner Community User Profile 	Enabled in all new and existing organizations
		Custom profiles	Disabled in all new and existing organizations
Edit Posts on Records I Own	Allows record owners to modify their own posts and	Custom profiles	Disabled in all new and existing organizations.

User Permission	Description	Available in	Default Setting
	posts other users made on groups and record detail pages.		However, Chatter moderators, community moderators, and users with “Modify All Data” permission can always edit all posts and comments.

The *Allow users to edit posts and comments* option in Chatter Settings is enabled by default. For users that have the required permissions, the Edit option is available from the drop-down menu on posts, comments, questions, and answers. It opens a separate Edit window, where users can modify the text.



After users saved their edited version of the post, it shows an Edited time stamp to indicate that the original post was modified.



If users edit a post or comment and mention new people or groups, those people and groups receive email notifications. People and groups who were mentioned in the original post or comment don't receive a new email notification. Email notifications for edited posts or comments show the Edited time stamp.

For community users, feed post editing is only available, if the community was created using Salesforce Tabs + Visualforce or the Napili template. The Edit option isn't available on system-generated posts like feed tracked record updates.

IN THIS SECTION:

[Enable Feed Post Editing in User Profiles or Permission Sets](#)

By default, feed post editing is disabled on all custom profiles. To make the feature available to your users, you can either modify your user profiles or assign the permissions to users via a permission set.

[Disable Feed Post Editing for All Users](#)

By default, all users who are assigned a profile that has the feed post editing permissions enabled can edit their posts and comments. If needed, you can disable feed post editing for all users in your organization, regardless of their assigned user profile.

Enable Feed Post Editing in User Profiles or Permission Sets

By default, feed post editing is disabled on all custom profiles. To make the feature available to your users, you can either modify your user profiles or assign the permissions to users via a permission set.

Here's how you enable the permissions in a permission set.

1. From Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets**.
2. Click an existing permission set or create one.
3. In the System Permissions section, click **Edit**.
4. Select the edit feed post permissions you want to enable.
 - Select *Edit My Own Posts* to allow users that are assigned this custom profile to edit their own posts and comments.
 - Select *Edit Posts on Records I Own* to allow users that are assigned this custom profile to edit posts and comments on records they own, including posts and comments made by other users.
5. Click **Save**.
6. Assign the permission set to the users who need the permissions.



Example:  [Walk Through It: Assign a Permission Set](#)

USER PERMISSIONS

To create custom profiles

- "Manage Profiles and Permission Sets"

To assign permission sets

- "Assign Permission Sets"

Disable Feed Post Editing for All Users

By default, all users who are assigned a profile that has the feed post editing permissions enabled can edit their posts and comments. If needed, you can disable feed post editing for all users in your organization, regardless of their assigned user profile.

1. From Setup, enter *Chatter Settings* in the Quick Find box, then select **Chatter Settings**.
2. Click **Edit**.
3. In the Post and Comment Modification section, deselect *Allow users to edit posts and comments*.

Post and Comment Modification
<p>The author of the post or comment, the record owner, a Chatter moderator, and a moderator in this community have permission to modify the text.</p> <p>Allow users to edit posts and comments <input type="checkbox"/></p>

4. Click **Save**.

The feed post editing feature is disabled for your entire organization. Users can no longer edit posts and comments.

USER PERMISSIONS

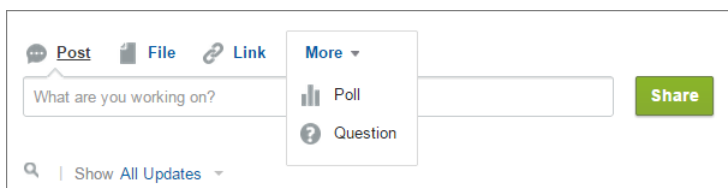
To enable or disable features in Chatter Settings:

- "Customize Application"

Publisher Actions and Layouts

Actions add functionality to the Chatter publisher and let your users do more in Salesforce and in Salesforce1.

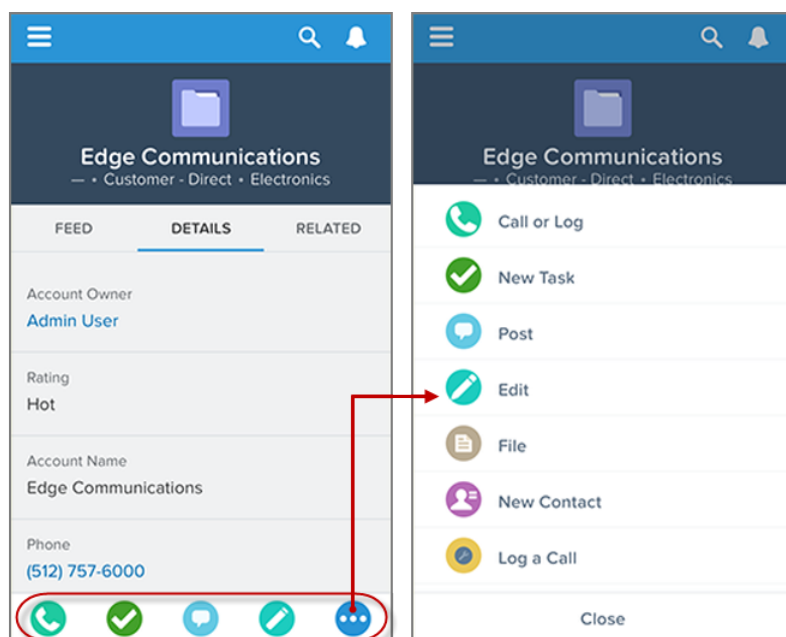
Actions are all about productivity. Actions let users accomplish things with fewer clicks, fewer fields, and ultimately less time spent. Actions are especially useful in Salesforce1, because it makes it easy to create and edit records with a simple, mobile-optimized interface. By default, the Chatter publisher includes the standard actions Post, File, Link, Poll, and Question.



EDITIONS

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

In Salesforce1, actions appear in the action bar, its associated action menu, and as list-item actions.



There are several categories of actions, like standard actions, nonstandard actions, default actions, mobile smart actions, custom actions, and productivity actions.

- **Standard actions:** Standard actions are actions that are automatically added to the publisher when Chatter is enabled—such as Post, File, Link, and Poll. You can customize the order in which these actions appear in the publisher, but you can't edit their properties.
- **Nonstandard actions:** Nonstandard actions are actions that you create and customize yourself.
- **Default actions:** Default actions are predefined actions provided by Salesforce. Add them to the publisher layout to make them available to your users.
- **Mobile smart actions:** Mobile smart actions are a set of preconfigured actions, just like default actions. In Salesforce1, mobile smart actions let users create records directly in the feed.

- **Custom actions:** Custom actions are Visualforce pages or canvas apps with functionality that you define. For example, you can create a custom action so that users can write comments that are longer than 5000 characters.
- **Productivity actions:** Productivity actions are predefined by Salesforce and are attached to account, contact, event, lead, user, and user profile objects. You can't edit or delete productivity actions.

To customize the publisher with more actions or change the order of the actions, first enable actions in the publisher on the Chatter Settings page in Setup.

IN THIS SECTION:

[Create Global Publisher Layouts](#)

Global publisher layouts determine the global actions that appear in the various Salesforce interfaces. In Salesforce Classic, these layouts customize the actions in Chatter publishers on global pages (like the Home page) and on the Chatter page. Lightning Experience uses these layouts to populate the Global Actions menu with Log A Call actions and Create a Record quick actions that point to the Events, Notes, and Tasks objects. And in Salesforce1, these layouts drive the actions that appear in the action bar on the Feed and People pages. Global publisher layouts can include global actions only.

[Add Actions to Global Publisher Layouts](#)

Actions you add to the global publisher layouts appear on pages such as the Home and Chatter pages, and the action bar and action menu on the Feed and People pages in Salesforce1.

Create Global Publisher Layouts

Global publisher layouts determine the global actions that appear in the various Salesforce interfaces. In Salesforce Classic, these layouts customize the actions in Chatter publishers on global pages (like the Home page) and on the Chatter page. Lightning Experience uses these layouts to populate the Global Actions menu with Log A Call actions and Create a Record quick actions that point to the Events, Notes, and Tasks objects. And in Salesforce1, these layouts drive the actions that appear in the action bar on the Feed and People pages. Global publisher layouts can include global actions only.

1. From Setup, enter *Publisher Layouts* in the Quick Find box, then select **Publisher Layouts**.
2. To create a new global publisher layout, click **New**.
3. To clone a publisher layout, select one from the Existing Global Publisher Layout drop-down list.
4. Enter a name for the new global publisher layout.
5. Click **Save**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited, Database.com,** and **Developer** Editions

USER PERMISSIONS

To create actions:

- "Customize Application"

To customize action layouts and page layouts:

- "Customize Application"

To view page layouts:

- "View Setup"

Add Actions to Global Publisher Layouts

Actions you add to the global publisher layouts appear on pages such as the Home and Chatter pages, and the action bar and action menu on the Feed and People pages in Salesforce1.

Arrange the actions so that the frequently used actions appear first in each list. All other actions appear in the publisher drop-down menu.



Walk Through It: Customizing Global Publisher Layouts

You can add actions to two sections on a page layout:

Quick Actions in the Salesforce Classic Publisher

This section can contain actions only from the Quick Actions category in the palette. Actions in this section appear in the Chatter publisher in the full Salesforce site.

Salesforce1 and Lightning Experience Actions

This section can contain actions only from the Salesforce1 Actions category in the palette. On object page layouts, the Salesforce1 Actions category contains all available types of actions for the object, including quick actions, productivity actions, and standard and custom buttons. Actions in this section appear in the action bar and action menu in Salesforce1 and in various areas of Lightning Experience.

1. From Setup, enter *Publisher Layouts* in the *Quick Find* box, then select **Publisher Layouts**.
2. To add or remove actions, drag them to and from the palette. To reorder actions, select an action and drag it to a new position.

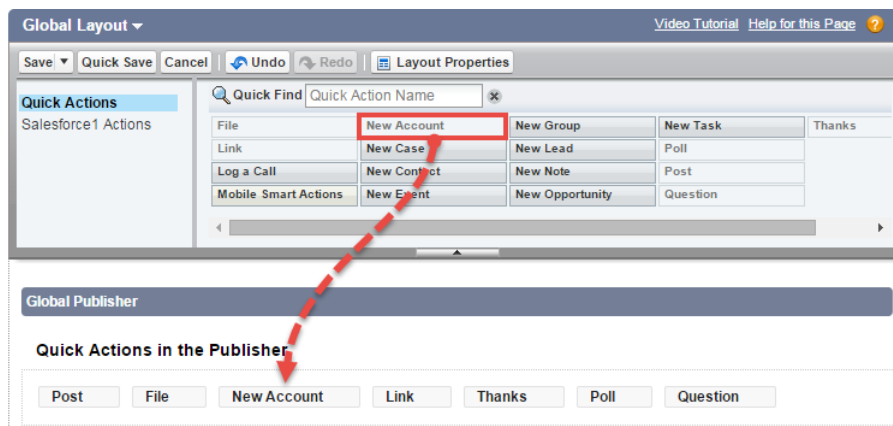
In the Quick Actions in the Salesforce Classic Publisher section, the first three actions on the left appear in the Chatter publisher. All other actions appear in the More drop-down menu.

3. Click **Save** when you're done, or click **Quick Save** to save your changes and continue working on the layout.

If you navigate away without saving, you lose your changes.



Example: Let's add the New Account action to the publisher, so users can create an account directly from the publisher. Just drag the New Account action to the Quick Actions in the Publisher section and save your changes.



Go to the Chatter tab. Now the New Account action shows up in the publisher.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create actions:

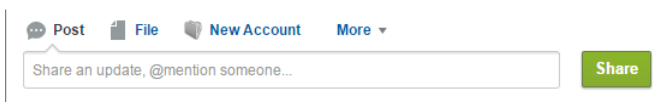
- "Customize Application"

To customize action layouts and page layouts:

- "Customize Application"

To view page layouts:

- "View Setup"



Feed Tracking

Feed tracking tracks changes to objects and fields and posts them as updates in Chatter. Users who follow a record, see the feed updates in their Chatter feed.

Feed tracking is available for objects and fields. You can configure feed tracking for users, Chatter groups, topics, custom objects, external objects, and the following standard objects: accounts, article types, assets, campaigns, cases, contacts, contracts, dashboards, events, leads, opportunities, products, reports, solutions, and tasks.

Sharing rules and field-level security determine visibility of record changes in Chatter feeds. To see changes to that record in their feeds, users must have access to the record.

These objects and fields are tracked by default:

- Account: Account Name, Account Owner
- Case: Case Owner, Priority, Status
- ChatterGroup: Allow Customers, Description, Group Access, Information Body, Information Title, Name, Owner Name
- Contact: Account Name, Contact Owner, Name
- Lead: Lead Owner, Lead Status, Name
- Opportunity: Amount, Close Date, Opportunity Name, Opportunity Owner, Stage
- Topic: Description
- User: About Me, Address, Email, Manager, Phone, Title

Tracked feed updates that are older than 45 days and have no likes or comments are deleted automatically. The tracked feed updates no longer appear in the feed. However, if auditing is enabled for a tracked field, the tracking field audit history is still available.

IN THIS SECTION:

[Customize Chatter Feed Tracking](#)

Enable feed tracking for objects and records, so users see updates for the objects and records they follow in their Chatter feed. Many objects and fields are tracked by default, but you can further customize feed tracking to include or exclude specific objects and fields.

[Enable Feed Updates for Related Records](#)

Show feed updates on a record's detail page whenever someone creates related records. Feed updates for related records give users a complete view of the account activity.

SEE ALSO:

[Chatter Settings](#)

EDITIONS

Available in: Salesforce Classic

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

The Account, Case, Contact, Lead, Opportunity and User objects are not available in **Database.com**.

Lightning Connect external objects are available in: **Developer** Edition and for an extra cost in: **Enterprise, Performance, and Unlimited** Editions

USER PERMISSIONS

To customize fields tracked in feeds:

- "Customize Application"

To view the field tracking setup page:

- "View Setup and Configuration"

Customize Chatter Feed Tracking

Enable feed tracking for objects and records, so users see updates for the objects and records they follow in their Chatter feed. Many objects and fields are tracked by default, but you can further customize feed tracking to include or exclude specific objects and fields.

You can configure feed tracking for users, Chatter groups, topics, custom objects, external objects, and the following standard objects: accounts, article types, assets, campaigns, cases, contacts, contracts, dashboards, events, leads, opportunities, products, reports, solutions, and tasks.

1. From Setup, enter *Feed Tracking* in the *Quick Find* box, then select **Feed Tracking**.
2. Select an object.
3. Select **Enable Feed Tracking**.

You must have the required user permissions to see this checkbox.

4. Select up to 20 fields to track.

You can't select fields for external objects or article types. The following standard field types can't be tracked:

- Auto-number, formula, and roll-up summary fields
- Encrypted and read-only system fields
- The *Expected Revenue* field on opportunities
- The *Solution Title* and *Solution Details* fields on solutions; these fields display only for translated solutions in organizations with multilingual solutions enabled

5. If you have actions in the publisher enabled, you see the *All Related Objects* option. Select this checkbox to show feed items when related objects are created.
6. Save your changes.

SEE ALSO:

[Feed Tracking](#)

EDITIONS

Available in: Salesforce Classic

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

The Account, Case, Contact, Lead, Opportunity and User objects are not available in **Database.com**.

Lightning Connect external objects are available in: **Developer** Edition and for an extra cost in: **Enterprise, Performance, and Unlimited** Editions

USER PERMISSIONS

To customize fields tracked in feeds:

- "Customize Application"

To view the field tracking setup page:

- "View Setup and Configuration"

Enable Feed Updates for Related Records

Show feed updates on a record's detail page whenever someone creates related records. Feed updates for related records give users a complete view of the account activity.

1. From Setup, enter *Feed Tracking* in the **Quick Find** box, then select **Feed Tracking**.
2. Click the object for which you want to enable feed updates for related records.

3. Click **All Related Objects**.

If you don't see this option, make sure that actions in the publisher are enabled. The All Related Objects option is available only on these objects:

- Account
- Campaign
- Case
- Contact
- Custom objects
- Group
- Lead
- Opportunity

4. Save your changes.



Example: If you enable feed updates for related records on accounts, the account feed includes:

- Feed updates for all activity on the account
- Updates for related tasks, events, and contacts

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To change feed tracking settings

- "Customize Application"

Chatter Email Settings and Branding

Chatter email settings let you control whether users receive email notifications about new posts, comments, and other changes. You can also change the format of the emails, like add your company's logo and sender information.

If Chatter is enabled, email notifications are enabled by default. However, your users can configure their own email settings. They control whether they want to receive emails, for which changes, and how often. It is important that you teach your users how they can control the amount of email they receive. Too many email notifications are a pain point for many Chatter users and a common barrier to adoption.

Configure the general Chatter email settings and branding from Setup. Enter *Email Settings* in the **Quick Find** box, then select **Email Settings**. This table describes the settings.

Setting	Description
General Settings	
Allow Emails	Enables or disables email notifications for your entire company. If you deselect this option, all email notifications are disabled and your users don't receive any notifications.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Setting	Description
Allow Email Replies	If selected, users can reply to email notifications about messages and comments via email instead of navigating to the comment or message in Chatter.
Allow Posts via Email	If selected, users can post to groups using email.
Allow Attachments via Email	If selected, users can include attachments in posts to groups using email.
Sender	
From Name	The name that appears as the sender's name in the email notification. For example, add your company's name.
Email Address	The email address of the sender. For example, add your company's email address.
Branding	
Logo	A logo that appears in the email notification. Upload a different logo to replace the default Chatter logo.
Footer Text	The text that appears in the footer of the notification email. We strongly recommend including your company's physical address to comply with applicable anti-spam laws.

IN THIS SECTION:

[Customize Branding for Email Notifications](#)

Customize your company's Chatter email notifications to display sender information, footer text, and a footer logo that is personalized for your organization.

Customize Branding for Email Notifications

Customize your company's Chatter email notifications to display sender information, footer text, and a footer logo that is personalized for your organization.

1. From Setup, enter *Email Settings* in the **Quick Find** box, then select **Email Settings**.
2. Enter custom values for the email sender's name and address to replace the default values.



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

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

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To customize Chatter email settings:

- "Customize Application"

**Note:**

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

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

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

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

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

4. Click **Save**.

SEE ALSO:

[Chatter Email Settings and Branding](#)

Chatter Post Actions and Layouts

Actions on posts and comments appear in the drop-down menu on a post or comment. They let users edit, bookmark, and delete posts, add topics, and create tasks from posts.

The standard Bookmark, Delete, and Add Topic actions on posts are available by default and you can't modify them. However, you can add more actions like the Edit and Create New Task actions.

IN THIS SECTION:

[Enable Create New Tasks on Posts](#)

Enhance the feed with an action that lets users create tasks directly from a post.

EDITIONS

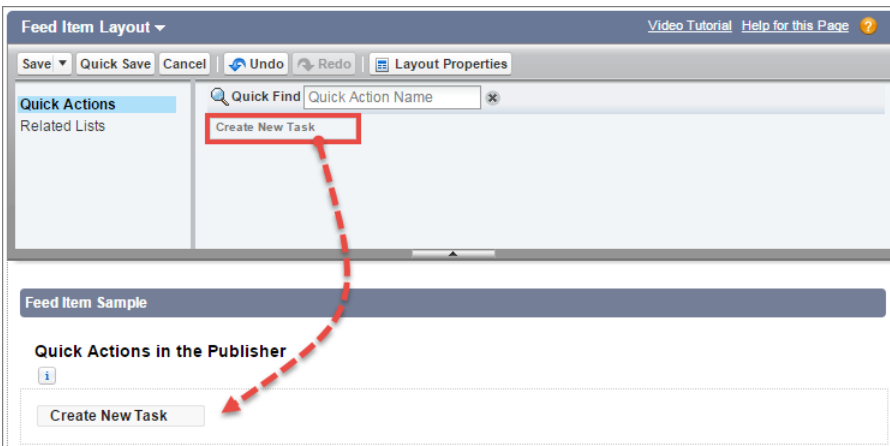
Available in: **Group, Professional, Enterprise, Performance, Unlimited, Contact Manager, Developer**, and **Database.com** Editions

Enable Create New Tasks on Posts

Enhance the feed with an action that lets users create tasks directly from a post.

Actions in the Publisher and [feed tracking](#) for task objects must be enabled.

1. From Setup, enter *Feed Item* in the Quick Find box, then select **Feed Item Layouts**.
2. Click **Edit** next to Feed Item Layout.
3. In the Feed Item Layout, click **Quick Actions**.
4. Select the **Create New Task** action and drag it to the Actions in the Publisher section.



If you don't see the Create New Task action, verify that the Actions in the Publisher feature is enabled in the Chatter Settings in Setup.

5. Save your changes.

The Create New Task action displays on the drop-down menu on text and content posts. When a user creates a task from a post, the task shows up in the My Task list on the user's Home page. The Create New Task action on posts

- Is available on text and content posts, but not on system-generated posts like tracked feed updates
- Can be partly customized. You can't change the fields, but you can change the layout of the fields.
- Generates an update that displays in the user's feed

Group Layouts

The group layout lets you customize which fields, buttons, actions, and lists appear in Chatter groups. Changes to the group layout affect all groups in your organization, but they only show up on the group pages in Salesforce1. Changes to the group publisher show up in the full Salesforce site and the Salesforce1 app.

Changes you make to the group layout and the publisher affect all groups in your organization. You can't customize the layout for an individual group.

IN THIS SECTION:

[Customize the Chatter Group Layout and Publisher](#)

Add and remove fields, buttons, lookups, and related lists to change the layout of groups.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To customize Chatter feed item layouts

- "Customize Application"

EDITIONS

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

Add Actions to the Group Publisher

Customize the group publisher with quick actions and Salesforce1 actions.

Customize the Chatter Group Layout and Publisher

Add and remove fields, buttons, lookups, and related lists to change the layout of groups.

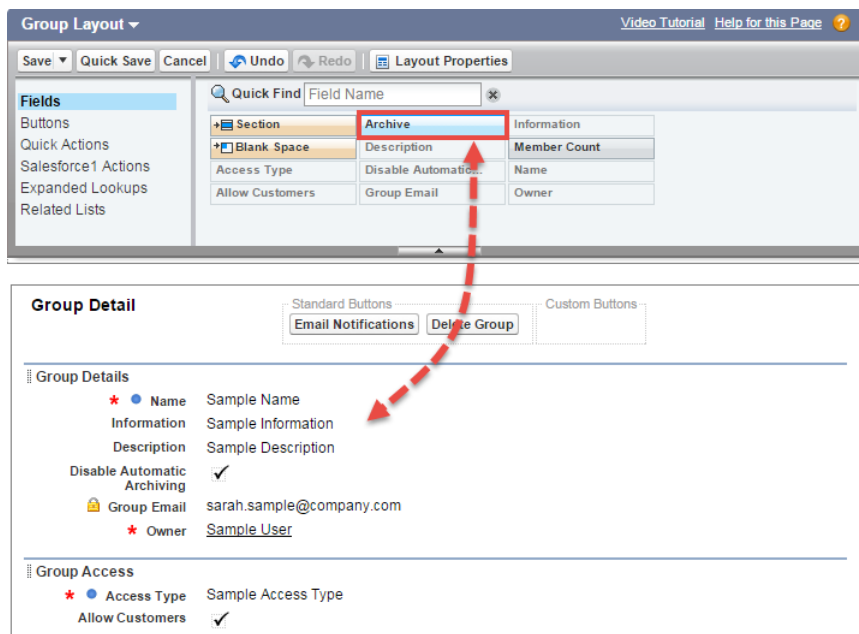
1. From Setup, enter *Group Layouts* in the **Quick Find** box, then select **Group Layouts**.
2. Click **Edit** next to the group layout you want to customize, or click **New** to create a layout.
3. From the palette on the top of the page, drag and drop fields, buttons, and other user interface elements to the different sections to add them to the group layout. Drag and drop them back to the palette to remove them from the layout.

All group layout changes affect Salesforce1 and Lightning Experience. Group publisher changes appear everywhere. For example, if you delete the Files related list or a field in the Group Details section, those changes show up only in Salesforce1 and Lightning Experience, but not in Salesforce Classic.

4. Click **Save** to save the layout.



Example: To allow group owners and managers to archive and activate groups from Salesforce1 and Lightning Experience, drag the Archive field to the Group Detail section.



To assign group layouts by user profiles, click **Page Layout Assignment** on the group layout list view.

SEE ALSO:

[Add Actions to Global Publisher Layouts](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS


To customize Chatter group layouts:

- "Customize Application"

Add Actions to the Group Publisher

Customize the group publisher with quick actions and Salesforce1 actions.

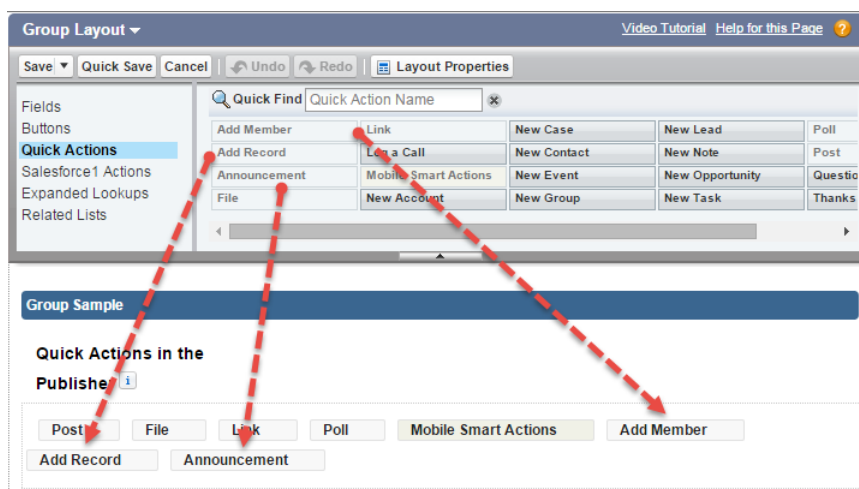
By default, Chatter groups display standard actions that are part of the global publisher layout, like Post, File, Link, and Poll. Override the global publisher layout with a customized group publisher layout.

1. From Setup, enter *Groups* in the *Quick Find* box, then select *Group Layouts*.
2. Click **Edit** next to the group layout you want to customize, or click **New** to create a layout.
3. Click **override the global publisher layout** or  in the Quick Actions in the Publisher or Actions in the Salesforce1 Action Bar section. Drag and drop actions between the palette and the publisher layout to add, remove, and reorder actions.

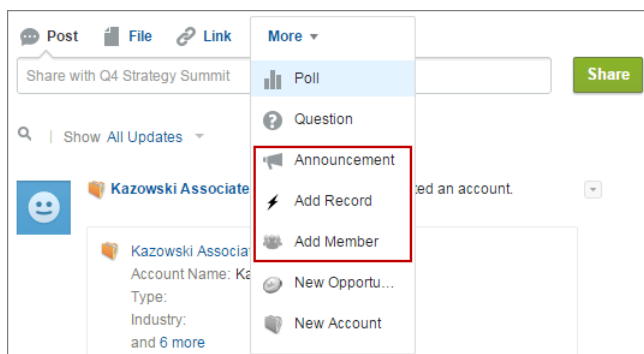
Changes to the Quick Actions in the Publisher section appear in the full Salesforce site. Changes to the Actions in the Salesforce1 Action Bar section appear in Salesforce1. In groups that allow customers, the publisher only shows standard actions.



Example: Add the Announcement, Add Record, and Add Member actions to the group publisher.



Now users can select these actions directly from the publisher.



EDITIONS

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

USER PERMISSIONS

To customize Chatter group layouts:

- "Customize Application"

Topics on Objects

Topics on objects is one of the most powerful ways to crowdsource your company's key themes and issues.

Your employees can attach topics to object records based on what they're seeing in the field and from working with customers, giving your business insight into the voice of your customer. And because topics can cross objects, they can provide connections across people, conversations, and records.

Users can also add topics to posts. Topics on posts help users organize posts and increase their visibility. Topics are great for discussing a particular issue, theme, or subject, that isn't limited to a particular group of people. For example, if your company has created a year-long goal around volunteering with local schools, create a topic to allow your entire company to share posts, photos, and updates related to the company goal. Groups, on the other hand, are good for conversation with a specific gathering of people. Collaboration within a group can cover any number of subjects, but always involves the same key team members. For example, if your company is planning a holiday party, a private group for the party committee lets them plan the event without the rest of the company learning the details in advance.

IN THIS SECTION:

[Enable and Configure Topics for Objects](#)

Enable topics for objects so users can add topics to records and organize them by common themes. This powerful feature is available with or without Chatter.

[Delete Topics](#)

People with appropriate permissions can delete topics directly from topic detail pages.

[Topics Privacy](#)

Topic names and descriptions are not private, even those that appear solely in private groups and on records. Posts and records with topics have the same security and privacy as those without topics.

EDITIONS

Available in: **Salesforce Classic**

Available in all editions

Enable and Configure Topics for Objects

Enable topics for objects so users can add topics to records and organize them by common themes. This powerful feature is available with or without Chatter.

Administrators can enable topics for accounts, assets, campaigns, cases, contacts, contracts, leads, opportunities, orders, solutions, custom objects, and English articles. For each object type, administrators specify which fields to use for topic suggestions.



Note: Topics are only supported on English Knowledge articles.



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

1. From Setup, enter *Topics for Objects* in the Quick Find box, then select **Topics for Objects**.
2. Select an object.
3. At the right, select **Enable Topics**.
4. Select the text fields that you want to use for topic suggestions. (From a combination of the selected fields, up to 3 suggestions are made from the first 2,000 characters.)
5. Click **Save** to save changes for all objects.

EDITIONS

Available in: **Salesforce Classic and Lightning Experience**

Available in all editions

USER PERMISSIONS

To enable topics for objects:

- "Customize Application"

Now, users with access to the enabled objects and appropriate topics permissions can:

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

Additionally, if your organization uses Chatter, users can click any topic assigned to a record to go directly to a topic page. There, they'll find other records on the topic, people who are knowledgeable about the topic, and other related information.


Delete Topics

People with appropriate permissions can delete topics directly from topic detail pages.

Because topic names and descriptions are not private, administrators might want to delete topics for compliance reasons or to remove inappropriate content. When deleting topics, consider these points.

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


To delete a topic:

1. Navigate to the topic detail page.
2. In the upper-right, click , and choose **Delete**.

Topics Privacy

Topic names and descriptions are not private, even those that appear solely in private groups and on records. Posts and records with topics have the same security and privacy as those without topics.

This table explains where you can see all topics and where you can't see topics used solely in private groups or on records.

User interface element	Shows all topics	Doesn't show topics used solely in private groups and on records
Topics list		

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To delete standard topics:

- "Modify All Data"
- OR
- "Delete Topics"

To delete topics also used as navigational or featured items in a community:

- "Create and Set Up Communities"
- OR
- "Manage Communities"

EDITIONS

Available in: Salesforce Classic

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

User interface element	Shows all topics	Doesn't show topics used solely in private groups and on records
Topic search results	✓	
Topic reports	✓	
Knowledgeable User reports		✓
Related Topics on the topic detail page	✓	
Recently Talked About topics on group detail pages	✓	
Recently Talked About topics on profiles		✓
Trending Topics on the Chatter page		✓
Topic suggestions when adding topics to a post		✓
People talking number in the topics list and in topic suggestions when adding topics to a post		✓



Note: You can't use topics in unlisted groups. You can add a hashtag topic when writing a post or comment in an unlisted group, and the topic will be formatted as a link after you post. However, a topic detail page isn't created, and the link won't work.

Customize Chatter Influence

Customize activity thresholds for posts, comments, and likes to improve the Chatter influence calculation.

Chatter activity statistics include how many posts and comments users made, how many comments they received, and how many people liked their posts and comments.

1. From Setup, enter *Influence* in the *Quick Find* box, then select **Influence**.
2. Change the minimum activity thresholds.
All minimum activity thresholds default to zero. If you set higher thresholds, users who don't meet all three minimums are considered observers who aren't counted when calculating influence rank. Users who do meet all three minimums but have relatively low activity are also considered observers, but they're counted when calculating influence.
3. Click **Save**.
Chatter influence is recalculated when you save these values.



Warning: Use caution when setting new thresholds because users' influence levels can change immediately.

SEE ALSO:

[Chatter](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To customize Chatter influence:

- "Customize Application"

Guidelines for Deleting Your Users' Chatter Messages

Salesforce administrators with the "Manage Chatter Messages" permission can access all users' private messages via the SOAP API. You can view and delete any message (such as for compliance purposes).

When you delete private Chatter messages, consider these guidelines.

- Messages are hard deleted. They aren't sent to the recycle bin.
- Deleted messages aren't included in message search results.
- Deleting a message that resulted from sharing a file with someone does not delete the file itself.
- If all messages in a conversation are deleted, the conversation isn't shown in My Messages and can't be retrieved via the Chatter REST API.
- If replies via email are enabled and a user replies to a deleted message, Chatter returns an error notification and doesn't process the reply message.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions for users with a Salesforce license, and **Database.com** Edition for users with a Database.com Admin license

Report on Chatter with the Dashboards Package

The Salesforce Chatter Dashboards package packs a punch! You get multiple dashboards, over 100 reports, and even custom report types that you can use to monitor and manage Chatter adoption and engagement in your organization.

Use the Salesforce Chatter Dashboards package to:

- View overall Chatter adoption with detailed metrics and monthly trends
- Monitor group adoption with membership and engagement metrics, such as the number of posts, comments, likes, and the top contributors
- Monitor content creation and user engagement, such as the top files, trending content, and the top contributors
- View topic taxonomy and monitor topic assignments, including the most assigned topics and the top assigners
- Create customized reports using out-of-the-box groupings such as department, country, role, or profile

You can install the [Salesforce Chatter Dashboards](#) from AppExchange.



Tip: For installation instructions, detailed information about the reports, and upgrade instructions, see [Get Started with Chatter Dashboards](#).

Once the package is installed, you can access your new dashboards, reports, and custom report types alongside all your other Salesforce dashboards and reports.


As newer versions of the package become available, you can upgrade your package by reinstalling the package. If you customized any of the reports and dashboards, fear not; your customizations are retained during upgrade.

Dashboard	Description
Overview	See the overall state of Chatter at a glance.
Adoption by Department	Get an overview of department metrics for groups, user profiles, and topic adoption.
Files	Track file uploads, downloads, engagement, and content creators.
Groups	Monitor feed and member activity in Chatter groups.
Management	Track unanswered questions and posts, group growth rates, and the overall health of your groups.

EDITIONS

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

Dashboard	Description
Q&A	Track recent activity for questions, answers, and best answers posted in groups.
Topics	Track your Chatter topics activity.
User	Track recent activity for questions, answers, and best answers in user profiles.

 **Note:** The reports in this package return data for all Chatter. If your organization is using a community, we recommend that you install the [Salesforce Communities Dashboards \(for Communities with Chatter\)](#) package instead. This package allows you to report on Chatter usage in your internal organization and Chatter usage in your community.

Chatter Administration FAQs

Can I connect multiple Salesforce organizations using Chatter?

Chatter is only available on a per-organization basis. Only users within the same Salesforce organization can communicate with each other using Chatter. However, you can add people outside of your company's email domains to use Chatter in your organization as a customer in groups you own or manage.

Can portal users use Chatter?

Chatter is not available to portal users in partner portals or Customer Portals. Chatter is available to customer users and partner users in Communities.

Can I take control of the Chatter Expert user?

As an administrator, you can either deactivate or take over the Chatter Expert user and provide posts to your company. By default, the Chatter Expert posts when a new user chooses to start one of the groups suggested by Chatter on the Groups you can join page.

 **Note:** This only applies to organizations created after Summer '11.

To deactivate the Chatter Expert:

1. Click **People > Find People**.
2. Search for Chatter Expert.
3. Click **Manage User > Deactivate User**.

To take control of the Chatter Expert so that you can send and receive posts:

1. Click **People > Find People**.
2. Search for Chatter Expert.
3. Change the email address to your own.

Can I Stop a User From Creating Chatter Groups?

If there are users that shouldn't be able to create groups, you can prevent them from doing so.

The ability to create groups (public, private, or unlisted) is controlled by the permission "Create and Own New Chatter Groups." The permission is enabled by default and administrators can disable it on the appropriate users' profiles.



After an administrator disables this permission, a user can no longer create or be assigned as owner of new Chatter groups. If the user was already the owner of any groups, that ownership is not revoked.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Can I change the location of Chatter feeds using the page layout editor?

Currently, you can't change the location of Chatter feeds. However, users can click the  **Hide Chatter** link in a Chatter feed to hide the feed, and the  **Show Chatter** link to show the feed.

Can I prevent certain words from being used in Chatter posts?

No, not using the standard Chatter interface. However, there are third-party apps like [Chatter Blacklist](#). This app lets you create a "blacklist" of words, phrases, or custom expressions (for example, credit card numbers) that are prohibited in Chatter posts and comments. These words can prevent a post, be substituted with approved words or phrases, or be recorded for audit purposes.

Salesforce Support doesn't provide troubleshooting for third-party applications/packages unless specifically stated in the provider information of the application.

Do Chatter posts and files count toward my storage use?

Chatter feed posts, tracked changes, and comments don't count toward your data storage. However, any files and photos you upload are counted against file storage. Files uploaded on the Files tab are also counted against file storage.

Salesforce Files

Add the Files Related List to Page Layouts

Add the Files related list to your page layouts for accounts, opportunities, leads, cases, and other objects so users can attach files to records while leveraging the rich features and flexibility of Salesforce Files. Use files instead of attachments to make the files available outside of the context of the individual record. The file owner or admin still decides sharing settings for the file.

You can customize page layouts to include the Files related list. This allows users to add files to a record and see a list of files associated with the record such as a lead or a case.

1. From Setup, enter *Object Manager* in the **Quick Find** box, then select the name of the object you want to add the Files related list to (such as Opportunity).
2. Click **Page Layouts**.
3. Click the page layout you want to customize.
4. In the list of available items in the left pane, click **Related Lists**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

5. Drag **Files** to the Related Lists section.
6. Click **Save**.

Prevent Users from Attaching Salesforce Files

You can disable the **Select Files from Salesforce** administrative permission in user profiles. Disabling this permission prevents users with that profile from selecting Salesforce files when attaching files to feed posts, records, or other objects. Another option is to apply the permission in a permission set. Users who have this permission disabled are still able to upload files from their local drive.

Disable or enable the user permission in Setup. Enter *User Profiles* in the **Quick Find** box, then select **Profiles**. Click **Edit** next to the user profile you want. In the Administrative Permissions section, enable or disable the Select Files from Salesforce checkbox. Click **Save**.

To apply the permission in a permission set, from Setup enter *Permission Sets* in the **QuickFind** box, then select **Permission Sets**. Edit the permission set and apply the Select Files from Salesforce permission.

EDITIONS

Available in: All Editions

Salesforce Files Sync

Enable Salesforce Files Sync

Enable Salesforce Files Sync to allow users to sync files between their devices and Salesforce.

1. From Setup, enter *Salesforce Files Sync* in the **Quick Find** box, then select **Salesforce Files Sync**.
2. At the bottom of the Salesforce Files Sync Settings page, click **Edit**.
3. Select **Enable Files Sync**.
4. Click **Save**.

Salesforce Files Sync is now enabled for your organization.

Next, grant users access to Salesforce Files Sync.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable Salesforce Files Sync:

- “Customize Application”

Grant Users Access to Salesforce Files Sync

After enabling Salesforce Files Sync, grant your users access by either creating and assigning a permission set or by granting permission on profiles.

IN THIS SECTION:

[Grant Access to Salesforce Files Sync Using a Permission Set](#)

Permission sets are an easy way to enable Salesforce Files Sync for users.

[Enable Salesforce Files Sync for Profiles](#)

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

USER PERMISSIONS

To enable Salesforce Files Sync for users:

- “Customize Application”

Grant Access to Salesforce Files Sync Using a Permission Set

Permission sets are an easy way to enable Salesforce Files Sync for users.

1. From Setup, enter *Permission Sets* in the **Quick Find** box, then select **Permission Sets**.
2. Click **New**.
3. Fill out the required fields.

Label

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

API Name

The unique name used by the Force.com API.

Description

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

4. Select a user license option.



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

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

Assign the permission set to users who should have access to Salesforce Files Sync.

USER PERMISSIONS

To create a permission set:

- "Customize Application"

Enable Salesforce Files Sync for Profiles

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

1. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles**.
2. Select the profile that will have the Salesforce Files Sync permission.
3. On the profile detail page, click **Edit**.
4. Under Administrative Permissions, select **Sync Files**.
5. Click **Save**.

USER PERMISSIONS

To enable Salesforce Files Sync for profiles:

- "Customize Application"

Install Salesforce Files Sync

To sync files between their computers and Salesforce, users must install the Salesforce Files Sync client, which is available for desktops and laptops. Users can also access synced files from Salesforce1.

To use Salesforce Files Sync, we recommend:

System Requirement	Windows	Mac
Supported operating systems	Microsoft® Windows® 7 and later	Apple® Mac OS X 10.8 Mountain Lion and later
Processors	2.33 GHz or faster x86-compatible processor, or Intel® Atom™ 1.6 GHz or faster processor for netbook devices	Intel® Core™ Duo 1.83 GHz or faster processor
Memory	512 MB of RAM (1 GB recommended)	512 MB of RAM (1 GB recommended)
Hard drive	4 GB of free space recommended for sync operations	4 GB of free space recommended for sync operations

Users can download Salesforce Files Sync from Chatter.

1. From your personal settings, enter *Files Sync* in the **Quick Find** box, then select **Salesforce Files Sync**. Multiple results? Select the one under Personal Setup.
2. Click the **Download** button.
3. Follow the installation instructions for your operating system.
4. Log in with your Salesforce credentials.

Configure File Upload and Download Security Settings

For security reasons, your organization may want to configure the way some file types are handled during upload and download.

To manage file upload and download settings:

1. From Setup, enter *File Upload and Download Security* in the **Quick Find** box, then select **File Upload and Download Security**.
2. Click **Edit**.
3. To prevent users from uploading files that may pose a security risk, select **Don't allow HTML uploads as attachments or document records**.

This setting blocks upload of these MIME file types: `.html`, `.htm`, `.mhtml`, `.svg`, `.swf`, `.thtml`, and `.xhtml`.



Warning: Keep the following in mind when selecting this option:

- If your organization uses the partner portal to give your partner users access to Salesforce, we don't recommend enabling this setting. Enabling this setting prevents your organization from customizing the appearance of your partner portal.
- HTML attachments are not permitted on solutions, regardless of whether this security setting is enabled. In addition, this setting does not affect attachments on email templates; HTML attachments on email templates are always permitted.
- After this setting is enabled, previously-uploaded HTML documents and attachments are unaffected. However, when users attempt to view an HTML attachment or document, their browser first prompts them to open the file in the browser, save it to their computer, or cancel the action.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

USER PERMISSIONS

To configure file upload and download settings:

- "Customize Application"

4. Set download behavior for each file type:
 - a. **Download** (recommended): The file, regardless of file type, is always downloaded.
 - b. **Execute in Browser**: The file, regardless of file type, is displayed and executed automatically when accessed in a browser or through an HTTP request.
 - c. **Hybrid**: Salesforce Files are downloaded. Attachments and documents execute in the browser.
5. Click **Save**.

Tips and Best Practices for Administering Salesforce Files Sync

After you've enabled Salesforce Files Sync for your users, you have access to administrator tools that help you monitor usage and access.

View When and How Salesforce Files Sync is Being Used

Once Salesforce Files Sync has been enabled for users, you may want to review how often the application is being accessed from the desktop, or how files are being shared.

- Logins to the Salesforce Files Sync desktop application are noted in the Login History page under the Application column as "Salesforce Files". To view these logins, you can either export your organization's login history to a CSV file, or create a custom list view with the Application column displayed prominently.
- An individual user's login history is available on their User detail page in the Login History related list.

Revoke Access to Salesforce Files Sync

Things happen—users have their laptops stolen, people leave the company. When these inconveniences arise, you have a few courses of action to revoke access to Salesforce Files Sync.

- On mobile devices, synced files are included in the Salesforce1 application, and therefore, if mobile security has been compromised, you should revoke that user's access to the Salesforce1 application.
- On desktop and laptop computers, Salesforce Files Sync is an installed application that syncs files in a folder called "Salesforce Files Sync" with Salesforce. When you disable the "Sync Files" permission for an individual user, the files in the user's Salesforce Files Sync folder will remain on their computer, but will no longer sync with Salesforce.

To make disabling Salesforce Files Sync for individual users easier, we recommend [enabling Salesforce Files Sync using a permission set](#) on the user record rather than [enabling the feature for profiles](#).

Regenerate a Content or File Preview

If content or a file doesn't have a preview or the preview quality is poor, try to regenerate the preview.

The file is added to a queue while the regeneration is in progress. The existing preview is deleted immediately and users don't a preview while the file is in the queue.

You can't regenerate a preview for encrypted files, password-protected files, copy-protected PDFs, unknown file types, and any file larger than 25 MB.

1. From Setup, enter *Regenerate Previews* in the *Quick Find* box, then select **Regenerate Previews**.
2. Specify either the Content Document ID or the Content Version ID.
If you specify the Content Document ID but don't specify the Version Number, the latest version is used.

To see whether the preview regenerated successfully, navigate to the file's detail page.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To regenerate a preview:

- "Customize Application"

Salesforce Files Connect

The Files Connect Setup Process

With Files Connect, Salesforce users can access, share, and search external data from systems like Google Drive or SharePoint. The setup process differs for cloud-based and on-premises external data sources.



Tip: For detailed visuals, tips, and troubleshooting, see the Files Connect [Setup Guide](#) and [User Guide](#).

First, enable Files Connect, and let users access related external data sources

1. [Enable Salesforce Files Connect for Your Organization](#).
2. [Let Users and Administrators Access Files Connect Data Sources](#).

For cloud-based data sources, create an authentication provider, and then define the source

If you use Google Drive:

1. [Create an Authentication Provider for Google Drive](#).
2. [Define an External Data Source for Google Drive](#).

If you use Microsoft's cloud systems:

1. [Create an Authentication Provider for SharePoint Online or OneDrive for Business](#).
2. [Define an External Data Source for SharePoint Online or OneDrive for Business](#).

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Files Connect for cloud-based external data sources is available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Files Connect for on-premises external data sources is available for an extra cost in: **Enterprise, Performance, Unlimited, and Developer** Editions

For on-premises data sources, set up a Secure Agent, and then define the source

 **Note:** This process requires a paid permission set license, “Files Connect for on-premises external data sources.” For information about permission set licenses, [see Salesforce Help](#).

1. [Set Up a Secure Agent for SharePoint 2010 or 2013](#) on a Linux or Windows server to securely connect Salesforce to data stored behind your firewall.
2. [Define an External Data Source for SharePoint 2010 or 2013](#).

Include the external data in global search

To let users access external data in global Salesforce searches, you’ll need to [create an external object and give users access to its fields](#). This is an optional step, but highly recommended to best integrate external data with Salesforce.

For per-user data sources, have users authenticate in Salesforce

If you specified per-user authentication for a data source and exposed it through profiles or permission sets, ask authorized users to [provide their data source credentials](#).


Start accessing, sharing, and searching external files!

Now users can [access and share external files](#) via the Files tab and feed, and [search for them](#) right alongside their Salesforce content.

Enable Salesforce Files Connect for Your Organization

Let users search and share files from external systems like Google Drive and SharePoint. To complete the process, Chatter must be enabled for both the organization and the profile of the administrator who performs these steps.

1. From Setup, enter *Files Connect Settings* in the Quick Find box, then select **Files Connect Settings**.
2. Click **Edit**, and then select **Enable Files Connect**.
3. For File Sharing, select one of the following:
 - **Copy** stores a copy of external files in Salesforce. If files are shared with a Chatter group, all group members can access the files, even if they lack access to the external system.
 - **Reference** points to external files stored outside Salesforce. No previews are available in Chatter, and file downloads require user access to the external system. (Users must enter credentials for the system in the Authentication Settings for External Systems section of personal setup).

 **Tip:** Choose the Copy mode if your organization shares files with external customers or partners. Choose the Reference mode to reflect access restrictions from the external system in Salesforce.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Files Connect for cloud-based external data sources is available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Files Connect for on-premises external data sources is available for an extra cost in: **Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To enable Salesforce Files Connect:

- “Customize Application”

Regardless of sharing mode, Chatter doesn't reflect file revisions in external systems. However, Reference mode points to the latest versions in those systems.


SEE ALSO:

[The Files Connect Setup Process](#)


[Let Users and Administrators Access Files Connect Data Sources](#)

Let Users and Administrators Access Files Connect Data Sources

After you enable Files Connect, give users and administrators permission to access specific external data sources from Salesforce.

 **Tip:** Though you can provide access to data sources via permission sets or profiles, permission sets let you more quickly adjust access for several types of users. Regardless of which method you choose, be sure to give administrators access so they can configure data sources.


1. From Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets** or enter *Profiles* in the Quick Find box, then select **Profiles**.
2. Create a new permission set or profile, or click an existing one.
If you use a permission set, User License must be set to the default option, "None."
3. For a permission set, click **System Permissions**, then click **Edit**.
For a profile, click **Edit**, and scroll down to the Administrative Permissions section.
4. Do either of the following, and then click **Save**.
 - To access cloud-based data sources like SharePoint Online, select **Files Connect Cloud**.
 - To access on-premises data sources like SharePoint 2010 or 2013, select **Files Connect On-premises**.

 **Note:** The on-premises permission is available with a paid permission set license, "Files Connect for on-premises external data sources." To enable the license for your organization, [see these brief instructions](#) in Salesforce Help.

5. For a permission set, click **Manage Assignments** in the toolbar at the top of the page. Then click **Add Assignments**, select users for the permission set, and click **Assign**.

 **Important:** Include any administrators who need to configure external data sources.

6. If you haven't already, define the external data sources for your organization:
 - [Define an External Data Source for SharePoint Online or OneDrive for Business](#)
 - [Define an External Data Source for SharePoint 2010 or 2013](#)
 - [Define an External Data Source for Google Drive](#)

 **Note:** If you select an identity type of Named Principal for the data source, skip the steps below. But if you select Per User, read on.

7. In Setup, return to the detail page for the permission set or profile. Then do either of the following:
 - For a permission set, in the Apps section, click **External Data Source Access**.
 - For a profile, go to the Enabled External Data Source Access related list.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Files Connect for cloud-based external data sources is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Files Connect for on-premises external data sources is available for an extra cost in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set permissions:

- "Customize Application"

8. Click **Edit**, add specific data sources to the Enabled External Data Sources list, and click **Save**.

(Users enter their credentials when they first access external data sources, or from their personal settings on the Authentication Settings for External Systems page.)

SEE ALSO:

[The Files Connect Setup Process](#)

[Enable Salesforce Files Connect for Your Organization](#)

Create an Authentication Provider for Google Drive

To use Google Drive as an external data source, you must create an authentication provider for it in Salesforce. The process begins with creating a related project in the Google Developers console.

Create a Project in the Google Developers Console

1. Using the credentials of your Google App for Work admin account, log in to <https://console.developers.google.com/project>.
2. Click **Create Project**.
3. Enter a project name, and click **Create**.
4. In the project dashboard, click **Enable and manage APIs** to access the API manager.
5. In the API manager, go to the Google APIs tab and search for *Drive API*.
6. Click **Drive API** in the search results, then click **Enable API**.
7. Click **Credentials**, located in the left-hand menu.
8. In the OAuth Consent Screen tab, enter a valid email address and product name. Then click **Save**.
9. In the Credentials tab, click **Add credentials** and select *OAuth 2.0 client ID*.
10. Select *Web application* and click **Create**.
11. Copy the client ID and client secret values to a text file. You'll use these values when creating an authentication provider in Salesforce.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create authentication providers:

- "Customize Application"
- AND
- "Manage Auth. Providers"

Create an Authentication Provider in Salesforce

1. In Setup, enter *Auth. Providers* in the Quick Find box, then select **Auth. Providers**.
2. Click **New**.
3. For *Provider Type*, select **Open ID Connect**, and then set the following options:
 - *Name*—Enter the name you want to appear in Salesforce.
 - *URL Suffix*—Enter the suffix at the end of the URL path. For example, in the path, <https://login.salesforce.com/services/authcallback/00Dx000000000001/MyGoogleProvider>, the suffix is "MyGoogleProvider"
 - *Consumer Key*—Enter the client ID you copied when creating the Google project.
 - *Consumer Secret*—Enter the client secret you copied when creating the Google project.
 - *Authorize Endpoint URL*—Enter https://accounts.google.com/o/oauth2/auth?access_type=offline&approval_prompt=force

- **Token Endpoint URL**—Enter `https://accounts.google.com/o/oauth2/token`
 - **Default Scopes**—Enter `openid email profile https://www.googleapis.com/auth/drive`
4. Click **Save**. Then, at the bottom of the Auth. Provider detail page, copy the **Callback URL** entry to a text file. (You'll use this when editing the Google project.)

Edit the Project in the Google Developer Console

1. In the API Manager, click **Credentials**, located in the left-hand menu.
2. Click on the previously created Web application.
3. In the Authorized Redirect URIs section, add the Callback URL you copied when creating the authentication provider in Salesforce.
4. Click **Save**.

Define an External Data Source for Google Drive

Let Chatter users access their Google Drive content from the Files tab, feed posts, and search. Salesforce supports Google documents, spreadsheets, presentations, and drawings.

1. From Setup, enter *External Data Sources* in the **Quick Find** box, then select **External Data Sources**.
2. Click **New External Data Source**. Then set the following options.

Field	Description
Label	A user-friendly name for the data source displayed in the Salesforce user interface.
Name	A unique identifier used to refer to this external data source definition through the API. The Name field can contain only underscores and alphanumeric characters. It must be unique, begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
Type	Choose Files Connect: Google Drive
Identity Type	<p>The identity type used to authenticate to the external data source.</p> <p>Select Per User to require separate credentials for each user who accesses the data source. (Administrators must enable the data source for specific permission sets and profiles. Users then enter their credentials when first accessing the data source..)</p> <p>Select Named Principal to use the same set of credentials for every user who accesses the data source from Salesforce.</p>

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To define an external data source:

- "Customize Application"

Field	Description
Authentication Protocol	The protocol used to access Google Drive. Select OAuth 2.0 .
Authentication Provider	Enter the Google Drive authentication provider .
Scope	Leave blank.
Start Authentication Flow on Save	Select to immediately test the settings above.

Create an Authentication Provider for SharePoint Online or OneDrive for Business

To use one of Microsoft's cloud-based external data sources, you must create an authentication provider for it in Salesforce and register that provider in an Office 365 app.

To fully configure an authentication provider, complete these steps:

1. [Create an Authentication Provider Using Placeholder Values](#)
2. [Register an Office 365 app](#)
3. [Edit the Authentication Provider](#)

Create an Authentication Provider Using Placeholder Values

1. In Setup, enter *Auth. Providers* in the Quick Find box, then select **Auth. Providers**.
2. Click **New**.
3. For **Provider Type**, select **Microsoft Access Control Service**, and then set the following options:
 - **Name**—Enter the name you want to appear in Salesforce.
 - **URL Suffix**—Enter a suffix you want to appear at the end of the URL path. By default, the suffix reflects the Name entry.
 - **Consumer Key**—Enter a placeholder value.
 - **Consumer Secret**—Enter a placeholder value.
 - **Authorize Endpoint URL**—Enter a placeholder that begins with *https*.
 - **Token Endpoint URL**—Enter a placeholder that begins with *https*.
 - **Default Scopes**—Leave empty.
4. Click **Save**. Then, at the bottom of the Auth. Provider detail page, copy the **Callback URL** entry to a text file. (You'll use this when registering an Office 365 app.)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create authentication providers:

- "Customize Application"
- AND
- "Manage Auth. Providers"

Register an Office 365 app

1. Log in to your Office365 account as an administrator, and go to one of the following URLs:

SharePoint Online

```
https://[your company name].sharepoint.com/[site collection path]/_layouts/15/appregnew.aspx
```

OneDrive for Business

```
https://[your company name]-my.sharepoint.com/_layouts/15/appregnew.aspx
```

2. Set the following options:

- App Type—Select **An app running on a web server**.
- Client Id—Click **Generate**, and copy the generated value to a text file.
- Client Secret—Click **Generate**, and copy the generated value to a text file.
- Title—Enter a name for the app.
- App Domain—Enter the domain name of your Salesforce organization.
- Redirect URL—Enter the Callback URL you copied when creating the Authentication Provider in Salesforce.

3. Click **Create**.

Now you'll configure the newly created app to access SharePoint resources.

4. Go to one of the following URLs:

SharePoint Online

```
https://[your company name].sharepoint.com/[site collection path]/_layouts/15/appinv.aspx
```

OneDrive for Business

```
https://[your company name]-my.sharepoint.com/_layouts/15/appinv.aspx
```

5. Set the following options:

- App Id—Enter the Client Id you copied to a text file, then click **Lookup**.
- Title—Keep the default value.
- App Domain—Keep the default value.
- Redirect URL—Keep the default value..
- Permission Request XML—Enter a string with this format:


SharePoint Online

```
<AppPermissionRequests>
  <AppPermissionRequest Scope="[SCOPE]" Right="[PLACEHOLDER]"/>
</AppPermissionRequests>
```

OneDrive for Business

```
<AppPermissionRequests>
  <AppPermissionRequest Scope="http://sharepoint/content/tenant"
  Right="[PLACEHOLDER]"/>
  <AppPermissionRequest Scope="http://sharepoint/social/tenant" Right="Read"/>
</AppPermissionRequests>
```

6. For SharePoint Online, replace [SCOPE] with one of these values:

 **Important:** Office 365 recognizes only these scope URLs; copy them exactly, without changes.

- `http://sharepoint/content/sitecollection/web` to let users access a single site (but not its subsites).
- `http://sharepoint/content/sitecollection` to let users access a single site collection (including all subsites).
- `http://sharepoint/content/tenant` to let users access all site collections.

7. Replace [PLACEHOLDER] with one of these values:

- Read
- Write
- Manage
- Full Control

For details about the differences between permission levels above, [see the Microsoft website](#).

8. Click **Create**.

Edit the Authentication Provider

In Salesforce, you'll now replace the original placeholder values with the correct ones from the Office 365 app.

1. In Setup, enter *Auth. Providers* in the Quick Find box, then select **Auth. Providers**.

2. Click **Edit** next to the authentication provider you created previously.

3. Change the following values:

- **Consumer Key**—Enter the Client Id you copied to a text file.
- **Consumer Secret**—Enter the Client Secret you copied to a text file.
- **Authorize Endpoint URL**—Enter the URL of the OAuthAuthorize.aspx page in Office 365. The URL format is as follows:

SharePoint Online

```
https://[your company name].sharepoint.com/[site collection path]/_layouts/15/OauthAuthorize.aspx
```

OneDrive for Business

```
https://[your company name]-my.sharepoint.com/_layouts/15/OauthAuthorize.aspx
```

- **Token Endpoint URL**— Enter a URL in the following format:

SharePoint Online

```
https://accounts.accesscontrol.windows.net/[your company name].onmicrosoft.com/tokens/OAuth/2?resource=00000003-0000-0ff1-ce00-000000000000/[your company name].sharepoint.com@[your company name].onmicrosoft.com
```

OneDrive for Business

```
https://accounts.accesscontrol.windows.net/[your company name].onmicrosoft.com/tokens/OAuth/2?resource=00000003-0000-0ff1-ce00-000000000000/[your company name]-my.sharepoint.com@[your company name].onmicrosoft.com
```

4. Click **Save**. Your authentication provider is now ready for use.


SEE ALSO:

[The Files Connect Setup Process](#)

Define an External Data Source for SharePoint Online or OneDrive for Business

With Files Connect and Chatter, Salesforce can access content from Microsoft's cloud-based systems.

1. From Setup, enter *External Data Sources* in the Quick Find box, then select **External Data Sources**.
2. Click **New External Data Source**. Then set the following options.

Field	Description
Label	A user-friendly name for the data source displayed in the Salesforce user interface.
Name	A unique identifier used to refer to this external data source definition through the API. The Name field can contain only underscores and alphanumeric characters. It must be unique, begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
Type	Choose Files Connect: Microsoft SharePoint Online or Files Connect: Microsoft OneDrive for Business .
Site URL	<p>The URL of your SharePoint site, site collection, or web app.</p> <p> Important: The URL must begin with <i>https</i> and end with the site name. (Don't copy the URL seen in the browser when accessing SharePoint.)</p>
Exclude Other Site Collections	Accesses only the collection specified by the URL, ignoring any related collections.
Identity Type	<p>The identity type used to authenticate to the external data source.</p> <p>Select Per User to require separate credentials for each user who accesses the data source. (Administrators must enable the data source for specific permission sets and profiles. Users then enter their credentials when first accessing the data source.)</p> <p>Select Named Principal to use the same set of credentials for every user who accesses the data source from Salesforce.</p>
Authentication Protocol	The protocol used to access SharePoint Online. Select OAuth 2.0 .

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To define an external data source:

- "Customize Application"

Field	Description
Authentication Provider	Enter the SharePoint Online authentication provider .
Scope	Leave blank.
Start Authentication Flow on Save	Select to immediately test your settings.

SEE ALSO:

[The Files Connect Setup Process](#)

Set Up a Secure Agent for SharePoint 2010 or 2013

A Secure Agent provides secure communication between Salesforce and on-premises data in SharePoint 2010 or 2013.



Note: The Secure Agent setup process requires a paid permission set license, “Files Connect for on-premises external data sources.” For information about permission set licenses, [see Salesforce Help](#).

To fully configure a Secure Agent, complete these steps:

1. [Create a Connected App for the Secure Agent](#)
2. [Create a Profile and User Specific to the Secure Agent](#)
3. [Create the Agent in Salesforce, and Download the Installer to Your Server](#)
4. Install and Run the Agent on a [Windows Server](#) or a [Linux Server](#)
5. [Install Secure Agent Plug-ins for Your On-premises Data Source](#)
6. [Update Previously Installed Plug-ins](#)
7. [Import Any Required Certificates](#)
8. [Track and Troubleshoot Secure Agent Activity](#)



Tip: For a visual walk-through, see this [video tutorial of Secure Agent setup](#).

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available for an extra cost in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To set up a Secure Agent:

- “Customize Application”


Create a Connected App for the Secure Agent

1. In Setup, enter *Apps* in the *Quick Find* box, then select **Apps**.
2. In the Connected Apps section, click **New**.
3. In the Basic Information section, enter the following settings:
 - *Connected App Name*—Enter a distinctive name like “Secure Agent App.”
 - *API Name*—Leave the default value.
 - *Contact Email*—Enter your administrator’s address.
4. In the API section, select **Enable OAuth Settings**, and enter the following settings:
 - *Callback URL*—Enter `https://login.salesforce.com` for a production instance, or `https://test.salesforce.com` for a sandbox.

- Use Digital Signatures—*Deselect* this option.
 - Selected OAuth Scopes—Add “Access and manage your data (api)” and “Perform requests on your behalf at any time (refresh_token, offline_access).”
5. Click **Save**.
 6. In Setup, enter *Connected Apps* in the Quick Find box, then select the option for managing connected apps.
 7. Next to the new app, click **Edit**, and then enter the following settings:
 - Permitted Users—Select “Admin approved users are pre-authorized.”
 - IP Relaxation—Select “Relax IP restrictions.”
 8. Click **Save**.


Create a Profile and User Specific to the Secure Agent

1. In Setup, enter *Profiles* in the Quick Find box, then select **Profiles**.
2. Next to the Standard User profile, click **Clone**.
3. For Profile Name, enter a distinctive name like “Secure Agent profile.”
4. Click **Save**.
5. Next to the new profile, click **Edit**.
6. In the Connected App Access section, select the connected app you created for the agent.
7. In the Administrative Permissions section, select **Modify Secure Agents**.
8. Click **Save**.
9. In Setup, enter *Users* in the Quick Find box, then select **Users**.
10. Click **New User**.
11. For Profile, select the profile you created for the agent. Then complete the remaining required fields, and click **Save**.

 **Important:** Be sure to *deselect* “Generate new password and notify user immediately.”

Create the Agent in Salesforce, and Download the Installer to Your Server


1. In Setup, enter *Secure Agents* in the Quick Find box, then select **Secure Agents**.
2. Click **New Secure Agent**.
3. Enter a **Label** for the user interface and **Name** for the API.


 **Note:** Choose the label carefully, because you can't change it. Salesforce relies on a consistent label to remain connected to the agent.
4. For **Proxy User**, enter the user you created for the Secure Agent.
5. Click **Save**.
6. On the details page, click **Download Installer**, and then choose **Linux Agent** or **Windows Agent**.
7. In Setup, enter *Apps* in the Quick Find box, then select **Apps**, and click the name of the connected app you created. Then, in the API section, copy the Consumer Key value to a text file.
8. To your server, copy the text file and the downloaded installer file (sfdc-agent.zip for Windows, or sfdc-agent.run for Linux).


 **Important:** Make sure the server can access both Salesforce and your on-premises data source, and has Java 6.x or 7.x installed.


Install and Run the Agent on a Windows Server

1. Extract the files in `sfdc-agent.zip`. Then double-click `SecureAgentInstaller.exe`
2. Click **Next**, and enter an installation folder. Click **Next** again, and finish initial installation.
3. When the configuration window appears, enter proxy settings used to connect to Salesforce.

 **Tip:** To change proxy settings after installation (due to a new password for example), enter the `agent:proxyconfig` command in the agent interface.
4. For Login Server Type, choose **Production** or **Sandbox**.

 **Tip:** To later change this and following configuration settings, you must uninstall and reinstall the agent.
5. For OAuth Client Key, enter the Consumer Key value you copied to the text file.
6. For Encryption Settings, select one of the following:
 - **Generate** to randomly generate a 1,024-bit public/private key pair. See the [Re-use existing certificate](#) setting if you need another key size. Then note the displayed path to the generated *.509 certificate file. You reference this path in the Salesforce connected app.
 - **Re-use existing keystore** to reuse a key pair from a previous agent installation. The keystore is in this location: `[agent installation folder]\etc\auth.jks`.

 **Note:** If you select an existing keystore, skip to step 10.
 - **Re-use existing certificate** to select your own certificate and private key. This option enables you to use a different key size. Contact Salesforce for more information.
7. In Salesforce, from Setup, enter `Apps` in the `Quick Find` box, then select **Apps**.
8. Click **Edit** next to the connect app, and select **Use Digital Signatures**.
9. Click **Choose File**, and select the *.509 certificate. Then click **Save**.
10. Return to the agent installer, and click **Next** to complete the installation.
11. Click **Install Agent as Service** to start the "Salesforce Secure Agent" service on your server.

 **Tip:** To access services in Windows, choose **Start > Administrative Tools > Services**.

Install and Run the Agent on a Linux Server

1. Run the installer using one of these commands:

- Production instance:

```
./sfdc-agent.run
```

- Sandbox instance:

```
./sfdc-agent.run -l https://test.salesforce.com
```

- Production instance with your own public/private key pair:


```
./sfdc-agent.run -l https://login.salesforce.com -p [private key filename].PKCS8 -f [public key filename].X509
```

- Production instance with a keystore generated during a previous installation:

```
./sfdc-agent.run -l https://login.salesforce.com -j [path to *.jks file]
```

You'll find the *.jks file here: `[agent installation folder]/etc/auth.jks`


2. Follow the on-screen instructions to enter an installation folder and proxy settings.

 **Tip:** To change proxy settings after installation, enter the `agent:proxyconfig` command in the agent interface.

3. When the installer prompts you for an OAuth Client Key, enter the Consumer Key value you copied to the text file.

 **Note:** If you specified a keystore generated during a previous installation, skip to step 8.

4. If prompted, generate a random 1,024-bit public/private key pair. Then note the displayed path to the generated *.509 certificate file. You reference this path in the Salesforce connected app.

 **Note:** Contact Salesforce if you need to use a different key size.

5. In Salesforce, from Setup, enter *Apps* in the *Quick Find* box, then select **Apps**.
6. Click **Edit** next to the connect app, and select **Use Digital Signatures**.
7. Click **Choose File**, and select the *.509 certificate. Then click **Save**.
8. Return to the agent installer, and press Enter to complete the installation.
9. Start the agent with this command: `[agent installation folder]/bin/start`

Install Secure Agent Plug-ins for Your On-premises Data Source

To connect a Secure Agent to an external data source in Salesforce, you need to install the necessary plug-ins.

1. In Setup, enter *Secure Agents* in the *Quick Find* box, then select **Secure Agents**.
2. Click an agent name to access its details page.
3. In the Secure Agent Plugins list, click **New**.

For SharePoint 2010 or 2013, you'll need to install the following plug-ins:

- Files Connect SharePoint
 - Files Connect Remote Connector Service
 - Secure Transport Client Service
4. To install a plug-in, select it from the Type menu, enter a distinctive name, and click **Save**. Repeat the process for each required plug-in.

Update Previously Installed Plug-ins

When plug-in updates are available, administrators receive weekly email notifications.

1. In Setup, enter *Secure Agents* in the *Quick Find* box, then select **Secure Agents**.

2. In the Secure Agent Plugins list, if the Update Available column states “Yes,” click **Edit** for that plug-in.
3. Select **Update to the recommended version on save**, and click **Save**.

Import Any Required Certificates

In the agent interface, you can press the TAB key to access a variety of commands. If your SharePoint server requires a self-signed certificate, or a certificated signed by an unofficial authority, you must use the `rsc:importcert` command. Then enter the path to import the self-signed certificate, or the root certificate of the authority, into the Secure Agent trust store.

The `rsc:listcert` command lists all certificates currently in the trust store, while `rsc:deletecert` deletes the specified certificate from the store.


Track and Troubleshoot Secure Agent Activity

Download log files to precisely monitor agent events.

1. In Setup, enter *Secure Agents* in the **Quick Find** box, then select **Secure Agents**.
2. Click the name of a previously created Secure Agent to open its detail page.
3. Click either of the following:
 - **Download Logs** to download a compressed .zip file containing text logs.
 - **Download Diagnostics** to see the current agent state, including the list of installed plug-ins and Java virtual machine status.

Ensure Access with Secure Agent Clusters

Secure Agent clusters provide failover protection, ensuring that Salesforce users can always access on-premises external data sources like SharePoint 2010 or 2013.

 **Note:** The Secure Agent setup process requires a paid permission set license, “Files Connect for on-premises external data sources.” For information about permission set licenses, [see Salesforce Help](#).

Create the Secure Agent Cluster

1. Create multiple Secure Agents on different servers by repeating this process: [Set Up a Secure Agent](#).
2. From Setup, enter *Secure Agent Clusters* in the **Quick Find** box, then select **Secure Agent Clusters**.
3. Click **New Secure Agent Cluster**.
4. Enter a **Label** for the user interface and **Name** for the API.
5. To add available agents to the cluster, select them, and click **Add**.

Change the priority order in which agents are used by moving them up or down in the Selected Secure Agents list. The accessible agent with highest priority is used first.

6. Click **Save**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available for an extra cost in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To set up Secure Agent clusters:


- “Customize Application”

Check Cluster Status


1. From Setup, enter *Secure Agent Clusters* in the **Quick Find** box, then select **Secure Agents Clusters**.
2. Click a cluster name to access its details page.
3. Note the overall status for the cluster. Green indicates that all agents are accessible, yellow that some are, and red that none are.
4. Note the status of individual agents and these additional details:
 - The **Priority** column shows the order in which agents are used. To change priority, click **Edit**, and move agents up or down in the **Selected Secure Agents** list.
 - The **Active** column indicates which agent is currently in use.

Define an External Data Source for SharePoint 2010 or 2013

Let Salesforce access data in your on-premises system. Files Connect and Chatter make it possible.

 **Note:** This setup process requires a paid permission set license, “Files Connect for on-premises external data sources.” For information about permission set licenses, [see Salesforce Help](#).

1. From Setup, enter *External Data Sources* in the **Quick Find** box, then select **External Data Sources**.
2. Click **New External Data Source**. Then set the following options.

Field	Description
Label	A user-friendly name for the data source displayed in the Salesforce user interface.
Name	A unique identifier used to refer to this external data source definition through the API. The Name field can contain only underscores and alphanumeric characters. It must be unique, begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
Type	Choose Files Connect: Microsoft SharePoint
Secure Agent	A service running on a Linux or Windows server on your intranet that lets you securely connect Salesforce to your on-premises SharePoint server. See Set Up a Secure Agent for SharePoint 2010 or 2013 .
Site URL	The URL of your SharePoint site, site collection, or web app.  Important: The URL must begin with <i>https</i> and end with the site name. (Don't copy the URL seen in the browser when accessing SharePoint.)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available for an extra cost in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To define an external data source:

- “Customize Application”

Field	Description
Identity Type	<p>The identity type used to authenticate to the external data source.</p> <p>Select Per User to require separate credentials for each user who accesses the data source. (Administrators must enable the data source for specific permission sets and profiles. Users then enter their credentials when first accessing the data source.)</p> <p>Select Named Principal to use the same set of credentials for every user who accesses the data source from Salesforce.</p>
Authentication Protocol	<p>The protocol required to access SharePoint.</p> <p>Select Password Authentication.</p> <p>(This option supports HTTP Basic and NTLM authentication.)</p>
Administration Username	<p>The username Salesforce uses to test the connection to SharePoint. You don't need to enter a SharePoint administrator's username. However, ensure that the credentials you use have adequate privileges to access the data source, perform searches, and return information.</p>
Administration Password	<p>The password Salesforce uses to test the connection to SharePoint.</p>



Note: Salesforce users can't access SharePoint 2010 if anonymous access is enabled for the web application.

SEE ALSO:

[The Files Connect Setup Process](#)

Include a Files Connect Data Source in Global Search

Combine searches for Salesforce data with external data from Google Drive, SharePoint, or OneDrive for Business. Via the API, developers can automate the process with supported SOQL or SOSL queries.

To include external data in global searches or API queries, first create a related external object. External objects behave similarly to custom objects, but map to data stored outside Salesforce in an external system like SharePoint. Each external object maps to a data table, and the object fields map to accessible table columns.



Tip: External objects support lookup relationships similar to custom objects, letting you integrate external data into related lists and other areas throughout Salesforce. For details, see [External Object Relationships](#).

To fully configure global search, complete these steps:

1. [Choose the Layout for Global Search Results](#)
2. [Create an External Object from an External Data Source](#)
3. [Give Users Access to the External Object Fields](#)

To automate search with SOQL or SOSL, review the supported queries for your data source:

- [SOQL and SOSL Support for SharePoint and OneDrive External Objects](#)
- [SOQL and SOSL Support for Google Drive External Objects](#)

Choose the Layout for Global Search Results

By default, Files Connect external objects use the standard search results layout for Chatter and the Files tab. If you want to display customized search layouts for these objects, complete these quick steps.

1. From Setup, enter *Files Connect Settings* in the **Quick Find** box, then select **Files Connect Settings**.
2. Select **Use External Object Search Layout**.

Create an External Object from an External Data Source

1. Define an external data source that supports search:
 - [SharePoint Online or OneDrive for Business](#)
 - [SharePoint 2010 or 2013](#)
 - [Google Drive](#)
2. In Setup, enter *External Data Sources* in the **Quick Find** box, then select **External Data Sources**.
3. Click the data source name to access the details page.
4. Click **Validate and Sync**.
5. Select the table named "items_[data source]." Then click **Sync** to create an external object that maps to the entire source. Now you deploy the object to make the data it contains available to users.
6. Choose **Build > Develop > External Objects**.
7. Click **Edit** next to the new external object.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Files Connect for cloud-based external data sources is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Files Connect for on-premises external data sources is available for an extra cost in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To create an external object and provide access to its fields:

- "Customize Application"

- At the bottom of the page, click **Deployed**, and then click **Save**.

Give Users Access to the External Object Fields

- In Setup, enter *Permission Sets* in the **Quick Find** box, then select **Permission Sets**.
- Click [a permission set in which you enabled Files Connect](#).
- In the Apps section, click **Object Settings**.
- Click the name of the external object.
- Click **Edit**, and enable the necessary Read permissions (for the object itself, and all fields you want to reveal in Salesforce).
- Click **Save**.

SOQL and SOSL Support for SharePoint and OneDrive External Objects

SharePoint and OneDrive external objects support these standard fields and any custom fields you enable.



Note: Queries on specific fields return only documents that the external data source indexed.

Field Name	Queryable	Sortable
Author	Yes	Yes
Comment	No	Yes
ContentLength	Yes	Yes
CreationDate	Yes	Yes
DisplayUrl	No	Yes
DownloadUrl	No	No
ExternalId	Yes	Yes
IsFolder	Yes	Yes
	Note: Not supported for SharePoint 2010 or 2013.	
MimeType	Yes	Yes
Name	Yes	Yes
UpdateDate	Yes	Yes
UpdatedBy	Yes	Yes



Note: You can also use `ParentId__c` as query criteria to retrieve the list of documents in a folder. However, that field isn't displayed in query results unless your query specifies a `ParentId__c` value.

SOQL and SOSL Support for Google Drive External Objects

Files Connect supports all standard Google Drive properties, but not custom properties. The following properties have different field names in Salesforce external objects:

Google Property	Salesforce Field
alternateLink	DisplayUrl
createDate	CreationDate
description	Comment
downloadURL	contentStreamUri
editable	readOnly
fileSize	ContentLength
id	ExternalId
lastModifyingUserName	UpdatedBy
mimeType	MimeType
modifiedDate	UpdateDate
ownerNames	Author
originalFilename	contentStreamFileName
title	Name

This subset of fields supports SOQL and SOSL queries. (None are sortable, reflecting limitations in the Google Drive API.)

- CreationDate
- lastViewedByMeDate
- MimeType
- Name



Note: Google Drive queries on the Name field support only one wildcard, %. Searches using this wildcard match only name prefixes. For example, the title "HelloWorld" would be returned with the query *Name LIKE "Hello%"* but not *Name LIKE "%World"*.

- sharedWithMe



Note: Queries on the sharedWithMe field with a value of "false" are not supported, protecting confidential data.

- starred
- UpdateDate

SEE ALSO:

[The Files Connect Setup Process](#)

[Include SharePoint Custom Properties in Search, SOQL, and SOSL Queries](#)

Include SharePoint Custom Properties in Search, SOQL, and Sosl Queries

After you create an external object for a SharePoint data source, some special steps are needed to search or query any custom properties it contains.

Configuring Custom Properties in SharePoint

External objects in Salesforce let you select and filter on these custom properties from SharePoint:

- Custom columns defined in a Custom Content Type
- Metadata from Microsoft Word, Excel, and other Office documents

To search on these custom properties in Salesforce, a corresponding Managed Property must be created by a Sharepoint administrator.

- To display these properties in external object fields, or use them in SOQL or Sosl `SELECT` queries, set the corresponding Managed Property to `Retrievable`. (In Sharepoint 2010, this option is labeled, "Allow this property to be used in scopes.")
- To filter on these properties in external objects, or use them as query criteria in a SOQL or Sosl `WHERE` clause, set the corresponding Managed Property to `Queryable`.

Querying Resulting Fields in Salesforce

In the examples below, `CustomProperty` stands for the Custom column name defined in the Custom Content Type, or the Office document metadata name. `ManagedCustomProperty` stands for the corresponding Managed Property name.

SharePoint 2010

Use `CustomProperty` in the `SELECT` clause and `ManagedCustomProperty` in the `WHERE` clause. Two corresponding fields must exist for the external object in Salesforce: one for selecting, the other for filtering.

Here's a SOQL example:

```
SELECT CustomProperty FROM items_sp2010_x WHERE ManagedCustomProperty=...
```

SharePoint 2013 and Online

In most cases, `ManagedCustomProperty` can be used for both the `SELECT` and `WHERE` clause.

Here's a SOQL example:

```
SELECT ManagedCustomProperty FROM items_sp2013_x WHERE ManagedCustomProperty=...
```

However, for file types SharePoint doesn't index for search, such as .jpg, .png, and .pdf files, you must use `CustomProperty` in the `SELECT` clause and `ManagedCustomProperty` in the `WHERE` clause. As a workaround, you can define an alias on the Managed Property in SharePoint and format queries like this:

```
SELECT Alias FROM items_sp2013/Online WHERE Alias=...
```



Tip: Normally, custom properties aren't displayed on external object detail pages—defining an alias also addresses this issue.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Files Connect for cloud-based external data sources is available in:

Professional, Enterprise, Performance, Unlimited, and Developer Editions

Files Connect for on-premises external data sources is available for an extra cost in: **Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To create an external object and provide access to its fields:

- "Customize Application"

Boolean Custom Properties

When using boolean (Yes/No) custom properties with a corresponding Managed Property set to the Text type, the corresponding external object field must be set to the Text type as well. In filters, the values "0" and "1" equal false and true, respectively. For example:

```
WHERE customBooleanWithTextManagedProperty="1"
```

"0" and "1" are also displayed as results, however, so ideally boolean custom properties correctly use a Managed Property type of YesNo. In that scenario, set the corresponding external object field to Checkbox to query it with standard `true` or `false` values. For example:

```
WHERE customBooleanWithYesNoManagedProperty=true
```

Metadata in Microsoft Office Documents

The Sharepoint Search service returns all metadata from Office documents as strings, so corresponding external object fields must be set to the Text type.

Dates are returned in the format, MM/DD/YYYY hh:mm:ss AM/PM, (for example, "3/31/2015 9:59:00 PM"). To query on fields using the Date type, the external object must include a corresponding Date field for filtering, and a Text field for selecting.

Limitations for Specific SharePoint Property Types in Salesforce

All versions

- Number, Currency, and Choice Dropdown properties can't be selected for file types SharePoint doesn't index for search, such as .jpg, .png, and .pdf files.

SharePoint 2010

- Numbers and Choice + Checkboxes properties can't be selected.
- Date properties can be selected but won't likely be returned in UTC (Coordinated Universal Time), so values may reflect a different time zone than expected.

SharePoint 2013

- Multiple Line of Text, URL, Date, and Choice Dropdown properties aren't queryable.
- Choice Dropdown can't be selected.

SharePoint Online

- Multiple Line of Text, URL, and Date properties aren't queryable.

SEE ALSO:

[Include a Files Connect Data Source in Global Search](#)

Define a Simple URL External Data Source

If Chatter is enabled for your organization, Salesforce can access data hosted on another Web domain for use in the Files tab and feed.

1. From Setup, enter *External Data Sources* in the Quick Find box, then select **External Data Sources**.
2. Click **New External Data Source**. Then set the following options.

Field	Description
Label	A user-friendly name for the data source displayed in the Salesforce user interface.
Name	A unique identifier used to refer to this external data source definition through the API. The Name field can contain only underscores and alphanumeric characters. It must be unique, begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
Type	Choose Simple URL .
URL	The URL of the server hosting data outside of Salesforce, which must begin with <i>http://</i> or <i>https://</i> .
Default External Repository	Used for SharePoint® Online®. If metadata is not accessible, use this field to create tables and default table fields.
Large Icon	Specify an icon to easily identify the data source in the Salesforce user interface. First define the icon as a static resource in Salesforce. For more information, see <i>Defining Static Resources</i> .
Small Icon	Specify an icon to easily identify the data source in the Salesforce user interface. First define the icon as a static resource in Salesforce. For more information, see <i>Defining Static Resources</i> .
Identity Type	The identity type used to authenticate to the external data source. Select Anonymous , which doesn't require users to provide credentials when accessing the data source.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To define an external data source:

- “Customize Application”

Field	Description
Authentication Protocol	The protocol required to access the data source. Select No Authentication .

 **Note:** Simple URL data sources can't be included in global search, so the "Validate and Sync" option isn't supported.

Chatter Desktop

Control Access to Chatter Desktop

Chatter Desktop is enabled for most organizations, but administrators can control access to Chatter Desktop.

1. From Setup, enter *Chatter Desktop Settings* in the **Quick Find** box, then select **Chatter Desktop Settings**.
2. Select **Enable Chatter Desktop** to allow users to access Chatter data from Chatter Desktop.
Deselect this option to block access to the Chatter Desktop self-installation page and prevent all instances of Chatter Desktop from accessing Chatter data.
3. Select **Allow Chatter Desktop Managed Installations Only** to prevent non-administrators from installing Chatter Desktop.
For example, select this option if your IT department plans to deploy Chatter Desktop to your organization.
4. Save your changes.

SEE ALSO:

[Chatter](#)

[Install Chatter Desktop Managed Version](#)

[Configure Chatter Desktop Managed Version](#)

EDITIONS

Available in: Salesforce Classic

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


Salesforce CRM, Approvals, Chatter email notifications, Chatter Invitations, and customer invitations are not available in **Database.com**.

Install Chatter Desktop Managed Version

Salesforce provides two Chatter Desktop installers: a standard version for individual installations and a managed version for enterprise deployments.

The following are the minimum requirements for using Chatter Desktop:

- Windows
 - 2.33GHz or faster x86-compatible processor, or Intel Atom™ 1.6GHz or faster processor for netbook devices
 - Microsoft® Windows® XP, Windows Server® 2003, Windows Server 2008, Windows Vista® Home Premium, Business, Ultimate, or Enterprise (including 64 bit editions) with Service Pack 2, or Windows 7
 - 512MB of RAM (1GB recommended)
- Mac
 - Intel® Core™ Duo 1.83GHz or faster processor
 - Mac OS X v 10.5, 10.6, or v10.7
 - 512MB of RAM (1GB recommended)

 **Important:** Chatter Desktop uses Adobe® Integrated Runtime (AIR®), Adobe's cross-platform runtime environment for desktop applications, and only runs on operating systems that Adobe AIR supports. Chatter Desktop does not run on operating systems that Adobe AIR does not support, such as 64-bit Linux. See the Adobe website for information on Adobe AIR.

The managed version of Chatter Desktop is ideal for enterprises deploying Chatter Desktop to users who don't have administrator privileges on their machines. The managed version:

- Doesn't automatically install AIR—your IT department must obtain a redistribution agreement from Adobe Systems Incorporated and deploy the required version of AIR before deploying Chatter Desktop
- Requires your IT department to accept the Chatter Desktop managed version end user license agreement on behalf of the users to which Chatter Desktop is deployed
- Doesn't automatically post to Chatter the first time Chatter Desktop launches
- Doesn't regularly check Salesforce for new versions

To install the managed version:

1. Deploy Adobe® Integrated Runtime (AIR®) version 2.6 or later (the latest version is recommended) to the machines on which you plan to deploy Chatter Desktop.

AIR is Adobe's cross-platform runtime environment for desktop applications, and is a prerequisite for Chatter Desktop.

 **Tip:** Visit these links before deploying AIR:

- AIR® overview:
http://www.adobe.com/devnet/air/articles/distributing_air_in_enterprise.html
- Information on obtaining an AIR® redistribution license from Adobe Systems Incorporated:
http://www.adobe.com/products/air/runtime_distribution1.html
- Installation information:
http://help.adobe.com/en_US/air/redist/WS485a42d56cd19641-70d979a8124ef20a34b-8000.html
- Administration information:
http://help.adobe.com/en_US/air/admin/WS485a42d56cd1964167ea49bd124ef17d52a-8000.html

EDITIONS

Available in: Salesforce Classic

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

Salesforce CRM, Approvals, Chatter email notifications, Chatter Invitations, and customer invitations are not available in **Database.com**.

- From Setup, enter *Chatter Desktop Settings* in the *Quick Find* box, then select **Chatter Desktop Settings**.
- Click the link to download the managed version.



Important: Chatter Desktop uses Adobe® Acrobat® Reader to preview PDF files. Before previewing files with Chatter Desktop, download Adobe Acrobat from [Adobe's website](#), install it, and open it at least once to complete the installation.

SEE ALSO:

[Control Access to Chatter Desktop](#)

[Configure Chatter Desktop Managed Version](#)

Configure Chatter Desktop Managed Version

Control Chatter Desktop settings by deploying an XML-based configuration file to each user's machine. The configuration in the file overrides the user's settings.

- Create a file named `.chatterdesktop`, add a `chatterdesktop` parent element with two child elements, `config` and `servers`.
- Inside the `config` element, create the child elements listed in this table and add an `default` and an `editable` attribute. Both attributes can have the value `true` or `false`.

To make a child element the default setting, set the element's `default` attribute to `true`. To allow users to change a default setting through the user interface, set the element's `editable` attribute to `true`.

Child Element	Description
<code>launchOnStartup</code>	Launches the application on startup.
<code>minimizeOnClose</code>	Minimizes the application on close.
<code>notifications</code>	Enables popup notifications.
<code>criticalAlerts</code>	Enables alerts for new feed posts and comments by highlighting the taskbar icon (Windows) or causing the dock icon to bounce (Mac OS).
<code>bringToFront</code>	Brings Chatter Desktop to the foreground for new feed posts and comments.
<code>alwaysOnTop</code>	Enables Chatter Desktop to always display in the foreground.
<code>chatWindowToFront</code>	Enables the chat window to display in the foreground when a new chat is received (Mac only).
<code>chatSoundEnabled</code>	Enables sounds for new chats received.
<code>playSoundForEveryMessage</code>	Enables sounds for all chats received.

EDITIONS

Available in: Salesforce Classic

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

Salesforce CRM, Approvals, Chatter email notifications, Chatter Invitations, and customer invitations are not available in **Database.com**.



Note: If the `default` attribute is set to `true` for `chatSoundEnabled` and `false` for `playSoundForEveryMessage`, a sound plays only for new chats received. If both are set to `true`, a sound plays for every chat received. If both are set to `false`, chat sounds are disabled.

3. If your organization uses instances of Salesforce other than Production and Sandbox, specify the servers that host those instances in separate `server` elements inside the `servers` element.

Inside each `server` element, include the following attributes:

- `label`—The name of the connection as you want it to appear in the user interface.
- `serverUrl`—The URL you use to log in to the instance. The URL must begin with `https://` and end with `salesforce.com` or `chatter.com`. For example, if your organization has a European division that you log into from `https://emea.salesforce.com`, enter that URL and name the connection `Europe`.
- `defaultServer`—Set to `TRUE` to make this server the default instance to which Chatter Desktop connects.

4. Test the `.chatterdesktop` configuration file.

- a. Copy the `.chatterdesktop` configuration file to the user directory on your machine. The user directories are:

- Windows—`c:\Documents and Settings\<username>` (Windows XP) or `C:\Users\<username>` (Windows 7)
- Mac OS—`/Users/<username>`
- Linux—`/home/<username>`

- b. Launch Chatter Desktop and verify that it functions correctly. See Chatter Desktop Troubleshooting Tips if there are problems.

5. Copy the `.chatterdesktop` file to the user directory on every machine running Chatter Desktop in your organization.



Example: The following is a sample configuration file:

```
<chatterdesktop>
  <config>
    <launchOnStartup default="false"
      editable="false"/>
    <minimizeOnClose default="false"
      editable="true"/>
    <notifications default="true"
      editable="true"/>
    <criticalAlerts default="false"
      editable="true"/>
    <bringToForeground default="false"
      editable="true"/>
    <alwaysOnTop default="false"
      editable="false"/>
    <chatWindowToForeground default="false"
      editable="false"/>
    <chatSoundEnabled default="true"
      editable="true"/>
    <playSoundForEveryMessage default="true"
      editable="true"/>
```

```

</config>

<servers>
  <server label="Europe"
    serverUrl="https://emea.salesforce.com"
    defaultServer="true"/>
  <server label="Production"
    serverUrl="https://login.salesforce.com"
    defaultServer="false"/>
</servers>
</chatterdesktop>

```

SEE ALSO:

[Control Access to Chatter Desktop](#)[Install Chatter Desktop Managed Version](#)

Chatter Licenses

Chatter User Licenses

All standard Salesforce licenses allow free Chatter access for everyone in your organization. Salesforce also offers Chatter-specific licenses: Chatter External, Chatter Free, and Chatter Only (also known as Chatter Plus).

Chatter External

This license is for users who are outside of your company's email domain. These external users, also called customers, can be invited to Chatter groups that allow customers. Customers can access information and interact with users only in the groups they're invited to. They have no access to Chatter objects or data.

Chatter Free

The Chatter Free license is for users who don't have Salesforce licenses but need access to Chatter. These users can access standard Chatter items such as people, profiles, groups, and files, but they can't access any Salesforce objects or data. Chatter Free users can also be Chatter moderators.

Chatter Free users don't see tabs like other Salesforce users. Chatter Free users access feeds, people, groups, and files using the links in the sidebar of the page.

Salesforce administrators can upgrade a Chatter Free license to a standard Salesforce or Chatter Only license at any time. You can't convert a standard Salesforce or Chatter Only license to a Chatter Free license.

EDITIONS

Available in: Salesforce Classic

Chatter External and Chatter Free licenses are available in: **Group, Professional, Enterprise, Performance, Unlimited, Contact Manager, and Developer** Editions

Chatter Only (also known as Chatter Plus) licenses are available in: **Professional, Enterprise Unlimited, and Performance** Editions

Chatter Only (Chatter Plus)

The Chatter Only license is also known as the Chatter Plus license. It is for users that don't have Salesforce licenses but need access to some Salesforce objects in addition to Chatter. Chatter Plus users can be Chatter moderators and have access to standard Chatter people, profiles, groups, and files pages. They also can

- View Salesforce accounts and contacts
- Use Salesforce CRM Content, Ideas, and Answers
- Access dashboards and reports
- Use and approve workflows
- Use the calendar to create and track activities
- View and modify up to ten custom objects
- Add records to groups

By default, the tabs for standard Salesforce objects are hidden from Chatter Plus users. Expose these tabs, if you want to make them available to Chatter Plus users. For more information on Chatter Plus users, see [Chatter Plus Frequently Asked Questions](#)

Chatter License Overview

This table shows the list of features that are available for Chatter External, Chatter Free, and Chatter Only licenses.

Feature	Chatter External (Access limited to items and people in the groups customers are invited to)	Chatter Free	Chatter Only (a.k.a. Chatter Plus)
Chatter Desktop client	✓	✓	✓
Use the Salesforce1 mobile app (Downloadable apps require the "API Enabled" profile permission)	✓ Downloadable app users can't access Groups or People list views.	✓	✓
Feeds	✓	✓	✓
File sharing	✓	✓	✓
Groups	✓	✓	✓
Invitations to join groups	✓ Only customers who are also group managers can invite Chatter users from groups they have access to or people outside Chatter.	✓	✓
Profiles	✓	✓	✓
Topics and hash tags	✓	✓	✓
Private messages	✓	✓	✓

Feature	Chatter External (Access limited to items and people in the groups customers are invited to)	Chatter Free	Chatter Only (a.k.a. Chatter Plus)
Global search	✓ Search results include only those items that customers have access to via groups.	✓	✓
Custom objects			✓ Up to 10 custom objects
Accounts and contacts			✓ Read only
Calendar and events			✓
Content library			✓
Ideas and answers			✓
Reports and dashboards			✓
Tasks and activities			✓
Using and approving workflows			✓

Salesforce CRM Content

Set Up Salesforce CRM Content

USER PERMISSIONS

To create, edit, or delete library permissions:	"Manage Content Permissions" OR "Manage Salesforce CRM Content"
To create, edit, or delete page layouts and record types:	"Manage record types and layouts for Files" OR "Manage Salesforce CRM Content"
To create content fields:	"Manage Content Properties" OR "Manage Salesforce CRM Content"

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

To create libraries:

“Create Libraries”

OR

“Manage Salesforce CRM Content”

To edit or delete libraries:

“Manage Salesforce CRM Content”

Set up Salesforce CRM Content to enable the use of content libraries in your org. Salesforce CRM Content is only available in Salesforce Classic, but files from content libraries are available in Lightning Experience if Salesforce CRM Content is enabled for your org.

To set up Salesforce CRM Content for your organization:

1. Enable Salesforce CRM Content from Setup by entering *Salesforce CRM Content* in the Quick Find box, selecting **Salesforce CRM Content**, and then selecting **Enable Salesforce CRM Content**.
2. Give users access to Salesforce CRM Content by assigning feature licenses in one of the following ways:
 - To assign feature licenses to users automatically, from Setup, enter *Salesforce CRM Content* in the Quick Find box, select **Salesforce CRM Content**, and then select **Autoassign feature licenses to existing and new users**.
 - To assign feature licenses to users manually, from Setup, enter *Users* in the Quick Find box, then select **Users** and click **Edit** next to the user's name. Select the *Salesforce CRM Content User* checkbox and click **Save**.
3. Verify that the Salesforce CRM Content users have the Salesforce CRM Content user permissions enabled. The user permissions include “Manage Salesforce CRM Content,” “Create Libraries,” “Manage Content Permissions,” “Manage Content Properties,” “Manage record types and layouts for Files”, and “Deliver Uploaded Files and Personal Content.”



Note: Users with the “Deliver Uploaded Files and Personal Content” user permission can create content deliveries from personal libraries. This user permission does not affect the ability to deliver content from shared libraries.

4. Optionally, create a public group with a set of Salesforce CRM Content users. You can save time later by assigning the group to a library rather than assigning several users to the same library individually.
5. Optionally, create one or more library permissions. Library permissions are the groups of privileges that determine user access within a library. Every user must be assigned a library permission before he or she can use a library. All new organizations contain three library permissions: library administrator, author, and viewer.
6. Use the New Library Wizard to create a library, add members to the library, and assign library permissions to the members.
7. Categorize and define your content:
 - a. Create content fields. These are custom fields that you assign to page layouts. 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.
 - b. Create a custom page layout or modify the default page layout. Page layouts are the containers for custom fields; they determine which fields are available during the publishing process and how the fields display on the content details page. You can create multiple page layouts and record types and assign a content field to any or all page layouts. For example, if sales and marketing users need to record different information about their content, you can create Sales and Marketing page layouts and record types. If you create a *Related Campaign* lookup field and add it to the Marketing page layout and record type only, users who select the Sales record type during the upload process will not have the option to choose a campaign.
8. Optionally, enable the Add Google Doc to Salesforce service so library members can contribute Google docs to Salesforce CRM Content.

Implementation Tips

- Before creating libraries, review the files you plan to store in Salesforce CRM Content to determine how many libraries you need and what content belongs in each library. Users are given access to content based on library.
- If you have a large number of Salesforce CRM Content users, create a public group and add the group to a library rather than adding users to the library individually.
- To enable Salesforce CRM Content functionality for leads, accounts, contacts, opportunities, cases, products, or custom objects, add the Related Content related list to the appropriate page layout.
- To send web-formatted content to colleagues, leads, or contacts and associate it with Salesforce records, add the Content Deliveries related list to the page layout for leads, accounts, contacts, opportunities, cases, campaigns, or custom objects.
- To allow users to publish, edit, and search in any of the Salesforce-supported languages, from Setup, enter *Salesforce CRM Content* in the Quick Find box, select **Salesforce CRM Content**, and then click **Enable multilanguage search and contribute**.
- To associate Google docs with a library, the Add Google Doc to Salesforce service must be activated for your organization.
- Salesforce CRM Content is available via the Customer Portal and partner portal.
- All Salesforce CRM Content items display as primary tabs in the Salesforce Console.

Best Practices

- If you are using the Related Content related list on Salesforce objects, align your custom content fields with the standard and custom fields on the object to increase the accuracy of a “Find Content” search. Clicking the **Find Content** button on the related list matches content to the fields on the record and displays search results containing the related content.
- To ensure that content is classified consistently, define consistent tag names with your contributors. For example, by establishing tag names at the outset, you can avoid having tags such as “channel” and “channels” in the same library.
- 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.
- To highlight valuable content and make it easier to find, mark it as “featured” on the content details page. Featured content receives a higher priority than similar content in search results, and appears on the Libraries tab for easy access. To feature content, users must have the *Feature Content* option checked in their library permission.
- If your organization uses Google Docs, encourage library members to add their Google docs to a library. 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.

SEE ALSO:

[Customize Salesforce CRM Content](#)


[Set Up Content Deliveries](#)

[Setting Up Salesforce CRM Content for Salesforce Classic Mobile](#)

Content Customization

Customize Salesforce CRM Content

From Setup, enter *Salesforce CRM Content* in the **Quick Find** box, then select **Salesforce CRM Content** to access the following options for customizing Salesforce CRM Content:

-  **Tip:** To perform the initial set up of Salesforce CRM Content for your organization, see [Set Up Salesforce CRM Content](#) on page 66.
- **Content Fields**—[Create, edit, or delete custom content fields](#). Custom fields allow users to categorize and define content during the publishing process.
- **Validation Rules**—Create, edit, or delete validation rules. Validation rules verify that the data a user enters when publishing content meets the standards you specify before the user can save the content.
- **Library Permissions**—[Create, edit, or delete library permissions](#). A library permission determines user privileges within a library.
- **Settings**—[Modify Salesforce CRM Content default settings](#) for multi-language support, PDF downloads, content pack creation, or the enhanced document viewer.

SEE ALSO:

[Set Up Salesforce CRM Content](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, edit, or delete content fields:

- "Manage Content Properties"

OR

"Manage Salesforce CRM Content"

To define or change field validation rules:

- "Customize Application"

To create, edit, or delete library permissions:

- "Manage Content Permissions"

OR

"Manage Salesforce CRM Content"

Modify content settings:

- "Manage Salesforce CRM Content"

Customizing Content Fields

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.

Click **Edit** or **Del** in the Content Custom Fields & Relationships related list to edit or delete a custom content field. You cannot edit or delete the standard content fields. Deleted custom fields and their data are stored until your organization permanently deletes them or 15 days has elapsed, whichever happens first. Until that time, you can restore the field and its data.

SEE ALSO:

[Customize Salesforce CRM Content](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, edit, or delete custom fields:

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

Libraries

Create Libraries

Store, share, and manage your files in content libraries so you can decide who has access to files in each library and what permissions they have. Each org can have up to 2,000 libraries.

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](#) on page 72.

EDITIONS

Available in: Salesforce Classic

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

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

Manage Library Permissions

To manage library permissions, from Setup, enter *Content Permissions* in the Quick Find box, then select **Content Permissions**. 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.

 **Note:** If your Salesforce CRM Content organization was created after the Spring '09 release, your organization already has three library permissions: Library Administrator, Author, and Viewer.

To [create a custom library permission](#), click the **Add Library Permissions** button. To [edit a library permission](#), click **Edit** next to the library permission name. To [delete a library permission](#), click **Del** next to the library permission name.


 **Note:** Library permissions do not apply to personal libraries. All Salesforce CRM Content users can save files in their personal libraries.

SEE ALSO:

[Create Libraries](#)

Creating Library Permissions

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

 **Tip:** If your Salesforce CRM Content organization was created after the Spring '09 release, your organization already has Viewer, Author, and Library Administrator library permissions. If not, consider creating them. These three library permissions provide the different levels of library access required for most organizations. For the "Viewer" library permission, select the *View Comments* and *Add Comments* library privileges. For the "Author" library permission, select the *Add Content*, *Add Content on Behalf of Others*, *Archive Content*, *Add Comment*, and *Tag Content* library privileges. For the "Library Administrator" permission, select the *Manage Library* privilege.

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.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, edit, or delete library permissions:

- "Manage Salesforce CRM Content"

OR

"Manage Content Permissions"

EDITIONS

Available in: Salesforce Classic

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

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. 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**.

SEE ALSO:

[Create Libraries](#)

[Manage Library Permissions](#)

[Editing Library Permissions](#)

Editing Library Permissions

To edit a Salesforce CRM Content library permission, from Setup, enter *Content Permissions* in the **Quick Find** box, then select **Content Permissions**. Then click **Edit** next to the appropriate 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.

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. 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.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To edit library permissions:

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

Library Privilege	Description
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**.

SEE ALSO:

[Create Libraries](#)
[Manage Library Permissions](#)
[Deleting Library Permissions](#)

Deleting Library Permissions

To delete a customized library permission for Salesforce CRM Content:

1. From Setup, enter *Content Permissions* in the Quick Find box, then select **Content Permissions**.
2. Click **Del** next to the appropriate permission.
3. Review the list of affected users. The delete page shows all Salesforce CRM Content users who are assigned to the library permission in a particular library. If you delete the library permission, the user will lose access to that library.
4. Click **Delete Permission** to confirm.

SEE ALSO:

[Create Libraries](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To delete library permissions:

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

Assigning Library 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 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.

3. 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.
4. 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.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To assign a tagging rule to a library:

- "Manage Salesforce CRM Content"

OR

Manage Libraries checked in your library permission definition

- 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.

SEE ALSO:

[Create Libraries](#)

Restrict Record Types in a Library

Library administrators can choose which record types are available in a library. They can also set the default record type for publishing content to the 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.
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.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To restrict record types:

- "Manage record types and layouts for Files"

OR

"Manage Salesforce CRM Content"

- 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.

Content Settings

Customize Content Settings

From Setup, enter *Salesforce CRM Content* in the `Quick Find` box, then select **Salesforce CRM Content** to modify the defaults for your Salesforce CRM Content organization:

Enable Salesforce CRM Content

If this option is checked, Salesforce CRM Content is enabled for your organization.

Autoassign feature licenses to existing and new users

If this option is checked, Salesforce automatically attempts to assign Salesforce CRM Content feature licenses to all existing users. If there aren't enough licenses available, no licenses are assigned. Contact Salesforce to request additional feature licenses. When a new user is created, a Salesforce CRM Content feature license is automatically assigned as long as licenses are available. A feature license corresponds to the `Salesforce CRM Content User` checkbox on the user detail page.

Enable multilanguage search and contribute

If this option is checked, a `Language` drop-down list is available when users publish, edit, or search for content. The `Language` drop-down list contains all 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.

Enable content pack creation

If this option is checked, the **Create New > Content Pack** option displays on the Libraries tab and users can create content packs from any documents or files in their Salesforce CRM Content private or public libraries.

If this option is not checked after users in your organization have already created content packs, those packs are not 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 > Edit Content Pack** option on the content details page are unavailable.

Enable enhanced document viewer

If this option is checked, an enhanced set of navigation and customization options are available for the document viewer. The document viewer allows users to preview a document without downloading, whether the document be a content delivery sent to a lead, prospect, or colleague, a document viewed internally in Salesforce CRM Content, or a file in Salesforce Files. The document viewer has three modes: the Preview tab on the content details page (preview mode), the content delivery URL (delivery mode),

EDITIONS

Available in: Salesforce Classic











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

USER PERMISSIONS

To modify Salesforce CRM Content settings:

- "Manage Salesforce CRM Content"

and full screen mode, which displays when you click the full-screen option on the content details page or in a content delivery. In Chatter, users can preview files in feeds, on file lists, and on the Files tab. The **Enhanced document viewer** setting provides the following capabilities to users who are viewing documents:

- In addition to using the next page () , previous page () , first page () , and last page () icons on the document toolbar, you can navigate page-by-page through a document by right-clicking and choosing **Next Page** and **Previous Page**. The right-click menu is not available in preview mode.
- You can jump directly to a page by entering the page number and clicking Enter. This option is not available in full-screen mode.
- From the right-click menu you can choose the **Fit Width** option to expand the width of the document or the **Fit Full Page** option to view the whole page of the document. The fit width icon () and fit full page icon () are also available on the toolbar.
- From the right-click menu you can choose the **Full Screen** option to view the document in full screen mode or the **Exit** option to exit full screen mode. The full screen icon () and exit icon () are also available on the toolbar.
- From the right-click menu you can **Zoom In** or **Zoom Out**. The zoom-in icon () and zoom-out icon () are also available on the toolbar.
- You can use the scroll bar to move continuously through a document without needing to click the **Next Page** and **Previous Page** icons. Continuous scrolling is not available in preview mode or for PowerPoint documents in any mode.
- You can use the keyboard arrow keys to navigate page-by-page through a document. Click on the document viewer and use the keys as follows:
 - Right-arrow key: moves a PowerPoint document forward one slide and moves a PDF, Word, or Excel document forward one page.
 - Left-arrow key: moves a PowerPoint document backward one slide and moves a PDF, Word, or Excel document backward one page.
 - Up-arrow key: moves a PowerPoint document forward one slide and scrolls a PDF, Word, or Excel document up the page.
 - Down-arrow key: moves a PowerPoint document backward one slide and scrolls a PDF, Word, or Excel document down the page.

Navigating with keyboard-arrow keys is not available in preview mode.

Enable Office 2007 previews in Content—Pilot

If this option is checked, Microsoft Office 2007 files, including PowerPoint, Word, and Excel can be previewed in their entirety in Salesforce CRM Content and Chatter. 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.

You can also preview files in Chatter feeds, from the Files tab, from a file detail page, and from group and profile file lists.

 **Note:** If this option is unchecked after Office 2007 previews have been generated, those previews will no longer be available.

Show Salesforce Files in Salesforce CRM Content

If this option is enabled, searches in Salesforce CRM Content include Salesforce Files. The search drop-down list on the Content and Libraries tabs, and the filters on the Content tab include **All Files**, **Shared with Company**, **My Groups**, and **My Libraries**.

If this option is not checked, searches in Salesforce CRM Content don't include Salesforce Files. The search drop-down list on the Content and Libraries tabs, and the filters on the Content tab include **All Libraries**, **Private Library**, and any shared libraries the user is a member of.

SEE ALSO:

[Customize Salesforce CRM Content](#)

[Allow Content Previews in Link Posts](#)

Allow Content Previews in Link Posts

Posts that contain rich media links are converted into embedded videos, images, and rich article previews.

You must enable Chatter before you can enable link previews.

The rich media content is provided by Embed.ly, a third-party service. 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.

1. From Setup, enter *Chatter Settings* in the **Quick Find** box, then select **Chatter Settings**.
2. Click **Edit**.
3. Select **Allow Rich Link Previews**.
4. Click **Save**.

Post with links to rich media content are rendered as a preview, including thumbnails, descriptions and video players for video URLs. If a post doesn't render a link as a rich preview in the feed, the URL domain for that link either isn't supported or Embed.ly was unable to return the preview content for the URL.

Rich media previews are enabled by default. If you disable rich media previews, users can only preview videos from the YouTube community.

SEE ALSO:

[Customize Content Settings](#)

EDITIONS

Available in: Salesforce Classic

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

Salesforce CRM, Approvals, Chatter email notifications, Chatter Invitations, and customer invitations are not available in **Database.com**.

USER PERMISSIONS

To enable Chatter:

- "Customize Application"

Content Deliveries

Set Up Content Deliveries

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.

In addition to tracking, content deliveries provide several benefits over sending files as attachments, such as giving you control over how long the delivery is available to viewers and whether a viewer can download a file or see it online only. By default, a content delivery shows the most recent version of the file being delivered.

Create content deliveries from the Content Deliveries related list on most Salesforce objects. Salesforce CRM Content users can also create a content delivery from the content details page or the Related Content related list.

1. From Setup, enter *Content Deliveries* in the Quick Find box, then select **Content Deliveries** and enable *Enable Creation of Content Deliveries for Salesforce Files*. If you don't have access to the Content Deliveries feature, contact Salesforce Customer Support to activate it.
2. 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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable or disable content deliveries:

- “Customize Application”

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.

Storage Implications

In Salesforce CRM Content, file storage is consumed when content is published to shared libraries or saved to a private library. Creating content deliveries does not have an additional affect on storage limits, but users who frequently upload files to their personal libraries for the purpose of content delivery should consider their organization's file-storage limits. Administrators can use reporting to identify which users are consuming the most storage and which files are largest in size.

For non-Salesforce CRM Content users, file storage is consumed each time a content delivery is created. Once uploaded to Salesforce, a file cannot be reused for multiple content deliveries. Creating multiple content deliveries with the same file requires uploading the file each time. Deleting a content delivery deletes the source file in Salesforce, thus increasing file-storage space.

SEE ALSO:

[Set Up Salesforce CRM Content](#)

[Content Delivery Fields](#)

Content Delivery Fields

The following table provides a description of the fields (in alphabetical order) that make up a content delivery. These fields are located on the create-delivery wizard, the Content Deliveries related list, or the delivery details page.

Field	Description
Allow Recipient to View in the Browser	If checked, the content delivery can be viewed online in a custom Web page. On the delivery details page, this field is labeled <code>Allow View in the Browser</code> .
Allow Recipient to Download as PDF	If checked, the content delivery converts Microsoft® Word, Excel, and PowerPoint files into PDF files and gives the recipient the option of downloading the PDF. If the file you uploaded was not a PDF, Word, Excel, or PowerPoint file, this option does not appear in the create-delivery wizard. On the delivery details page, this field is labeled <code>Allow Download as PDF</code> .
Allow Download in Original Format	If checked, the content delivery allows recipients to download the original file. In the create-delivery wizard, this field is called <code>Allow Recipient to Download as [file type]</code> where <code>[file type]</code> is the original file's file type, such as .ppt, .pdf, or .doc.
Author	For Salesforce CRM Content files, the user who published the file. (Read only)

EDITIONS

Available in: Salesforce Classic

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

Salesforce CRM Content available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Field	Description
Content Delivery Name	The name assigned to the content delivery. By default, the <code>Content Delivery Name</code> includes the file name and the creation date.
Content Delivery Opens Latest Version	For Salesforce CRM Content files, this flag indicates that the recipient of a content delivery sees the most current version of a file. For example, if a file is updated between the delivery-creation date and today's date, a recipient who views the delivery today sees the newest version.
Content Delivery Expires	A flag that indicates whether access to the content delivery will expire on the expiration date. In the create-delivery wizard, this flag corresponds to the checkbox next to the <code>Remove access to content on</code> field.
Created By	The user who created the content delivery, including creation date and time. (Read only)
Description	For Salesforce CRM Content files, the description provided when the file was published. (Read only)
Expiration Date	The date on which the content delivery can no longer be viewed. In the create-delivery wizard, this is the date entered in the <code>Remove Access to Content on</code> field.
File Downloaded	A flag that indicates whether a file in the content delivery was downloaded. For example, if a content delivery includes options to view the content in the browser, download the content in its original file format, and download the content as a PDF file, this flag is checked if the recipient downloads the original file or the PDF file. (Read only)
Internal View	A flag that indicates whether a Salesforce user viewed the content delivery. A view is considered internal if the user opens the delivery URL from within Salesforce, for example by clicking View on the Content Deliveries related list or clicking the delivery URL on the delivery detail page. If the user copies the URL and pastes it into his or her browser, the view is considered external. (Read only)
Last Modified By	The user who last modified the content delivery, including modification date and time. (Read only)
Last Viewed	The date and time on which the content delivery was last viewed. A view is one click of the content-delivery URL. (Read only)
Notify Me of First View or Download	If checked, the user who created the content delivery receives an email notification the first time the content delivery URL is clicked.
Owner Name	The user who owns the content delivery. (Read only)

Field	Description
Related To	The record that the content delivery is associated with, such as an account, opportunity, or custom object. Users with sharing access to the record can click it to view more details.
Require Password to Access Content	If checked, the recipient must enter the provided password before viewing the content delivery. The password appears when the content delivery is generated and for the life of the delivery on the delivery detail page.
Title	For Salesforce CRM Content files, the title of the file included in the content delivery. (Read only)
View Count	Total number of views for the content delivery, including internal and external. (Read only)

SEE ALSO:

[Set Up Content Deliveries](#)

Setting Up Salesforce CRM Content for Salesforce Classic Mobile

Note the following about how Salesforce CRM Content is implemented in Salesforce Classic Mobile:

- Content record information is synchronized to the device; however, the files associated with the content records are not. This allows users to deliver content from the app even when a file is too large to be downloaded to a mobile device.
- Users can't search for a specific piece of content in the app. They can only share the content available on the Content tab, which is automatically synchronized to their device based on the filters in their assigned mobile configuration.
- Users can't view a list of their subscribed content in the app. They also can't filter the list of records on the Content tab based on a particular library.
- While users can preview and share content from the app, they can't update the file associated with a content record. If they have the required permissions, they can edit the fields on the content detail page.
- Users must have a data connection to preview and deliver content. Without a data connection, they can only view the content detail page.
- Content in Salesforce Classic Mobile is only supported on BlackBerry and iPhone devices.
- Content is not available in the free version of Salesforce Classic Mobile.
- You can't block mobile permissions for the content object. Currently, the content object in Salesforce Classic Mobile is read-only.
- You can't edit the mobile page layout for the content object. The content detail page in the app is hard-coded to display only a few fields.

To set up Content for a Salesforce Classic Mobile configuration:

1. From Setup, enter *Salesforce Classic Configurations* in the Quick Find box, then select **Salesforce Classic Configurations**, and then click the name of a mobile configuration.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Free version available in: **All** editions except **Database.com**

Full version available in: **Performance, Unlimited, and Developer** Editions, and for an extra cost in: **Professional** and **Enterprise** Editions

USER PERMISSIONS

To view Salesforce Classic Mobile configurations:

- "View Setup and Configuration"

To create, change, or delete Salesforce Classic Mobile data sets:

- "Manage Mobile Configurations"

2. In the Data Sets related list, click **Edit**.
3. Click **Add....**
4. In the popup window, select Content, then click **OK**.
5. Use field filters to specify which content records are synchronized.

Because users can't search for content in the Salesforce Classic Mobile app, it's essential to set up filters that make important content available on the device. You can't create filters based on libraries or subscriptions, but here are a few options for setting up useful filter conditions:

- **Date:** Filter on the `Last Modified Date`, `Content Modified Date`, or `Created Date` fields. Use special date values like `LAST 90 DAYS` or `LAST 180 DAYS` to ensure that recently updated content records are synchronized.
 - **Owner:** Filter on the author if certain people in your organization are responsible for publishing content.
 - **File Type:** Filter on certain types of documents. For example, your opportunity team might generally be interested in presentations or PDF documents.
 - **Custom Fields:** If you created custom content fields that help you categorize your content, filter on the custom fields. For example, if you built a `Functional Use` field with picklist values, you could set up a filter condition where `Functional Use` equals `Sales`.
6. Optionally, prevent content records from consuming all the memory on a mobile device by selecting the second radio button under Set Max Record Limit and entering the maximum number of content records this configuration can transfer to mobile devices. Use the Order By and Sort drop-down lists to specify which records are synchronized if the data size limit for your mobile configuration is exceeded.
 7. Click **Done**.

SEE ALSO:

[Set Up Salesforce CRM Content](#)

Google Apps


Getting Started with Salesforce and Google Apps

Google Apps is a suite of on-demand communication and collaboration services hosted by Google and designed for business users. If your organization has a Google Apps account, Salesforce administrators can enable Google Docs, Gmail, and a host of Google-related AppExchange apps—customized for use within Salesforce.

Step 1: Creating a Google Apps Account

Create a Google Apps account for your organization using one of the following methods:

- From Setup, enter *Google Apps* in the *Quick Find* box, select **Google Apps Settings**, and click **Sign Up** to launch the account-creation page on the Google website. You are prompted to register your organization's domain name or purchase a new domain name from Google. A domain is the portion of a website's URL that follows the "www." Follow Google's steps to configure your new or existing domain and set up your Google Apps account.
- If your organization purchased the Salesforce and Google Apps Supported feature, from Setup, enter *Premier Setup* in the *Quick Find* box, then select **Premier Setup** to create a new Google Apps Premier Edition account or upgrade your existing Standard Edition account to Premier Edition. For details, see [Getting Started With Salesforce and Google Apps Supported](#).

 **Note:** Google Apps in Salesforce supports Google Apps business accounts but not consumer accounts. You can identify a consumer account by the "gmail.com" domain in an email address; for example, *myname@gmail.com* is a consumer account. The Google Apps domain you set up in Salesforce must be the domain you registered with Google for your organization; for example, *mycompany.com* is a business rather than consumer account.

Step 2: Configuring Google Apps Domain Settings

1. On the Google Apps Settings page in Salesforce, click **Edit**.
2. Choose a user for the *Google Apps Administrative Contact* field. This person is the point of contact for Google Apps users in your organization; specifically, if a user cannot access a Google Apps service, he or she is directed to contact the Google Apps Administrative Contact. The Google Apps Administrative Contact does not need to be the same person who is registered as your organization's Google Apps administrator with Google, but only the Google Apps administrator can create new Google Apps users on your domain.
3. Enter the *Google Apps Domain* that you registered with Google. For example, if your company's URL is <http://www.acme.com> and you created a Google Apps account for the *acme.com* domain, enter *acme.com* in the *Google Apps Domain* field.
4. Click **Save**.

Step 3: Activating Google Apps Services

1. In the *Activate Google Apps Services* section on the Google Apps Settings page, locate the Google Apps service(s) that you want to activate.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view and modify Google Apps domain settings:

- "Customize Application"

To activate or deactivate Google Apps services:

- "Customize Application"

To install or uninstall Force.com AppExchange packages:


- "Download AppExchange packages"

To export a list of users to Google to create Google Apps accounts:

- "Customize Application"

2. Click **Edit** or **Install** to activate a service. In the Action column, **Edit** corresponds to Google Apps services that are already integrated in Salesforce, and **Install** corresponds to uninstalled Force.com AppExchange apps. Integrated Google Apps services include:

- [Add Google Docs to Salesforce](#)
- [Gmail to Salesforce](#)
- [Gmail Buttons and Links](#)
- [Google Talk Sidebar Component](#)

 **Important:** Google Talk within Salesforce is no longer available. For alternative ways to use Google Talk, see [the Google Talk online help](#).

For descriptions of the Google-related AppExchange apps, visit <http://sites.force.com/appexchange>.

Step 4: Creating Google Apps Users

Activating Google Apps services in Salesforce makes the services visible to all users in your organization, but a user cannot access a service unless he or she has a Google Apps account on your organization's domain. The Google Apps administrator registered with Google can create these additional accounts. For more information, see [Creating Google Apps Accounts](#).

SEE ALSO:

[Getting Started With Salesforce and Google Apps Supported](#)

[Set Up Google Apps in Salesforce](#)

[Activate Google Docs in Salesforce](#)

[Using Gmail in Salesforce](#)

Getting Started With Salesforce and Google Apps Supported

The Salesforce and Google Apps Supported feature includes a Google Apps Premier Edition account for your organization. In Salesforce, you can create that account or upgrade from an existing Google Apps Standard Edition account to Google Apps Premier Edition.

After you create a new Google Apps Premier Edition account or upgrade your existing Google Apps Standard Edition account in Salesforce, the Premier Setup page displays your organization's domain name, the number of Google Apps Premier Edition licenses available to your organization, and, if applicable, the status of your upgrade.

Creating a New Google Apps Premier Edition Account

If your organization does not have a Google Apps account, complete the following steps to register a Google Apps Premier Edition account and enable Salesforce and Google Apps:

1. From Setup, enter *Premier Setup* in the *Quick Find* box, then select **Premier Setup**.
2. Complete the fields in Column A:

Field	Description
Domain Name	Enter the domain that you want to register as your organization's Google Apps account. For example, if your company's URL is <code>http://www.acme.com</code> , enter <code>acme.com</code> as your Domain Name.
User Name	This value is used to create the Google Apps administrator for your organization's account. For example, if your Google Apps administrator will be <code>jsmith@acme.com</code> , enter <code>jsmith</code> . After your Google Apps account is created, you can log in with the User Name and Password and change this value if necessary.
First Name	This value is used to create the Google Apps administrator for your organization's account. After your Google Apps account is created, you can log in with the User Name and Password and change this value if necessary.
Last Name	This value is used to create the Google Apps administrator for your organization's account. After your Google Apps account is created, you can log in with the User Name and Password and change this value if necessary.
Email Address	This email address receives a confirmation notice when your Google Apps Premier

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create a new Google Apps Premier Edition account in Salesforce:

- "Customize Application"

OR

Google Apps
Administrative Contact

To upgrade Google Apps Standard Edition to Google Apps Premier Edition in Salesforce:

- "Customize Application"

OR

Google Apps
Administrative Contact

Field	Description
	Edition account is created. Google does not store this value for any other purpose.
Password	The Google Apps administrator can log in to Google Apps with this password.
Confirm Password	The Google Apps administrator can log in to Google Apps with this password.

3. Click **Create New Premier Account**.

4. To enable Salesforce and Google Apps, from Setup, enter *Google Apps Settings* in the **Quick Find** box, then select **Google Apps Settings**.
5. Choose a user for the *Google Apps Administrative Contact* field. This person is the point of contact for Google Apps users in your organization; specifically, if a user cannot access a Google Apps service, he or she is directed to contact the Google Apps Administrative Contact. The Google Apps Administrative Contact does not need to be the same person who is registered as your organization's Google Apps administrator with Google, but only the Google Apps administrator can create new Google Apps users on your domain.
6. Verify that the *Google Apps Domain* field contains the domain name you registered with Google.
7. Activate Google Apps services in Salesforce. For more information, see [Activating Google Apps Services](#).
8. Create users for your organization's Google Apps account. For more information, see [Creating Google Apps Accounts](#).




Note: The number of Google Apps Premier Edition accounts you can create is limited to the number of licenses your organization purchased with the Salesforce and Google Apps Supported feature.

Upgrading to a Google Apps Premier Edition Account

Complete the following steps to upgrade your organization's existing Google Apps Standard Edition account to a Google Apps Premier Edition account.

- From Setup, enter *Premier Setup* in the **Quick Find** box, then select **Premier Setup**.
- Complete the fields in Column B:

Field	Description
Domain Name	The domain that you want to register as your organization's Google Apps Premier Edition account. If you already enabled Salesforce and Google Apps, this field is prepopulated with your organization's domain name.
Google Apps Token	The 16-digit token required to upgrade from Google Apps Standard Edition to Google Apps Premier Edition. Your organization's Google Apps administrator can access this information on the Google website. For more information, click Retrieve Google Apps Token in Column B.


3. Click **Upgrade Existing Account to Premier**.
 4. To enable Salesforce and Google Apps, from Setup, enter *Google Apps Settings* in the **Quick Find** box, then select **Google Apps Settings**.
 5. As needed, edit the *Google Apps Administrative Contact* field. This person is the point of contact for Google Apps users in your organization; specifically, if a user cannot access a Google Apps service, he or she is directed to contact the Google Apps Administrative Contact. The Google Apps Administrative Contact does not need to be the same person who is registered as your organization's Google Apps administrator with Google, but only the Google Apps administrator can create new Google Apps users on your domain.
 6. Verify that the *Google Apps Domain* field contains the domain name you registered with Google.
 7. As necessary, activate Google Apps services in Salesforce. For more information, see [Activating Google Apps Services](#).
 8. As necessary, create users for your organization's Google Apps account. For more information, see [Creating Google Apps Accounts](#).
-  **Note:** The number of Google Apps Premier Edition accounts you can create is limited to the number of licenses your organization purchased with the Salesforce and Google Apps Supported feature.

SEE ALSO:

[Getting Started with Salesforce and Google Apps](#)

Set Up Google Apps in Salesforce

From Setup, enter *Google Apps Settings* in the **Quick Find** box, then select **Google Apps Settings** to edit your Google Apps domain settings, activate or deactivate Google Apps services in Salesforce, or install or uninstall Google-related Force.com AppExchange packages..

 **Important:** You cannot use Salesforce and Google Apps until a Google Apps account has been created for your organization and your Google Apps domain settings are configured in Salesforce. For instructions on creating an account and configuring your domain settings, see [Getting Started with Salesforce and Google Apps](#) on page 87.

Editing Google Apps Domain Settings

Domain settings consist of two values: the user chosen to administer your organization's Google Apps account and the domain your organization registered with Google. Both fields are required to enable Google Apps in Salesforce. To edit your domain settings:

1. In the **Configure Google Apps Domain** section, click **Edit**.
2. Optionally, choose a new user for the *Google Apps Administrative Contact* field. This person is the point of contact for Google Apps users in your organization; specifically, if a user cannot access a Google Apps service, he or she is directed to contact the Google Apps Administrative Contact. The Google Apps Administrative Contact does not need to be the same person who is registered as your organization's Google Apps administrator with Google, but only the Google Apps administrator can create new Google Apps users on your domain.
3. Optionally, modify the *Google Apps Domain* that is registered with Google for your organization's Google Apps account. Your *Google Apps Domain* is typically your company's domain; for example, acme.com.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To edit Google Apps domain settings and activate or deactivate services:

- "Customize Application"

To install or uninstall AppExchange packages:

- "Download AppExchange packages"

Modifying Google Apps Services

This section lists Google Apps services that are integrated with Salesforce and also provides links to several Google-related Force.com AppExchange apps that can be easily installed from AppExchange.

To activate or deactivate an integrated service, click **Edit** next to the service name. These services include:

- [Add Google Docs to Salesforce](#)
- [Gmail to Salesforce](#)
- [Gmail Buttons and Links](#)
- [Google Talk Sidebar Component](#)



Important: Google Talk within Salesforce is no longer available. For alternative ways to use Google Talk, see [the Google Talk online help](#).

To install or uninstall an AppExchange app, click **Install** or **Uninstall** next to the appropriate name. To view all Google-related AppExchange offerings, visit <http://sites.force.com/appexchange>.

Implementation Tips

- For detailed information about Google Apps, refer to [Google's online help](#).
- Google Apps in Salesforce is available for Google business accounts but not consumer accounts. You can identify a consumer account by the "gmail.com" domain in an email address; for example, *myname@gmail.com* is a consumer account. The Google Apps domain you set up in Salesforce must be the domain you registered with Google for your organization; for example, *mycompany.com* is a business rather than consumer account.
- After creating a Google Apps account for your organization, create Google Apps accounts for your Salesforce users. From Setup, enter *Users* in the **Quick Find** box, select **Users**, and then click **Export to Google Apps**.
- Notify users of their Google Apps usernames and passwords.
- Notify users about the changes they will see in Salesforce when Google Apps services are activated.
- To view all the Google apps available on Force.com AppExchange, visit <http://sites.force.com/appexchange>.
- By default, Google Apps users on your organization's domain can share Google docs with Google Apps accounts outside your domain. The control panel for your Google Apps account contains sharing settings that enable you to restrict document sharing to within your domain.
- When the Add Google Docs to Salesforce service is deactivated, Google docs cannot be accessed from Salesforce records, and any Google docs in users' Recycle Bins that were deleted from a record are permanently removed from Salesforce. If the Add Google Docs to Salesforce service is reactivated within 30 days, Google docs that were associated with Salesforce records before the deactivation are restored to their previous location. Deactivating the Add Google Docs to Salesforce service does not affect Google docs in Salesforce CRM Content libraries; deactivation does not remove Google docs associations in libraries and does not permanently delete Google docs in Recycle Bins.
- Customer Portal and partner portal users with access to the Contribute tab in Salesforce CRM Content can create new Google docs and associate existing Google docs to a Salesforce library. Portal users without access to Salesforce CRM Content can associate an existing Google doc to a record, but they cannot create new Google docs from within a record because they do not have access to the Google Docs, Notes, and Attachments related list in the portal. Portal users cannot use the **Add Google Doc to Salesforce** browser button.
- Customer Portal and partner portal users cannot access Gmail Buttons and Links.
- If your organization purchased the Salesforce for Google Apps Supported feature, see [Getting Started With Salesforce and Google Apps Supported](#) on page 89.

Best Practices


- Test your Google Apps integration using a sandbox or Developer Edition organization.
- Manage Google Apps users as you would Salesforce users. For example, if you deactivate a Salesforce user, also deactivate his or her Google Apps account in the control panel for your organization's Google Apps account. For information about administering your organization's Google Apps account, refer to [Google's online help](#).
- To locate a Google doc quickly in Salesforce, search for the doc using search.

SEE ALSO:

[Getting Started with Salesforce and Google Apps](#)


Creating Google Apps Accounts

After [creating a Google Apps account for your organization](#) and [enabling Google Apps in Salesforce](#), you can create Google Apps accounts for individual users. To access the Google Apps services that are enabled in Salesforce, each user needs a Google Apps account on the domain your organization registered with Google. An account includes a username and password that allow the user to log into all Google Apps services.

 **Note:** If your organization purchased Salesforce and Google Apps Supported, the number of Google Apps Premier Edition accounts you can create is limited to the number of licenses your organization purchased.

To export a list of users to Google and create Google Apps accounts for each user:

1. From Setup, enter *Users* in the *Quick Find* box, then select **Users**.
2. In the View drop-down list, choose a list of users.
3. Click **Export to Google Apps** to export all the users in the list. To export certain users only, select those users in the Action column.

 **Note:** If Google Apps is not enabled for your organization, the **Export to Google Apps** button does not display. To enable Google Apps in Salesforce, see [Getting Started with Salesforce and Google Apps](#) on page 87.

4. On the Export Users to Google Apps page, click the export file link that is labeled as Step 1. The name of the link depends on the list view you chose to export; for example, if you were viewing the All Users list, the link on the Export Users to Google Apps page is **All Users Export File**.
5. In the CSV spreadsheet that displays when click you the export link, provide a temporary password for each user. You can modify the *username*, *last name*, and *first name* fields for any user as needed. Google creates account names by adding your domain to the usernames in the spreadsheet; for example, if your domain is *acme.com* and the spreadsheet contains *john.doe* and *jane.doe* usernames, the Google Apps usernames are *john.doe@acme.com* and *jane.doe@acme.com*.
6. Save the spreadsheet to your computer.
7. Click the **Google Apps Bulk User Import Tool** link to launch the Bulk Account Update page for your organization's Google Apps account. If prompted, log in with your Google Apps administrator username. Only the user who is registered with Google as the administrator of your organization's account can create additional Google Apps accounts on your organization's domain.
8. Follow Google's instructions to import the data in the spreadsheet. The Google Apps administrator receives a confirmation report, and the user for each successfully created account receives a notification email at his or her new Gmail account..

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

Export users to Google:

- "Customize Application"

Create new Google Apps accounts:


- Google Apps administrator

9. Notify users of their usernames and passwords. They will need this information to use any Google Apps service that is enabled in Salesforce.

SEE ALSO:

[Getting Started with Salesforce and Google Apps](#)

Activate Google Docs in Salesforce

 **Important:** Once you activate a Google Apps service in Salesforce, it is visible to all users in your organization. To use these services, your users must have Google Apps accounts on your domain. For more information, see [Getting Started with Salesforce and Google Apps](#).

Google Docs™ allows you to create on-demand documents, spreadsheets, and presentations, edit them in your browser, and work together in real time with other collaborators.

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**.

When the Add Google Docs to Salesforce service is enabled, the following changes allow users to create, edit, or view Google docs and associate them with Salesforce records:

- The Notes & Attachments related list on accounts, assets, contacts, contracts, leads, opportunities, products, and custom objects is renamed to Google Docs, Notes, & Attachments.
- The Attachments related list on cases, solutions, and campaigns is renamed to Google Docs & Attachments.
- If Salesforce CRM Content is enabled, the Libraries tab has an **Add Google Doc** drop-down list.

Users can also install the **Add Google Doc to Salesforce** browser button, which allows them to associate a Google doc to several Salesforce records or a Salesforce CRM Content library without being logged into Salesforce.

Implementation Tips

- For information about Google Docs, refer to [Google's online help](#).
- By default, Google Docs users on your domain can share their Google docs with Google Apps accounts outside your domain. The control panel in your Google Apps account contains sharing settings that enable you to restrict document sharing to users within your organization's domain.
- Customer Portal and partner portal users with access to the Contribute tab in Salesforce CRM Content can create new Google docs and associate existing Google docs to a Salesforce library. Portal users without access to Salesforce CRM Content can associate an existing Google doc to a record, but they cannot create new Google docs from within a record because they do not have access to the Google Docs, Notes, and Attachments related list in the portal. Portal users cannot use the **Add Google Doc to Salesforce** browser button.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

Activating the Add Google Docs to Salesforce service:


- "Customize Application"

- When the Add Google Docs to Salesforce service is deactivated, Google docs cannot be accessed from Salesforce records, and any Google docs in users' Recycle Bins that were deleted from a record are permanently removed from Salesforce. If the Add Google Docs to Salesforce service is reactivated within 30 days, Google docs that were associated with Salesforce records before the deactivation are restored to their previous location. Deactivating the Add Google Docs to Salesforce service does not affect Google docs in Salesforce CRM Content libraries; deactivation does not remove Google docs associations in libraries and does not permanently delete Google docs in Recycle Bins.
- The Add Google Docs to Salesforce service cannot be disabled for your organization if Google docs are referenced in Apex.
- Google docs count against data storage. For each Google doc associated with a record or library in Salesforce, two Kb of storage is used.

SEE ALSO:

[Getting Started with Salesforce and Google Apps](#)

Using Gmail in Salesforce

 **Important:** Once you activate a Google Apps service in Salesforce, it is visible to all users in your organization. To use these services, your users must have Google Apps accounts on your domain. For more information, see [Getting Started with Salesforce and Google Apps](#).

Gmail™ (also called Google Mail) is a free Web-based email service from Google that operates on all standard browsers and can be used with your company's domain. You can integrate Gmail with Salesforce in two ways:

- [Gmail to Salesforce](#)
- [Gmail Buttons and Links](#)

Gmail to Salesforce

Gmail to Salesforce allows you to automatically log emails and chats you send from your Gmail account as activities on lead, contact, opportunity, and other records that support activity history in Salesforce.

Gmail to Salesforce is based on the Email to Salesforce feature. To activate Gmail to Salesforce for your organization, from Setup, enter *Email to Salesforce* in the **Quick Find** box, then select **Email to Salesforce**. To configure your personal Gmail to Salesforce setup, from your personal settings, enter *My Email to Salesforce* in the **Quick Find** box, then select **My Email to Salesforce**.

Gmail Buttons and Links

Gmail Buttons and Links adds **Gmail** links next to email fields on all records and adds **Compose Gmail** buttons in Activity History related lists on leads and contacts. When you click a Gmail link or the **Compose Gmail** button, Salesforce automatically logs you into your Gmail account and automatically populates the **To** field. If Gmail to Salesforce is activated, Salesforce also populates the **BCC** field with your Email to Salesforce address.

To activate Gmail Buttons and Links:

1. From Setup, enter *Google Apps* in the **Quick Find** box, then select **Google Apps Settings**.
2. In the Activate Google Apps Services list, click **Edit** next to Gmail Buttons and Links.
3. Select the **Active** checkbox to activate Gmail Buttons and Links for your organization.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

Activating Gmail in Salesforce:

- "Customize Application"

4. Select the `Gmail Links` checkbox to add **Gmail** links next to all email fields (except email fields on pages under Setup).
5. Select the `Gmail Buttons` checkbox to add **Compose Gmail** buttons in Activity History related lists on leads and contacts.
6. Read the Terms of Use, and select the checkbox indicating you have read and agree to them.
7. Click **Save**.


Implementation Notes

- If your organization enables Gmail Buttons and Links but does not enable Gmail to Salesforce, you can still use the Gmail links on contact and lead records; however, Salesforce does not log emails you send from your Gmail account, or automatically populate the **BCC** field on the **Compose Mail** screen with an Email to Salesforce address.

SEE ALSO:

[Getting Started with Salesforce and Google Apps](#)
<http://support.google.com/mail/?hl=en>

Using Google Talk in Salesforce

 **Important:** Google Talk within Salesforce is no longer available. For alternative ways to use Google Talk, see [the Google Talk online help](#).

Deactivating Google Talk

To deactivate Google Talk in Salesforce:

1. From Setup, enter *Google Apps* in the `Quick Find` box, then select **Google Apps Settings**.
2. Click **Edit** next to the Google Talk Sidebar Component option in the Activate Google Apps Services list.
3. Deselect the `Active` checkbox.
4. Click **Save**.

SEE ALSO:

[Getting Started with Salesforce and Google Apps](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

Activating or deactivating Google Talk:

- "Customize Application"

INDEX

A

Actions

- All Related Objects setting [22](#)
- creating global publisher layouts [18](#)
- customizing global publisher layouts [19](#)
- displaying feed items for related records [22](#)
- enable [14](#)

C

Chatter

- actions [17](#)
- actions in the publisher [14](#)
- Chatter Desktop [60](#)
- customer invitations [13](#)
- customizing Chatter influence [30](#)
- customizing feed tracking [21](#)
- delete messages [31](#)
- email settings [22](#)
- emoticons [12](#)
- enabling [8](#)
- External Data Source [59](#)
- feed item action [24](#)
- feed item layout [24](#)
- feed post editing [16](#)
- feed tracking [20](#)
- group layouts [25](#)
- group settings [9](#)
- license types [64](#)
- profile-based rollout [1–3, 5, 7](#)
- Salesforce Files Connect [38–43, 46–47, 51–52, 54, 57](#)
- Salesforce Files Sync [34–35](#)
- setting up [1](#)

Chatter Actions

- tasks from posts [25](#)

Chatter Desktop

- configuring managed version [62](#)
- controlling access [60](#)
- deploying configuration file [62](#)
- install managed version [61](#)

Chatter groups

- actions [27](#)
- allow records [10](#)
- layout [26–27](#)
- publisher [27](#)
- publisher layout [26–27](#)

Chatter groups (*continued*)

- revoke a user's ability to create [33](#)
- unlisted [10–11](#)

Chatter influence

- customizing [30](#)

Chatter Settings

- coworker invitations [13](#)
- link previews [80](#)

Chatter topics

- deleting [29](#)
- privacy [29](#)

Content

- adding users to libraries [71](#)
- administration [66](#)
- creating libraries [71](#)
- creating library permissions [72](#)
- customizing [69](#)
- customizing fields [70](#)
- deleting library permissions [75](#)
- editing library permissions [74](#)
- fields [70](#)
- library permissions [72](#)
- library roles [72](#)
- preview [38](#)
- rendition [38](#)
- restricting record types [77](#)
- setting up [66](#)
- settings [78](#)
- setup for Salesforce Classic Mobile [85](#)
- tagging rules [76](#)

Content deliveries

- description [81](#)
- fields [83](#)

Customize

- Chatter email [23](#)
- email notifications [23](#)

D

- disable selecting files from Salesforce [34](#)

F

Feed Item

- action [24](#)
- layout [24](#)

Feeds

- customizing Chatter feed tracking [21](#)

Feeds (*continued*)
 feed tracking [20](#)

Files
 preview [38](#)
 rendition [38](#)
files page layouts [33](#)
files related list [33](#)

G

Global publisher layouts
 creating [18](#)
 customizing [19](#)
Gmail [95](#)
Google Apps
 about [91](#)
 creating users [93](#)
 getting started [87](#)
 Premier Edition [89](#)
 See also Gmail [87](#)
 See also Google Docs [87](#)
 Upgrading from Standard to Premier Edition [89](#)
Google Docs
 activating [94](#)
 deactivating [94](#)
Google Talk
 activating [96](#)
 using [96](#)
group records
 configure [10](#)
 enable [10](#)

L

Licenses
 Chatter [64](#)
 Chatter External [64](#)
 Chatter Free [64](#)
 Chatter Only [64](#)
 Chatter Plus [64](#)

M

Messages
 deleting [31](#)

P

prevent selecting files from Salesforce [34](#)

S

Salesforce Chatter Dashboards Package
 install [31](#)
 upgrade [31](#)
Salesforce Classic Mobile
 enabling Content [85](#)
Salesforce CRM Content
 preview [38](#)
 rendition [38](#)
Salesforce Files Connect
 enabling for an organization [38–43, 46–47, 51–52](#)
 searching content [54, 57](#)
Salesforce Files Sync
 enabling [34](#)
 enabling for an organization [34](#)
 enabling for individual profiles [35](#)
 enabling for users [35](#)
 file security [36](#)
 installing managed version [35](#)
 login history [37](#)
 permission set [35](#)
 preview [38](#)
 rendition [38](#)
 revoking access [37](#)
 viewing usage [37](#)
Secure Agents [47, 51](#)
select files from Salesforce [34](#)

T

Topics
 deleting [29](#)
 enable for objects [28](#)
 on objects [28](#)
 privacy [29](#)

U

unlisted groups
 enable [10](#)
 limitations [11](#)