
Set Up and Maintain Customer Support Tools

Salesforce, Winter '17



CONTENTS

- SET UP AND MAINTAIN CUSTOMER SUPPORT TOOLS 1**
 - Welcome, Support Administrators 1
 - Setting Up Customer Channels 1
 - Setting Up Case Feed 261
 - Automating Contact Centers 291
 - Adding Entitlements and Service Agreements 317
 - Setting Up a Field Service Hub 367
 - Adding a Knowledge Base 426
 - Organizing Articles, Answers, and Ideas into Categories 515
 - Case Teams and Queues 535
 - Adding Social Customer Service 541
 - Reporting on Support Activity 606
- INDEX 610**

SET UP AND MAINTAIN CUSTOMER SUPPORT TOOLS

Welcome, Support Administrators

This documentation is for administrators who want to set up Salesforce customer service and support features, also known as the Service Cloud. It's organized by tasks so that you can quickly find information about setting up features that solve support issues for your company. For example, information about setting up self-service websites is located in a section named Creating Web and Social Channels, rather than a section that includes the feature names, Customer Portal or Chatter Answers. However, you can search this documentation by keywords to find a feature name or support solution. Note that this documentation doesn't include many feature-specific concepts or overviews. For those, please refer to the documentation, *Support Your Customers*.

Together, *Set Up and Maintain Customer Support Tools* and *Support Your Customers* contain the information you need to set up and deliver customer service with Salesforce.

Setting Up Customer Channels

Creating Email Channels

Email-to-Case

Automatically turn emails from your customers into cases in Salesforce to track and resolve customer cases quickly.

There are two versions of Email-to-Case:

- Email-to-Case, which uses an agent on your machine
- On-Demand Email-to-Case, which uses Salesforce Apex email services

Each version supports a different business case.

Details	Email-to-Case	On-Demand Email-to-Case
Business case:	Keep email traffic <i>inside</i> your network's firewall and accept emails larger than 25 MB	Keep email traffic <i>outside</i> your network's firewall and refuse emails larger than 25 MB
Set up:	Requires you to download and install the Email-to-Case agent on your local machine to turn emails into cases	Requires you to set up Salesforce Apex email services to turn emails into cases
Maximum number of emails converted to cases each day:	2,500	Number of user licenses multiplied by 1,000, up to a daily maximum of 1,000,000

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Email-to-Case and On-Demand Email-to-Case are available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions.

Details	Email-to-Case	On-Demand Email-to-Case
Email size limit, including header, message, and attachments:	Over 25 MB	Under 25 MB

SEE ALSO:

[Set Up Email-to-Case](#)

[Set Up On-Demand Email-to-Case](#)

Set Up Email-to-Case

Email-to-Case helps your company efficiently resolve and correspond with customer inquiries via email. Salesforce automatically creates cases and auto-populates case fields when customers send messages to the email addresses you specify.

Email-to-Case requires [downloading the Email-to-Case agent](#). The Email-to-Case agent software allows you to keep all email traffic within your network's firewall and to accept emails larger than 25 MB from customers.

1. Download the [Email-to-Case agent](#).
2. [Install the agent](#) behind your network's firewall.
3. [Enable Email-to-Case and configure your Email-to-Case settings](#).
4. [Configure your routing address settings](#) to customize the way Salesforce handles your customer emails.
5. Test your email routing addresses by manually sending emails to them and verify that these emails convert to cases based on their routing address settings.
6. Add the email address that you configured to your company's support website. Customers can use this email address to submit cases to your support team.
7. Add the Emails related list to the Cases page layout.
8. Optionally, create email templates agents can use when replying to email. These templates can include merge fields that display information from the original email in the reply.

SEE ALSO:

[Email-to-Case](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Email-to-Case is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** editions.

USER PERMISSIONS

To set up Email-to-Case:

- "Customize Application"

To enable Email-to-Case:

- "Modify All Data"

AND

"Customize Application"

Enable and Configure Email-to-Case

Get your company ready to automatically turn incoming email messages into cases by enabling Email-to-Case and choosing the settings that fit your needs.

 **Note:** Before you can enable and configure Email-to-Case, [download and install the Email-to-Case agent](#) onto your local machine. If you’re using On-Demand Email-to-Case, then it’s not necessary to download and install the Email-to-Case agent.

- 1. From Setup, enter *Email-to-Case* in the **Quick Find** box, then select **Email-to-Case**.
- 2. Click **Edit**.
- 3. Select **Enable Email-to-Case**.
- 4. [Configure your Email-to-Case settings](#).
- 5. Click **Save**.

SEE ALSO:

- [Email-to-Case](#)
- [Email-to-Case Settings](#)
- [Configure Routing Addresses for Email-to-Case and On-Demand Email-to-Case](#)

Email-to-Case Settings

Configure your Email-to-Case settings to customize the way Salesforce handles and creates cases from incoming emails.

To access these settings, from Setup, enter *Email-to-Case* in the **Quick Find** box, then select **Email-to-Case**.

Email-to-Case Setting	Description
Enable Email-to-Case	Enables Salesforce to create cases from inbound emails.
Notify Case Owners on New Email	Allows case owners to automatically receive notifications of new emails for their existing cases. Email notifications assign a task to the case owner to respond to the new email. Responding to the email closes the task. To disable email notifications at any time, simply deselect the checkbox.
Enable HTML Email	Warns users before they view incoming HTML email content so that they can avoid opening potentially malicious HTML that could harm their computers. If this setting isn’t selected, support agents see text instead of HTML in the email message detail pages. When agents reply to an email, the text version of the message is

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

- To set up Email-to-Case:
- “Customize Application”
- To enable Email-to-Case:
- “Modify All Data”
- AND
- “Customize Application”

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Email-to-Case Setting	Description
	copied to the email editor, instead of the HTML version.
Insert Thread ID in the Email Subject	Adds the thread ID to the subject of email. The thread ID is a unique number that identifies the organization and case associated with the outgoing email. It helps ensure that replies to the original email are associated with the correct case.
Insert Thread ID in the Email Body	Adds the thread ID to the body of email.
Place User Signatures before Email Threads	Adds the user signature after the reply, but before the email thread. If this setting isn't selected, the user signature is placed at the bottom of the email thread.

Use Unique Email Subject and Email Body IDs

Make sure the subject line and body of your outgoing emails are unique.



Warning: If the Email Subject ID and Email Body Text ID are the same, Email-to-Case creates an infinite loop of emails related to each case. If these settings are not selected, Email-to-Case eventually could stop accepting new emails.

To exclude the thread ID from email, deselect both the Insert Thread ID in the Email Subject and Insert Thread ID in the Email Body checkboxes. A new case is created when a support agent responds to an outbound case email.

SEE ALSO:

[Email-to-Case](#)

Set Up On-Demand Email-to-Case

On-Demand Email-to-Case helps your company efficiently resolve customer inquiries via email. Salesforce automatically creates cases and auto-populates case fields when customers send messages to email addresses you specify. On-Demand Email-to-Case lets you process customer emails up to 25 MB.

Unlike Email-to-Case, you don't need to download and install an agent to use On-Demand Email-to-Case.

1. [Set the Default Case Owner and Automated Case Owner](#) for your organization.
2. [Enable and configure Email-to-Case](#).
3. [Enable and configure On-Demand Email-to-Case](#).
4. [Configure your routing address settings](#) to customize the way Salesforce handles your customer emails.
5. Test your email routing addresses by manually sending emails to them and verify that these emails convert to cases based on their routing address settings.
6. Add the email address that you configured to your company's support website. Customers can use this email address to submit cases to your support team.
7. Add the Emails related list to the Cases page layout.

EDITIONS

Available in: Salesforce Classic

On-Demand Email-to-Case is available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions.

USER PERMISSIONS

To set up On-Demand Email-to-Case:

- "Customize Application"

To enable On-Demand Email-to-Case:

- "Modify All Data"

- Optionally, create email templates agents can use when replying to email. These templates can include merge fields that display information from the original email in the reply.

 **Note:** On-Demand Email-to-Case automatically shortens email text to 32,000 characters. Contact Salesforce if you'd like this limit raised to 128,000 characters for your organization.

SEE ALSO:

[Email-to-Case](#)

Enable and Configure On-Demand Email-to-Case

Turn incoming emails into cases automatically without having to download and install software with On-Demand Email-to-Case.

 **Note:** Before you enable On-Demand Email-to-Case, set the [Default Case Owner and Automated Case User](#) and [enable and configure Email-to-Case](#).

- From Setup, enter *Email-to-Case* in the *Quick Find* box, then select **Email-to-Case**.
- Click **Edit**.
- Select **Enable On-Demand Service**.
- Select your [Over Email Rate Limit Action and Unauthorized Sender Action settings](#) based on how your company plans to use On-Demand Email-to-Case.
- Click **Save**.

SEE ALSO:

[Email-to-Case](#)

[Set Up On-Demand Email-to-Case](#)

[Routing Address Settings for Email-to-Case and On-Demand Email-to-Case](#)

On-Demand Email-to-Case Settings

Use the On-Demand Email-to-Case settings to specify how Salesforce handles incoming email messages that are beyond your organization's daily processing limits or that come from unauthorized senders.

These settings are specific to On-Demand Email-to-Case. For more information about general Email-to-Case settings, see [Email-to-Case Settings](#).

On-Demand Email-to-Case Setting	Description
Over Email Rate Limit Action	Choose what On-Demand Email-to-Case does with email that surpasses your organization's daily email processing limit: Bounce message—The email service returns the message to the sender or to the

EDITIONS

Available in: Salesforce Classic and Lightning Experience

On-Demand Email-to-Case is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** editions.

USER PERMISSIONS

To set up On-Demand Email-to-Case:

- "Customize Application"

To enable On-Demand Email-to-Case:

- "Modify All Data"

AND

"Customize Application"

EDITIONS

Available in: Salesforce Classic

On-Demand Email-to-Case is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions.

On-Demand Email-to-Case Setting	Description
	<code>Automated Case User</code> for On-Demand Email-to-Case, with a notification that explains why the message was rejected. • Discard message—The email service deletes the message without notifying the sender. • Requeue message—The email service queues the message for processing in the next 24 hours. If the message is not processed within 24 hours, the email service returns the message to the sender with a notification that explains why the message was rejected.
Unauthorized Sender Action	If you limited the email addresses and domains available for On-Demand Email-to-Case in the <code>Accept Email From</code> field, choose what happens to messages received from senders who are blocked: • Bounce message—The email service returns the message to the sender or to the <code>Automated Case User</code> for On-Demand Email-to-Case, with a notification that explains why the message was rejected. • Discard message—The email service deletes the message without notifying the sender.

Make sure the subject line and body of your outgoing emails are unique.

 **Warning:** If the `Email Subject ID` and `Email Body Text ID` are the same, Email-to-Case creates an infinite loop of emails related to each case. If these settings are not selected, Email-to-Case eventually could stop accepting new emails.

SEE ALSO:

[Email-to-Case](#)

Configure Routing Addresses for Email-to-Case and On-Demand Email-to-Case

Set routing addresses to ensure that customer emails are handled correctly.

Before you set up routing addresses for Email-to-Case and On-Demand Email-to-Case, [enable Email-to-Case](#) and [configure your Email-to-Case settings](#).

1. From Setup, enter *Email-to-Case* in the **Quick Find** box, then select **Email-to-Case**.
2. In the **Routing Addresses** list, click **New**.
3. [Enter your routing address settings](#).
4. Click **Save**.
A verification email is sent to the routing email address you provided.
5. Click the link in the verification email.
A confirmation page opens in your web browser.
6. Click the link in the confirmation page to continue to Salesforce.

Configure your email system to forward case submissions to the email services address provided by Salesforce.

SEE ALSO:

[Email-to-Case](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To configure routing addresses for Email-to-Case and On-Demand Email-to-Case:

- “Customize Application”

Routing Address Settings for Email-to-Case and On-Demand Email-to-Case

You can define your email routing address settings after you add and verify your email routing addresses for Email-to-Case and On-Demand Email-to-Case.

Setting	Description
Routing Name	The name for the routing address—for example, Gold Support or Standard Support.
Email Address	<i>Email-to-Case source only:</i> The inbound email address for this On-Demand Email-to-Case routing address. Email sent to this address creates new cases using the specified settings. The email address must be unique. Note that this is the email address to which you will provide a link on your company's support website.
Save Email Headers	<i>Email-to-Case source only:</i> Select this checkbox to save the email routing information associated with each email submitted as a case. Saving email routing information counts towards your organization's overall storage limit. To view email headers from an email converted to a case, see Working with Case Emails.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Email-to-Case and On-Demand Email-to-Case are available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions.

Setting	Description
Accept Email From	To limit the email addresses and domains available for On-Demand Email-to-Case, entering them in this field. Leave it blank to allow On-Demand Email-to-Case to receive email from any email address or domain.
Create Task from Email	<i>Email-to-Case source only:</i> Select this checkbox to automatically assign a task to the case owner when an email is submitted as a case. Assignment rules automatically assign owners to a case; however, if a case does not match assignment rule criteria, then the user in the Default Case Owner field on the Support Settings page is assigned to the case.
Task Status	<i>Email-to-Case source only:</i> Choose a status from this drop-down list with which to predefine the Status field on tasks automatically assigned to case owners when email is submitted as cases. This setting is only available if you selected the Create Task from Email checkbox.
Case Owner	<i>Outlook source only:</i> The owner of the case, which can be either an individual user or a queue.
Case Priority	The priority assigned to cases created from emails sent to this email routing address.
Case Origin	The value assigned to the Case Origin field for email sent to this email routing address.

 **Note:** The **Priority** and **Case Origin** fields auto-populate the case via the routing address settings when the routing address is included in either the **To**, **CC**, or **BCC** fields of an inbound email.

SEE ALSO:

[Email-to-Case](#)

Email-to-Case FAQ

- [How can I prevent spam from becoming cases?](#)
- [Is there a size limit for attachments using Email-to-Case?](#)

EDITIONS

Available in: Salesforce Classic

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

Is there a size limit for attachments using Email-to-Case?

Email attachments using On-Demand may be up to 25 MB. There is no attachment size limit when using the Email-to-Case agent.

SEE ALSO:

[Email-to-Case FAQ](#)

Creating Web and Social Channels

Web Cases

Get Ready to Capture Cases with Web-to-Case

Gather customer support requests directly from your company's website and automatically generate up to 5,000 new cases a day with Web-to-Case. This can help your organization respond to customers faster, improving your support team's productivity.

Before you set up Web-to-Case:

- Create custom case fields, if needed.
- Create a default email template for the automated notification that will be sent to your customers when they submit a case.
- Create case queues if you wish to assign incoming cases to queues as well as to individual users.
- [Customize Support settings](#) on page 292 to select the default owner of cases that don't meet the criteria in your assignment rule.
- Create an active case assignment rule to determine how web-generated cases are assigned to users or put into queues. If you do not set an active assignment rule, all web-generated cases are assigned to the default owner you specify in the Support Settings.

Next, you're ready to [set up Web-to-Case](#) on page 10.

SEE ALSO:

[Create Queues](#)

[Set Up Assignment Rules](#)

[Web-to-Case FAQ](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up Web-to-Case:

- "Customize Application"

Set Up Web-to-Case

Gather customer support requests directly from your company's website and automatically generate up to 5,000 new cases a day with Web-to-Case. Setting up Web-to-Case involves enabling the feature, choosing settings, and adding the Web-to-Case form to your website.

 **Note:** Before you start, review [Get Ready to Capture Cases with Web-to-Case](#) and [Web-to-Case Notes and Limitations](#) for information on prerequisites and things to consider as you set up Web-to-Case.

1. From Setup, enter *Web-to-Case* in the **Quick Find** box, then select **Web-to-Case**.
2. Select **Enable Web-to-Case**.
3. Choose a default case origin.
4. Select a default response template for automatically notifying customers that their case was created.

If you set up response rules to use different email templates based on the information submitted, the default email template is used when no response rules apply. Leave this option blank if you do not wish to send emails when no response rules apply. This template must be marked as "Available for Use."

5. Select **Hide Record Information** to hide the record information in the email sent to customers if the case creation fails.
6. Enter an email signature if you'd like to use a different signature than the default.
7. Click **Save**.

To generate HTML code that your webmaster can use on your website to handle Web-to-Case support requests from your customers, see [Generate Web-to-Case HTML Code](#).

SEE ALSO:

[Set Up Customer Support](#)
[Web-to-Case FAQ](#)

Generate Web-to-Case HTML Code

Generate HTML code that your webmaster can insert into your company's website to capture cases in a Web form. Whenever someone submits information on any of those Web pages, a case will be created.

You must have Web-to-Case enabled. For instructions on setting up Web-to-Case, see [Set Up Web-to-Case](#) on page 10.

1. From Setup, enter *Web-to-Case HTML Generator* in the **Quick Find** box, then select **Web-to-Case HTML Generator**.
2. Use the Add and Remove arrows to move fields between the Available Fields list and the Selected Fields list to select the fields to include on your Web-to-Case form. Use the Up and Down arrows to change the order of the fields on your form.

For organizations using multiple currencies, add the *Case Currency* field to the HTML if you add any other currency amount fields, otherwise all amounts will be captured in your corporate currency. For organizations using record types on cases, select the *Case Record Type* field if you want users submitting Web-generated cases to select specific record types.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up Web-to-Case:

- "Customize Application"

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up Web-to-Case:

- "Customize Application"

3. If your organization uses the Self-Service portal or the Customer Portal and you want Web-generated cases to be visible to users in these portals, select `Visible in Self-Service Portal`.
4. Specify the complete URL to which customers should be directed after they submit their information. For example, the URL can be for a “thank you” page or your company's home page.
5. If your organization uses the Translation Workbench or has renamed tabs, select the language for the form labels displayed on your Web-to-Case form. The source of your Web-to-Case form is always in your personal language.
6. Click **Generate**.
7. Copy the generated HTML code and provide it to your company's webmaster so he or she can incorporate it into your website.
8. Click **Finished**.



Tip: Use a custom multi-select picklist to allow customers to report cases on several products at a time.

If you want to test the Web-to-Case form, add the line `<input type="hidden" name="debug" value="1">` to the code. This line redirects you to a debugging page when you submit the form. Don't forget to remove it before releasing the Web-to-Case page to your website.

Web-to-Case Notes and Limitations

Learn more about how Web-to-Case works to be sure you set it up in the most effective way for your company.

Keep these considerations in mind as you decide how to set up Web-to-Case.

- Whenever possible, Web-generated cases are automatically linked to the relevant contact and account based on the customer's email address.
- Salesforce runs field validation rules before creating records submitted via Web-to-Case and only creates records that have valid values. All universally required fields must have a value before a record can be created via Web-to-Case.
- The format for date and currency fields captured online is taken from your organization's default settings - `Default Locale` and `Currency Locale`.
- Salesforce doesn't support rich text area (RTA) fields on Web-to-Case forms. If you use RTA fields on your forms, any information entered in them is saved as plain text when the case is created.
- If your organization exceeds its daily Web-to-Case limit, the default case owner (specified in your Support Settings page) will receive an email containing the additional case information.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

SEE ALSO:

[Get Ready to Capture Cases with Web-to-Case](#)

[Set Up Web-to-Case](#)

[Web-to-Case FAQ](#)

Web-to-Case FAQ

- [What is the maximum number of web cases we can capture?](#)
- [Who owns new web-generated cases?](#)
- [How do I specify which information to capture?](#)
- [Can I capture cases from multiple web pages?](#)
- [How can our webmaster test the Web-to-Case page?](#)
- [What status and origin are assigned to Web-generated cases?](#)
- [How can I prevent spam from becoming cases?](#)
- [How can I be sure that cases won't be lost?](#)

EDITIONS

Available in: Salesforce Classic

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

What is the maximum number of web cases we can capture?

In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, you can capture up to 5,000 cases in a 24-hour period. If your company generates more case requests than that, click **Help & Training** at the top of any page and select the My Cases tab to submit a request for a higher limit directly to Salesforce Customer Support.

When your organization reaches the 24-hour limit, Salesforce stores additional requests in a pending request queue that contains both Web-to-Case and Web-to-Lead requests. The requests are submitted when the limit refreshes. The pending request queue has a limit of 50,000 combined requests. If your organization reaches the pending request limit, additional requests are rejected and not queued. Your administrator receives email notifications for the first five rejected submissions. Contact Salesforce Customer Support to change your organization's pending request limit.

SEE ALSO:

[Web-to-Case FAQ](#)

Who owns new web-generated cases?

Your administrator can set an active case assignment rule to automatically assign web-generated cases to users or queues based on specific criteria in those cases. Cases that do not match any of the assignment rule criteria are assigned to the Default Case Owner specified in the Support Settings.

SEE ALSO:

[Web-to-Case FAQ](#)

How do I specify which information to capture?

When you generate the HTML for your company's website, you can choose which standard or custom case fields for which you want to gather information. You must create the custom case fields prior to generating the HTML code. From Setup, enter *Web-to-Case* in the **Quick Find** box, then select **Web-to-Case** to set up the feature and generate the HTML.

SEE ALSO:

[Web-to-Case FAQ](#)

Can I capture cases from multiple web pages?

Yes. Insert the generated HTML code into the web pages from which you want to capture cases. Whenever someone submits information on any of those web pages, a case will be created.

SEE ALSO:

[Web-to-Case FAQ](#)

How can our webmaster test the Web-to-Case page?

Add the following line to your Web-to-Case code if you want to see a debugging page when you submit the form. Don't forget to remove this line before releasing the Web-to-Case page on your website.

```
<input type="hidden" name="debug" value="1">
```

SEE ALSO:

[Web-to-Case FAQ](#)

What status and origin are assigned to Web-generated cases?

New Web cases are marked with the default status that your administrator selected from the `Case Status` picklist values. The default value for the `Origin` field is determined by your administrator when setting up Web-to-Case.

SEE ALSO:

[Web-to-Case FAQ](#)

How can I prevent spam from becoming cases?

You can limit spam through the following options:

- Create a black list rule to reject emails from specified IP addresses.
- Download spam filter apps from [AppExchange](#).

SEE ALSO:

[Email-to-Case FAQ](#)

How can I be sure that cases won't be lost?

If your organization exceeds its daily Web-to-Case limit, the Default Case Owner (specified in the Support Settings) will receive an email containing the additional case information. If a new case cannot be generated due to errors in your Web-to-Case setup, Customer Support is notified so that we can assist you in correcting it.

If your organization is using On-Demand Email-to-Case, Salesforce ensures that your cases won't be lost if users submit them during a scheduled Salesforce downtime.

SEE ALSO:

[Web-to-Case FAQ](#)

How is the “Age” calculated in case reports?

The Age of an open case is the time that has elapsed from its creation to the present. The Age of a closed case is the elapsed time from its creation to the time it was closed. Case reports display a drop-down list labeled “Units” that lets you choose to view the Age in days, hours, or minutes.

SEE ALSO:

[Web-to-Case FAQ](#)

Customer Portals

Setting Up Your Customer Portal



Note: Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities.

Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

A Salesforce Customer Portal provides an online support channel for your customers—allowing them to resolve their inquiries without contacting a customer service representative. With a Customer Portal, you can customize and deliver a visually stunning user interface to your customers, and use the following Salesforce features to help you and your customers succeed:

- Determine which pages and fields customers see with page layouts and field-level security
- Manage customers with profiles, permission sets, roles, and sharing rules
- Provide and organize documents via Salesforce CRM Content or the Documents tab
- Create a knowledge base for your customers using [Salesforce Knowledge](#)
- Allow customers to participate in Ideas communities.
- Display and collect data that is unique to your organization with custom objects
- Display custom s-controls and content from other websites via Web tabs
- Provide customized reports via the Reports tab



Note: High-volume portal users are available for customer portals or communities intended for many thousands to millions of users. See [About High-Volume Portal Users](#) on page 50.

Setting up your Customer Portal consists of the following steps:

1. [Enable the Customer Portal.](#)
2. [Create one or more portals.](#)

For each portal:

- a. [Configure the settings and communication templates.](#)

You can standardize the communication templates sent to the users of all your Customer Portals by clicking the **Set Default Email Templates for All Customer Portals** link on the Tools section of the Customer Portal Setup page. For more information, see [Creating Multiple Customer Portals](#) on page 20.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up and update the Customer Portal:

- “Customize Application”

The [Convert Portal User Access wizard](#) automatically displays after the first time you save settings for your first portal, whether it is the Customer Portal or partner portal. You can use this wizard to help ensure that records and folders owned by Salesforce users are not shared with portal users.

- b.** [Customize the fonts and colors.](#)
 - c.** [Customize the available tabs and tab order.](#)
 - d.** [Configure portal languages.](#)
- 3.** Optionally, if [available to your portal user licenses](#), you can enable [Salesforce CRM Content, Ideas, Answers, Entitlement Management](#) or [Salesforce Knowledge](#) as needed.
- 4.** [Create Customer Portal profiles.](#)

For each profile:

 - a.** Customize page layouts. See [Customize Your Customer Portal Pages](#).

For set up tips and general information about Salesforce Customer Portal pages, see [Setup Tips and Considerations for Customer Portal Pages](#) on page 41.
 - b.** Customize list views.

Customer Portal users can automatically see any list view with visibility settings marked `Visible to all users`. We recommend that you create specific list views on all objects accessible to portal users, and then assign portal users to only the list views you want them to view.
 - c.** Customize search layouts.

The search layouts in your Salesforce organization are the same search layouts used in your Customer Portal. Verify that search layouts on objects accessible to portal users only include fields you want them to view in search results.
- 5.** Set up workflow:
 - a.** Set up workflow rules or case assignment rules to automatically assign cases created by portal users to Salesforce users or queues by using the criteria *Current User: User Type contains Customer Portal*.

For case assignment rules to work on the Customer Portal, select the `Select Case Assignment` checkbox by default checkbox on case page layouts assigned to portal profiles. Portal users cannot view these checkboxes on the Customer Portal. Note that assignment rules trigger when a case is created *and* when it is edited. To prevent cases from being automatically reassigned when edited by portal users, add a rule entry using the criteria *Current User: User Type contains Customer Portal* and select the `Do Not Reassign User` checkbox
 - b.** Create workflow alerts or case auto-response rules to automatically respond to portal users when they create a case on your portal.
- 6.** [Configure portal user access.](#)
- 7.** [Grant high-volume portal users access to objects.](#)
- 8.** Optionally, enable single sign-on.
- 9.** [Enable login on each Customer Portal.](#)
- 10.** Add a link on your organization's website to the portal.

Users can navigate to your Customer Portal after you copy the `Login URL` from your portal's settings and paste it into the HTML of your website. For more information, see [Enable Customer Portal Login and Settings](#) on page 21.
- 11.** Enable contacts to use your portal.

To learn more about implementing a Customer Portal, see [Preparation for Setting Up Your Portal](#) on page 79.

 **Note:** Contact Salesforce about activating a Customer Portal for your organization.

SEE ALSO:

[Customer Portal Setup Limits](#)
[Creating Multiple Customer Portals](#)
[Enable Single Sign-On for Portals](#)
[Configuring Multilingual HTML Messages for Customer Portals](#)
[Administrator setup guide: Salesforce Customer Portal Implementation Guide](#)

What customer portals can I create with Salesforce?

Salesforce provides three ways to help you manage your customers. The following table briefly describes the differences between them:

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

	Chatter Answers	Salesforce Customer Portal	Self-Service Portal
Purpose	Provides customers with a Web Community to resolve their inquiries with other community members or by contacting a support agent	Provides customers with an online support channel to resolve their inquiries without contacting a support agent	Provides customers with an online support channel to resolve their inquiries without contacting a support agent
User Interface	Highly customizable via a point-and-click editor and Visualforce pages, as well as functionality from Salesforce features such as Answers, Customer Portal, Force.com Sites, and Salesforce Knowledge	Highly customizable via a point-and-click editor, as well as functionality similar to Salesforce such as permissions, custom objects, sharing rules, and Web tabs	Customizable via a cascading style sheet (CSS) or point-and-click editor
Supported Record Types	- Articles - Cases - Questions (answers)	- Activities - Assets - Cases - Documents - Solutions - Custom objects	- Cases - Solutions
Quantity	Contact Salesforce for more information	Contact Salesforce for more information	One
Administrator Controls	- Customize the look and feel of the community - Moderate questions and answers	- Customize the look and feel of the Customer Portal - Generate Customer Portal usernames and passwords	- Generate Self-Service usernames and passwords - Manage Self-Service user information

	Chatter Answers	Salesforce Customer Portal	Self-Service Portal
	• Generate usernames and passwords • Manage Customer Portal user information • Manage Customer Portal users via permissions, roles, and sharing rules	• Manage Customer Portal user information • Manage Customer Portal users via permissions, roles, and sharing rules	
User Controls	Users can click Edit My Settings after they sign in to change their: • Community username • Community password • Locale • Language • Time zone • Notification settings • Contact information	Users can use the Customer Portal Welcome component to change their: • Portal username • Portal password • Locale • Language • Time zone • Contact information	None

 **Note:** Contact Salesforce to activate a specific portal for your organization.

Enabling Your Customer Portal

 **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities. Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

To enable the Salesforce Customer Portal:

1. From Setup, enter *Customer Portal Settings* in the Quick Find box, then select **Customer Portal Settings**.
2. Click **Edit**.
3. Select **Enable Customer Portal**.
4. Click **Save**.
5. Continue [setting up the portal](#).

Tips on Enabling the Customer Portal

Consider the following when enabling the Customer Portal:

- After you enable the Customer Portal, you can [create multiple Customer Portals](#) to satisfy the various business needs of your customers.
- These items become available after you enable the Customer Portal:

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable the Customer Portal:

- "Customize Application"

- The High Volume Customer Portal, Authenticated Website, Customer Portal Manager, and Customer Portal User profiles, if you purchased [user licenses](#) for them.
- The **Enable Customer Portal User** and **View Customer Portal User** buttons on contact and person account records.
- The All Customer Portal Users and All Internal Users groups along with the Roles and Internal Subordinates sharing rule category.
- After you enable a Customer Portal, you cannot disable it. However, you can prevent users from logging into it. See [Enable Customer Portal Login and Settings](#) on page 21.

SEE ALSO:

[Setting Up Your Customer Portal](#)

Considerations for the Convert Portal User Access Wizard

Your Customer Portal and partner portal users appear in the role hierarchy, however, they're external contacts who don't need access to your organization's internal data. When setting up a Customer Portal or partner portal, you can use the Convert Portal User Access wizard to help ensure that no records or folders are shared with a portal user.

-  **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities.
- Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

The wizard affects the following areas of your Salesforce org:

Sharing Rules

The Convert Portal User Access wizard converts any sharing rules that include the Roles, Internal and Portal Subordinates data set category to include the Roles and Internal Subordinates data set category instead.

The Roles and Internal Subordinates data set category allows you to create sharing rules that include all users in a specified role plus all users in roles below that role, excluding any Customer Portal and partner portal roles.

Only organization-wide sharing rules are updated when you convert Roles, Internal and Portal Subordinates to Roles and Internal Subordinates. The Roles, Internal and Portal Subordinates category for queues, public groups, list views, documents, and manual sharing created on specific records by clicking the **Sharing** button is not converted to Roles and Internal Subordinates.

-  **Note:** After running the Convert Portal User Access wizard, you must recalculate the sharing rules to apply the changes. From the Setup **Quick Find** box, enter *Sharing Settings*. Under *Account Sharing Rules*, click **Recalculate**, then click **OK**.

The Roles, Internal and Portal Subordinates data set category is only available in your organization after you create at least one role in the role hierarchy.

The Roles and Internal Subordinates data set category is only available in your organization after you create at least one role in the role hierarchy *and* enable a portal.

Folder Sharing

The Convert Portal User Access wizard also enables you to automatically convert the access levels of any report, dashboard, or document folders that are accessible to Roles, Internal and Portal Subordinates to a more restrictive access level: Roles and Internal Subordinates. This helps prevent Customer Portal and partner portal users from accessing folders. Using the wizard is more efficient than locating various folders in Salesforce and setting their access levels individually.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set sharing rules:

- "Manage Sharing"

The wizard does not convert folders that are accessible to all users or accessible to public groups. You must manually update the access levels on those folders.

When you first save a Customer Portal or partner portal, Salesforce automatically displays the Convert Portal User Access wizard.

SEE ALSO:

[Using the Convert Portal User Access Wizard](#)

[Configuring User Access to the Customer Portal](#)

Using the Convert Portal User Access Wizard



Note: Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities. Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

When setting up a Customer Portal or partner portal, you can use the Convert Portal User Access wizard to help ensure that no records or folders are shared with a portal user.

To use the wizard:

1. For the Customer Portal, from Setup, enter *Customer Portal Settings* in the **Quick Find** box, then select **Customer Portal Settings**. For the partner portal, from Setup, enter *Partners* in the **Quick Find** box, then select **Settings**.
2. Click the **Convert Portal User Access** link.
3. Select the checkboxes next to the sharing rules you want to convert to Roles and Internal Subordinates.

If there are no sharing rules to convert but you want to convert the access level for folders, proceed to the following step.

4. Click **Next**.
5. Select the checkboxes next to the folders whose access levels you want to change to Roles and Internal Subordinates.

The wizard does not convert folders that are accessible to all users or accessible to public groups. You must manually update the access levels on those folders.

A particular folder may display on multiple rows in the wizard. This is because the wizard displays a row for each Role, Internal and Portal Subordinates category to which a folder is shared.

6. Click **Next**.
7. Click **Save** to apply your selected changes.

SEE ALSO:

[Considerations for the Convert Portal User Access Wizard](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set sharing rules:

- "Manage Sharing"

Creating Multiple Customer Portals

-  **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities. Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

After you have [enabled the Salesforce Customer Portal](#), you can create multiple Customer Portals to satisfy the various business needs of your customers.

To create more than one Customer Portal:

1. From Setup, enter *Customer Portal Settings* in the **Quick Find** box, then select **Customer Portal Settings**.
2. Click **New**.
3. Follow the same steps used to set up your organization's first Customer Portal. See [Setting Up Your Customer Portal](#) on page 14.

-  **Note:** Contact Salesforce for information about the number of Customer Portals you can activate for your organization.

Before you begin creating multiple Customer Portals for your organization, review the following implementation tips and best practices.

Implementation Tips

- Portal users can only log into Customer Portals assigned to their profile. To assign a profile to a Customer Portal, select the name of a portal from the Customer Portal Setup page, click **Edit Profiles** in the Assigned Profiles section, and select the **Active** checkbox next to the profile you want to assign to the portal.
A portal user can access all the Customer Portals assigned to his or her profile with one username and password.
You can view the number of active users associated with each profile assigned to a Customer Portal by creating a custom summary report and adding **Profile** to your report columns.
- The login URL of each Customer Portal you create contains a unique identifier, such as `portalId=060D00000000Q1F`. The unique identifier determines the specific portal a user can access. If a user accesses a login URL that does not contain a unique identifier, they are automatically directed to the login URL of the first Customer Portal you created. Note that portal users can only log into a Customer Portal via the portal's login page and not through the Salesforce login page.
- The settings on the following items apply to both your organization *and* your Customer Portals:
 - List views
 - Search layouts
 - Case assignment rules
 - Workflow alerts

Best Practices

- Because you can uniquely customize the fonts, colors, email templates, and login message of each Customer Portal you create, you can build a Customer Portal for each product and customer service level supported by your organization. For example, if your organization provides gold, silver, and bronze levels of customer support, then you could create a unique Customer Portal for each.

-  **Note:** JavaScript and CSS code are automatically removed from HTML files used as the portal login message.

EDITIONS

Available in: **Salesforce Classic**

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

USER PERMISSIONS

To create multiple Customer Portals:

- "Customize Application"

- You can standardize the communication templates sent to the users of all your Customer Portals by clicking the **Set Default Email Templates for All Customer Portals** link on the Tools section of the Customer Portal Setup page. These settings determine the email templates to use when sending email notifications, such as a new case comment or a reset password, to portal users whose profiles are associated with more than one Customer Portal.

By default, sample templates are automatically selected for you in the *New User Template*, *New Password Template*, and *Lost Password Template* lookup fields. However, sample templates are not selected for you in the *New Comment Template* and *Change Owner to Portal User Template* lookup fields. Unless you select templates for these fields, users whose profiles are associated with more than one Customer Portal will not receive email notifications when new comments are added to their cases or when they become the new owner of a record in the Customer Portal. Email templates must be marked as *Available for Use* to be sent to portal users.



Tip: Because the default email templates are sent to users of multiple Customer Portals, we recommend that you create default email templates that do not contain portal-specific branding.

- You cannot delete a Customer Portal, but you can prevent users from logging into a portal by deselecting the *Login Enabled* checkbox. For more information, see [Enable Customer Portal Login and Settings](#) on page 21.
- You can create multiple Customer Portals that display different tabs for users with the same profile, as long as the profile has access to each object displayed on a tab. For more information, see [Customizing Your Customer Portal Tabs](#) on page 31.

SEE ALSO:

[Setting Up Your Customer Portal](#)

[About Customer Portal User Management](#)

[Administrator setup guide: Salesforce Customer Portal Implementation Guide](#)

Enable Customer Portal Login and Settings



Note: Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities. Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

- From Setup, enter *Customer Portal Settings* in the *Quick Find* box, then select **Customer Portal Settings**.
- Click **Edit** next to the name of the Salesforce Customer Portal you want to customize.
- Set the following options:

Setting	Description
Name	Name of the Customer Portal as displayed on the portal's detail and edit pages, as well as the Customer Portal Setup page. The name of the Customer Portal is not displayed on portal pages, but it does display in the browser title bar. The name of your portal must be unique for your organization and not already in use by a Customer Portal or partner portal.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable login and settings for the Customer Portal:

- "Customize Application"

Setting	Description
	Furthermore, an error may occur if you name a Customer Portal “partner portal” Customer Portal
Description	A description of the Customer Portal as displayed on the portal's detail and edit pages. The description of the Customer Portal is not displayed in the portal.
Login Enabled	Allows users to log in to the Customer Portal. We recommend that you do not select this checkbox until you have completed the steps described in Setting Up Your Customer Portal.  Note: Users must be able to log in to the Customer Portal, be within their user profile's restricted IP range, and be within designated Login Hours in order to be able to reset their passwords.
Administrator	Click the lookup icon () to choose a default administrator for your Customer Portal. All email notifications regarding users who self-register for your Customer Portal will be sent to this Salesforce user. Notifications include information about registration errors and any other issues self-registering customers may experience, such as inadvertently entering duplicate email addresses, creating duplicate contact records, and exceeding your organization's user license limit. When choosing an administrator for your Customer Portal, you can only select users that have the “Edit Self-Service Users” permission. Furthermore, you cannot deactivate a user selected as a portal administrator.
Portal Default Settings	
Setting	Description
Login URL	The URL of the Web page that displays when users log in to your Customer Portal. You can click this URL to log in to your portal and interact with it. Insert this URL into your website so users can access the login page to your Customer Portal. The login URL of each Customer Portal you create contains a unique identifier, such as portalId=060D00000000Q1F. The unique identifier determines the specific portal a user can access. If a user accesses a login URL that does not contain a unique

Portal Default Settings

Setting	Description
	identifier, they are automatically directed to the login URL of the first Customer Portal you created. Note that portal users can only log into a Customer Portal via the portal's login page and not through the Salesforce login page.
Logout URL	The URL of the Web page that displays when users log out of the Customer Portal—for example, “http://www.acme.com.” If a logout URL is not specified, portal users return to the login page when they log out.
Top-Level Category for Portal	The top-level category accessible by customers in the Customer Portal. Customers can view all solutions marked <code>Visible in Self-Service Portal</code> in this category and its subcategories. This field is available only if you have enabled solution browsing. See Customizing Solution Settings on page 508.
Enable Self-Close Case from Suggested Solutions	Allows users to close cases in the Customer Portal directly from suggested solutions. For example, when a user views a suggested solution that helps them solve a case, he or she can click Yes, please close my case if this setting is enabled.
Show Action Confirmation	Allows users to view confirmation messages after they complete an action in the Customer Portal. For example, after a user creates a case in your Customer Portal, he or she views the message “Case has been submitted” if this setting has been enabled. Confirmation messages may help users clearly understand actions they have completed in your Customer Portal.
HTML Messages Default Language	Specifies the language that portal HTML messages are displayed in when custom language portal HTML messages are not configured. This setting is only available for organizations that have multiple languages enabled.

Email Notification Settings

Setting	Description
From Email Address	The email address from which all Customer Portal communication templates are sent—for example, “support@acme.com.” Salesforce sends the emails automatically, but they appear to portal users as if they were sent from this email address. If a portal user responds to a communication template, the response is sent to this address.

Email Notification Settings

Setting	Description
From Email Name	The name associated with the “From” Email Address—for example, “Acme Customer Support.”
New User Template	The email template used to send a username and initial password to all newly enabled and self-registering Customer Portal users. By default, a sample template is automatically selected for you. You can also create your own template or modify the sample. Be sure to mark the template as Available for Use .
New Password Template	The email template used to send a new password to existing Customer Portal users when you reset their passwords. By default, a sample template is automatically selected for you. You can also create your own template or modify the sample. Be sure to mark the template as Available for Use .
Lost Password Template	The email template used to send a new password to existing Customer Portal users when they reset their own passwords by clicking Forgot your password? on the login page of the Customer Portal. By default, a sample template is automatically selected for you. You can also create your own template or modify the sample. Be sure to mark the template as Available for Use .
New Comment Template	The email template used to send a notification to Customer Portal users when a public comment is added to one of their cases. This template must be marked as Available for Use .
Change Owner to Portal User Template	The email template used to send a notification to Customer Portal users when they become the new owner of a record in the portal. This template must be marked as Available for Use .

 **Note:** You can standardize the communication templates sent to the users of all your Customer Portals by clicking the **Set Default Email Templates for All Customer Portals** link on the Tools section of the Customer Portal Setup page. For more information, see [Creating Multiple Customer Portals](#) on page 20.

 **Tip:** If you plan to use the same communication template for different objects, such as the Change Owner to Portal User Template, we recommend that you include text and merge fields on the template that are appropriate for both objects. For example, if your organization has a Warranty custom object and a Training custom object, and you want to use the Change Owner to Portal User Template for both, the text and merge fields on the template should read: “A new record has been assigned to you. Id: {!Training.ID}{!Warranty.Id}.” When the template is sent, only the relevant merge fields will display.

Look and Feel

Setting	Description
Header	A text or HTML file that allows you to incorporate your organization’s branding into the header of your Customer Portal.

Look and Feel

Setting	Description
	Click the lookup icon () to choose a file that has been uploaded to a publicly accessible folder on the Documents tab. The files you include in the <code>Header</code> and <code>Footer</code> lookup fields can have a combined size of up to 10 KB. We recommend that you do not add a header <i>and</i> a logo to your portal because they may not display properly together. You can position the logout link anywhere on the header by using the HTML tag: <code>Logout.</code>
Footer	A text or HTML file that allows you to incorporate your organization's branding into the footer of your Customer Portal. Click the lookup icon () to choose a file that has been uploaded to a publicly accessible folder on the Documents tab. The files you include in the <code>Header</code> and <code>Footer</code> lookup fields can have a combined size of up to 10 KB.
Logo	An image file that allows you to incorporate your organization's branding into the top left header of your Customer Portal. Click the lookup icon () to choose a file that has been uploaded to a publicly accessible folder on the Documents tab and marked as an <code>Externally Available Image</code>. The file you include in the <code>Logo</code> lookup field can be up to 20 KB. We recommend that you do not add a header <i>and</i> a logo to your portal because they may not display properly together.
Login Message	A text or HTML file that allows you to incorporate your organization's branding into the header of the login page, forgot password page, and change password page of your Customer Portal. Click the lookup icon () to choose a file that has been uploaded to a publicly accessible folder on the Documents tab. The file you include in the <code>Login Message</code> lookup field can be up to 2 KB.  Note: JavaScript and CSS code are automatically removed from HTML files used as the portal login message.

Self-Registration Settings

Setting	Description
Self-Registration Enabled	Allows existing contacts to register themselves for access to your Customer Portal. When you select this checkbox and add the <code>Allow Customer Portal Self-Registration</code> checkbox to contact page layouts, contacts whose records are marked <code>Allow Customer Portal Self-Registration</code> can view a self-registration area on the Login page of your Customer Portal. From the self-registration area, users can enter their email address and click Submit to receive an automatically assigned username and password for logging in to your Customer Portal. Other email notifications sent to users regarding their registration status include: - Existing user, from which the user can enter another email address or click a Forgot Password? link to retrieve his or her password. - New user, which informs the user that the email address he or she submitted does not match an existing contact in your organization. If an administrator has implemented Web-to-Case or Web-to-Lead to capture new user information, then the user can click a link to enter his or her information on the appropriate form. - Internal error, which informs the user that an error occurred during the self-registration process and that your portal's administrator has been notified about the error. - Ineligible user, which informs the user that he or she is not eligible for self-registration to your Customer Portal. This notification is sent when a submitted email address matches a contact that does not have the <code>Allow Customer Portal Self-Registration</code> checkbox selected. It is also sent when a submitted email address does not match any contacts, and your administrator has not set up Web-to-Lead or Web-to-Case to capture new user information. Ensure that all required custom fields on users have default values. Otherwise, users who self-register for your Customer Portal will receive an error message. Note that person account users cannot self-register for your Customer Portal. When person account users self-register for your Customer Portal, they receive an email notification that instructs them to contact the portal administrator.

Self-Registration Settings

Setting	Description
New User Form URL	Allows you to specify the URL of a Web-to-Lead or Web-to-Case form for users who self-register for access to your Customer Portal. The URL to this form is offered via the template selected in the Registration Error Template field to self-registering users who lack an existing contact record, so that their information can be captured and converted to a contact.
Registration Error Template	The email template sent to users who self-register for your Customer Portal, but experience a registration error, or need to complete a Web-to-Case or Web-to-Lead form to register for your portal. By default, a sample template is automatically selected for you. You can also create your own template or modify the sample. Be sure to mark the template as Available for Use. The From Email Address and From Email Name fields on Customer Portal settings specify who this template is sent from.
Default New User License	Click the lookup icon () to choose a default portal user license for users who self-register for your Customer Portal.
Default New User Role	Click the lookup icon () to choose a default portal role for users who self-register for your Customer Portal.
Default New User Profile	Click the lookup icon () to choose a default portal profile for users who self-register for your Customer Portal. You cannot delete the profile selected as the default portal profile.

- Click **Save** to save your Customer Portal settings.

SEE ALSO:

[Setting Up Your Customer Portal](#)

Customize Your Customer Portal Fonts and Colors

-  **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities. Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can customize the fonts and colors of the Salesforce Customer Portal to reflect your company's branding. Your portal's fonts and colors are specified in a portal "color theme." Select a predefined color theme and, optionally, customize it to better match your branding. You can click the **See examples** link to see all of the theme attributes you can customize.

1. From Setup, enter *Customer Portal Settings* in the **Quick Find** box, then select **Customer Portal Settings**.
2. Select the name of your Customer Portal.
3. Click **Change Portal Fonts and Colors**.
4. Select a color theme from the **Color Theme** drop-down list. Select Custom from the **Color Theme** drop-down list to create your own theme from scratch. A preview of the color theme you select is automatically displayed in the Preview sections.
5. Optionally, customize the color of any theme you select by either:
 - Entering a hexadecimal value into any theme attribute, or
 - Clicking the hexadecimal value of any theme attribute and selecting a color from the point-and-click editor

When you customize a theme, it is automatically renamed Custom when saved. You can customize the following options, which, when customized, automatically display in the Preview sections:

Tab Styles

Theme Attribute	Description
Current Tab Text	Text color of the tab users have selected.
Current Tab Background	Background color of the tab users have selected.
Current Tab Border	Border color of the tab users have selected.
Other Tab Text	Text color of the tabs users have not selected.
Other Tab Background	Background color of the tabs users have not selected.
Other Tab Border	Border color of the tabs users have not selected.
Tab Bar Background	Background color behind all tabs.

Page Styles

Theme Attribute	Description
Page Background	Portal background color, excluding search, related lists, recent items, solution categories, document folders, and the Create New drop-down list.

EDITIONS

Available in: **Salesforce Classic**

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

USER PERMISSIONS

To change the fonts and colors of the Customer Portal:

- "Customize Application"

Page Styles

Theme Attribute	Description
Text	Text color, size, and font on all portal items, except for tabs, buttons, headers, and field labels. Optionally, you can change the number in the percent field to increase or decrease the size of all portal items. Additionally, you can change the font of all portal items, except for tabs, buttons, headers, and field labels from the drop-down list.
Field Label Text	Text color of the field names on records. Optionally, you can change the font of the text from the drop-down list.
Link	Text color of all links.
Link Hover	Text color of all links when a user hovers the mouse over them.
Field Separator	Color of the lines that separate fields on records.
Bottom Border	Color of the line bordering the bottom of the portal.

Section Styles

Theme Attribute	Description
Header Background	Background color of all headings, including search, recent items, related lists, solution categories, documents folders, and the selected tab.
Section Header Text	Text color and font on the headers of search, related lists, recent items, solution categories, and document folders. Optionally, you can change the font of the text from the drop-down list.
Left Border	Border to the left of search, related lists, recent items, solution categories, document folders, and the Create New drop-down list. Optionally, you can change the number in the pixel field to increase or decrease the thickness of the border. Additionally, you can select the style of the line displayed for the border from the drop-down list.
Right Border	Border to the right of search, related lists, recent items, solution categories, document folders, and the Create New drop-down list. Optionally, you can change the number in the pixel field to increase or decrease the thickness of the border. Additionally,

Section Styles	
Theme Attribute	Description
	you can select the style of the line displayed for the border from the drop-down list.
Top Border	Border above search, related lists, recent items, solution categories, document folders, and the Create New drop-down list. Optionally, you can change the number in the pixel field to increase or decrease the thickness of the border. Additionally, you can select the style of the line displayed for the border from the drop-down list.
Bottom Border	Border underneath search, related lists, recent items, solution categories, document folders, and the Create New drop-down list. Optionally, you can change the number in the pixel field to increase or decrease the thickness of the border. Additionally, you can select the style of the line displayed for the border from the drop-down list.
Section Background	Background color of search, related lists, recent items, solution categories, document folders, and the Create New drop-down list.
List Styles	
Theme Attribute	Description
List Header Text	Text color of the field names selected as column headings on list views. Optionally, you can change the font of the text from the drop-down list.
Header Underline	Color of the lines underneath column headings on related lists and list views.
Separator	Color of the lines between records on list views.
Row Highlight	Color of a record when a user hovers the mouse over it on list views.

- Click **Save** to save all changes to the theme values.



Tip: Changes are visible to Customer Portal users when they refresh their browsers. Therefore, we recommend updating your portal color theme at times when users are least likely to visit your Customer Portal.

 **Note:** To customize the header, footer, and logo of your Customer Portal, see [Enable Customer Portal Login and Settings](#) on page 21.

SEE ALSO:

[Setting Up Your Customer Portal](#)

[Customizing Your Customer Portal Tabs](#)

Customizing Your Customer Portal Tabs

 **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities. Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

The Salesforce Customer Portal can display the following tabs:

- Answers
- Articles
- Ideas
- Home
- Cases
- Reports
- Solutions
- Web tabs
- Entitlements
- Custom objects
- Service contracts
- Chatter Answers
- Documents from the Documents tab
- Salesforce CRM Content tabs: Libraries, Content, and Subscriptions

Additionally, the Customer Portal can display the following tabs to [delegated external user administrators](#):

- Accounts
- Contacts

To choose which tabs display to users logged in to a Customer Portal, and to customize the order in which tabs display to portal users:

1. From Setup, enter *Customer Portal Settings* in the **Quick Find** box, then select **Customer Portal Settings**.
2. Select the name of the Customer Portal whose tabs you want to customize.
3. Click **Customize Portal Tabs**.
4. To add or remove tabs, select a tab title, and click the **Add** or **Remove** arrow to add or remove the tab to or from the Selected Tabs box. To change the order of the tabs, select a tab title in the Selected Tabs box, and click the **Up** or **Down** arrow.
5. Optionally, from the **Default Landing Tab** drop-down, you can select which tab to display to users when they log into your portal.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To customize Customer Portal tabs:

- "Customize Application"

6. Click **Save.**

You can further specify which tabs users can access by editing tab settings in users' associated profiles and permission sets.



Tip: You can [create multiple Customer Portals](#) that display different tabs for users with the same profile, as long as they have access to each object displayed on a tab.

To make the following tabs visible in the Customer Portal, use the steps above and change the tab visibility setting to Default On in all Customer Portal profiles.

Allowing Portal Users to View Web Tabs

To allow portal users to view Web tabs, simply create Web tabs and assign them to Customer Portal profiles.

Granting Portal Users Access to the Documents Tab

To allow portal users to view a Documents tab, grant Customer Portal users access to the folders on your Salesforce Documents tab that contain the files you want them to view.

Allowing Portal Users to View the Reports Tab

To allow portal users to view a Reports tab:

1. Grant portal users access to the folders on your Salesforce Reports tab that contain the reports you want them to run.
2. Set the organization-wide default sharing model to Private on objects you want portal users to report on.
3. Assign portal users to permission sets or profiles that include the "Run Reports" permission.

When you add the Reports tab to your Customer Portal, portal users:

- Cannot customize reports or filter report results; they can only run reports.
- Can export reports to Excel if they have the "Export Reports" permission.
- Do not have access to the Unfiled Public Reports and My Personal Custom Reports folders.
- Will receive an insufficient privileges error if they run a report that contains objects they do not have permission to view.

Providing Portal Users with Access to the Ideas Tab

To allow portal users to access the Ideas tab, configure Ideas to display in the portal. For more information, see [Creating and Editing Zones](#) on page 97 and [Enabling Ideas in the Customer Portal](#) on page 35.

If your organization has the Ideas and Answers Portal license, hide the Reports tab in the Customer Portal. Otherwise, your Customer Portal users receive an Insufficient Privileges message when they click the Reports tab. For information on hiding tabs, see [Customizing Your Customer Portal Tabs](#) on page 31.

Allowing Portal Users to Access Salesforce CRM Content Tabs

To allow portal users to access Salesforce CRM Content, see [Enabling Salesforce CRM Content in the Customer Portal](#) on page 33.

SEE ALSO:

[Setting Up Your Customer Portal](#)

[Administrator setup guide: Salesforce Customer Portal Implementation Guide](#)

Enabling Salesforce CRM Content in the Customer Portal

USER PERMISSIONS

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

EDITIONS

Available in: Salesforce Classic

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



Note: Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities.

Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

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

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

Enabling Salesforce CRM Content for Non-Licensed Users

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

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

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

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

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

Enabling Salesforce CRM Content for Licensed Users

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

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

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

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

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

SEE ALSO:

[Setting Up Your Customer Portal](#)

Enabling Ideas in the Customer Portal

-  **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities. Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Ideas is available in the Customer Portal.

After you have [set up your Customer Portal](#), follow the steps below to enable Ideas in your portal.

1. Create zones in the Ideas context that are active and configured to display in the portal. For more information, see [Creating and Editing Zones](#) on page 97.
2. Add the Ideas tab to your Customer Portal. For more information, see [Customizing Your Customer Portal Tabs](#) on page 31.
3. If your organization has the Ideas and Answers Portal license, hide the Reports tab in the Customer Portal. Otherwise, your Customer Portal users receive an Insufficient Privileges message when they click the Reports tab. For information on hiding tabs, see [Customizing Your Customer Portal Tabs](#) on page 31.

SEE ALSO:

[Setting Up Your Customer Portal](#)

Enabling Entitlement Management in the Customer Portal

-  **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities. Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can use the Customer Portal to provide your customers with access to their entitlements and service contracts. Contract line items don't display in the Customer Portal.

-  **Note:** High-volume customer portal users do not have access to service contracts and entitlements.

After you have [set up entitlement management](#) and [enabled a Customer Portal](#), complete the following steps to add entitlement management to your portals.

1. Update Customer Portal profiles:
 - a. Clone Customer Portal profiles and enable the "Read" permission on entitlements or service contracts.
 - b. Optionally, on the profiles of [delegated external user administrators](#), enable the "Create" and "Delete" permissions on entitlement contacts. This lets delegated external user administrators update entitlement contacts.
 - c. In the cloned profiles, verify that the tab visibility for the Entitlements or Service Contracts tabs are Default On.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up and update the Customer Portal:

- "Customize Application"

To create and edit profiles:

- "Manage Profiles and Permission Sets"

To customize Ideas:

- "Customize Application"

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up and update the Customer Portal:

- "Customize Application"

To create and edit profiles:

- "Manage Users"

To manage Customer Portal users:

- "Edit Self-Service Users"

2. At the bottom of the customer portal detail page, click **Edit Profiles** and activate the new profiles.
3. Customize case page layouts to add the `Entitlement Name` lookup field. This lets portal users add entitlements to cases.
 **Tip:** *Don't* add the following entitlement process fields to case page layouts for portal users because portal users shouldn't access information related to your internal support processes: `Entitlement Process Start Time`, `Entitlement Process End Time`, `Stopped`, and `Stopped Since`.
4. Optionally, customize related lists on accounts and contacts to add Entitlements. This lets delegated external user administrators create cases automatically associated with the right entitlements.
5. [Add the Entitlements or Service Contract tabs](#) to each Customer Portal.
6. Assign the cloned profiles to your Customer Portal users:
 - a. To create a new Customer Portal user, click **Manage External User** and choose **Enable Customer User** on the contact detail page. To update an existing user, click **Manage External User** and choose **View Customer User**.
 - b. For a new user, select the cloned profile from the **Profile** drop-down menu. For an existing user, click **Edit** and then select the profile.
 - c. Click **Save**.

SEE ALSO:

[Setting Up Your Customer Portal](#)

Enabling Salesforce Knowledge in the Customer Portal

 **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities. Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can use the Customer Portal to provide your customers with access to Salesforce Knowledge articles. Portal users can view and rate articles but cannot create or edit articles.

After you have [set up Salesforce Knowledge in your organization](#) and [enabled your Customer Portal](#), complete the following steps to enable Salesforce Knowledge in your portals.

1. Update Customer Portal profiles:
 - a. Clone the Customer Portal User or Customer Portal Manager profiles and enable the "Read" permission for article types you want to share with customers.
 - b. In the cloned profiles, verify that the tab visibility for the Articles tab is Default On.
2. At the bottom of the customer portal detail page, click **Edit Profiles** and activate the new profile.
3. Assign the cloned profiles to your Customer Portal users:
 - a. To create a new Customer Portal user, click **Manage External User** and choose **Enable Customer User** on the contact detail page. To update an existing user, click **Manage External User** and choose **View Customer User** on the contact detail page.
 - b. For a new user, select the cloned profile from the **Profile** drop-down menu. For an existing user, click **Edit** and then select the profile.
 - c. Click **Save**.
4. [Add the Articles tab](#) to each Customer Portal.
5. If you want your Customer Portal users to have different category group visibility settings than the account owner, [change the visibility settings for the Customer Portal user](#).
By default, Customer Portal users inherit their data category access from the account owner. For example, if the account owner has a role of CEO and the CEO role has full access to all the data categories in a category group, then Customer Portal users can also access all categories in that group. In some cases, you may want to limit which categories a Customer Portal user can access.
6. If you have high-volume portal users, [make the categories these users need to access visible by default](#). Because high-volume portal users don't have roles, they can only access categorized articles if the associated data categories have been made visible to all users regardless of role.
7. Notify users who create articles that they must select **Customer Portal** as a channel option when creating or modifying an article. If the Customer Portal channel is not selected, the article will not be published in the portal.
8. To allow users to search for articles from the Home tab, add the Article Search component to the home page layout. Ensure that you assign the layout to the Customer Portal profiles.

SEE ALSO:

[Setting Up Your Customer Portal](#)

EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

USER PERMISSIONS

To set up and update the Customer Portal:

- "Customize Application"

To create and edit profiles:

- "Manage Profiles and Permission Sets"

To manage Customer Portal users:

- "Edit Self-Service Users"

To view Salesforce Knowledge articles:

- "Read" on the article's article type

Enabling Answers in the Customer Portal

-  **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities. Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can use the Customer Portal to provide your customers with access to an answers community.

To enable answers in your portal:

1. [Set up your Customer Portal.](#)

When [customizing your portal fonts and colors](#), note that answers only supports the following changes:

- All tab styles
- The following page styles:
 - Page Background
 - Text
 - Link
 - Link Hover

2. [Set up answers](#), making sure that your answers community is configured to display in the Customer Portal.

3. [Add the Answers tab](#) to your Customer Portal.

4. Create Customer Portal users:

- a. On the contact detail page, click **Manage External User** and then choose **Enable Customer User**.
- b. Enter the required information, making sure to select the correct Customer Portal profile from the **Profile** drop-down menu.
- c. Click **Save**.

5. If you want your Customer Portal users to have different category group visibility settings than the account owner, [change the visibility settings for the Customer Portal user](#).

By default, Customer Portal users inherit their category access from the account owner. For example, if the account owner has a role of CEO and the CEO role has full access to all the data categories in the category group assigned to answers, then Customer Portal users can also access all categories in the answers community. In some cases, you may want to limit which categories a Customer Portal user can access.

6. If you have high-volume portal users, [make the data categories these users need to access visible through permission sets or profiles](#).

7. If your organization has the Ideas and Answers Portal license, hide the Reports tab in the Customer Portal. Otherwise, your Customer Portal users receive an Insufficient Privileges message when they click the Reports tab. For information on hiding tabs, see [Customizing Your Customer Portal Tabs](#) on page 31.

SEE ALSO:

[Setting Up Your Customer Portal](#)

EDITIONS

Available in: **Salesforce Classic**

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

USER PERMISSIONS

To set up and update the Customer Portal:

- "Customize Application"

To create and edit profiles:

- "Manage Profiles and Permission Sets"

To create an answers community:

- "Customize Application"

Customize Your Customer Portal Pages

 **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities. Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can customize your Salesforce Customer Portal pages just as you customize pages in Salesforce: with page layouts.

Page layouts control the layout and organization of buttons, fields, s-controls, Visualforce, custom links, and related lists on object record pages. They also help determine which fields are visible, read only, and required. Page layouts can include s-controls and Visualforce pages that are rendered within a field section when the page displays. You can control the size of the s-controls and Visualforce pages, and determine whether or not a label and scroll bars display.

Customer Portal users view the layouts assigned to their profile when they log in to your Customer Portal. You can customize the following objects' page layouts for your portal:

- Home
- Tasks
- Events
- Cases
- Assets
- Accounts
- Solutions
- Contacts
- Entitlements
- Custom Objects
- Service Contracts

Customizing Portal Page Layouts

From the object management settings for the object whose page layout you want to edit, go to Page Layouts.

By default, Customer Portal users have "Read" permissions on accounts, contacts, assets, products and price books, so that they can view their account name and choose a contact and asset for the cases they create on your portal. They may also have "Update" or "Create" permissions for assets and accounts, depending on the type of customer portal.

 **Note:** Customer Portal users can't view the tags section of a page, even if it is included in a page layout.

To display a custom object in your Customer Portal, you must:

- Select the `Available for Customer Portal` checkbox on the custom object. You cannot assign a portal profile to a custom-object page layout unless this checkbox is selected.
- Grant user permissions to the custom object on permission sets or profiles assigned to portal users.

EDITIONS

Available in: **Salesforce Classic**

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

USER PERMISSIONS

To modify page layouts:

- "Customize Application"

To assign page layouts to profiles:

- "Manage Profiles and Permission Sets"

- Add the tab of the custom object to your Customer Portal so that the tab is accessible to your Customer Portal users. For more information, see [Customizing Your Customer Portal Tabs](#) on page 31.

SEE ALSO:

[Customize Your Customer Portal Fonts and Colors](#)

[Enable Customer Portal Login and Settings](#)

[Setup Tips and Considerations for Customer Portal Pages](#)

Configuring Multilingual HTML Messages for Customer Portals

-  **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities.
- Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

If your organization has multiple languages enabled, you can upload HTML messages in any of the languages supported by Salesforce and configure the messages to display in the portal based on portal user language settings. For example, you can upload an HTML message in French to display on the Home tab for portal users with French language settings, and an HTML message in English to display on the Home tab for portal users with English language settings.

Note the following before configuring multilingual HTML messages:

- Before you can add a multilingual HTML message to a portal, you must upload the HTML-formatted file in the Documents tab.
- Even if configured, portal HTML messages will not display on the Ideas, Reports, Content, or Solutions tabs.

To configure multilingual HTML messages:

1. To configure a display language for the Customer Portal, from Setup, enter *Customer Portal Settings* in the **Quick Find** box, then select **Customer Portal Settings**.
2. Click the name of the portal to edit.
3. Click **Add New Language** in the Assigned Languages related list.
4. Select a language from the **Language** drop-down list.
5. Click the lookup icon () next to a tab name, then select the HTML message to display on that tab. Optionally repeat this step for each tab that you want to display an HTML message.
6. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To configure languages in portals:

- "Customize Application"

Setup Tips and Considerations for Customer Portal Pages

-  **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities. Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Consider the following set up tips and general information about Salesforce Customer Portal pages.

Setting Up Cases

- When setting up your Customer Portal, clone the page layout for cases (Case Layout), and rename it *Portal Case Layout*. This allows you to easily differentiate between case page layouts for internal users and case page layouts for portal users.
- By default, new cases are accessible in the Customer Portal, but you can include the `Visible in Self-Service` checkbox on case page layouts so that you can deselect the checkbox to prevent a case from being displayed.
- Do not select the `Show Case Email Notification` and `Show Case Email Notification by default` checkboxes on case page layouts. These features only apply to Salesforce users.
- Do not add the `Internal Comments` field to case page layouts assigned to portal profiles because portal users may view comments intended only for Salesforce users.
- Include the `Asset` field on case page layouts if you want portal users to be able to associate cases with an asset related to their account.
- Include the `Contact Name` lookup field on case page layouts so that users with "Edit" permissions on that field can change a case's contact to another portal user in the same account.
- If a portal user is the owner of a case, the `Contact Name` field on the case must be the contact associated with the same portal user who owns the case. You can't specify a different contact, even if they're associated with the same portal account.
- Do not select the `Show solution information section`, `Show Contact Notification checkbox`, and `Select Contact Notification checkbox by default` checkboxes on close-case page layouts because their functions only apply to Salesforce users.
- Create case record types to set the default value of the `Case Origin` picklist field for cases logged on your Customer Portal.
- For case assignment rules to work on the Customer Portal, select the `Select Case Assignment checkbox by default` checkbox on case page layouts assigned to portal profiles. Portal users cannot view these checkboxes on the Customer Portal. Note that assignment rules trigger when a case is created *and* when it is edited. To prevent cases from being automatically reassigned when edited by portal users, add a rule entry using the criteria `Current User: User Type contains Customer Portal` and select the `Do Not Reassign User` checkbox.
- Portal users can view all the values in the `Type`, `Status`, `Priority`, and `Case Reason` picklist fields unless you create record types for cases that contain separate picklist values for them.
- You can prevent portal users from submitting cases with attachments by removing the **Submit & Add Attachment** button from case page layouts:
 1. Edit a case page layout with the enhanced page layout editor.
 2. Click **Layout Properties**.
 3. Deselect **Show Submit & Add Attachment Button**.
 4. Click **OK**.
 5. Click **Save**.

EDITIONS

Available in: **Salesforce Classic**

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

Cases

- Portal users need the “Read” permission on contacts to create cases.
- Portal users cannot edit the value of the `Status` picklist field on cases.
- Portal users can edit and delete attachments they have added to their cases, but portal users cannot edit and delete attachments added to cases by Salesforce users.
- The **Delete** and **Sharing** buttons on case detail pages are not available to portal users.
- The **Email Message List**, **Next**, and **Previous** links are not available to Customer Portal users when they view emails from the Email related list on case detail pages. The Email related list is only available in organizations where Email-to-Case or On-Demand Email-to-Case is enabled.
- Optionally, you can create case auto-response rules to automatically respond to portal users when they create a case on your portal.
- Portal users can view, search, and create notes and attachments on cases.
- When creating a case, a portal user bypasses the Suggested Solutions page and is directed to their case if:
 - No relevant suggested solutions match the case.
 - He or she creates the case by clicking **Submit & Add Attachment**.

Note that suggested solutions are only available in organizations where they are enabled. For more information on suggested solutions, see [Suggested Solutions Overview](#) on page 507. For more information about how Customer Portal users can self-close their own cases from suggested solutions, see [Enable Customer Portal Login and Settings](#).

- If [Salesforce Knowledge](#) is enabled, you can add the Articles related list to case page layouts assigned to portal users so that they can find articles that help them solve their cases.
- If Chatter is enabled for your organization, feed attachments are included in the Notes and Attachments related list. Portal users can download feed attachments, but can't preview, edit, or delete them.

Solutions

- The `Status` picklist field on solutions is not available to portal users.
- The `Status` picklist field on a solution does not need to be set to Reviewed for a solution to be visible in the Customer Portal; a solution is visible in the Customer Portal if the `Visible in Self-Service Portal` checkbox is selected on a solution.
- If you enable solution categories for your organization, solution categories are also available in your Customer Portal. Uncategorized solutions do not display in the solution categories of your Customer Portal, but they do display in your portal's search and list views.
- The [top solutions feature](#) is not available for your Customer Portal, but you can create links on your Customer Portal home page to your organization's most relevant solutions.

Home Page

- Include the Customer Portal Welcome component on home page layouts assigned to Customer Portal users. Each Customer Portal user who logs in to your portal receives a welcome message with his or her name. The users can also change their own portal username, password, locale, language, time zone, and contact information. When portal users change information about themselves their user records are updated but their contact records aren't automatically updated with those changes.

Note that Customer Portal users who have the “Is Single Sign-On Enabled” permission cannot change their usernames from the Customer Portal Welcome component.

- When designing home page layouts for your Customer Portal, we recommend adding the following components: Search, Solution Search, Recent Items, Customer Portal Welcome, and a custom HTML Area component that includes your corporate branding in the wide column.

- Create custom components to put on the home page layouts of your Customer Portal, such as links to custom list views, specific documents, and top solutions.
- Custom component names do not display in the wide section of the home page in the Customer Portal.
- You can position the logout link anywhere on the header by using the HTML tag: "Logout." For more information on the header, see [Enable Customer Portal Login and Settings](#) on page 21.
- We recommend *not* adding the following components to your Customer Portal home page layouts because they are for Salesforce users: Tasks, Calendar, Product Search, Recent Items, Dashboard Snapshot, Messages & Alerts, and Items To Approve.

Activities

- Portal users can't be assigned to activities.
- Portal users can view completed tasks and past events marked `Visible in Self-Service` that are associated with objects they have permission to view.

Documents

Verify that none of your organization's internal documents on the Documents tab are available in folders accessible to portal users.

Reports

- Portal users can run reports if they have the "Run Reports" permission.
- Portal users can export reports if they have the "Export Reports" permission.
- The Report Options section does not display on report results for portal users because portal users cannot customize report results. Also, the Generated Chart section, which includes the **Edit**, **Large**, **Medium**, and **Small** links, does not display on report results.
- Report results for portal users only include links to objects the portal users have permission to access.
- Portal users can only report on objects set to Private in the organization-wide default sharing model. Some objects, such as solutions and articles, are not included in the sharing model and cannot be reported on by Customer Portal users.
- Portal users will receive an insufficient privileges error if they run a report that contains objects they do not have permission to view.
- By default all users, including portal users, can view report folders. To prevent portal users from viewing report folders, update the sharing settings on report folders to the All Internal Users group.

Custom Objects

- When you deselect the `Available for Customer Portal` checkbox on a custom object, the custom object is no longer available on the Customer Portal, and all of the permissions for the custom object are automatically removed from portal profiles. If you select the `Available for Customer Portal` checkbox on a custom object again, you must update the permissions for the custom object on portal profiles.



Note: If you configure custom object access at a later time, permission sets retain their configuration.

- Portal users can view, search, and create notes and attachments on custom objects.
- If Chatter is enabled for your organization, feed attachments are included in the Notes and Attachments related list. Portal users can download feed attachments, but can't preview, edit, or delete them.

Articles

For setup information, see [Enabling Salesforce Knowledge in the Customer Portal](#) on page 37.

Assets

- Portal users can create, view, and update assets associated with their accounts.

- Assets are only visible to portal users if you include the `Assets` lookup field on case page layouts. From case detail pages, portal users can view an asset by clicking it in the `Asset` field.
- Portal users can view and search attachments on assets.
- If Chatter is enabled for your organization, feed attachments are included in the Notes and Attachments related list. Portal users can download feed attachments, but can't preview, edit, or delete them.

Salesforce CRM Content

- Portal users with a Salesforce CRM Content feature license can perform any tasks granted by their library permission.
- Portal users with the "View Content on Portals" user permission have view-only access to Salesforce CRM Content.
- Portal users with the "Create Libraries" user permission can create and administer libraries.

For more information, see [Enabling Salesforce CRM Content in the Customer Portal](#) on page 33.

Answers

For setup information, see [Enabling Answers in the Customer Portal](#) on page 38. When [customizing your portal fonts and colors](#), note that answers only supports the following changes:

- All tab styles
- The following page styles:
 - Page Background
 - Text
 - Link
 - Link Hover

Ideas

For setup information, see [Enabling Ideas in the Customer Portal](#) on page 35.

Accounts

Only users with delegated external user administrator rights can view the Accounts tab and their account's detail page in your Customer Portal. See [Delegating Customer Portal User Administration and Portal Super User](#) on page 65.

 **Note:** Customer portal users don't see the Notes & Attachments related list on accounts.

Contacts

Only users with delegated external user administration rights can view their account's contacts. See [Delegating Customer Portal User Administration and Portal Super User](#) on page 65.

Only users with the "Portal Super User" permission can view the Contacts tab and edit and detail pages for contacts in your Customer Portal. See [Delegating Customer Portal User Administration and Portal Super User](#) on page 65.

 **Note:** Customer portal users don't see the Notes & Attachments related list on contacts.

Entitlements

- For set up information, see [Enabling Entitlement Management in the Customer Portal](#) on page 35.
- Add the "Read" permission on entitlements to custom portal profiles; assign the profiles to portal users who need access to entitlements. See [Configuring User Access to the Customer Portal](#) on page 57.
- Add the `Entitlement Name` lookup field to case page layouts so that portal users can add entitlements to cases.
- *Don't* add the following entitlement process fields to case page layouts for portal users because portal users shouldn't access information related to your internal support processes: `Entitlement Process Start Time`, `Entitlement Process End Time`, `Stopped`, and `Stopped Since`. See Case Fields.

- Optionally, add the Entitlements tab to your Customer Portal so that portal users can view entitlements associated with their accounts and create cases from entitlements.
- Add the Entitlements related list to account and contact page layouts so that delegated external user administrators can create cases automatically associated with the right entitlements. See [Delegating Customer Portal User Administration and Portal Super User](#) on page 65.

Service Contracts

- For set up information, see [Enabling Entitlement Management in the Customer Portal](#) on page 35.
- Grant the “Read” permission on service contracts to the portal users who need access to service contracts. See [Configuring User Access to the Customer Portal](#) on page 57.
- Add the Service Contracts tab to your Customer Portal so that portal users can view the details of their service contracts. See [Customizing Your Customer Portal Tabs](#) on page 31.
- Contract line items don't display in the Customer Portal.

Flows

- You can include Force.com flows in your Customer Portal by embedding them in a Visualforce page.
- Users can run only flows that have an active version. If the flow you embed doesn't have an active version, users see an error message. If the flow you embed includes a subflow element, the flow that is referenced and called by the subflow element must have an active version.
- When you make a flow available to site or portal users, point them to the Visualforce page that contains the embedded flow, not the flow itself. Site and portal users aren't allowed to run flows directly.

SEE ALSO:

[Customize Your Customer Portal Pages](#)

Customer Portal Setup Limits



Note: Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities. Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Contact Salesforce for information about the number of Customer Portals and Customer Portal user licenses you can activate.

The maximum number of custom objects you can include in a Customer Portal is determined by the total number of custom objects your Edition allows.

Also, user licenses control the number of custom objects a portal user can see in a Customer Portal. For information, contact Salesforce.

SEE ALSO:

[Setting Up Your Customer Portal](#)

EDITIONS

Available in: Salesforce Classic

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

Enable Single Sign-On for Portals

Single sign-on allows users to access all authorized network resources without having to log in separately to each resource. You validate usernames and passwords against your corporate user database or other client application rather than having separate user passwords managed by Salesforce.

You can set up Customer Portals and partner portals to use SAML single sign-on, so that a customer only has to login once.

 **Note:** Single sign-on with portals is only supported for SAML 2.0.

To enable single sign-on for portals:

- 1. In addition to the SAML sign-on information that must be gathered and shared with your identity provider, you must supply your information provider with the Organization ID and the Portal ID. In the SAML assertion that is sent from your identity provider, the `portal_id` and `organization_id` must be added as attributes.

 **Note:** You can leave these attributes blank to differentiate between portal and platform users. For example, when blank, the user is a regular platform user and when populated, the user is a portal user.

- a. From Setup, enter *Company Information* in the Quick Find box, then select **Company Information** and copy the ID located in the *Salesforce Organization ID*.
- b. For Customer Portals, from Setup, enter *Customer Portal Settings* in the Quick Find box, select **Customer Portal Settings**, click the name of the Customer Portal, and then copy the ID located in the *Portal ID*.
- c. For partner portals, from Setup, enter *Partners* in the Quick Find box, then select **Settings**. Next, click the name of the partner portal, and copy the ID located in the *Salesforce Portal ID*.

SEE ALSO:

[Setting Up Your Customer Portal](#)

Customer Portal Users

About Customer Portal User Management

USER PERMISSIONS	
To manage Customer Portal users:	"Edit Self-Service Users"
To manage profiles and permission sets:	"Manage Profiles and Permission Sets"
To create, edit, and delete page layouts:	"Customize Application"
To set field-level security:	"Manage Profiles and Permission Sets"
	AND
	"Customize Application"

EDITIONS

Available in: Salesforce Classic

Customer Portal is available in: **Enterprise, Performance, Unlimited, and Developer** Editions

Partner Portal is available in: **Enterprise, Performance, and Unlimited** Editions

USER PERMISSIONS

To view the settings:

- "View Setup and Configuration"

To edit the settings:

- "Customize Application"
- AND
- "Modify All Data"

EDITIONS

Available in: Salesforce Classic

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

To set sharing rules:

“Manage Sharing”

 **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities.

Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Managing Customer Portal users is similar to managing regular Salesforce users. General user administration concepts like profiles and page layouts still apply. Review the following advice for managing Customer Portal users:

- [Customer Portal Profiles](#)
- [Customer Portal Sharing Rules](#)
- [Customer Portal Role Hierarchy](#)
- [Customer Portal User Licenses](#)

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

Customer Portal Profiles

The profiles you assign to Customer Portal users define permissions for them to perform different functions within a Customer Portal, such as whether they can view, create, edit, or delete cases and custom object records.

When you enable a Customer Portal, the following profiles are automatically created if you purchased [user licenses](#) for them:

- High Volume Customer Portal
- Authenticated Website
- Customer Portal User
- Customer Portal Manager

The settings on Customer Portal profiles are similar. However, you can grant users with the Customer Portal Manager profile greater access to data via the Customer Portal role hierarchy and sharing rules (neither of which apply to [high-volume portal users](#)). You can also clone and customize each profile to suit the various support requirements of specific customers. You can also use permission sets to grant additional permissions and access settings to Customer Portal users.

Depending on the user licenses you purchased, you can configure Customer Portal profiles for custom objects, [Salesforce CRM Content](#), reporting, and customer support functionality, such as cases and solutions.

 **Important:** For portal users to be able to view their new cases, the **New Cases Visible in Portal** support setting must be selected. From Setup, enter *Support Settings* in the Quick Find box, select **Support Settings**, then select **New Cases Visible in Portal**.

Customer Portal Sharing Rules

After you enable a Customer Portal, the following groups and sharing rule category are created:

Groups and Sharing Rule Category	Description

All Customer Portal Users group	Contains all Customer Portal users, except for high-volume portal users.

Groups and Sharing Rule Category	Description
All Internal Users group	Contains all Salesforce users in your organization.
Roles and Internal Subordinates sharing rule category	Lets you create sharing rules with specific Salesforce users in your organization by role plus all of the users in roles below that role, excluding any Customer Portal and partner portal roles. Because high-volume portal users don't have roles, they aren't included in this or any other sharing rule category.

You can use these groups and the sharing rule category to create sharing rules that:

- Grant Customer Portal or Salesforce users access to specific data (except for high-volume portal users, because you can't include them in any groups or sharing rules)
- Link Customer Portal users and Salesforce users
- Link Customer Portal users from different accounts as long as they have the Customer Portal Manager user license

Customer Portal Role Hierarchy

When you enable a Customer Portal on an account, the system creates a role hierarchy for the account's portal users. The portal roles are unique for each account and include the account's name—or example, "Account A Customer User." In your organization's overall role hierarchy, this account-specific hierarchy is directly below the account owner.

The roles in a portal role hierarchy are fixed. You cannot customize them or add new ones. They are:

- Executive—for contacts
- Manager—for contacts
- User—for contacts
- Person Account—for person accounts

 **Note:** All users in a customer portal role (Executive, Manager, and User roles) have read access to all portal-enabled contacts under their portal account even when the contact sharing model is private.

As you enable customers as Customer Portal users, the system automatically assigns roles based on the [user license](#). Person accounts always have the Person Account role. Contacts with the High Volume Customer Portal or Authenticated Website license do not have a role.

If access to contacts are set to private, high-volume portal users only have access to their own contact and those they are granted access to.

Role hierarchies ensure that portal users from different accounts never see each other's data. Even though high-volume portal users aren't included in role hierarchies, they're restricted from seeing records that aren't associated with their account or contact, and they can only see objects to which they've been [granted access](#). You can, however, create sharing rules so that users with the Customer Portal Manager license from different accounts can see each other's data.

Accounts with different portal types—Customer Portal *and* partner portal—have a separate role hierarchy for each portal. Role names include the portal type with which they are associated. For example, if Account A has both a Customer Portal and a partner portal, then roles for the Customer Portal are named "Account A Customer User" and roles for the partner portal are named "Account A Partner User."

To view the roles assigned to your Customer Portal users, create a custom report, choose Administrative Reports, select Users as the data type, and add `Role` to your report columns. Note that you can't report on roles for high-volume portal users because they don't have roles.

 **Note:** You cannot create a Customer Portal user associated with an account owned by a partner user.

Customer Portal User Licenses

A user license determines the baseline of features that the user can access. Every user must have exactly one user license.

You can assign the following user licenses to Customer Portal users:

- High Volume Customer Portal
- Authenticated Website
- Customer Portal Manager Custom
- Customer Portal Manager Standard (not available for new customers)

These user licenses determine the available Customer Portal profiles. They also determine users' positions in the Customer Portal role hierarchy.

The following table shows the Customer Portal user licenses with their associated profiles and positions in the Customer Portal role hierarchy.

User License	Profiles	Roles and Sharing
High Volume Customer Portal and Authenticated Website Both user licenses are high-volume portal users (Available to purchase)	High Volume Customer Portal or Authenticated Website profile, or a profile cloned and customized from one of these.	High-volume portal users don't have roles. See About High-Volume Portal Users on page 50. Can't share but can transfer records they own. Can't transfer cases from non-high-volume portal users to them. Can't include in: • Personal groups or public groups. • Sharing rules. • Account teams, opportunity teams, or case teams. • Salesforce CRM Content libraries. • High-volume portal users can't access standard Account and Contact detail pages. However, you can create a custom solution, using tools like Visualforce or the API, where they can access those records. Can access custom objects depending on profile settings.
Customer Portal Manager Custom (Available to purchase)	Customer Portal Manager profile or a profile cloned and customized from the Customer Portal Manager profile.	Can assign to either the Executive, Manager, or User role. Can view and edit data they directly own or data owned by or shared with users below them in the Customer Portal role hierarchy; and they can view and edit cases where they are listed in the <code>Contact Name</code> field. Can have data shared to them just like other Salesforce users. • Can access custom objects depending on profile settings. • Can access reports depending on profile settings.

User License	Profiles	Roles and Sharing
		- Can access Salesforce CRM Content depending on feature license and profile settings. See Enabling Salesforce CRM Content in the Customer Portal on page 33. - Can receive the “Portal Super User” and “Delegated External User Administrator” permissions.
Customer Portal Manager Standard	Customer Portal User profile or a profile cloned and customized from the Customer Portal User profile.	Can only assign to either the Executive, Manager, or User role. Can view and edit data they directly own or data owned by or shared with users below them in the Customer Portal role hierarchy; and they can view and edit cases where they are listed in the <code>Contact Name</code> field. Can have data shared to them just like other Salesforce users. - Can access custom objects depending on profile settings. - Can receive the “Portal Super User” permission. - Can access Salesforce CRM Content depending on feature license and profile settings. See Enabling Salesforce CRM Content in the Customer Portal on page 33.  Note: This license is not available for new customers.

 **Note:** Person accounts enabled as Customer Portal users are automatically assigned the Person Account role, which you cannot change. Person accounts are automatically assigned to this role because they include a single user, so multiple roles are not necessary for their account. Furthermore, all person accounts owned by the same user are assigned the same role.

SEE ALSO:

[Setting Up Your Customer Portal](#)

[Delegating Customer Portal User Administration and Portal Super User](#)

[Administrator setup guide: Salesforce Customer Portal Implementation Guide](#)

About High-Volume Portal Users

 **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities. Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

High-volume portal users are limited-access portal users intended for organizations with many thousands to millions of portal users. Unlike other portal users, high-volume portal users don't have roles, which eliminates performance issues associated with role hierarchy calculations. High-volume portal users include both the High Volume Customer Portal and Authenticated Website license types.

EDITIONS

Available in: Salesforce Classic

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

Characteristics

High-volume portal users:

- Are contacts enabled to access a Customer Portal.
- Are assigned to the High Volume Customer Portal or Authenticated Website license.
- Only share the records they own with Salesforce users in the high-volume portal users sharing group.

Access to Records

High-volume portal users can access records if any of the following conditions are met:

- They have “Update” access on the account they belong to.
- They own the record.
- They can access a record’s parent, and the organization-wide sharing setting for that record is Controlled by Parent.
- The organization-wide sharing setting for the object is Public Read Only or Public Read/Write.
- They access the account or contact that they’re enabled under via the API (not via the standard account or contact detail page).

Administrators can create sharing sets to grant high-volume portal users additional access to records; see [Granting High-Volume Portal Users Access to Records](#) on page 53.

Limitations

- High-volume portal users can’t manually share records they own or have access to.
- You can’t transfer cases from non-high-volume portal users to high-volume portal users.
- High-volume portal users can’t own accounts.
- You can’t add case teams to cases owned by high-volume portal users.
- You can’t include high-volume portal users in:
 - Personal groups or public groups.
 - Sharing rules.
 - Account teams, opportunity teams, or [case teams](#).
 - Salesforce CRM Content libraries.
 - High-volume portal users can’t access standard Account and Contact detail pages. However, you can create a custom solution, using tools like Visualforce or the API, where they can access those records.

These limitations also apply to records owned by high-volume portal users.

- You can’t assign high-volume portal users to territories.

SEE ALSO:

[Sharing Records Owned by High-Volume Portal Users to Salesforce Users](#)

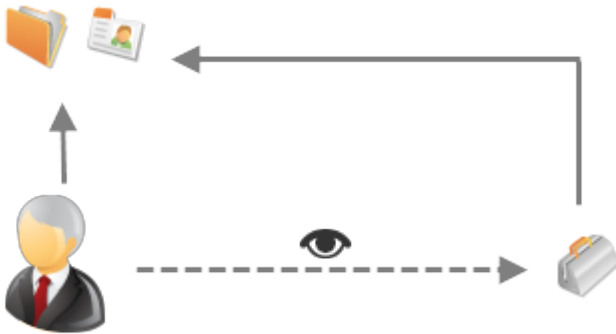
[Granting High-Volume Portal Users Access to Records](#)

[Sharing Set Overview](#)

Sharing Set Overview

Grant portal or community users access to records that are associated with their accounts or contacts using sharing sets, based on their user profiles.

Previously, a sharing set granted access to any record that has a lookup field to an account or contact that matches the user's account or contact. With Spring '14, you can also determine how access is granted using an access mapping in the sharing set, which supports indirect lookups from the user and target record to the account or contact. You can determine the objects to use in the access mapping, and they must both either point to an account or contact.



For example, you might want to use a sharing set if you would like to:

- Grant users access to all cases related to their account or contact record.
- Grant users access to all cases related to a parent account or contact that is identified on the user's account or contact record.

You can use sharing sets to grant access to accounts, contacts, cases, service contracts, users, and custom objects. Sharing sets can be used with these user profiles:

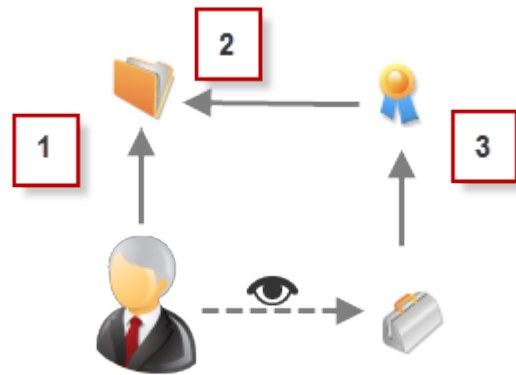
- Authenticated Website
- Customer Community User
- Customer Community Login User
- High Volume Customer Portal
- High Volume Portal
- Overage Authenticated Website User
- Overage High Volume Customer Portal User

The following example shows an access mapping on a sharing set, which grants portal or community users access to all cases associated with the entitlements on their account, even if they are not directly associated with the case.

EDITIONS

Available in: Salesforce Classic

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

**Example:**

1. Account lookup on portal or community user
2. Related account on entitlement
3. Entitlement lookup on case



Note: Portal or community users gain access to all order entitlements and order items under an account to which they have access. To share records owned by high-volume portal users, use a share group instead.

SEE ALSO:

[Granting High-Volume Portal Users Access to Records](#)

[Granting High-Volume Portal or Community Users Access to User Records](#)

Granting High-Volume Portal Users Access to Records

Grant users access to records based on their profiles using sharing sets.



Note: Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities.

Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

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

You can also grant access to records via access mapping in a sharing set, which supports indirect lookups from the user and target record to the account or contact. For example, grant users access to all cases related to an account that's identified on the users' contact records.

1. From Setup, enter *Customer Portal Settings* in the *Quick Find* box, then select **Customer Portal Settings**.
2. In the Sharing Sets related list, click **New** to create a sharing set, or click **Edit** next to an existing sharing set.
3. In the Sharing Set Edit page, fill in the **Label** and **Sharing Set Name** fields. **Label** is the sharing set label as it appears on the user interface. **Sharing Set Name** is the unique name used by the API.
4. Enter a description.
5. Select the profiles of the users to whom you want to provide access.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To grant high-volume portal users access to records:

- "Customize Application"

6. Select the objects you want to grant access to.

The Available Objects list excludes:

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

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

 **Note:** Objects with **Set Up** in the Action column aren't configured for high-volume portal user access. Until you configure an object, high-volume portal users have limited or no access to its records. For more information on access, see [About High-Volume Portal Users](#) on page 50.

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

- Select a value in the User drop-down list to determine the account or contact lookup on the user.
- Select a value in the Target Object field to determine the account or contact lookup on the target object.

For example, to grant access to all cases associated with an account identified on the user's contact record, select `Contact.Account` and `Account` respectively.

 **Note:** Both selected fields must point to either an account or contact. For example, `Contact.Account` and `Entitlement.Account` both point to an account.

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

10. Click **Update**, then click **Save**.

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

SEE ALSO:

[About High-Volume Portal Users](#)

[Sharing Set Overview](#)

Granting High-Volume Portal or Community Users Access to User Records

Grant users access to other users using sharing sets.

 **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities.

Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can create a sharing set to grant high-volume portal users access to internal users or other users in the same portal, enabling them to see or edit the target user records.

With Spring '14, you can also grant access to users in other portals through an indirect lookup to an account or contact.

To grant access to selected users in the same portal, you would typically create a sharing set if you deselected the `Portal User Visibility` checkbox on the Sharing Settings page.

To create a sharing set to grant access to other users:

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To grant high-volume portal users access to records:

- "Customize Application"

1. From Setup, enter *Customer Portal Settings* in the *Quick Find* box, then select **Customer Portal Settings**.
2. In the Sharing Settings for High-Volume Portal Users related list, click **New** to create a sharing set, or click **Edit** next to an existing sharing set.
3. In the Sharing Set Edit page, fill in the **Label** and **Sharing Set Name** fields. **Label** is the sharing set label as it appears on the user interface. **Sharing Set Name** is the unique name used by the API.
4. Select the profiles of the users you want to have access.
5. Select the User object.
Target users can be other high-volume portal or community users or internal users.
6. In the Configure Access section, click **Set Up** or **Edit** next to the User object to configure access for the selected profiles, or click **Del** to remove access settings for an object.
7. Grant access based on an account or contact lookup:
 - Select a value in the User drop-down list to determine the account or contact that's related to the user, either by a direct lookup or indirect lookup via an intermediate object.
 - Select a value in the Target User drop-down list to determine the account or contact that's related to the target user, either by a direct lookup or indirect lookup via an intermediate object.

For example, to grant access to target users associated with another account identified on the user's account record, select *Account.Parent* and *Account* respectively.



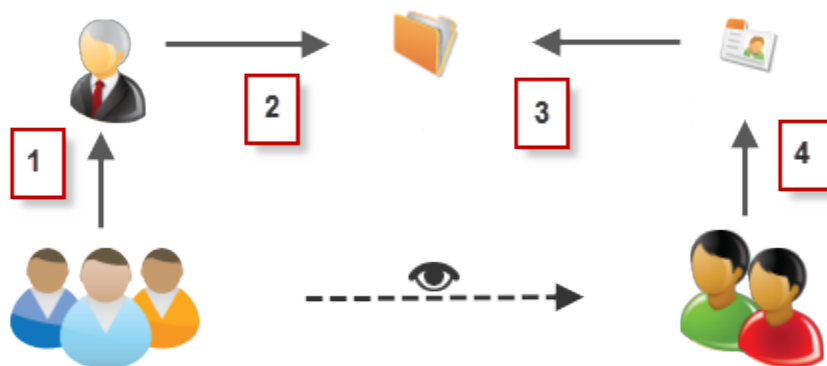
Note: Both selected fields must point to either an account or contact. For example, *Account.Parent* and *Contact.Account* both point to an account.

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

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



Example: The following example grants your portal users access to users whose contacts are related to the accounts identified on the portal users' managers records. In other words, the account field on the portal user's manager record must match the account field identified on the target user's contact



record.

1. Manager lookup on portal user
2. Account lookup on manager
3. Account lookup on contact

4. Contact lookup on target user

In this example, to grant access to the target users, you would select *Manager.Account* and *Contact.Account* in the User and Target User drop-down list respectively.

SEE ALSO:

[Sharing Set Overview](#)

Sharing Records Owned by High-Volume Portal Users to Salesforce Users

-  **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities.
- Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

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

To specify the Salesforce users who can access records owned by high-volume portal users:

1. From Setup, enter *Customer Portal Settings* in the **Quick Find** box, then select **Customer Portal Settings**.
2. Click the name of a Customer Portal.
3. Click the Share Group Settings subtab.
4. Click **Activate** to turn on the share group.

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

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

5. Click **Edit** to add Salesforce users to the share group:
 - a. From the **Search** drop-down list, select the type of member to add.
 - b. If you don't see the member you want to add, enter keywords in the search box and click **Find**.
 - c. Select members from the Available Members box, and click **Add** to add them to the group.
 - d. Click **Save**.

SEE ALSO:

[About High-Volume Portal Users](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To share records owned by high-volume portal users to Salesforce users:

- "Customize Application"

Viewing Sharing Sets for High-Volume Portal Users

 **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities. Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Administrators can create sharing sets to grant high-volume portal users access to objects based on their profiles. To view detailed information about a sharing set:

1. From Setup, enter *Customer Portal Settings* in the *Quick Find* box, then select **Customer Portal Settings**.
2. In the Sharing Settings for High-Volume Portal Users related list, click the name of a sharing set. The Sharing Set detail page shows the profiles included and the access granted to objects in the set. On this page, you can do any of the following:
 - To edit the sharing set, click **Edit**.
 - To remove the sharing set, click **Delete**.
 - To view the details of an included profile, click its name.
 - To change or remove access settings for an object, click the **Edit** or **Del** link next to the object name.

SEE ALSO:

- [About High-Volume Portal Users](#)
- [Granting High-Volume Portal Users Access to Records](#)

Customer Portal Access

Configuring User Access to the Customer Portal

USER PERMISSIONS	
To set up the Customer Portal:	"Customize Application"
To manage Customer Portal users:	"Edit Self-Service Users"
To create, edit, and delete profiles:	"Manage Profiles and Permission Sets"
To set default sharing access and sharing rules:	"Manage Sharing"
To enable Customer Portal users:	"Edit Self-Service Users"

 **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities. Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To grant high-volume portal users access to records:

- "Customize Application"

EDITIONS

Available in: Salesforce Classic

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

When setting up a Salesforce Customer Portal for the first time, configure the following before enabling users to access your portal:

1. Set up your portal as described in [Setting Up Your Customer Portal](#).
2. Assign Customer Portal profiles to a portal:
 - a. Select the name of a portal from the Customer Portal Setup page.
 - b. Click **Edit Profiles** in the Assigned Profiles section.
 - c. Select the **Active** checkbox next to the profile you want to assign to the portal.Portal users can only log into Customer Portals assigned to their profile. If you are [creating multiple portals](#), you must assign profiles to each portal you want users to access.
3. Set the organization-wide defaults in your organization's sharing model to Private on accounts, contacts, contracts, assets, and cases. This ensures that portal users can only view and edit data related to their accounts.



Tip: To maintain Public organization-wide default behavior for Salesforce users, while ensuring that portal users can only view and edit data related to their accounts, you can create self-referencing sharing rules of "All Internal Users" to "All Internal Users".

4. Optionally, set sharing rules for portal users (except for high-volume portal users). This lets you share records between portal users and Salesforce users or vice versa.



Note: If your organization uses sharing rules that share to Roles, Internal and Portal Subordinates, then update those sharing rules to share to Roles and Internal Subordinates instead. This is to help ensure that no records owned by a Salesforce user are accidentally shared with a portal user.

The Roles and Internal Subordinates data set category allows you to create sharing rules that include all users in a specified role plus all users in roles below that role, excluding any Customer Portal and partner portal roles.

You can easily convert sharing rules that include Roles, Internal and Portal Subordinates to include Roles and Internal Subordinates instead by using the Convert Portal User Access wizard. Furthermore, you can use this wizard to convert any publicly accessible report, dashboard, and document folders to folders that are accessible by all users except for portal users.

5. Verify that portal users are not added to any queues and are not included in any public groups added to queues. This is because portal users added to queues may be able to access records from accounts to which they are not related.
6. Optionally, add the Welcome component to home page layouts assigned to portal users.

The Welcome component allows portal users to receive a welcome message with their name, plus the ability to change their own portal username, password, locale, language, time zone, and contact information. For details, see [Setup Tips and Considerations for Customer Portal Pages](#) on page 41.

7. Optionally, allow contacts to register themselves for access to your portal. See [Enable Customer Portal Login and Settings](#) on page 21.

SEE ALSO:

[About Customer Portal User Management](#)

[Administrator setup guide: Salesforce Customer Portal Implementation Guide](#)

Enable the Customer Portal for Contacts and Person Accounts

To allow a customer to access your Salesforce customer portal, enable the customer's contact or person account record as a customer user.

1. From a contact or person account detail page, click **Manage External User**, and then select **Enable Customer User**.
2. Verify the general information and locale settings, and enter any missing information. The customer's **Username** defaults to the customer's **Email**.
3. Select a portal user license. The user license that you choose determines the permission sets, user profile, and role hierarchy options that you can select for the customer user. See [Customer Portal User Licenses](#) on page 49.
4. Select **Generate new password and notify user immediately** to email a customer portal username and password to the customer.

If your Salesforce org uses multiple customer portals, customer users can access all customer portals that are assigned to their profiles with a single username and password. See [Creating Multiple Customer Portals](#) on page 20.
5. Click **Save**.
6. To troubleshoot or confirm the portal configuration, on the contact detail page, click **Manage External User**, and then choose **Log in to Portal as User**. A new browser window opens and logs you in to the portal as the partner user.

You can [deactivate customer users](#) as needed.

SEE ALSO:

[About Customer Portal User Management](#)

Roles Per Customer Portal Account

-  **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities.
- Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can set the default number of roles for Customer Portal accounts. This benefits your customer portal by reducing the number of unused roles for Customer Portal accounts. You must have a Customer Portal enabled to use this functionality.

For example, if you currently have three roles created when an account is enabled for your Customer Portal, but only need one role for new accounts, you can reduce the number of roles to one. You can set up to three roles for Customer Portal accounts. The default number of roles for Customer Portal accounts is three.

To set the number of roles per Customer Portal account:

1. From Setup, enter *Customer Portal Settings* in the **Quick Find** box, then select **Customer Portal Settings**.
2. Click **Set number of roles per Portal Account**.
3. Click **Edit**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable customer users or to log in as a portal user:

- "Edit" on the account that's associated with the customer user
- AND
- "Edit Self-Service Users"

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set the number of roles per portal account:

- "Customize Application"

4. In the **Number of Roles** drop-down list, set your default number of roles per Customer Portal account.

5. Click **Save**.

The number of roles for existing portal accounts doesn't change with this setting.

SEE ALSO:

[Enable the Customer Portal for Contacts and Person Accounts](#)

Disabling and Deactivating Portal Users

 **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities. Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

There are two ways in which you can remove a customer's access to your Salesforce Customer Portal or partner portal. As described in detail below, *disabling* a portal user is permanent, while *deactivating* a portal user is not:

Disabling a portal user

Disabling a portal user includes the following actions:

- Termination of the user's access to your portal
- Removal from all groups, teams, and sharing rules with which the user is associated.
- Permanent loss of the portal user's association with the contact

If you later re-enable a contact for portal access, a new portal user is created that is not related to the previous portal user record in any way.

- The **Role** on the portal user record is removed.
- For partner users, the partner user role becomes obsolete. As a result:
 - The user's data no longer rolls up to the partner account owner role
 - Opportunities owned by that user are removed from your organization's forecast hierarchy

 **Note:** Before disabling a partner user, we recommend transferring opportunities owned by that user to an active user.

We recommend disabling a portal user if:

- A contact was accidentally enabled as a portal user
- The portal user is associated with a duplicate contact
- You do not want a contact to access the portal in the future

 **Note:** Salesforce doesn't delete user records, including portal user records. While you can't re-enable a disabled portal user, you can view and update the record for a disabled user in Setup by entering *Users* in the **Quick Find** box, then selecting **Users**.

EDITIONS

Available in: Salesforce Classic

Customer Portal is available in: **Enterprise, Performance, Unlimited, and Developer** Editions

Partner Portal is available in: **Enterprise, Performance, and Unlimited** Editions

USER PERMISSIONS

To disable or deactivate Customer Portal users:

- "Edit" on the account associated with the Customer Portal user
- AND
- "Edit Self-Service Users"

To disable or deactivate partner portal users:

- "Edit" on the account associated with the partner portal user
- AND
- "Manage External Users"

Deactivating a portal user

Deactivating a portal user prevents that user from logging into your portal and gives you the option to remove the user from any teams in which he or she is a member (for example, [case teams](#) and account teams). When you deactivate a portal user, the portal user record does *not* permanently lose its association with the contact. You can reactivate the portal user at any time.



Note: When a delegated external user admin deactivates a portal user, the admin doesn't have the option to remove the portal user from teams that user is a member of.

We recommend deactivating a portal user if you may reactivate the portal user in the future.

If a user on an account team has Read/Write access (**Account Access**, **Contact Access**, **Opportunity Access**, and **Case Access**) and is deactivated, the access will default to Read Only if the user is reactivated.

Disabling a Portal User

To disable a portal user:

1. On the contact detail page, click **Manage External User** and choose either **Disable Customer User** or **Disable Partner User**. On the account detail page of a person account, click **Manage External Account** and choose **Disable Customer Account**.

Person accounts are not available for the partner portal.

2. Click **OK**.

Deactivating a Portal User

To deactivate a portal user:

1. For the Customer Portal, click **Manage External User** and choose **View Customer User** on the contact or person account detail page. For the partner portal, click **Manage External User** and choose **View Partner User** on the contact detail page.

Person accounts are not available for the partner portal.

2. Click **Edit**, and deselect the **Active** checkbox.

To reactivate a portal user at any time, select the **Active** checkbox.

3. Click **Save**.



Note: You can't mass deactivate portal users.

Tips on Disabling and Deactivating Portal Users

Consider the following when disabling or deactivating portal users (*disabling* is permanent; *deactivating* is not):

- You can't delete an active portal user; you can only disable or deactivate his or her access to the portal.
- The following table describes whether you can delete contacts that are associated with portal users:

State of Portal User Associated to Contact	Can You Delete the Contact?
Active portal user	No. This is to ensure that the contact is available if you choose to reactivate the portal user.
Inactive portal user	No. This is to ensure that the contact is available if you choose to reactivate the portal user.
Disabled portal user	Yes. Deleted contacts are sent to the Recycle Bin.

- To delete a portal-enabled contact, first disable the portal user, then delete the contact.
- Cases associated with a portal user are not updated in any way when you disable or deactivate the portal user. For example, if a portal user owns a case, and the portal user is disabled, he or she remains the owner of the case until the case is updated with a new owner.
- Before you disable a partner user, we recommend that you transfer any opportunities owned by the user to another user who will remain active. This is because when you disable a partner user, any opportunities he or she owns are removed from your organization's forecast hierarchy (the partner user's role becomes obsolete).
- After you disable a portal user, it may take Salesforce up to ten seconds to disable the user. During that time, a portal user may still perform actions on a portal.
- You can remove the **Disable Customer User** and **Disable Partner User** buttons from contact page layouts at any time. Doing so would prevent users with the "Edit Self-Service Users" or "Manage External Users" permissions from disabling portal users.
- A disabled or deactivated portal user does not count against your organization's available user licenses. However, disabling or deactivating a portal user does not reduce the number of licenses for which your organization is billed; you must change your organization's license count to change your billing.
- To disable *all* portal users associated with an account and permanently delete all of the account's portal roles and groups:
 - Click **Manage External Account** and choose **Disable Partner Account** on a partner portal account.
 - Click **Manage External Account** and choose **Disable Customer Account** on a Customer Portal account or Customer Portal person account.

You can remove the **Disable Customer Account** and **Disable Partner Account** buttons from account page layouts at any time. Doing so would prevent users with the "Edit Self-Service Users" or "Manage External Users" permissions from disabling portal accounts.

- When you disable a portal user or portal account, the change is tracked in the setup audit trail.
- Portal roles are not removed from disabled portal users associated with person accounts. However, you can remove the portal roles manually:
 1. From Setup, enter *Users* in the **Quick Find** box, then select **Users**.
 2. Select the name of a disabled portal user.
 3. Click **Edit**.
 4. Select **None** from the **Role** drop-down list.
 5. Click **Save**.

SEE ALSO:

[Enable the Customer Portal for Contacts and Person Accounts](#)

Disabling Customer Accounts

Disabling a customer account disables external users associated with the account. We recommend disabling a customer account only if the account was accidentally enabled.

You can't delete customer accounts, but you can disable them. Disabling the account permanently disables up to 100 external users associated with the account and removes them from all communities, groups, teams, permission sets, and sharing rules that they're associated with. This includes both active and inactive external users. Additionally, roles and groups associated with the account are permanently deleted and you won't have the option to restore them from the Recycle Bin.

 **Note:** You can't disable an account if there are more than 100 active or inactive external users associated with it. You must disable the users before disabling the account.

- 1. Go to the Account detail page for the account you want to disable.
- 2. Click **Manage External Account**, then click **Disable Customer Account**.
- 3. Click **OK** to confirm.

If you decide to re-enable the account in the future, you can re-enable individual contacts as Customer Portal users. Re-enabling a contact for a Customer Portal creates a new customer portal user record and role that is not associated with the previous customer portal user record and role. You can't restore deleted roles and groups.

Editing Customer Portal User Information

USER PERMISSIONS

To manage Customer Portal users:	"Edit Self-Service Users"
To manage profiles and permission sets:	"Manage Profiles and Permission Sets"
To create, edit, and delete page layouts:	"Customize Application"
To set field-level security:	"Manage Profiles and Permission Sets" AND "Customize Application"
To set sharing rules:	"Manage Sharing"

 **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities.

Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can edit Salesforce Customer Portal user information for contacts associated with accounts you have permission to access. To edit information for a Customer Portal user:

- 1. From Setup, enter *Users* in the *Quick Find* box, then select **Users**.
- 2. Click **Edit** next to a user's name.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view accounts:

- "Read" on accounts

To create or disable accounts:

- "Create" on accounts

To enable a customer account:

- "Manage External Users"

EDITIONS

Available in: Salesforce Classic

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

3. Change the necessary information and click **Save**.

Tips for Editing Customer Portal User Information

Consider the following when editing Customer Portal user information:

- Create a custom list view to display only Customer Portal users by filtering on the Customer Portal Manager and Customer Portal User license types. For example, use the criteria “License Type equals Customer Portal User, Customer Portal Manager.”
- When generating a new password for a user, the new password is automatically sent to the user’s email address and email verification is not enforced.
- When changing a user’s email address to a new email address, email confirmation isn’t enforced.
- Include the Customer Portal Welcome component on home page layouts assigned to Customer Portal users so that, upon logging in to the portal, they receive a welcome message with their name. From the component, a user can change their own portal username, password, locale, language, time zone, and contact information. When portal users change information about themselves, their user record is updated but their contact record is not automatically updated with those changes.

SEE ALSO:

[About Customer Portal User Management](#)

[Disabling and Deactivating Portal Users](#)

Resetting Customer Portal User Passwords

-  **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities. Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

If a Salesforce Customer Portal user loses his or her password, the user can click the **Forgot your password?** link on the Customer Portal login page to have a new password emailed to him or her.

To reset a Customer Portal user's password:

1. From Setup, enter *Users* in the **Quick Find** box, then select **Users**.
2. Select the checkbox next to the user's name. Optionally, to change the passwords for all currently displayed users, check the box in the column header to select all rows.
3. Click **Reset Password**. The user receives an email that contains a link and instructions to reset the password.

-  **Tip:** You can include the Customer Portal Welcome component on home page layouts assigned to Customer Portal users. Each Customer Portal user who logs in to your portal receives a welcome message with his or her name. The users can also change their own portal username, password, locale, language, time zone, and contact information. When portal users change information about themselves their user records are updated but their contact records aren't automatically updated with those changes.

SEE ALSO:

[About Customer Portal User Management](#)

EDITIONS

Available in: **Salesforce Classic**

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

USER PERMISSIONS

To reset Customer Portal users' passwords:

- “Edit Self-Service Users”

Delegating Customer Portal User Administration and Portal Super User

 **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities. Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can delegate some administrative rights to Customer Portal users with the Customer Portal Manager Custom user license. Delegated external user administrators can do the following for external users, including both customer users and partner users, associated with their own account:

- Create new external users
- Edit existing external users
- Reset passwords for external users
- Deactivate existing external users

 **Note:** When a delegated external user admin deactivates a portal user, the admin doesn't have the option to remove the portal user from teams that user is a member of.

Delegated external user administrators can also view their account's detail page, along with contacts and cases related to their account via the Accounts tab. In addition, delegated external user administrators receive the "Portal Super User" permission. This permission lets delegated external user administrators do the following for their own account:

- View, edit, and transfer all cases
- Create cases for contacts
- View and edit all contacts, whether portal enabled or not
- View account details when they're the contact on a case
- Report on all contacts, whether portal enabled or not, if the Reports tab is added to your Customer Portal and the user has the "Run Reports" permission

You can add just the "Portal Super User" permission to the profiles of external users (except for high-volume portal users) so that they have access to their account and can view and edit all of its cases and contacts without having the ability to manage other external users. However, super users can't view the Contacts tab on the Customer Portal without the Delegated External User Administrator permission. To edit contacts, super users must select a contact from a case record. For more information, see:

- [Delegating External User Administration Rights](#)
- [Providing Users with the "Portal Super User" Permission](#)
- [Tips on Setting Up Delegated Customer Portal User Administration](#)

Delegating External User Administration Rights

 **Note:** You must use the original profile user interface to delegate administration rights for external users. If you're using the enhanced profile user interface, disable it temporarily in the User Interface settings to complete this procedure.

To delegate External User Administration Rights:

1. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles** and click a custom Customer Portal profile.

You can't add delegation rights or the "Portal Super User" permission to the standard Customer Portal Manager, Customer Portal User, or High Volume Customer Portal profiles.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To manage Customer Portal users:

- "Delegated External User Administrator"

To create, edit, and delete profiles:

- "Manage Profiles and Permission Sets"

To view and edit all cases and contacts for an account:

- "Portal Super User"

2. Click **Edit**.
3. Select **Delegated External User Administrator**.

When you select **Delegated External User Administrator**, the **Portal Super User** is automatically selected after you click **Save**.

4. Click **Save**.
5. In the Delegated External Users Profiles related list, click **Edit**.
6. Select the external user profiles you want users with this profile to be able to administer. An external user delegated administrator can manage external users with Customer Portal, partner portal, or Communities profiles, as long as the users with the profile are under the same account.
7. Click **Save**.

To change which profiles a delegated Customer Portal user administrator can edit:

1. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles** and click a custom Customer Portal profile.
2. Click **Edit** in the Delegated External User Profiles related list.
3. Select the external user profiles you want this profile to be able to administer.
4. Click **Save**.

Delegated Customer Portal administrators can perform the following tasks from a contact's detail page:

- Click **Enable Customer Portal User** to allow a contact to use a Customer Portal.
- Click **View Customer Portal User** to view the Customer Portal user's details. From a Customer Portal user's detail page, delegated Customer Portal users can:
 - Click **Edit** to edit a Customer Portal user's details.
 - Click **Reset Password** to reset the Customer Portal user's password.
 - Click **Edit** and deselect the **Active** checkbox to deactivate the user.

Providing Users with the "Portal Super User" Permission

To provide users with the "Portal Super User" permission:

1. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles** and click a custom Customer Portal profile.
You can't add the "Portal Super User" permission to the standard Customer Portal Manager, Customer Portal User, or High Volume Customer Portal profiles.
2. Click **Edit**.
3. Select **Portal Super User**.
4. Click **Save**.



Tip: To report on profiles with the "Portal Super User" permission:

1. Note the names of profiles with the "Portal Super User" permission.
2. Select the Reports tab.
3. From the Administrative Reports folder, select the All Active Users report.

Tips on Setting Up Delegated Customer Portal User Administration

Consider the following when setting up delegated Customer Portal User Administration:

- On the profile of users you are granting delegated portal administration:
 - Add the “Create” and “Edit” permissions on contacts so that delegated portal administrators and users with the “Portal Super User” permission can create and update contacts related to their account.
 - Set the Accounts and Contacts tab settings to Default On so that delegated portal administrators can view the Accounts and Contacts tabs and easily manage contacts related to their accounts.
- Add the Accounts and Contacts tabs to your Customer Portal.
- Set field-level security and page layouts so that delegated Customer Portal user administrators and portal super users can only access the account, contact, and case fields you specify.



Note: To allow portal super users to create cases for contacts other than themselves, set the field-level security on the `Contact Name` field on cases to Editable.

- Customer Portal users are prevented from viewing related lists to objects they don't have access to. For example, if a Customer Portal user views a contact, and the contact page layout includes the Opportunities related list, the portal user can't view the Opportunities related list because portal users don't have access to opportunities.
- Delegated Customer Portal user administrators can update portal users on any account to which they are transferred.

SEE ALSO:

[About Customer Portal User Management](#)

Customer Portal Health

Portal Health Check

Your customers and partners can access your information via portals in many ways. With portal health check reports, you can easily monitor this access. Portal health check reports show your security-related portal settings and provide information you can use to improve portal security.

Customer Portals and partner portals let you collaborate with and provide services to your customers and partners. With portals, you share and capture information from third-party users. To ensure that you don't expose more information than intended, it's important to follow best practices for portal implementation.



Note: Portal health check reports show sensitive user permissions, object permissions, and field permissions granted through profiles, as well as organization-wide sharing settings and sharing rules. Your portal users can also access records via the following means, which aren't included in portal health check reports.

- Permission sets
- Manual sharing
- Apex managed sharing
- Territories
- List views
- Groups
- Queues
- Teams
- Content libraries

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view portal health check reports:

- “Customize Application”
- AND
- “Manage Users”
- AND
- “Modify All Data”

- Folders

To view portal health check reports, from Setup enter *Portal Health Check* in the **Quick Find** box, then select **Portal Health Check**. Lastly, click the report you want.

The following reports are included:

- Administrative and User Permissions
- Object Access and Field-Level Security
- Sharing Organization-Wide Defaults
- Sharing Rules

 **Note:** The portal health check reports don't include information for criteria-based sharing, high-volume portal users, or Self-Service portal users.

SEE ALSO:

[View the Administrative and User Permissions Report for Portal Users](#)

[View the Object Access and Field-Level Security Report for Portal Users](#)

[View the Sharing Organization-Wide Defaults Report for Portal Users](#)

[View the Sharing Rules Report for Portal Users](#)

View the Administrative and User Permissions Report for Portal Users

User permissions are powerful, as they expand users' access to data. It's important to use caution when setting permissions for a profile. Use the Administrative and User Permissions report—one of the portal health check reports—to see portal profiles and their critical permission settings.

 **Note:** This report doesn't show permissions granted through permission sets.

For each profile, the report lists the number of portal users assigned to it and the following permission settings:

- Delegated External User Administrator
- Send Email
- Convert Leads
- Edit Events
- Edit Opportunity Product Sales Price
- Edit Tasks
- Transfer Cases
- Portal Super User
- API Enabled
- Password Never Expires
- Create Libraries
- View Content in Portals
- Export Reports
- Run Reports

 **Note:** Depending on your organization's settings, some permissions won't appear in the report.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view portal health check reports:

- "Customize Application"
- AND
- "Manage Users"
- AND
- "Modify All Data"

To view this report:

1. From Setup, enter *Portal Health Check* in the **Quick Find** box, then select **Portal Health Check**.
2. Click **Administrative and User Permissions**.

From the report page, you can:

- View a profile detail page by clicking the profile name.
- Show a filtered list of items by selecting a predefined view from the drop-down list.
- Return to the list of reports by clicking **Back to list: Portal Health Check Reports**.

SEE ALSO:

[Portal Health Check](#)

View the Object Access and Field-Level Security Report for Portal Users

Object permissions specify the access that users have to standard and custom objects. It is important to monitor this information for portal user profiles to ensure that portal users have access to only the appropriate objects and fields. The Object Access and Field-Level Security report—one of the portal health check reports—allows you to do just that.

The Object Access and Field-Level Security report shows how many portal profiles can access each standard and custom object in your organization. For each object, it also lists the number of portal users with access, the object access level, and the fields that are visible to those users.

 **Note:** The Object Access and Field-Level Security report doesn't show permissions granted through permission sets.

To view this report:

1. From Setup, enter *Portal Health Check* in the **Quick Find** box, then select **Portal Health Check**.
2. Click **Object Access and Field-Level Security**.
3. From the report page, click an object name.

On the object detail page, you can:

- View a profile detail page by clicking the profile name.
- View a profile's field-level security detail page by clicking **visible fields**.
- Return to the high-level object access and field-level security report by clicking **Object Access and Field-Level Security**.

From both report pages, you can:

- Show a filtered list of items by selecting a predefined view from the drop-down list.
- Return to the list of reports by clicking **Back to list: Portal Health Check Reports**.

SEE ALSO:

[Portal Health Check](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view portal health check reports:

- "Customize Application"
AND
"Manage Users"
AND
"Modify All Data"

View the Sharing Organization-Wide Defaults Report for Portal Users

The Sharing Organization-Wide Defaults report—one of the portal health check reports—lists standard and custom objects and the default access setting for each object. You can use this report to review and edit the organization-wide default settings that expose records to portal users.

Organization-wide default settings specify each object's default access level for users in your organization. If an object's default access level is Public, users with enabled object permissions ("Read," "Create," "Edit," or "Delete") may be able to access records that they don't own. For example, if the default access setting for the account object is Public Read/Write, then any user with the "Read" permission on the account object can view any account record. When setting organization-wide defaults, you want to make sure you don't let portal users see objects they shouldn't access.

To view this report:

1. From Setup, enter *Portal Health Check* in the **Quick Find** box, then select **Portal Health Check**.
2. Click **Sharing Organization-Wide Defaults**.

The report lists the default access setting for each object. If an object's default access is Public, Show Details (for calendar), or Use (for price book), portal users with object permissions can access other users' records. In this case, the Security column indicates a weak organization-wide default setting. You can view the specific object permissions granted to portal profiles in the [Object Access and Field-Level Security report](#).

If the object's default access is Private, Hide Details (for calendar), or No Access (for price book), the Security column indicates a strong organization-wide default setting.

 **Note:** Even with a strong organization-wide default setting, portal users may have access to other users' records through exceptions such as sharing rules.

If **Grant Access Using Hierarchies** is checked, any user above a record owner in a territory or role hierarchy can access the owner's records for that object.

From the report page, you can:

- Change the organization-wide sharing settings for any object by clicking **Edit**, then changing the settings on the Organization-Wide Sharing Defaults Edit page.
- Show a filtered list of items by selecting a predefined view from the drop-down list.
- Return to the list of reports by clicking **Back to list: Portal Health Check Reports**.

SEE ALSO:

[Portal Health Check](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view portal health check reports:

- "Customize Application"
- AND
- "Manage Users"
- AND
- "Modify All Data"

To set default sharing access:

- "Manage Sharing"

View the Sharing Rules Report for Portal Users

The Sharing Rules report—one of the portal health check reports—lists all sharing rules that give portal users access to records they don't own. It shows how many portal users can access records as a result of each sharing rule, and lets you edit access levels for each rule. For some user sets (like groups, roles, and territories), you can drill down to detail pages, and edit, delete, or manage the users in the set.

To view this report:

1. From Setup, enter *Portal Health Check* in the **Quick Find** box, then select **Portal Health Check**.
2. Click **Sharing Rules**.

The Number of Portal Users Affected column shows the number of portal users who can get access as a result of the sharing rule. This number includes users specified in the rule and, if **Grant Access Using Hierarchies** is enabled for the object, any portal users above them in the role or territory hierarchy. If any users in this set have enabled object permissions ("Read," "Create," "Edit," or "Delete"), they can access records exposed by the rule.



Note:

- The Sharing Rules report doesn't include criteria-based sharing rules.
- The Sharing Rules report doesn't check portal users' object permissions. You can view the specific object permissions granted to portal profiles in the [Object Access and Field-Level Security report](#).

From the report page, you can:

- Change the access level in a sharing rule by clicking **Edit**, then changing the settings on the sharing rule edit page.
- View the details of a user set in a sharing rule by clicking the link in the Owned By or Shared With column.
- Show a filtered list of items by selecting a predefined view from the drop-down list.
- Return to the list of reports by clicking **Back to list: Portal Health Check Reports**.



Note: Account and account territory sharing rules can grant access to contacts, opportunities, and cases associated with the shared accounts. The Sharing Rules report shows access levels only for top-level objects, not associated objects.

SEE ALSO:

[Portal Health Check](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view portal health check reports:

- "Customize Application"
- AND
- "Manage Users"
- AND
- "Modify All Data"

To create and edit sharing rules:

- "Manage Sharing"

Self-Service Portal

Self-Service Jump Start

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

Get your Self-Service portal running quickly using the **Jump Start** button. It automates the setup process by choosing some default settings for you.

 **Note:** You can't save any JavaScript as part of your custom code, and [can only use certain HTML elements and attributes](#).

1. From Setup, enter *Self-Service Portal* in the Quick Find box, select **Settings**, then click **Jump Start**.
2. Review the process and click **Continue**.
3. Choose a color theme.
4. Edit the default settings as needed and click **Save**.
5. Test your Self-Service portal by:
 - a. Clicking **Generate** to retrieve a test username and password.
 - b. Clicking **Access Self-Service Portal** to preview your pages.
 - c. Optionally, click **Invite** to notify other users how to log in and preview your pages.
6. Enable your Self-Service portal by copying the link provided in the **Enable Self-Service...** section to an appropriate place on your website.
7. Click **Done** when finished.
8. Enable your customers to use your Self-Service portal. See [Managing Self-Service Users](#) on page 94.

 **Tip:** To make changes to your settings, see [Enable Self-Service Features and Settings](#) on page 74. The Self-Service Jump Start automatically enables the **Enable Self-Service** button on contact detail pages.

SEE ALSO:

[Setting Up Self-Service](#)

[Administrator tip sheet: Getting the Most from Your Self-Service Portal](#)

[Administrator setup guide: Self-Service Implementation Guide](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To use Self-Service Jump Start:

- "Manage Self-Service Portal"

Setting Up Self-Service

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

Self-Service provides an online support channel for your customers - allowing them to resolve their inquiries without contacting a customer service representative.

Setting up your Self-Service portal is simple. Choose from two setup options:

- **Jump Start** - Gets you up and running quickly; see [Self-Service Jump Start](#) on page 72.
- **Self-Service Setup** - Complete setup which allows you more customization. The setup consists of:
 - [Enable Self-Service Features and Settings](#) on page 74
 - [Customizing Your Self-Service Look and Feel](#) on page 77
 - [Customizing Your Self-Service Fonts and Colors](#) on page 78
 - [Customizing Your Self-Service Pages](#) on page 79
 - [Generating Login HTML](#) on page 93
 - [Managing Self-Service Users](#) on page 94

See [Preparation for Setting Up Your Portal](#) to learn more about implementing Self-Service.

SEE ALSO:

[Self-Service Jump Start](#)
[Customizing Your Self-Service Look and Feel](#)
[Customizing Your Self-Service Fonts and Colors](#)
[Administrator tip sheet: Getting the Most from Your Self-Service Portal](#)
[Administrator setup guide: Self-Service Implementation Guide](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To use Self-Service Jump Start:

- "Manage Self-Service Portal"

To set up the Self-Service portal:

- "Manage Self-Service Portal"

To modify Self-Service pages:

- "Manage Self-Service Portal"

AND

"Customize Application"

Enable Self-Service Features and Settings

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

1. From Setup, enter *Self Service Portal* in the **Quick Find** box, then select **Settings**.
2. Click **Self-Service Setup** on the Self-Service Settings page.
3. Set the following options:

Setting	Description
Login Enabled	Allows users to log into the Self-Service portal.
Edit Self-Service Users	Displays the Enable Self-Service button on contact detail pages. Or, for contacts in which Self-Service is already enabled, the View Self-Service button displays.
Logout URL	The URL of the web page that will be displayed when users log out of the Self-Service portal, for example, <code>http://www.acme.com</code> . If a logout URL is not specified, the Logout button does not display to users.
Default Case Origin	The default origin assigned to all cases submitted via the Self-Service portal. Available values are taken from your organization's Case Origin picklist. You can assign different default origins for cases submitted via Self-Service and Web-to-Case.
New Cases Visible in Portal	Automatically selects the Visible in Self-Service Portal checkbox for all new cases, including cases created via Web-to-Case, Email-to-Case, and On-Demand Email-to-Case. Regardless of this default, users creating new cases can manually set the Visible in Self-Service Portal checkbox.
Enable Solution Browsing	Enables solution categories in the Self-Service portal so that customers can browse solutions by category. If multilingual solutions is enabled, you can translate solution categories.
Top-Level Category for Self-Service Portal	The top-level category accessible by customers in the Self-Service portal. Customers can view all solutions marked

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up the Self-Service portal:

- "Manage Self-Service Portal"

To modify Self-Service pages:

- "Manage Self-Service Portal"

AND

"Customize Application"

Setting	Description
	Visible in Self-Service Portal in this category and its subcategories. Leave this blank to let customers view all solutions marked Visible in Self-Service Portal in all categories.
Case Record Type	The record type to assign to any case submitted via the Self-Service portal.
"From" Email Address	The email address from which all new user and password emails will be sent, for example, support@acme.com. When this field is blank, Salesforce uses: • The Automated Case User's email address for users who receive an email with a temporary password by clicking Forgot your password? on the Login Page of the Self-Service portal. The Automated Case User is specified on the Support Settings page in Setup. • The email address of the user who last posted a comment for users who receive a case comment notification email.
"From" Email Name	The name that will be associated with the "From" Email Address, for example, "Acme Customer Support." When this field is blank, Salesforce uses: • Your organization's name for users who receive an email with a temporary password by clicking Forgot your password? on the Login Page of the Self-Service portal. • The name of the user who last posted a comment for users who receive a case comment notification email.
New User Template	The email template used to send a username and initial password to all newly-enabled Self-Service users. Self-Service automatically selects a sample template for you, but you can modify the sample or create your own email template. This template must be marked as "Available for Use."
New Password Template	The email template used to send a new password to existing Self-Service users when you reset their passwords or when they reset their own passwords by clicking Forgot your password? on the Login Page of the Self-Service portal. Self-Service automatically selects a sample template for you, but you can modify the sample or create your own email template. This template must be marked as "Available for Use."
Enable Notification Email on New Case Comment	When selected, indicates that the Send Customer Notification option on a case comment is displayed. Even if this checkbox is not selected, the Send Customer Notification option still displays on cases if you have enabled email notifications to contacts who are not members

Setting	Description
	of your Self-Service portal. See Customize Support Settings on page 292.
New Comment Template	The email template used to send a notification to Self-Service users when a public comment is added to one of their cases. Self-Service automatically selects a sample template for you, but you can modify the sample or create your own email template. This template must be marked as “Available for Use.” Note that case owners are sent a separate notification that you can't customize.
Enable Case Auto-Response Rules for Self-Service Cases	Indicates if cases submitted through your Self-Service portal will trigger your auto-response rules.
Case Creation Template	The email template to use when cases submitted through your Self-Service portal do not match any auto-response rules.
Maximum Page Width	The maximum pixel width of the Self-Service pages from Salesforce. If hosting the portal yourself, this is the width of the inner HTML frame on your Self-Service login page.
Minimum Page Height	The minimum pixel height of the Self-Service pages from Salesforce.
Style Sheet URL	The complete, publicly accessible URL of your organization's Self-Service style sheet, for example, “http://www.acme.com/styles/selfservice.css.” See Customizing Your Self-Service Look and Feel on page 77. If you use a predefined color theme, leave this field blank.
Color Theme	Use one of Salesforce's color themes if you do not have your own style sheet to use. Click the View link to see template settings. To change the fonts and colors of one of Salesforce's color themes, see Customizing Your Self-Service Fonts and Colors on page 78.
Case Single Term	Term used on the Self-Service portal instead of “case” (singular form).
Case Plural Term	Term used on the Self-Service portal instead of “cases” (plural form).
Solution Single Term	Term used on the Self-Service portal instead of “solution” (singular form).
Solution Plural Term	Term used on the Self-Service portal instead of “solutions” (plural form).

4. Click **Save** to save your Self-Service settings.

SEE ALSO:

[Setting Up Self-Service](#)

[Administrator tip sheet: Getting the Most from Your Self-Service Portal](#)

[Administrator setup guide: Self-Service Implementation Guide](#)

Customizing Your Self-Service Look and Feel



Note: Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

To develop a meaningful look and feel for your Self-Service portal:

1. Customize the headers and footers of the Self-Service pages; see [Create Your Custom Page Header and Footer Sections](#) on page 86.
2. Customize the Self-Service portal fonts and colors via one of these options:
 - [Choose a predefined color theme or upload your own style sheet](#) on page 80.
 - [Customize fonts and colors using a point-and-click editor](#) on page 78.

SEE ALSO:

[Setting Up Self-Service](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up the Self-Service portal:

- "Manage Self-Service Portal"

To modify Self-Service pages:

- "Manage Self-Service Portal"

AND

"Customize Application"

Customizing Your Self-Service Fonts and Colors

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

You can customize the fonts and colors of the Self-Service portal to reflect your company's branding. Your portal's fonts and colors are specified in a portal "color theme." Select a predefined color theme and customize it using a point-and-click editor.

1. From Setup, enter *Fonts and Colors* in the **Quick Find** box, then select **Fonts and Colors**. Salesforce offers predefined themes that you can customize. Click **Preview** to view any theme.

2. Select the color theme you want to customize.

From the color theme page, you can:

- Click the **Reset to Default** link to remove all customizations from a theme.
- Click the **Back to All Themes** link to return to the list of color themes.
- Click **Preview Theme Name** to view the theme you are customizing.

3. Choose a portal page to customize. Color themes are customized page-by-page with some page elements being shared by multiple pages.

From the portal page, you can:

- Click **See Examples** to see all of the elements that you can customize.
- Click **Clear** next to an element to remove customizations.
- Click **Preview Theme Name** to view the theme you are customizing.
- Click the **Back to All Pages** link to return to the list of all portal pages.

4. Click **Edit** next to the visual element you want to customize. Some elements are visible only on the selected portal page, and some are shared across multiple portal pages. Changes you make to shared elements affect all pages.

 **Note:** Depending on the visual element, you can customize attributes using a point-and-click editor or a custom style sheet editor which lets you modify the cascading style sheets (CSS) directly. Choose the [click here](#) link to switch between the two. If you are using the point-and-click editor, select the Show advanced attributes box to access the [click here](#) link. We recommend that only users familiar with cascading style sheets (CSS) define them.

5. Edit the visual element as desired.

If you are using the point-and-click editor:

- Click **Edit** next to a basic or advanced attribute. If you do not see the advanced attributes, select the **Show advanced attributes** box.
- In the popup window, change the attribute as needed.
- Click **OK** to confirm your changes in the popup window.

If you are using the custom style sheet editor, enter valid CSS code.

For a list of all the page attributes you can edit, see [Self-Service Page Attributes](#) on page 91.

6. Click **Save** to save all changes to the visual element and its attributes. Customizations are not visible to your Self-Service users until you set the color theme as active.
7. Repeat these steps to customize all visual elements and their attributes as necessary.
8. Return to the list of color themes by clicking the **Back to All Pages** link and then the **Back to All Themes** link.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up the Self-Service portal:

- "Manage Self-Service Portal"

To modify Self-Service pages:

- "Manage Self-Service Portal"

AND

"Customize Application"

9. Click **Set Active Theme**.

10. Select the theme to activate for your portal, live and in real-time. Your organization can only have one active theme.

11. Click **Save**.

 **Note:** Since changes to an active theme take effect immediately, we recommend that you fully customize a theme before activating it so as not to disturb your customers.

SEE ALSO:

[Setting Up Self-Service](#)

Customizing Your Self-Service Pages

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

1. From Setup, enter *Self-Service Portal* in the **Quick Find** box, then select **Settings**.
2. Make the necessary enhancements to any Self-Service pages. See the following for more information:
 - [Customize the Self-Service Portal Login Page](#)
 - [Customize the Self-Service Portal Home Page](#)
 - [Enable the Solutions Page](#)
 - [Customize the Self-Service Portal Log a Case Page](#)
 - [Customize the View Cases Page](#)
 - [Customize the Suggested Solutions Page](#)

 **Note:**

- You cannot create multiple versions of the same Self-Service portal page. However, you can customize each Self-Service page.
- [Salesforce Knowledge](#) articles do not display in the Self-Service portal.

SEE ALSO:

[Setting Up Self-Service](#)

[Customize the Self-Service Style Sheet](#)

[Self-Service Page Attributes](#)

[Create Your Custom Page Header and Footer Sections](#)

Preparation for Setting Up Your Portal

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

Before setting up your [Self-Service portal](#) or your [Salesforce Customer Portal](#):

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To modify Self-Service pages:

- "Manage Self-Service Portal"
- AND
- "Customize Application"

- **Build your public solutions** - Review and mark your solutions as `Visible in Self-Service Portal`. Only solutions marked `Visible in Self-Service Portal` can appear in the Self-Service portal or the Customer Portal. For your Self-Service portal only, identify the top five solutions you want to feature on the Home Page.
- **Determine the information to show and collect** - Decide which case fields will be available when users view their cases. You should also decide which fields should be required when users submit cases online and which picklist values users can select when they solve their own cases with suggested solutions. (See [Case Fields](#).)
- **Designate the portal's location** - Choose where to add your portal's login URL on your corporate website. To locate the login URL for your Self-Service portal, see [Generating Login HTML](#); to locate the login URL for your Customer Portal, see [Enable Customer Portal Login and Settings](#) on page 21.
- **Customize your portal communication templates** - Decide which email templates to send to users to communicate a variety of information, such as reset passwords, notifications when public comments are added to cases, and case auto-responses with suggested solutions.
- **Customize and distribute the portal tip sheet** - Download the [Using the Self-Service Portal and Customer Portal](#) tip sheet and edit it to match your portal's branding and features, such as suggested solutions and the ability to attach files to submitted cases. Then distribute the document to your customers who want to learn how to answer their own inquiries using your portal.

SEE ALSO:

[Setting Up Self-Service](#)[Customize the Self-Service Style Sheet](#)

Customize the Self-Service Style Sheet

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

Select a predefined color theme, or download a sample Self-Service color theme so you can customize it. This color theme allows you to incorporate your organization's branding into your Self-Service portal.

 **Note:** To customize the Self-Service color theme using a point-and-click editor, see [Customizing Your Self-Service Fonts and Colors](#) on page 78.

1. From Setup, enter `Self-Service Portal` in the `Quick Find` box, then select **Settings**.
2. Click **Self-Service Setup**.
3. Click the **View Color Theme Options** link in the page settings section.
4. Find a set of fonts and colors you like and click **Download This Color Theme**.
To use a predefined color theme without customizing it, simply click **Select This Color Theme**.
5. Save the color theme you downloaded and give it to your webmaster if it needs more customization. The downloaded color theme is a CSS style sheet that your webmaster can edit.
6. Store the downloaded style sheet in a publicly accessible location and enter the URL for your style sheet in the `Style Sheet URL` field.
7. Click **Save**.

SEE ALSO:

[Setting Up Self-Service](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up the Self-Service portal:

- "Manage Self-Service Portal"

To modify Self-Service pages:

- "Manage Self-Service Portal"

AND

"Customize Application"

Customize the Self-Service Portal Login Page

Customize the Self-Service login page to specify what users see when they're prompted to sign in to your portal.

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

1. From Setup, enter *Self-Service Portal* in the **Quick Find** box, then select **Settings**.
2. In the Portal Pages list, click **Edit** next to Login Page.
3. Check **Show Message** to display a custom message on the login page.
4. If you enabled a page message, enter it in the text box, using the format toolbar to change the size, color, or font.

Optionally, select **Show HTML** to view and edit your page message in HTML.

You can't save any JavaScript as part of your custom code, and [can only use certain HTML elements and attributes](#).

5. Click **Save**.

SEE ALSO:

[Setting Up Self-Service](#)

[Customizing Your Self-Service Pages](#)

Customize the Self-Service Portal Home Page

Customize the Self-Service home page to include the features you want users to see when they log in to your Self-Service portal.

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

1. From Setup, enter *Self-Service Portal* in the **Quick Find** box, then select **Settings**.
2. In the Portal Pages list, click **Edit** next to Home Page.
3. Choose the features you want to enable:

Feature	Description
Show Top Solutions List	Lists the titles of up to five solutions of your choice on the Home Page.
Show My Open Cases	Lists the open cases of the Self-Service user who is logged in.
Show Message	The message that will be displayed at the top of the home page. You can enter a message of up to 32,000 characters including any HTML tags.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To modify Self-Service pages:

- "Manage Self-Service Portal"
- AND
- "Customize Application"

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To modify Self-Service pages:

- "Manage Self-Service Portal"
- AND
- "Customize Application"

4. If you chose to show a message on the page, enter your message in the text box, using the formatting toolbar to change the size, color, or font.
Select `Show HTML` to view your page message in HTML. You can't save any JavaScript as part of your custom code, and [can only use certain HTML elements and attributes](#).
5. Optionally, insert merge fields for data that you want to replace dynamically.
6. Click **Save**.
7. To see how your Home Page will look, click **Preview** next to Home Page in the Portal Pages list. If you have customized the Self-Service style sheet, the preview shows your custom styles.

Set the Top Solutions

If you checked `Show Top Solutions List` from the Home page, click **Add** in the Solutions related list of the Self-Service Settings page to search for and select solutions to display on the Home page. You can only select solutions that have been marked `Visible in Self-Service Portal`.

SEE ALSO:

[Setting Up Self-Service](#)
[Customizing Your Self-Service Pages](#)

Enable the Solutions Page

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

You can enable the Self-Service Solutions Page from the Self-Service Portal Pages related list. The Solutions Page allows users to see solutions that have been marked `Visible in Self-Service Portal` and any files attached to those solutions.

1. To enable this page, click **Edit** on the Solutions Page line.
2. Select the `Show Solution Page` checkbox.
3. Check `Show Message` to display a message at the top of the Solutions Page.
4. If you enabled the message, enter your message in the text box, using the formatting toolbar to format the size, color, or font.
Optionally, check `Show HTML` to view your page message in HTML code. You can't save any JavaScript as part of your custom code, and [can only use certain HTML elements and attributes](#).
5. Optionally, insert any merge fields for data that you want to replace dynamically.
6. Click **Save**.
7. To see how your Solutions Page will look, click **Preview** on the Solutions Page line. If you have customized the Self-Service style sheet, the preview shows your custom styles.

SEE ALSO:

[Setting Up Self-Service](#)
[Customizing Your Self-Service Pages](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To modify Self-Service pages:

- "Manage Self-Service Portal"
- AND
- "Customize Application"

Customize the Self-Service Portal Log a Case Page

The Log a Case Page on the Self-Service portal lets users submit new cases to your customer support team. Customize the page by creating a page message, adding merge fields, and choosing the case fields you want to include.

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

New cases submitted from this page are automatically created in Self-Service and assigned to the support representative or queue defined by your case assignment rules.

1. From Setup, enter *Self-Service Portal* in the **Quick Find** box, then select **Settings**.
2. In the Portal Pages list, click **Edit** next to Log a Case Page.
3. Select the **Show Log a Case Page** checkbox.
4. Select **Show Message** to display a message on this page.
5. If you enabled a page message, enter it in the text box, using the formatting toolbar to change the size, color, or font.

Select **Show HTML** to view and edit your page message in HTML. You can't save any JavaScript as part of your custom code, and [can only use certain HTML elements and attributes](#).
6. Optionally, insert merge fields for data that you want to replace dynamically.
7. Click **Save**.
8. To change the fields that display on the page, click the **Page Layout** link.

 **Note:** If a case field is tied to a validation rule, the rule can prevent Self-Service portal users from logging a case if they do not have access to fill in that field. Consider making those fields visible on the Log A Case page.

9. Click **Save** at any time to finish.
10. To see how your Log a Case Page will look, click **Preview** next to Log a Case Page in the Portal Pages list. If you have customized the Self-Service style sheet, the preview shows your custom styles.

SEE ALSO:

[Setting Up Self-Service](#)

[Customizing Your Self-Service Pages](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To modify Self-Service pages:

- "Manage Self-Service Portal"
- AND
- "Customize Application"

Customize the View Cases Page

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

You can enable and customize the View Cases Page from the Self-Service Portal Pages related list. The View Cases Page allows users to view their open and closed cases, related solutions, completed activities, comments, and (optionally) to add comments to their cases.

1. Click **Edit** on the View Cases Page line.
2. Select the `Show View Cases Page` box to allow users to view their open and closed cases.
3. Select `Add Comments to Cases` to allow users to add comments to their cases. When a user adds a comment, an email is automatically sent to the case owner.
4. Select `Add Attachments to Cases` to allow users to upload files to their cases. When a user adds an attachment, an email is automatically sent to the case owner.

When editing the page layout for the View Cases Page, add the Case Attachments related list to allow Self-Service users to view the files they've added to their cases. Be aware that this related list also shows any files that support reps have added to the case.

5. Check `Show Message` to display a message on this page.
6. If you enabled the message, enter your message in the text box, using the formatting toolbar to format the size, color, or font.

Optionally, check `Show HTML` to view your page message in HTML code. You can't save any JavaScript as part of your custom code, and [can only use certain HTML elements and attributes](#).

7. Optionally, insert any merge fields for data that you want to replace dynamically.
8. Click **Save**.
9. To change the fields and related lists that display on the page, click the **Page Layout** link.

Add the Case Activities related list to allow Self-Service users to view public, completed activities related to their cases. You also need to set field-level security to visible for the `Visible in Self-Service Portal` checkbox on activity page layouts so support reps will be able to display or hide completed activities in the Self-Service portal by clicking `Make Public` or `Make Private` in the case's Activity History related list.

10. Click **Save** at any time to finish.
11. To see how your View Cases Page will look, click **Preview** on the View Cases Page line. If you have customized the Self-Service style sheet, the preview shows your custom styles.

 **Tip:** To hide specific cases from users in the portal, you can deselect the `Visible in Self-Service Portal` checkbox on the case.

 **Note:** View Cases pages list cases in descending order via the `Case Number` field. Portal users cannot change this order; nor can they sort case columns in the Self-Service portal.

SEE ALSO:

[Setting Up Self-Service](#)

[Customizing Your Self-Service Pages](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To modify Self-Service pages:

- "Manage Self-Service Portal"
- AND
- "Customize Application"

Customize the Suggested Solutions Page

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

You can enable and customize the Suggested Solutions Page from the Self-Service Portal Pages related list. The Suggested Solutions Page displays up to ten relevant solutions that may help users solve a particular case. When submitting a case or viewing cases in the Self-Service portal, users can view suggested solutions and close their cases themselves.

To customize the Suggested Solutions Page:

1. Click **Edit** on the Suggested Solutions Page line.
2. Select `Show Suggested Solutions Page` to enable the page in the Self-Service portal.
3. Select a `Self-Closed Case Status` to show in the `Status` field for cases closed by Self-Service users. You must select at least one "Closed" value for this field.
4. Choose the maximum number of suggested solutions to display to users at one time. You can show a maximum of ten.
5. Select the `Self-Closed Case Reasons` that Self-Service users can choose from when they self-close their cases.
6. Check `Show Message` to display a message on this page.
7. If you enabled the message, enter your message in the text box, using the formatting toolbar to format the size, color, or font.

Optionally, check `Show HTML` to view your page message in HTML code.

You can't save any JavaScript as part of your custom code, and [can only use certain HTML elements and attributes](#).
8. Optionally, insert any merge fields for data that you want to replace dynamically..
9. Click **Save**.
10. To see how your Suggested Solutions Page will look, click **Preview** on the Suggested Solutions Page line. If you have customized the Self-Service style sheet, the preview shows your custom styles.

SEE ALSO:

[Setting Up Self-Service](#)

[Customizing Your Self-Service Pages](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To modify Self-Service pages:

- "Manage Self-Service Portal"
- AND
- "Customize Application"

Create Your Custom Page Header and Footer Sections

Apply your company's branding to every page in your Self-Service portal by customizing your page headers and footers. Your portal page headers and footers can contain a company logo, your company messaging, or your company's colors.

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

1. From Setup, enter *Self-Service Portal* in the *Quick Find* box, then select **Settings**.
2. Click **Edit** next to the Page Header or Page Footer listed in the Portal Page Sections.
3. Check *Show Header* or *Show Footer* to display a header or footer on your portal pages.
4. Check *Show Header Separator* or *Show Footer Separator* to include a line separating the header or footer from your body pages.
5. Optionally, enter a page message, and use the format toolbar to format it.
Select *Show HTML* to view and edit your page message in HTML. You can't save any JavaScript as part of your custom code, and [can only use certain HTML elements and attributes](#).
6. Click **Save**.

SEE ALSO:

[Setting Up Self-Service](#)

[Customizing Your Self-Service Pages](#)

[Customize the Self-Service Style Sheet](#)

[Self-Service Page Attributes](#)

Supported HTML Elements and Attributes for Self-Service Portal Customization

Use HTML to customize the page message on your Self-Service portal pages.

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

You can customize any of your Self-Service portal pages, and the header and footer on these pages, to include a message, and can use the following HTML elements and attributes in that message.

Supported Elements

- a
- abbr
- acronym
- address
- area
- b
- basefont
- bdo

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up the Self-Service portal:

- "Manage Self-Service Portal"

To modify Self-Service pages:

- "Manage Self-Service Portal"
- AND
- "Customize Application"

EDITIONS

Available in: Salesforce Classic

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

- big
- blockquote
- body
- br
- button
- caption
- center
- cite
- code
- col
- colgroup
- dd
- del
- dfn
- dir
- div
- dl
- dt
- em
- fieldset
- font
- form
- h1
- h2
- h3
- h4
- h5
- h6
- head
- hr
- html
- i
- img
- input
- ins
- kbd
- label
- legend
- li
- link

- map
- menu
- meta
- ol
- optgroup
- option
- p
- pre
- q
- s
- samp
- select
- small
- span
- strike
- strong
- style
- sub
- sup
- table
- tbody
- td
- textarea
- tfoot
- th
- thead
- title
- tr
- tt
- u
- ul
- var
- xmp

Supported Attributes

- abbr
- accept
- accept-charset
- accesskey
- action

- align
- alink
- alt
- axis
- background
- bgcolor
- border
- cellpadding
- cellspacing
- char
- charoff
- charset
- checked
- cite
- class
- classid
- clear
- code
- codebase
- codetype
- color
- cols
- colspan
- compact
- content
- coords
- data
- datetime
- declare
- defer
- dir
- disabled
- enctype
- face
- frameborder
- headers
- height
- href
- hreflang
- hspace

- http-equiv
- id
- ismap
- label
- lang
- language
- link
- longdesc
- marginheight
- marginwidth
- maxlength
- media
- method
- multiple
- name
- nohref
- noresize
- noshade
- nowrap
- readonly
- rel
- rev
- rows
- rowspan
- rules
- scheme
- scope
- scrolling
- selected
- shape
- size
- span
- src
- standby
- start
- style
- summary
- tabindex
- target
- text

- title
- usemap
- valign
- value
- valuetype
- version
- vlink
- vspace
- width

SEE ALSO:

- [Customize the Self-Service Portal Home Page](#)
- [Customize the Self-Service Portal Log a Case Page](#)
- [Customize the Self-Service Portal Login Page](#)
- [Create Your Custom Page Header and Footer Sections](#)

Self-Service Page Attributes

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

The following is a list of Self-Service page attributes which can be modified with the point-and-click editor:

Page Attribute	Description
Color	The color of the text.
Bold	The bolded value of the text. For example, whether the text is bolded or not.
Font size	The size of the text.
Font	A specific style of type in which letters are displayed.
Font Family	A prioritized list of font family names for an element. Web browsers use the first font value recognized.
Underline	The underline value of the text. For example, whether the text is underlined or not.
Border Color	The color of a border.
Border Style	The style of a border, such as dotted, dashed, or solid.
Border Width	The width of a border.
Bottom Border Width	The width of a bottom border.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up the Self-Service portal:

- "Manage Self-Service Portal"

To modify Self-Service pages:

- "Manage Self-Service Portal"

AND

"Customize Application"

Page Attribute	Description
Padding	The amount of space between the border and the element.
Padding Top	The amount of space to put between the top border and the element.
Padding Right	The amount of space to put between the right border and the element.
Padding Left	The amount of space to put between the left border and the element.
Padding Bottom	The amount of space to put between the bottom border and the element.
Height	The height of the element.
Line Height	The height of a line.
Background Color	The background color of the element.
Background Repeat	The format in which the background image displays. For example, whether the image displays repeatedly in a horizontal or vertical format.
Background Image	The background image of the element. The relative or absolute URL which hosts the image must be inside the surrounding URL() syntax. For example, <code>url (/sserv/img/tabBg_gray.gif).</code>

SEE ALSO:

[Setting Up Self-Service](#)[Customizing Your Self-Service Pages](#)[Customize the Self-Service Style Sheet](#)

Generating Login HTML

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

After enabling and customizing your Self-Service portal, generate the URL or HTML code where users will log in to your Self-Service portal.

1. From Setup, enter *Self-Service Portal* in the **Quick Find** box, then select **Settings**.
2. Click **Generate Login HTML**.
3. Insert the URL or HTML code provided into your portal's Web page.
4. Click **Finished** to return to the Self-Service Settings page.

 **Note:** You can't be logged into Salesforce and the Self-Service portal at the same time, with the same browser. For example, if you log into Salesforce and then the Self-Service portal using the same browser, your Salesforce session becomes invalid. Conversely, if you log into the Self-Service portal and then Salesforce using the same browser, your Self-Service portal session becomes invalid.

SEE ALSO:

[Setting Up Self-Service](#)

Using the Portals Tab

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

The Portals Tab is where you set up an online support channel for your Self-Service customers - allowing them to resolve their inquiries without contacting a customer service representative.

Clicking on the Portals tab displays the portals home page. From there, you can:

- View your customer Self-Service portal home page.
- Click on your Self-Service portal pages to see how your customers will interact with them.
- Under **Reports**, click any report name to jump to that report.
- Select any of the links under **Tools** to access utilities for managing your Self-Service portal and Self-Service users.

 **Note:** The Portals tab does not include the Customer Portal.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To generate Self-Service portal HTML:

- "Manage Self-Service Portal"

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up the Self-Service portal:

- "Manage Self-Service Portal"

To modify Self-Service pages:

- "Manage Self-Service Portal"

AND

"Customize Application"

Managing Self-Service Users

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

Manage your Self-Service user information from a single place and make changes to more than one user at a time. Before your customers can take advantage of the Self-Service portal, you must enable Self-Service access for each contact. You can enable access for one contact at a time from the Contacts tab or for multiple contacts via the Self-Service setup pages.

- To enable Self-Service users individually from the Contacts tab, select a contact and click **Enable Self-Service** on the contact's detail page.
- To enable multiple Self-Service users at once, see [Enabling Multiple Self-Service Users](#) on page 94.
- To change Self-Service user information, see [Editing Self-Service User Information](#) on page 95.
- To reset Self-Service user passwords, see [Resetting Self-Service User Passwords](#) on page 95.

SEE ALSO:

[Setting Up Self-Service](#)

Enabling Multiple Self-Service Users

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

You can perform mass actions for Self-Service user management such as enabling Self-Service access for many contacts at once. Each contact must have an email address and must be associated with an account to be a Self-Service user.

To enable new users for your Self-Service portal:

1. From Setup, enter *Users* in the **Quick Find** box, then select **Users**.
2. Click **Enable New User(s)**.
3. Enter search criteria to compile a list of the contacts you want to enable and click **Search**.
4. Select the contacts you want to enable and click **Next**.
5. Modify Self-Service user information as necessary.
6. Select the **Super User** checkbox to enable the contact as a Self-Service super user who can view case information, add comments, and upload attachments for all cases submitted by anyone in his or her company.
7. Click **Save**.

SEE ALSO:

[Managing Self-Service Users](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To manage Self-Service users:

- "Edit Self-Service Users"

To mass manage Self-Service users:

- "Manage Self-Service Portal"

AND

"Edit Self-Service Users"

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To manage Self-Service users:

- "Edit Self-Service Users"

To mass manage Self-Service users:

- "Manage Self-Service Portal"

AND

"Edit Self-Service Users"

Editing Self-Service User Information

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

Edit Self-Service user information to keep user information updated.

1. From Setup, enter *Users* in the **Quick Find** box, then select **Users**.
2. Select the users you want to change.
3. Click **Edit User(s)**.
4. Make any necessary changes to these records.
5. Click **Save**.

SEE ALSO:

[Managing Self-Service Users](#)

Resetting Self-Service User Passwords

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

If a Self-Service user loses his or her password, you can email a new password to him or her. To reset one or more Self-Service users' passwords:

1. From Setup, enter *Users* in the **Quick Find** box, then select **Users**.
2. Select the users whose passwords you want to reset.
3. Click **Reset Password(s)**.
4. Click **OK**.

SEE ALSO:

[Managing Self-Service Users](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To manage Self-Service users:

- "Edit Self-Service Users"

To mass manage Self-Service users:

- "Manage Self-Service Portal"

AND

"Edit Self-Service Users"

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To manage Self-Service users:

- "Edit Self-Service Users"

To mass manage Self-Service users:

- "Manage Self-Service Portal"

AND

"Edit Self-Service Users"

Zones for Salesforce Communities and Customer Portals

Using Zones to Organize Communities

 **Note:** Starting with the Summer '13 release, Chatter Answers and Ideas “communities” have been renamed to “zones.”

Zones organize ideas and questions into logical groups, with each zone having its own focus and unique ideas and questions. Zones are shared by the Ideas, Answers, and Chatter Answers applications, allowing you to view and create zones from those locations. Professional Edition organizations can have only one internal zone. All other editions can have up to 50 zones shared between Ideas, Answers, and Chatter Answers.

 **Note:** If you need more than 50 zones, contact Salesforce.

You can display a zone to the following types of users:

- Salesforce Communities users.
- Public users (requires setting up a Force.com site).
- Internal Salesforce users. Salesforce users can access all zones regardless of whether the community is internal-only or displayed in a portal.
- Customer Portal or partner portal users.
- Salesforce console users.

 **Note:** You cannot use Salesforce sharing rules to restrict access to zones. When you create a zone, you can restrict access by selecting the portal where the zone should appear. Only the users assigned to that portal (and internal Salesforce users) will be able to access that unless you expose it publicly using Force.com sites.

Users will see zones, search results, and content that are associated with the context defined by their user profile:

- Community users see the zones associated with the community they're signed in to.
- Internal users with permission to see Ideas can see all internal-only zones in the organization. If internal users sign in to a community, they see only those zones associated with that community.
- Internal users with permission to see Chatter Answers can see all internal-only zones for the organization in the Q&A tab. If internal users sign in to a community, they see only those zones associated with that community.
- Portal users can see the zones associated with their portal.
- Portal users with access to both a portal and a community can see the zones associated with the portal or community that they are currently signed in to.
- Users who are accessing the portal or community through an API can access all zones that they have access to in all contexts.
- Global searches in the internal application performed by internal users return results from all ideas that are available within the organization. Searches performed by all other users in Salesforce Communities return results from the ideas that are available within the community.

SEE ALSO:

[Creating and Editing Zones](#)

EDITIONS

Available in: Salesforce Classic

Ideas zones available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Answers zones available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Chatter Answers zones available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To create or edit a zone:

- “Customize Application”

Creating and Editing Zones

Zones are shared by the Ideas, Answers, and Chatter Answers applications, allowing you to view and create zones from those locations. Answers can only have one zone displayed at a time. Supported editions allow up to 50 zones per organization.

To create a new zone or edit the details of an existing zone:

1. From Setup, enter *zones* in the **Quick Find** box, then select **Zones** under **Answers**, **Ideas Zones**, or **Chatter Answers Zones**.
2. Click **Edit** next to the zone you want to change or **New** to create a new zone.
3. Enter a unique name for your zone that clearly identifies the zone's purpose.
4. Optionally, enter a description in plain text. HTML and other markup languages are not supported.
5. Select the **Active** checkbox to display the zone to your community.

You can't delete zones, so if you need to hide a zone, make sure **Active** isn't selected. All active zones are automatically available from the Ideas tab, but you can only assign one active zone to Answers.

6. Select the **Username Format** to specify how usernames appear in posted questions and answers throughout the zone. Chatter Answers uses the Username Format for questions and answers only. Ideas uses the Nickname for usernames within a community rather than the Username Format within in a zone.

 **Note:** For Chatter Answers, first names are used for users in the Customer Support Agents Group even if Nickname is selected as the Username Format for the zone.

7. Specify where you want this zone displayed.

- **Community** lets you select a community in which to display the zone. For Chatter Answers only, you can also select **Visible Without Authentication** to allow guest users to view activity within the zone through the community without signing in.
- **Internal Only** displays the zone to internal users only. Portal and Salesforce Communities members can't see internal zones.
- **Portal** lets you select from a list of existing portals.

To make a zone publicly available, you must select the Customer Portal that you plan to expose publicly using Force.com sites. Chatter Answers is supported on Force.com sites. Answers isn't supported on Force.com sites.

 **Note:** If you re-assign a zone to another community, the items associated with that zone move to the new community, as well. Users who are logged in to the original community can't view the items that have been moved to the new community, including from the Recent Items section of the sidebar column. If the zone is moved back to the original community, the ability to view those items is restored.

8. To set up zones for Chatter Answers, follow these steps:
 - a. Select **Enable for Chatter Answers** to associate the zone with Chatter Answers.
 - b. Select **Enable Private Questions** to let customers post their questions privately to customer support (create cases). If you don't select this setting, support agents can still initiate private communications with customers.
 - c. In **Visualforce Page That Hosts Your Zone's Feeds**, click  and choose the Visualforce page on which questions, replies, and knowledge articles display.

EDITIONS

Available in: Salesforce Classic

Ideas zones available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Answers zones available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Chatter Answers zones available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To create or edit a zone:

- "Customize Application"

The page you choose must include either the `chatteranswers:allfeeds` component or a combination of the following components: `chatteranswers:aboutme`, `chatteranswers:guestsignin`, `chatteranswers:feedfilter`, `chatteranswers:feeds`, `chatteranswers:searchask`, `chatteranswers:datacategoryfilter` so that the zone is linked to your Force.com site correctly. If you don't choose a Visualforce page, one is automatically generated when you save your zone. The generated page includes your zone's ID so that topics, questions, and replies are associated with your specific zone and can display on it. The page is named after your zone with a suffix of "_main," for example, `ZoneName_main`. The page also includes a language attribute that matches your organization's default language.

You can use the `NoSignIn` Boolean attribute in the `chatteranswers:allfeeds`, `chatteranswers:aboutme`, `chatteranswers:feeds` or `chatteranswers:searchask` components to remove all sign-in links from your zone. Use this option when you have an external sign-in path and want to ensure that your users follow it instead of the standard Chatter Answers sign-in. When the `NoSignIn` Boolean attribute is `true`, users can still search and view publicly accessible content for the zone. If they already have a valid session, they can still post questions, replies, vote, and flag content.

- d. In **Site That Hosts Your Zone**, click  and choose the Force.com site on which you want to host the zone.

- If you associated the zone with a portal, you can enter a Force.com site domain.
- If you associated the zone with a Salesforce Community that does not require authentication for users to view zone activity, we populate the Force.com site domain for you.

- e. Optionally, in **Email Notification URL**, customize the URL that's included in email notifications sent from the zone.

The email notification URL is generated automatically to be adapted to the visibility settings of the zone, but it can be modified to fit specific needs or use cases. If you have a customized login page, enter its URL. For example, if you've created a login page from which users can access multiple zones, you can customize **Email Notification URL** to redirect users to that page from email notifications.

 **Note:** If you have an existing URL for email notifications for an internal zone and subsequently set up a custom domain using **My Domain**, you must manually update the Email Notification URL. To update the URL, clear the existing URL so that the field is blank. Save the page, and the system populates the field with the new **My Domain** URL.

- f. In **Customer Support Agents Group**, select the public group of users who will act as support agents for the zone. These users will have a headset icon next to their username in the zone.
- g. Optionally, in **Header or Footer**, click  and choose a text or HTML file that incorporates your organization's branding into the headers or footers of email notifications sent from the zone.

You can only choose a file that has been uploaded to a publicly accessible folder on the **Documents** tab and marked **Externally Available Image**. The files you include in the fields can have a combined size of up to 10 KB.

- h. Select the data categories that you want exposed to the zone from the list of pre-defined data categories.

9. To set up Ideas for the zone, use the **Experts group** field to select the public group of experts who will monitor the zone for Ideas.

10. Click **Save**.

SEE ALSO:

[Select Picklist Values and Defaults for a Zone](#)

[Enabling Ideas in the Customer Portal](#)

[Designating Community Experts](#)

[Administrator setup guide: Salesforce Ideas Implementation Guide](#)

Answers Communities

Setting Up Answers

 **Note:** Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '13, Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Answers if it was enabled before the Summer '13 release from now until Winter '18.

To set up answers:

1. [Enable answers and set the default zone](#).
2. [Create a category group](#) for answers and [add data categories](#) to the category group.

 **Note:** Even though you can create up to five hierarchy levels of categories in a category group, only the first level of categories is supported in your answers community. Child categories below the first level are not displayed in the community, and community members can't assign these child categories to questions.
3. [Assign the data categories to your answers community](#).
4. [Review the category group visibility settings](#) to decide how you want to restrict access to categories and categorized questions in the answers community.
5. Using roles, permission sets, or profiles:
 - a. [Customize data category group visibility](#).
 - b. (Optional) [Designate default category group visibility](#) for users without visibility through roles, permission sets, or profiles.
6. (Optional) To allow community members who work with cases to escalate an unanswered or problematic question to a new case:
 - a. From the object management settings for cases, go to Page Layouts. Then edit the case page layouts to include the `Question` field.
 - b. From the object management settings for cases, go to Fields. Then ensure that field-level security for the `Question` field makes the field visible in the necessary profiles.

Only community members who have permission to create cases will see an **Escalate to Case** option on questions.
7. (Optional) If your organization uses Salesforce Knowledge, users can convert particularly helpful replies into articles in the knowledge base. From Setup, enter *Knowledge Settings* in the Quick Find box, then select **Knowledge Settings** and ensure that `Allow users to create an article from a reply` is checked.
8. (Optional) Create validation rules for questions and replies to prevent offensive language from being posted to the answers community. To create validation rules, from the object management settings for Chatter Answers question and Chatter Answers reply, go to Validation Rules.
9. (Optional) Create workflow rules for questions. For example, you may want to create a workflow rule that sends the community administrator an email whenever a question has ten or more replies but no best answer. Questions do not support approval processes or workflow tasks.
10. (Optional) Create reports for your answers community.
11. (Optional) [Enable answers in your Customer Portal](#) or enable answers in your partner portal.

EDITIONS

Available in: Salesforce Classic

Data categories and answers are available in: **Enterprise, Performance, Unlimited, and Developer** Editions.

USER PERMISSIONS

To customize answers settings:

- "Customize Application"

 **Tip:** Any custom fields you create for questions or replies can't display in the Salesforce user interface. However, you can add custom fields to questions or replies for API integration purposes. For example, add a custom text field to questions and use the API to populate that text field with the name of the country from which each question is posted.

SEE ALSO:

[Creating and Editing Zones](#)

[Salesforce Answers Implementation Guide](#)

[Setting Up Answers](#)

Enabling Answers and Assigning the Default Zone

 **Note:** Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '13, Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Answers if it was enabled before the Summer '13 release from now until Winter '18.

Answers is a feature of the Community application that enables users to ask questions and have community members post replies. Community members can then vote on the helpfulness of each reply, and the person who asked the question can mark one reply as the best answer.

To enable the answers feature:

1. From Setup, enter *Answers Settings* in the Quick Find box, then select **Answers Settings**.
2. Click **Edit**.
3. Use the **Enable Answers** checkbox to enable answers.

Enabling answers adds the Answers tab to the Community application and creates a zone named Internal Zone.

4. Select the default zone for the Answers tab. You can only display one answers zone at a time. You can either use Internal Zone as the default or [create a new zone](#) and use it as the default.
5. Click **Save**.

SEE ALSO:

[Creating and Editing Zones](#)

[Salesforce Answers Implementation Guide](#)

EDITIONS

Available in: Salesforce Classic

Answers is available in:
Enterprise, Performance, Unlimited, and Developer Editions.

USER PERMISSIONS

To customize answers settings:

- "Customize Application"

Assigning Data Categories to Answers

 **Note:** Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '13, Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Answers if it was enabled before the Summer '13 release from now until Winter '18.

In an answers zone, a *category group* provides one or more categories that help organize questions for easy browsing. If the category group contains a hierarchy, only the first-level categories display on the Answers tab. For example, if you're a computer manufacturer you might create a Products category group for your Products zone that has four categories: Performance Laptops, Portable Laptops, Gaming Desktops, and Enterprise Desktops. Zone members can choose one of the categories to assign to a question.

The following example shows how the categories within a category group appear on the Answers tab.

EDITIONS

Available in: Salesforce Classic

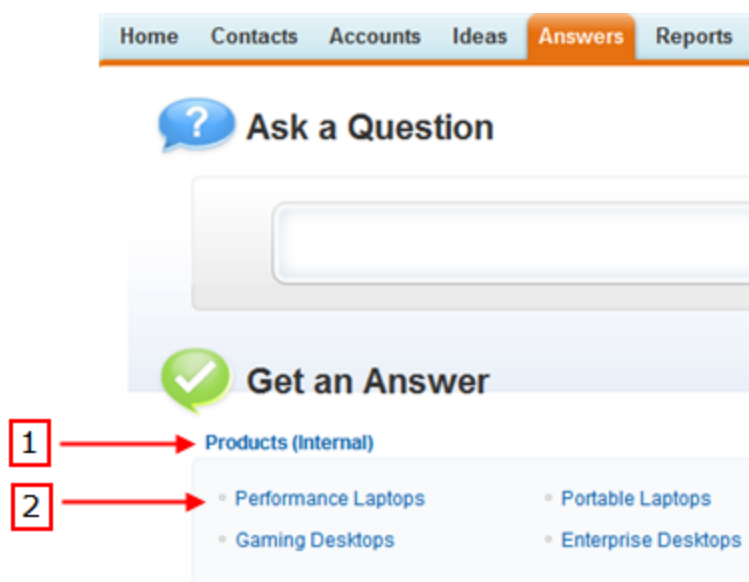
Answers is available in: **Enterprise, Performance, Unlimited, and Developer** Editions.

USER PERMISSIONS

To customize answers settings:

- "Customize Application"

Answers tab displaying categories



1. The zone assigned to answers.
2. When you assign a category group to answers, the data categories within the group appear beneath the zone name on the Answers tab. Zone members can assign these categories to their questions and browse within categories to see related questions. The name of the category group isn't displayed within the answers community.

The name of the category group is not displayed in the answers community; however, all the categories within the group appear below the zone name on the Answers tab.

To assign a category group to answers:

1. [Create a category group](#) for answers and [add data categories](#) to the category group.

We recommend naming the category group the same as the answers community so other administrators understand where the category group is being used.



Note: Even though you can create up to five hierarchy levels of categories in a category group, only the first level of categories is supported in your answers community. Child categories below the first level are not displayed in the community, and community members can't assign these child categories to questions.

2. From Setup, enter *Data Category Assignments* in the **Quick Find** box, then select **Data Category Assignments** under **Answers**. The category group assignments page only displays after you [enable answers](#).
3. Click **Edit**.
4. Select the category group you want to assign to your answers zone.



Note: If you change the category group for answers later, all the existing categories associated with your questions are removed. The questions in your answers community become uncategorized until community members assign the new categories to them.

5. Click **Save**.

You receive an email after the save process completes..

SEE ALSO:

[Data Categories in Salesforce.com](#)

Ideas Communities

Encourage Idea Creation and Sharing in Salesforce Communities

Add your Ideas users to Salesforce Communities to take advantage of new ways to collaborate.

Create more engagement and collaboration around Ideas as you enable your customers to post and comment on Ideas right from their Salesforce Communities home page. Adding Ideas to Salesforce Communities lets your users reap the benefits of a vibrant, creative partnership between community members. Communities are customizable, public or private spaces for employees, customers, and partners to collaborate on best practices and business processes. When you enable Ideas in Salesforce Communities, you give your community members the ability to create ideas and idea themes and have a dialog around them. You can create public communities that let your customers or partners exchange ideas, as well as private internal communities that are specific to your employees.

Moderating and managing ideation communities can be assigned to internal community members, depending on their privileges. Internal users can moderate both internal and external communities because they have access to internal communities as well as any public communities that they have permission to access.

To organize your community into smaller groups, you can create zones within a community that reflect special interests, product groupings, or types of customers. Zones are shared by the Ideas, Answers, and Chatter Answers applications, allowing you to view and create zones from those locations. For example, if you're a computer manufacturer you can create a community named Laptop Products and another named Desktop Products. Within each of those communities, you can create zones that are specific to different aspects of the products.

Community members have visibility into different zones based on their user profiles:

- Community users see the zones associated with the community they're signed in to.
- Internal users with permission to see Ideas can see all internal-only zones in the organization. If internal users sign in to a community, they see only those zones associated with that community.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To customize Ideas settings for Salesforce Communities:

- "Customize Application"

- Internal users with permission to see Chatter Answers can see all internal-only zones for the organization in the Q&A tab. If internal users sign in to a community, they see only those zones associated with that community.
- Portal users can see the zones associated with their portal.
- Portal users with access to both a portal and a community can see the zones associated with the portal or community that they are currently signed in to.
- Users who are accessing the portal or community through an API can access all zones that they have access to in all contexts.
- Global searches in the internal application performed by internal users return results from all ideas that are available within the organization. Searches performed by all other users in Salesforce Communities return results from the ideas that are available within the community.

Managing Ideas

Ideas is a community of users who post, vote for, and comment on ideas. Consider it an online suggestion box that includes discussions and popularity rankings for any subject. To further organize your community into smaller groups, you can create zones within a community that reflect special interests, product groupings, or types of customers.

You can display Ideas to internal Salesforce users, a Salesforce.com Community, Customer Portal or partner portal users, or to public users (requires setting up a Force.com site). You can also manage Ideas from the console.

Professional Edition organizations can have only one internal zone. All other editions can have up to 50 zones shared between Ideas, Answers, and Chatter Answers.

As an administrator, you can:

- Control whether ideas are enabled for your organization and customize the half-life of ideas. See [Customizing Ideas Settings](#).
- Create zones to organize ideas. See [Creating and Editing Zones](#).
- Create Idea Themes that let you invite community members to post ideas about specific topics so that members can solve problems or propose innovations for your company.
- Define picklist values for the `Categories` and `Status` fields. See [Define Picklist Values for the Categories and Status Fields](#).
- Specify the layout of custom fields. See [Set Page Layouts for Ideas](#).
- Make idea reports available to your users.
- Customize idea search layouts.
- Merge ideas to reduce the number of duplicate ideas.
- Assign a status to an idea.
- Delete a vote through the API to erase all history that the vote ever occurred.

Specifically, deleting a vote does the following:

- Removes 10 points from the idea's overall score
- Removes the user's name from the Last 100 Votes section on the idea's detail page

SEE ALSO:

[Enabling Ideas in the Customer Portal](#)

[Administrator setup guide: Salesforce Ideas Implementation Guide](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To manage Ideas communities:

- "Customize Application"

Customizing Ideas Settings

To manage organization-wide settings for Ideas:

- 1. From Setup, enter *Ideas Settings* in the Quick Find box, then select **Ideas Settings**.
- 2. Click **Edit**.
- 3. Use the **Enable Ideas** checkbox to enable or disable Ideas for your organization.

Disabling Ideas removes the Ideas tab and users will no longer be able to access active zones, but these zones will reappear on the Ideas tab the next time you enable Ideas.

- 4. Optionally, select **Enable Text-Formatting, Images and Links** to enable the Ideas HTML editor, which gives users WYSIWYG HTML editing and image referencing capabilities when they post or comment on ideas.

 **Warning:** Once you enable the Ideas HTML editor, you cannot disable it. If you do not see the **Enable Text-Formatting, Images and Links** checkbox, the Ideas HTML editor is enabled for your organization by default.

- 5. If your organization does not already have the multi-select **Categories** field enabled, click the **Enable** button located below the Categories message at the top of the page. This button is not displayed if your organization already has the **Categories** field enabled.

If the **Categories** field is already enabled, the **Enable Categories** checkbox is selected. Once the field is enabled, you cannot disable it.

- 6. Select **Enable Reputation** to let users earn points and ratings based on their activity in each zone.
- 7. Select an **Ideas User Profile** type for all user profiles in the zone.

User Profile Type	Description
Chatter profile	The user’s Chatter profile is the default user profile type. If you select this option and a user doesn’t have a Chatter profile, then the Ideas zone profile is used.
Ideas zone profile	The profile that the user sets up for the Ideas zone. This profile type is used for Ideas zones in portals.
Custom profile with a Visualforce page	You can specify a Visualforce page for a custom profile for all Ideas users in the zone. If you select this profile type, you must specify a Visualforce page in Custom Profile Page .

- 8. In the **Half-Life (in Days)** field, enter a number of days.

The half-life setting determines how quickly old ideas drop in ranking on the Popular Ideas subtab, to make room for ideas with more recent votes. A shorter half-life moves older ideas down the page faster than a longer half-life.

 **Note:** This field does not appear if Ideas is disabled. To modify the **Half-Life (in Days)** field, save your changes after enabling ideas, and then click **Edit** on the Ideas Settings page.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To customize Ideas settings:

- “Customize Application”

9. Click **Save**.

SEE ALSO:

[Enable Idea Themes](#)

[Managing Ideas](#)

[Administrator setup guide: Salesforce Ideas Implementation Guide](#)

[Encouraging Innovation with Idea Reputation](#)

Encouraging Innovation with Idea Reputation

Reward the most influential and innovative members of your Ideas community by acknowledging their participation and contribution to the community. By enabling Reputation in Ideas, and then choosing level names and thresholds, you let users earn points and ratings that reward and encourage frequent, meaningful activity in the community. As community members engage more frequently, they improve the overall quality of ideas, which means that everyone reaps the benefits of a vibrant, creative partnership with your customers.

Users are awarded points for many activities including:

- Creating an idea
- Receiving a comment on their idea
- Receiving an upvote on their idea or comment
- Commenting on someone else's idea

Reputation points are calculated separately for each zone, and for the cumulative activity within the entire organization. Users who participate in different zones will have different reputation values for each zone based on their activity in that zone. When users are logged into the internal application, their reputation score is based on their participation in all zones to which they belong.

Ideas comes with the following pre-defined reputation levels that apply to all zones and to the internal application. Using the API, reputation levels and points for each level can be added or edited to reflect the levels of participation in your community.

Name	Points per Level
Observer	0 – 99
Contributor	100 – 399
Influencer	400 – 1499
Thought Leader	1500+

Reputation levels are available through the API and can be displayed in custom Ideas implementations. To add or edit reputation level names, points per level, or other attributes of a reputation in any of your zones, use the IdeaReputation and IdeaReputationLevel objects in the API. You can create up to 25 different reputation levels for each zone.

SEE ALSO:

[Customizing Ideas Settings](#)

EDITIONS

Available in: Salesforce Classic

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

Designating Community Experts

Designate your star users as experts in their communities.

A community expert is a member of the community who speaks credibly and authoritatively on behalf of your organization. When community experts post comments or ideas, a unique icon (★👤) displays next to their name. The Salesforce administrator can designate as many community experts as necessary.

If you want to have experts within your community, set up [Zones](#) and create a public group that includes the expert users. Then, during the setup process you can designate this public group as your community experts.

Before you select a public group to be community experts, note the following:

- A community expert can be an employee of your organization who is responsible for providing official responses to the community. A community expert can also be someone outside your organization who is active within the community and knowledgeable about the subject matter.
- The only difference between a community expert and other community members is the unique icon that displays next to the community expert's name. Community experts do not have any extra permissions beyond what is specified in their user profile and permission sets.
- Community experts must be part of a public group and that public group must be specified in the `Experts Group` drop-down list. You might need to create a public group for each community if the experts within those communities are different.
- If a community is displayed in a Customer Portal or partner portal, you can use a cascading style sheet (CSS) to change the icon associated with the community expert. When creating a portal, specify your CSS in the `Header` of your portal and use the `expertUserBadge` class to reference the new background image for the community expert. We recommend the icon be no larger than 16 by 16 pixels.

SEE ALSO:

[Creating and Editing Zones](#)

EDITIONS

Available in: Salesforce Classic

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

Set Page Layouts for Ideas

When you create a custom field for Ideas, you can add it to the Additional Information section that appears on the Post Idea and Idea Detail pages.

You can specify the order in which a custom field appears in the Additional Information section as well as remove a custom field from these pages without permanently deleting the field from the system. Although it's possible to move standard fields onto the page layout, by default they already appear in the Idea Detail section at the top of the page and their order is not customizable. However, you can drag the `Status` field to the Additional Information section to have the status of an idea appear in the page layout.



Note: The label and layout of the Additional Information section can't be customized.

1. From the object management settings for ideas, go to Page Layouts.
2. Click **Edit**.
3. Select a custom field from the box on the right and drag it to the Additional Information section. Custom fields appear in the order they are placed in the Additional Information section.
4. To display an idea's status to zone members, select the `Status` field and drag it to the Additional Information section.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set the layout of a Ideas custom field:

- "Customize Application"

5. To let users add files to ideas, select the `Attachments` field and drag it to the Additional Information section. Make sure you've set field-level security for your users.
6. Click **Save**.

SEE ALSO:

[Define Picklist Values for the Categories and Status Fields](#)

Adding Apex Triggers to Idea Comments

Adding Apex triggers to Idea Comments lets you perform actions related to comments that users post to an idea.

A trigger is a set of Apex code that fires at a particular time in the life cycle of a record. You can add Apex triggers to comments in Ideas to better manage ideas in your community.

Use triggers on comments to perform actions such as:

- Send an email notification to the moderator or other user when a comment is left on an idea.
- Send an email notification to the user with the contents of their comment.
- Notify the moderator when a specified number of comments is reached for an idea.
- Prevent posting of comments with specific words.

Migrating to the Community Application

If your organization enabled Ideas prior to the Winter '10 release, we recommend that you migrate to the new Community application. The Community application:

- Replaces the Ideas application in the Force.com app menu.
- Includes the Ideas and Answers tabs.

Answers is a feature of the Community application that enables users to ask questions and have community members post replies. Community members can then vote on the helpfulness of each reply, and the person who asked the question can mark one reply as the best answer.



Warning: Once you migrate to the Community application, you cannot return to the old Ideas application. The Ideas tab with all your existing data will still be available in the new Community application.

To migrate to the Community application:

1. From Setup, enter *Ideas Settings* in the *Quick Find* box, then select **Ideas Settings**.

The Community message appears at the top of the Ideas Settings page. If the Community message does not appear, the Community application is already enabled for your organization.

2. Click **Enable** below the Community message. Salesforce checks your organization for any custom objects named Community. If such an object exists, you must delete or rename the object before enabling the Community app.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To define Apex triggers:

- "Author Apex"

To manage Ideas communities:

- "Customize Application"

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To customize Ideas settings:

- "Customize Application"

3. Click **Enable** when Salesforce confirms it's okay to migrate to the Community application.

Customizing Ideas Standard and Custom Fields

USER PERMISSIONS

To define picklist values:	"Customize Application"
To set field level security:	"Customize Application"
To define or change field validation rules:	"Customize Application"
To create Ideas custom fields:	"Customize Application"
To enable attachments for ideas:	"Customize Application"

EDITIONS

Available in: Salesforce Classic

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

Administrators can customize Ideas standard and custom fields to meet the needs of an organization's unique requirements:

- Define picklist values for the Categories and Status fields.
- Click the name of a standard or custom field to set field-level security.
- Click the name of a custom field to set validation rules.
- Create a custom field for Ideas. Custom fields appear in the Additional Information section on the Post Idea and Idea Detail pages.
- Add the Attachment field to the layout and set field-level security. Users can attach all supported file types, including Microsoft PowerPoint® presentations and Excel® spreadsheets, Adobe® PDF files, image files, audio files, and video files. The maximum attachment size is determined by your organization.



Note: In custom implementations of Ideas, you can use the `URL.getFileFieldURL` Apex method to retrieve the download URL for file attachments.

SEE ALSO:

[Customizing Ideas Settings](#)

Select Picklist Values and Defaults for a Zone

After you define picklist values for the Categories and Status fields, you can add and remove picklist values from these fields on a per-zone basis and specify a default value. This allows you to customize the Categories and Status fields based on the unique purpose of a zone. For information, see [Define Picklist Values for the Categories and Status Fields](#) on page 109.

To add or remove picklist values from a specific zone:

1. From Setup, enter *Zones* in the Quick Find box, then select **Zones**.
2. Click the name of the zone.
3. In the Idea Picklists Available for Editing section, click **Edit** next to the Categories or Status field.
4. To remove a picklist value, select the value from the Selected Values list and click **Remove**.
5. To add a picklist value to the zone, select the value from the Available Values list and click **Add**.
6. To specify a default value for the field, use the Default drop-down list.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To add or remove picklist values from a zone:

- "Customize Application"

7. Click **Save**.

SEE ALSO:

[Creating and Editing Zones](#)

Define Picklist Values for the Categories and Status Fields

Overview

For members of a zone to assign categories to an idea or be able to view an idea's status, the Ideas administrator needs to define picklist values for the **Categories** and **Status** fields. These fields are only available in an ideas community and not in an answers community.

Categories are administrator-defined values that help organize ideas into logical sub-groups within a zone. The View Category drop-down list on the Ideas tab allows users to filter ideas by category, and the **Categories** picklist on the Post Ideas page lets users add categories to their ideas.

An idea's status helps zone members track the progress of the idea. For example, "Under Review", "Reviewed", "Coming Soon", and "Now Available" are common status values an administrator can define and assign to ideas. An idea's status appears next to the idea's title for all zone members to see.

 **Note:** If the **Category** field is displayed (instead of **Categories**), then your zone members can only assign a single category to an idea. To allow them to assign multiple categories to an idea, from Setup, enter *Ideas Settings* in the **Quick Find** box, then select **Ideas Settings** and enable **Categories**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To define picklist values:

- "Customize Application"

Defining Picklist Values

To define picklist values for the **Categories** and **Status** standard fields:

1. From Setup, enter *Ideas* in the **Quick Find** box, then select **Fields**. From the management settings for ideas, go to **Fields**.
2. Click **Edit** next to the **Categories** or **Status** standard field.
3. On the picklist edit page, click **New** to add new picklist values to the standard field. You can also edit, delete, reorder, and replace picklist values.

 **Note:** Once you add picklist values to the **Categories** or **Status** field, the field will always require at least one picklist value. This means you can delete picklist values until there is one remaining for the field.

4. Add one or more picklist values (one per line) in the provided text area.
5. Select the zones that you want to include the new picklist values.
6. Save your changes.
7. To specify a default value for the **Categories** or **Status** fields, see [Select Picklist Values and Defaults for a Zone](#).

 **Note:** Do not use the **Edit** link on the **Fields** page to specify a default value for **Categories** or **Status**. You can only specify a default value from the Zone Detail page.

8. To display an idea's status to zone members, select the **Status** field and drag it to the Additional Information section. You can find this field from Setup by entering *Ideas* in the **Quick Find** box, then selecting **Fields**.

Once you select this checkbox, you can assign a status to any idea when you post a new idea or edit an existing idea.

SEE ALSO:

[Managing Ideas](#)

[Select Picklist Values and Defaults for a Zone](#)

Enabling the Categories Field

Organizations using the `Category` field can switch to the multi-select `Categories` field that allows zone members to associate more than one category with an idea. The `Category` field only allows one category to be associated with an idea.



Warning: Once you enable the `Categories` field, you cannot disable it. Also, enabling the `Categories` field automatically disables the old `Category` field in Salesforce and the API.

When you enable the `Categories` field, Salesforce automatically does the following:

- Checks your organization's workflow rules, triggers, validation rules, custom fields, and Apex code and lists any area that references the `Category` field. You must manually fix or remove these references before Salesforce allows you to enable the `Categories` field.
- Automatically moves all picklist values and search layouts from the old `Category` field to the new `Categories` field.
- Ensures each idea is associated with the appropriate picklist value in the new `Categories` field.
- Makes the new `Categories` field available in Salesforce and the API.

To enable the `Categories` field:

1. From Setup, enter *Ideas Settings* in the *Quick Find* box, then select **Ideas Settings**.
2. Click **Enable** located below the `Categories` message at the top of the page. This button is not displayed if your organization already has the `Categories` field enabled.

Salesforce checks your organization's workflow rules, triggers, validation rules, custom fields, and Apex code for references to the `Category` field and lists any areas where this reference needs to be removed.

3. If you need to remove references to the `Category` field, click **Cancel**. Once you have removed the references, try enabling the `Categories` field again.



Note: For validation and workflow rules you must delete the rule or fix the `Category` reference within the rule. It is not sufficient to deactivate the rule. If you need to delete a custom field that references the `Category` field, make sure to erase the field after it has been deleted. .

4. Read the information in the pop-up window, and click **Enable**. It may take several minutes for Salesforce to enable the new field.
5. Fix any custom reports that reference the old `Category` field.

SEE ALSO:

[Customizing Ideas Settings](#)

[Select Picklist Values and Defaults for a Zone](#)

[Define Picklist Values for the Categories and Status Fields](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To customize Ideas settings:

- "Customize Application"

Enable Idea Themes

1. From Setup, enter *Idea Themes Settings* in the Quick Find box, then select **Idea Themes Settings**.
2. Click **Edit**.
3. Select **Enable Idea Themes**.
4. Click **Save**.

SEE ALSO:

[Customizing Ideas Settings](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To customize Idea Themes settings:

- “Customize Application”

Chatter Answers Communities

Chatter Answers Implementation Overview

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

 **Note:** We recommend that advanced Salesforce administrators and developers set up and maintain Chatter Answers, as it involves several Salesforce features.

Chatter Answers is a self-service and support community where users can post questions and receive answers and comments from other users or your support agents. Chatter Answers brings together Case, Questions and Answers, and Salesforce Knowledge articles in a unified experience. Before administrators can set up Chatter Answers, their organizations must have implemented [Data Categories](#). If you want Salesforce Knowledge articles to display in your zones, then administrators need to implement [Salesforce Knowledge](#).

Unlike other Salesforce features, Chatter Answers spans across several areas of setup. There isn't one location in Salesforce where you can update and configure all the settings related to Chatter Answers. For example, configuring Chatter Answers might require you to update Customer Portal settings from Setup by entering *Customer Portal Settings* in the Quick Find box, then selecting **Customer Portal Settings**, and Force.com Site settings by entering *Sites* in the Quick Find box, then selecting **Sites**.

Setting up Chatter Answers also includes customizing or maintaining:

- Cases
- [Case assignment rules](#)
- Workflow rules on cases or questions
- Apex triggers on questions
- Visualforce pages
- [Customer Portal users](#)

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

- Organization-wide sharing defaults
- Feature licenses

Customizing the appearance of your Chatter Answers zone to match your company's branding involves creating or updating Visualforce pages and adding them to the Force.com Site used to host your zone.

SEE ALSO:

[Setting Up Chatter Answers](#)

Setting Up Chatter Answers

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

 **Note:** The steps below are general guidelines for setting up Chatter Answers. Chatter Answers integrates several Salesforce features, including features administrators may have implemented already, so each Chatter Answers implementation may be different. Contact Salesforce for specifics on your implementation.

Before administrators can set up Chatter Answers, their organizations must have implemented [Data Categories](#). If you want Salesforce Knowledge articles to display in your zones, then administrators need to implement [Salesforce Knowledge](#).

1. [Enable Chatter Answers](#).
2. [Configure email notification settings](#).
3. [Implement a Customer Portal](#) (if one doesn't already exist for your organization).
4. [Configure your organization's Customer Portal for Chatter Answers](#).
5. [Configure high-volume portal users for self-registration](#).
6. Implement a Force.com site (if one doesn't already exist for your organization and you want to use a site).
7. [Configure your organization's Force.com site for Chatter Answers](#).
8. [Configure cases for Chatter Answers](#).
9. [Set Questions tab visibility](#).
10. Optionally:
 - [Assign data categories to Chatter Answers](#).
 - [Configure Salesforce Knowledge for Chatter Answers](#).
 - [Add Chatter Answers to your Customer Portals or Partner Portals](#).
11. [Configure one or more zones](#).
12. [Troubleshoot any setup issues](#).

 **Important:** After you set up Chatter Answers, it may not work properly if you change any of the configurations in the features mentioned above. If certain configuration issues are detected, Salesforce sends email notifications to the `Site Contact` user.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

USER PERMISSIONS

To set up Chatter Answers:

- "Customize Application"
- AND
- "Manage Users"
- AND
- "Edit Self-Service Users"



Tip:

- You can add custom fields to questions or replies for API integration purposes only. For example, add a custom text field to questions and use the API to populate that text field with the name of the country from which each question is posted. Any custom fields you create for questions or replies can't display in the Salesforce user interface.
- You can customize fields, page layouts, buttons and links, Apex triggers, and validation rules for questions and replies for Chatter Answers from Setup by entering "Chatter Answers" in the Quick Find box, then selecting **Chatter Answers** and choosing the appropriate setting.
- You can rename Customer Support on your zones' user interface. For example, you can change "Customer Support" to "Acme Support." Just edit the Customer Support label on the Question object.
- You can rename the Chatter Answers tab in your portal, as well.

SEE ALSO:

- [Chatter Answers Implementation Overview](#)
- [Chatter Answers Implementation Guide](#)

Enable Chatter Answers



Note: Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

Enable Chatter Answers to set up Chatter Answers zones.

1. From Setup, enter *Chatter Answers Settings* in the Quick Find box, then select **Chatter Answers Settings**.
2. Click **Edit**.
3. Select **Enable Chatter Answers**.
4. Optionally, select:

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

USER PERMISSIONS

To enable Chatter Answers:

- "Customize Application"

Option	Description
Show Chatter Answers in Portals	Lets you add Chatter Answers as a tab to your Customer Portal or Partner Portal. If you choose this option, you must add the Chatter Answers tab to each portal and assign the Chatter Answers User license to portal users. If you only want to display Chatter Answers in your portals, then you don't need to set up a Force.com site to host Chatter Answers. However, a site lets guest users access some Chatter Answers data without a login, whereas portals do not.
Optimize Question Flow	Lets users filter search results by articles or questions before they post a question to any of your Chatter Answers zones. Also, adds Title and Body fields to questions for easier text input and

Option	Description
	scanning. This setting is turned on automatically when you enable Chatter Answers.
Enable Rich Text Editor	Lets zone members use the rich text editor to format text and upload images when posting questions and replies. This setting is turned on automatically when you enable Chatter Answers.  Note: Optimize Question Flow must be enabled to select this option.
Show Search/Ask Publisher Inline	Embeds the Search/Ask Publisher inline instead of using a pop-up window.  Note: Optimize Question Flow must be enabled to select this option.
Enable Reputation	Lets users earn points and ratings that display as hover text on their profile pictures. Reputation is enabled across all zones. This setting is turned on automatically when you enable Chatter Answers.
Allow Posting Answers via Email	Lets users post answers by replying to email notifications.
Enable Facebook Single Sign On	Lets users sign in to your Chatter Answers zones with their Facebook logins. If you choose this setting, your zones display an option to Sign in with Facebook next to your zones' Sign In. When a user signs in to Chatter Answers with a Facebook login, the first name, last name, and the photo associated with the Facebook account is used in posts to your zones. When you enable this feature, you must define and enable a Facebook authentication provider in your organization's security controls.
Facebook Authentication Provider	Lets you choose an existing Facebook authentication provider after you select Enable Facebook Single Sign On. You must choose a Facebook authentication provider to implement Facebook Single Sign On for your Chatter Answers zones. This setting is ignored if you have associated the Chatter Answers zone to a Chatter community with a different Facebook authentication provider.
Custom Profile Page	Lets you select a custom Visualforce page for users' profiles for Chatter Answers on a public Chatter community site. You must have Visible without authentication set for the zone in order for the user profile pages to be used. The following attributes are passed to the custom Visualforce page that you select:

Option	Description
	• <code>communityId</code>. This attribute indicates which zone the currently selected feed item, such as a question or a reply, belongs to. • <code>userId</code>. This attribute indicates the owner of the currently selected feed item, such as a question or a reply. • <code>showHeader</code>. This attribute is a Boolean value that specifies whether the Salesforce tab header is included in the page. If this attribute is set to true, the Salesforce tab header is displayed.

5. Click **Save**.

After you enable Chatter Answers, several items are automatically added to your organization for use with setting up zones:

- A Q&A tab where internal users and administrators can view and use Chatter Answers. Administrators can rename this tab.
- Standard permission settings for Questions on user profiles so that you can grant users permissions to questions and replies.
- Visualforce pages that you can add to a Force.com site, a tab in a Community, or a Customer Portal so that users can register, sign in, and view feed items on a zone.
- An Apex class named `ChatterAnswersRegistration` with a method for customizing Account creation for portal users.
- An Apex trigger for questions named `chatter_answers_question_escalation_to_case_trigger` so that questions with specified attributes are automatically escalated to cases.
- A workflow field update named `chatter_answers_num_subscriptions_above_` so that when a question is escalated to a case, `Priority` on questions is updated.
- Two workflow rules, `chatter_answers_no_best_reply_within_time_limit_wf` and `chatter_answers_num_subscriptions_above_limit_wf`, which you can customize and activate so that questions without best replies or questions with a specified number of followers are automatically escalated to cases.

SEE ALSO:

[Chatter Answers Implementation Overview](#)

[Setting Up Chatter Answers](#)

Visualforce Pages for Chatter Answers

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After you enable Chatter Answers, the Visualforce pages below are automatically added to your organization. You can use these pages to set up and configure Chatter Answers.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

Visualforce page	Description
ChatterAnswersAgentView	The Visualforce component that displays questions on case detail pages when questions are converted to cases. This component is optional and offers an alternative to the case detail page.
ChatterAnswersChangePassword	The page where users can change their passwords to your zone.
ChatterAnswersForgotPassword	The forgot password page for your zone.
ChatterAnswersForgotPasswordConfirm	The forgot password confirmation page for your zone.
ChatterAnswersHelp	The online help page displayed to users when they click Need Help? .
ChatterAnswersLogin	The login page for your zone.
ChatterAnswersRegistration	The page where users can self-register for access to your zone.
When you create a zone, the following page is added to your organization: <i>Community Name_main</i> (Home Page)	The page that includes the question, reply, and Salesforce Knowledge article feeds for your zone. This page is also used to determine the community from which email notifications are sent to users. This page is automatically generated when you save a new zone without choosing <i>Visualforce Page That Hosts Your Community's Feeds</i>. The generated page includes your zone's ID so that topics, questions, and replies are associated with your specific zone and can display on it. The page is named after your zone with a suffix of "_main," for example, <i>ZoneName_main</i>. The page also includes a language attribute that matches your organization's default language.

SEE ALSO:

[Enable Chatter Answers](#)[Setting Up Chatter Answers](#)[Customizing Chatter Answers using Visualforce Pages](#)

Customizing Chatter Answers using Visualforce Pages

You can create a Visualforce page that displays a Chatter Answers zone customized for your users.



Note: Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

By using a Visualforce page, you can add custom widgets to Chatter Answers, such as announcements or ads, which let you extend your branding and change the experience for users.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

You can also control the arrangement of elements on the page. Your customers can access your custom Chatter Answers zone through a Force.com site, a tab in a Community, or a Customer Portal to which you've added the Visualforce page. When internal users access a Chatter Answers zone that uses a Visualforce page, they see only the zone that is related to the page; they can't switch zones as they can when using the standard Q&A tab.



Note: You can't customize the Chatter Answers Q&A tab with a Visualforce page, but you can add a Visualforce tab in your organization and create an internal Chatter Answers experience with your custom Visualforce page.

In order to display the zone, the Visualforce page you create must include either the `chatteranswers:allfeeds` component or a combination of the following components: `chatteranswers:aboutme`, `chatteranswers:guestsignin`, `chatteranswers:feedfilter`, `chatteranswers:feeds`, `chatteranswers:searchask`, `chatteranswers:categoryfilter`.

Example: Custom Visualforce Page using the `chatteranswers:allfeeds` Component

The `chatteranswers:allfeeds` component provides an out-of-the-box Chatter Answers Visualforce page. A page that uses the `chatteranswers:allfeeds` component includes the following Chatter Answers elements:

- Chatter Answers sign in
- Chatter Answers profile
- Data category filters
- The Search/Ask bar
- Feed filters
- The questions feed

For example, the following Visualforce page including the `chatteranswers:allfeeds` component has all of the Chatter Answers elements in the standard arrangement for a zone without any other custom widgets.

```
<apex:page>

    <body>
        <chatteranswers:allfeeds communityId="09aD00000000K7c"/>
    </body>
</apex:page>
```

Example: Custom Visualforce Page using All of the Chatter Answers Page Components

Using the Chatter Answers page components allows you to pick and choose which elements of your Chatter Answers zone appear to your customers. You can use as few as one component or you can customize your page to use all of them. You can include the following components:

- `chatteranswers:aboutme`
- `chatteranswers:guestsignin`
- `chatteranswers:feedfilter`
- `chatteranswers:feeds`
- `chatteranswers:searchask`
- `chatteranswers:categoryfilter`

Using the Chatter Answers page components instead of the `chatteranswers:allfeeds` component allows you more flexibility over the arrangement of the elements on the page. For example, the following Visualforce page includes all of the standard Chatter Answers elements, but they appear in a different order on the resulting page than they do when you use the

`chatteranswers:allfeeds` component. In this example, the Search/Ask component and the feed filter appear below the feed instead of above it.

```
<apex:page language="en_US" showHeader="false" cache="true">
  <body>
    <div class="csMini">
      <div class="threecolumn">
        <div class="leftContent">
          <chatteranswers:guestsignin />
          <chatteranswers:aboutme communityId="09aD00000000cfE"/>
          <chatteranswers:categoryfilter communityId="09aD00000000cfE"/>
        </div>
        <div class="mainContent">
          <div class="lowerMainContent" id="lowerMainContent">
            <div id="rightContent" class="rightContent"></div>
            <div id="centerContent" class="centerContent">
              <chatteranswers:feeds communityId="09aD00000000cfE"/>
              <chatteranswers:searchask communityId="09aD00000000cfE"/>
              <chatteranswers:feedfilter />
            </div>
          </div>
        </div>
        <div class="clearingBox"></div>
      </div>
    </body>
  </apex:page>
```

SEE ALSO:

[Adding a Custom Visualforce Page to Display Chatter Answers](#)

[Visualforce Pages for Chatter Answers](#)

Configuring Email Notifications for Chatter Answers Users

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

Determine when emails are sent to users by configuring the notification settings that apply to all of your zones. Each email includes a link to a specific zone so that users can easily return to it.

1. From Setup, enter *Email Notification Settings* in the Quick Find box, then select **Email Notification Settings**.
2. Click **Edit**.
3. Choose from the following settings:

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance,** and **Unlimited** Editions.

USER PERMISSIONS

To configure email notifications for your Chatter Answers users:

- "Customize Application"

Option	Description
Replies to a question they own	Notify customers when other users reply to their questions.
Replies to a question they follow	Notify customers when other users reply to questions they're following.
Selects a best answer on a question they follow	Notify customers when a best answer is selected for a question they're following.
Sends a private reply to their question (Customer Support)	Notify customers when customer support responds to their questions privately.

4. Click **Save**.

SEE ALSO:

[Chatter Answers Implementation Overview](#)

[Setting Up Chatter Answers](#)

Configuring a Customer Portal for Chatter Answers

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

 **Note:** Even if you don't plan on using a Customer Portal, you must configure one for Chatter Answers to authenticate users who sign in to your Chatter Answers zone.

1. From Setup, enter *Customer Portal Settings* in the Quick Find box, then select **Customer Portal Settings**.
2. Click **Edit** next to the Customer Portal you want to configure for Chatter Answers.
3. Click **Login Enabled** to let customers sign in to Chatter Answers.
4. In **From Email Address**, type the address from which all email communications from your Chatter Answers zone are sent. For example, support@acme.com.
5. In **From Email Address Name**, type the name associated with the **From Email Address**. For example, Acme Customer Support.
6. Click **Self-Registration Enabled** to let customers register themselves for access to Chatter Answers.
7. In **Default New User License**, choose the portal user license that's automatically assigned to customers who self-register. We recommend you choose the High Volume Customer Portal license.
8. In **Default New User Profile**, choose the profile that's automatically assigned to customers who self-register. We recommend you [choose the profile you cloned and customized for self-registration](#).
9. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

USER PERMISSIONS

To set up and update the Customer Portal:

- "Customize Application"

10. Assign the profile you selected as the `Default New User Profile` to your Customer Portal so that users can sign in to your zone:
 - a. From Setup, enter `Customer Portal Settings` in the `Quick Find` box, then select **Customer Portal Settings**.
 - b. Select your portal's name.
 - c. In the `Assigned Profiles` section, click **Edit Profiles**.
 - d. Click `Active` next to the profile you selected as the `Default New User Profile`.
 - e. Click **Save**.

SEE ALSO:

[Chatter Answers Implementation Overview](#)

[Setting Up Chatter Answers](#)

[Enable Customer Portal Login and Settings](#)

Configuring Portal Users for Self-Registration to Chatter Answers

-  **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

Configure Customer Portal users for self-registration to your Chatter Answers community.

1. Clone the High Volume Customer Portal profile so that you can customize it:
 - a. From Setup, enter `Profiles` in the `Quick Find` box, then select **Profiles**.
 - b. Click **Clone** next to High Volume Customer Portal.
 - c. Type a name for the new profile.
 - d. Click **Save**.
2. Customize the cloned profile to include permissions to the standard objects on your community:
 - a. From Setup, enter `Profiles` in the `Quick Find` box, then select **Profiles**.
 - b. Click the name of the cloned profile.
 - c. Click **Edit**.
 - d. In `Standard Object Permissions`, click on the following permissions to these objects:

Object	Permissions
Cases	Read, Create
Contacts	Read
Questions	Read, Create
Account	Read

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

USER PERMISSIONS

To set up and update the Customer Portal:

- "Customize Application"

To manage Customer Portal users:

- "Edit Self-Service Users"

- e. Click **Save**.

SEE ALSO:

[Setting Up Chatter Answers](#)

[Configuring a Customer Portal for Chatter Answers](#)

[Chatter Answers Users Overview](#)

Configuring a Force.com Site for Chatter Answers

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

 **Note:** Configuring a Force.com site is recommended for self-service communities.

Configure a Force.com site for Chatter Answers to host a domain and publicly display some of your Salesforce data, such as questions, replies, and Salesforce Knowledge articles.

1. From Setup, enter *Sites* in the **Quick Find** box, then select **Sites**.
2. Click **Edit** next to the name of the site you want to configure for Chatter Answers.
3. Click **Active** to activate the site.
You can activate the site after you've finished [setting up Chatter Answers](#).
4. In **Active Site Home Page**, choose a Visualforce page as the home page for your site.
5. Click **Save**.
6. Click **Edit** on the Site Visualforce Pages related list.
 - a. Use the **Add** and **Remove** buttons to enable the following Visualforce pages for your site:
 - ChatterAnswersAgentView
 - ChatterAnswersChangePassword
 - ChatterAnswersForgotPassword
 - ChatterAnswersForgotPasswordConfirm
 - ChatterAnswersHelp
 - ChatterAnswersLogin
 - ChatterAnswersRegistration
 - b. Click **Save**.
7. Click **Public Access Settings** to grant guest users (unauthenticated, non-Customer Portal users) access to cases, questions, and Salesforce Knowledge articles.
 - a. Click **Edit** on the profile for Chatter Answers users.
 - b. In Standard Object Permissions, click **Read** on Cases and Questions.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

USER PERMISSIONS

To create and edit Force.com sites:

- "Customize Application"

- c. Optionally, if you want articles to display in Chatter Answers, click **Read** on articles types in Article Type Permissions.
 - d. Click **Save**.
8. Click **Edit** next to a category group in the Category Group Visibility Settings related list to grant users access to the categories so that they can browse questions, replies, and Salesforce Knowledge articles.
 - a. Next to **Visibility**, click **All Categories**.
 - b. Click **Save**.
9. Return to the site and select its name from Setup by entering *Sites* in the **Quick Find** box, then selecting **Sites**.
10. Click **Login Settings** to enable user authentication for the site.
 - a. Click **Edit**.
 - b. In **Enable Login For**, choose the Customer Portal you created for Chatter Answers.
 - c. Click **Save**.

After you configure your Force.com site for Chatter Answers, you can replace the default Visualforce pages that make up your community with customized ones. The Visualforce pages are automatically set to your site's URL so that portal users can navigate to them.



Note: To make your site's page URLs short and easy to remember, you can use the Chatter Answers URL rewriter. The following pages use the URL rewriter:

- ChatterAnswersHelp
- ChatterAnswersLogin
- ChatterAnswersRegistration
- ChatterAnswersForgotPassword

Chatter Answers is also compatible with custom URL rewriters for sites.

1. From Setup, enter *Sites Settings* in the **Quick Find** box, then select **Sites Settings**.
2. Click **Edit** next to a site.
3. Choose the pages to replace. If you replace the **Change Password Page**, the **Change Password Page** for your site is automatically updated too.
4. Click **Save**.



Note: Internet Explorer 8 users receive a security warning if you customize with URLs that don't include https://.

SEE ALSO:

[Chatter Answers Implementation Overview](#)

[Setting Up Chatter Answers](#)

[Visualforce Pages for Chatter Answers](#)

Configuring Cases for Chatter Answers

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

Configure case features for Chatter Answers so that cases are created, escalated, and accessed by the appropriate users of your Chatter Answers zones.

1. Set your organization-wide sharing defaults to `Private on Account`, `Controlled by Parent on Contact`, and `Private on Case` to prevent users from accessing each others' information.
2. Set field-level security on `Question` on cases to `Visible` for profiles assigned to your Customer Portal so that users can access their private questions.
3. Update `Origin` on cases with the value in the Question trigger so that support agents can see which cases originated from Chatter Answers.
4. Create a case assignment rule where Case Origin equals the value of Chatter Answers so that cases created from private questions are assigned to support agents.
5. [Grant high-volume portal users access to cases](#) so that they can access their private questions on Chatter Answers.

SEE ALSO:

[Setting Up Chatter Answers](#)

Setting Q&A Tab Visibility

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

Set the visibility of the Q&A tab to `Default On` so that support agents can view, search, filter, and moderate questions posted to your Chatter Answers zones.

1. From Setup, enter `Profiles` in the `Quick Find` box, then select **Profiles**.
2. Select a support agent profile.
3. Depending on which user interface you're using, do one of the following:
 - Enhanced profile user interface—In the **Find Settings...** box, enter the name of the tab you want and select it from the list, then click **Edit**.
 - Original profile user interface—Click **Edit**, then scroll to the Tab Settings section.
4. Specify the visibility of the Q&A tab to `Default On`.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

USER PERMISSIONS

To set organization-wide sharing defaults:

- "Manage Sharing"

To set field-level security:

- "Manage Profiles and Permission Sets"

AND

"Customize Application"

To customize fields:

To create assignment rules:

To grant high-volume portal users access to cases:

- "Customize Application"

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

USER PERMISSIONS

To set Q&A tab visibility:

- "Manage Profiles and Permission Sets"

5. (Original profile user interface only) To reset users' tab customizations to the tab visibility settings that you specify, select **Overwrite users' personal tab customizations**.
6. Click **Save**.

SEE ALSO:

[Setting Up Chatter Answers](#)

Assigning Data Categories to Chatter Answers

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

Assign a data category group to Chatter Answers so that it's available to all of your Chatter Answers zones. You configure each zone with a top-level data category (topic) in which customers and support agents can categorize and filter questions and knowledge articles.

1. From Setup, enter *Data Category Assignments* in the *Quick Find* box, then select **Data Category Assignments** under Chatter Answers.
2. Click **Edit**.
3. Select a category group.
4. Click **Save**.

 **Note:** Each zone in Chatter Answers can be associated with a top-level category. For a zone to be visible to a customer, the customer's user profile must have visibility to that zone's top-level data category. In addition, if a customer has visibility to child data categories but not to the top-level data category associated with a zone, the zone won't be visible to them.

SEE ALSO:

[Setting Up Chatter Answers](#)

[Data Categories in Salesforce.com](#)

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

USER PERMISSIONS

To assign data categories to Chatter Answers:

- "Customize Application"

Configure Salesforce Knowledge for Chatter Answers

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

To display Salesforce Knowledge articles in your Chatter Answers zones, you must:

1. [Implement Data Categories](#) (if you haven't done so already).
2. [Implement Salesforce Knowledge](#) (if you haven't done so already).
3. Configure both for Chatter Answers.

You configure each zone with a top-level data category (topic) in which customers and support agents can categorize and filter questions and knowledge articles.

1. If you use role-based data category visibility, [set the Default Data Category Visibility to All Categories](#) so that customers not included in your organization's role hierarchy, such as high-volume portal users, can access categories that include questions and Salesforce Knowledge articles.

Alternatively, use permission sets or profiles to [set data category visibility](#).

2. [Create one category group for all of your communities](#) so that you're less likely to reach the limit of three active data categories. Then add a child category for each community; and add child categories to those categories to provide topics.
3. [Activate the category group you want available to Chatter Answers](#) so that users can access it.
4. [Grant "Read" permissions to specific article types](#) on the profiles of Chatter Answers users so that they can access articles from your zones.
5. [Optionally, allow support agents to promote replies to draft articles in the knowledge base](#) so that your support team can capture useful information quickly.

SEE ALSO:

[Chatter Answers Implementation Overview](#)
[Setting Up Chatter Answers](#)
[Data Category Visibility](#)
[Create and Modify Category Groups](#)

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

USER PERMISSIONS

To create or edit users:

- "Manage Internal Users"

To create article types and article actions:

- "Customize Application"

AND

"Manage Salesforce Knowledge"

To manage synonyms:

- "Manage Synonyms"

To create data categories:

- "Manage Data Categories"

Adding Chatter Answers to a Portal

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

You can add Chatter Answers to an existing Customer Portal or Partner Portal so that portal users can access Chatter Answers zones from one of your established channels. After users log in to one of your portals, they can access Chatter Answers from a tab and choose which zone to view from a drop-down list. If you only want to display Chatter Answers in your portals, then you don't need to set up a Force.com site to host Chatter Answers. However, a site lets guest users access some Chatter Answers data without a login, whereas portals do not.

The following occurs to Chatter Answers when it appears in a portal:

- Chatter Answers displays as a tab, which you can rename.
- A drop-down list lets portal users switch between all of your Chatter Answers zones.
- The **My Settings** link for users is replaced by **Enable Emails** and **Disable Emails**.
- **Sign In** and **Sign Up** are removed because portal users can only view Chatter Answers after they've logged in to your portal.
- Chatter Answers displays a look and feel, which you can't customize.
- The **Need help?** link is removed.
- If you display Chatter Answers with a Visualforce page on a portal, the option for users to switch zones in a portal isn't available.

SEE ALSO:

[Setting Up Chatter Answers](#)

[Setting Up Your Customer Portal](#)

Add Chatter Answers to a Customer Portal

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

You can add Chatter Answers to an existing Customer Portal so that portal users can access Chatter Answers zones from one of your established support channels.

1. Enable Chatter Answers for portals:
 - a. From Setup, enter *Chatter Answers Settings* in the Quick Find box, then select **Chatter Answers Settings**.
 - b. Click **Edit**.
 - c. Select **Show Chatter Answers in Portals**.
 - d. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

USER PERMISSIONS

To add Chatter Answers to a Customer Portal:

- "Customize Application"

2. Edit Customer Portal user profiles to support Chatter Answers.

Using the enhanced profile user interface, follow these steps:

- a. From Setup, enter *Profiles* in the Quick Find box, then select **Profiles**.
- b. Click **Edit** next to a portal user profile.
- c. In the Apps section of the page, select **Object Settings**.
- d. On the Object Settings page, select **Q&A**.
- e. In Tab Settings, select *Default On*.
- f. Click *Save* and navigate back to the Objects Settings page.
- g. Select **Questions and Answers**, and in the Object Permissions section select *Read and Create*.
- h. Click **Save**.

Using the original profile interface, follow these steps:

- a. From Setup, enter *Profiles* in the Quick Find box, then select **Profiles**.
- b. Click **Edit** next to a portal user profile.
- c. In Tab Settings, select *Default On* for **Q&A**.
- d. In Standard Object Permissions, select *Read and Create* on Questions.
- e. Click **Save**.

3. Add the Chatter Answers User feature license to Customer Portal users:

- a. From Setup, enter *Users* in the Quick Find box, then select **Users**.
- b. Click **Edit** next to a portal user.
- c. In the General Information area, select *Chatter Answers User*.
- d. Click **Save**.

4. Add Chatter Answers as a tab to your Customer Portal:

- a. From Setup, enter *Customer Portal Settings* in the Quick Find box, then select **Customer Portal Settings**.
- b. Click the name of a Customer Portal.
- c. Click **Customize Portal Tabs**.
- d. Select Q&A and click the **Add** arrow to move it into the Selected Tabs box.
- e. Click **Save**.

5. Optionally, rename the Q&A tab for your Customer Portal:

- a. From Setup, enter *Rename Tabs and Labels* in the Quick Find box, then select **Rename Tabs and Labels**.
- b. Click **Edit** next to Questions.
- c. Click **Next**.
- d. In Other Labels, rename Q&A. You can only rename it as *Singular*, not *Plural*.
- e. Click **Save**.

SEE ALSO:

[Adding Chatter Answers to a Portal](#)

Adding Chatter Answers to a Partner Portal

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

You can add Chatter Answers to an existing Partner Portal so that portal users can access Chatter Answers zones from one of your established partner channels.

1. Enable Chatter Answers for portals:
 - a. From Setup, enter *Chatter Answers Settings* in the Quick Find box, then select **Chatter Answers Settings**.
 - b. Click **Edit**.
 - c. Select *Show Chatter Answers in Portals*.
 - d. Click **Save**.
2. Edit Partner Portal user profiles to support Chatter Answers:
 - a. From Setup, enter *Profiles* in the Quick Find box, then select **Profiles**.
 - b. Click **Edit** next to a portal user profile.
 - c. In the Apps section of the page, select **Object Settings**.
 - d. On the Object Settings page, select **Q&A**.
 - e. In Tab Settings, select *Default* On.
 - f. Click *Save* and navigate back to the Objects Settings page.
 - g. Select **Questions and Answers**, and in the Object Permissions section select *Read* and *Create*.
 - h. Click **Save**.
3. Add the Chatter Answers User feature license to Partner Portal users:
 - a. From Setup, enter *Users* in the Quick Find box, then select **Users**.
 - b. Click **Edit** next to a portal user.
 - c. In the General Information area, select *Chatter Answers User*.
 - d. Click **Save**.
4. Add Chatter Answers as a tab to your Partner Portal:
 - a. From Setup, enter *Partners* in the Quick Find box, then select **Settings**.
 - b. Click the name of a Partner Portal.
 - c. Click **Customize Portal Tabs**.
 - d. Select Chatter Answers and click the **Add** arrow to move the Chatter Answers tab into the Selected Tabs box.
 - e. Click **Save**.
5. Optionally, rename the Chatter Answers tab for your Partner Portal:

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

USER PERMISSIONS

To add Chatter Answers to a Partner Portal:

- "Customize Application"

- a. From Setup, enter *Rename Tabs and Labels* in the **Quick Find** box, then select **Rename Tabs and Labels**.
- b. Click **Edit** next to Questions.
- c. Click **Next**.
- d. In Other Labels, rename Q&A. You can only rename it as *Singular*, not *Plural*.
- e. Click **Save**.

SEE ALSO:

[Adding Chatter Answers to a Portal](#)

Adding a Custom Visualforce Page to Display Chatter Answers

Use a Visualforce page to provide a custom Chatter Answers experience for your customers.

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

You must have a Visualforce page created that includes either the `chatteranswers:allfeeds` component or a combination of the following components: `chatteranswers:aboutme`, `chatteranswers:guestsignin`, `chatteranswers:feedfilter`, `chatteranswers:feeds`, `chatteranswers:searchask`, `chatteranswers:categoryfilter`.

To add a custom Visualforce page for displaying Chatter Answers:

1. From Setup, enter *Tabs* in the **Quick Find** box, then select **Tabs** to display a list of your organization's Visualforce tabs.
2. In the Visualforce section, click **New** to create a new Visualforce tab.
3. Select the Visualforce page you want to use and add details for the other fields on the page.
4. Click **Next**.
5. Select which user profiles can see the tab.
6. Select the custom apps from which the tab will be available.
7. Click **Save**.

To add the Visualforce tab as a Community tab, make sure the page is available in the community's tabs.

To add the Visualforce tab to a Customer Portal, make sure the Visualforce tab is configured to show in the portal.

You don't need to add the Visualforce tab to a Force.com site. Just make sure that you have created the Visualforce page with Chatter Answers components before you set up the site.

SEE ALSO:

[Customizing Chatter Answers using Visualforce Pages](#)

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

USER PERMISSIONS

To create a Visualforce page:

- "Customize Application"

To add a Visualforce tab:

- "Customize Application"

Troubleshooting Chatter Answers Setup

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

After you set up a Chatter Answers community, you can view a snapshot of all of its configurations on one page so that you don't have to visit several pages in setup to diagnose issues.

1. From Setup, enter *Sites Settings* in the **Quick Find** box, then select **Sites Settings**.
2. In the Site Snapshot column, click **View** next to the Force.com site associated with your community.
3. Click  to show or  to hide various settings.
4. Click **Go!** to go to a specific page in setup where you can change settings.

 **Example:** For example, you can use a site snapshot to see if the Force.com site hosting your community is marked **Active** or to verify the names of the user profiles assigned to your Customer Portal.

SEE ALSO:

[Chatter Answers Implementation Overview](#)
[Chatter Answers Users Overview](#)
[Setting Up Chatter Answers](#)

Chatter Answers Users Overview

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

Because Chatter Answers integrates several features with the Customer Portal, managing Chatter Answers users is similar to managing Customer Portal users. Use the following to manage the data and functions that are accessible to Chatter Answers users:

- Profiles, permissions, and access settings determine a user's permission to perform different functions, such as adding comments to a case.
- User licenses define which profiles and permission sets are available to a user, such as the High Volume Customer Portal (Service Cloud Portal User) or Customer Portal Manager Custom license.
- Feature licenses entitle a user to additional Salesforce features, such as Chatter Answers.
- Field-level security defines which fields users can access, such as fields on Salesforce Knowledge articles.
- [Sharing sets](#) let you selectively grant record access to defined groups of high-volume portal users.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

USER PERMISSIONS

To view Setup:

- "View Setup and Configuration"

To set up Chatter Answers:

- "Customize Application"

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

Chatter Answers excludes some features typically available to Customer Portal users, such as:

- Ideas
- Groups
- Teams
- Reports
- Content
- Page layouts
- Custom objects
- Delegated external user administration
- Customer Portal role hierarchy (available, but not used)
- Customer Portal sharing rules, except for high-volume portal users

Chatter Answers users can only access the following records from your zone:

- Cases
- Questions
- Replies (answers)
- Salesforce Knowledge articles

Chatter Answers is designed to support one user language for each zone that you create. When you [enable Chatter Answers](#), the Visualforce pages automatically added to your organization inherit your organization's default language. However, you can change the language attribute on each Visualforce page. Users who self-register for your zone inherit your organization's default language. Guest users view your zone in the language specified in the Visualforce pages, no matter the language chosen for their browsers.

**Note:**

- Chatter Answers users can't change their language, timezone, or locale settings.
- Portal users must have the Chatter Answers User feature license to use Chatter Answers. This feature license is automatically assigned to high-volume portal users who self-register for Chatter Answers. You can manually assign the license to users who don't self-register by editing a user and clicking `Chatter Answers User`.
- Authenticated Website User profiles don't have access to Chatter Answers.

Internal users with permission to see Chatter Answers can see all zones in the Q&A tab in their organization. If internal users sign in to a community, they see only those zones associated with that community.

SEE ALSO:

[Setting Up Chatter Answers](#)

Encouraging Participation with Chatter Answers Reputation



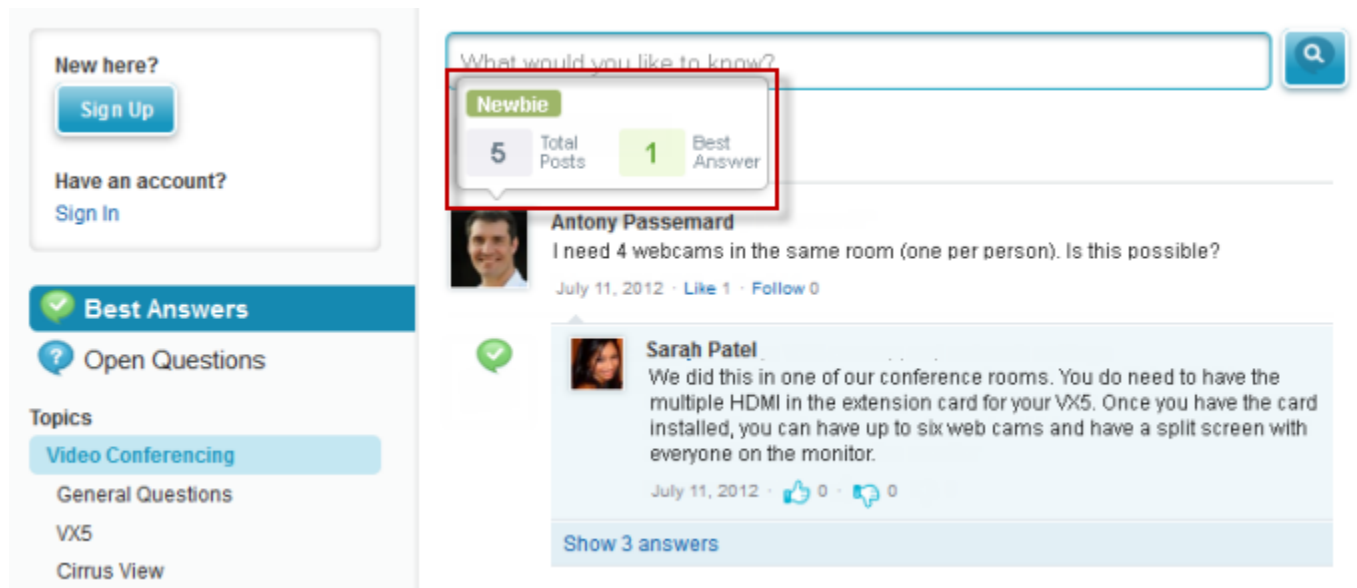
Note: Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

Tap into the expertise and knowledge of your most active community members by rewarding their activity. By enabling reputations, you let users earn points and ratings that display in hover details over a user's photo in the feed. As your star posters engage more frequently, they improve the overall content in your community and provide better answers for users who are searching for help with an issue. This means that users who are searching for a solution can be confident that an answer from an expert can be trusted, which means fewer support calls for your organization.



Users earn points when their posts receive votes or are selected as having resolved the question in any of the zones to which they belong. When they earn enough points, the hover details show their reputation as well as the number of posts and questions they've resolved in that zone. Reputation points are calculated separately for each zone, and for the cumulative activity within the entire organization. Users who participate in different zones will have different reputation values for each zone based on their activity in that zone. When users are logged into the internal application, their reputation score is based on their participation in all zones to which they belong.

Chatter Answers comes with the following pre-defined reputation levels that apply to all zones:

Name	Points per Level	Color
Newbie	0 – 499	Green
Smartie	500 – 1999	Blue
Pro	2000 – 4999	Purple
All Star	5000+	Orange

To add or edit reputation level names or points per level in any of your zones, use the `ChatterAnswersReputationLevel` object in the API. You can create up to 25 different reputation levels for each zone. Colors for the different reputation levels can be changed at the style sheet (CSS) level.

SEE ALSO:

[Chatter Answers Users Overview](#)

Chatter Answers Implementation Tips

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

Consider the following information when planning and implementing Chatter Answers.

- We recommend that advanced Salesforce administrators and developers set up and maintain Chatter Answers, as it involves several Salesforce features.
- Before administrators can set up Chatter Answers, their organizations must have implemented [Data Categories](#). If you want Salesforce Knowledge articles to display in your zones, then administrators need to implement [Salesforce Knowledge](#).
- You can customize fields, page layouts, buttons and links, Apex triggers, and validation rules for questions and replies for Chatter Answers from Setup by entering "Chatter Answers" in the **Quick Find** box, then selecting **Chatter Answers** and choosing the appropriate setting.
- After you enable Chatter Answers, several items are automatically added to your organization for use with setting up zones:
 - A Q&A tab where internal users and administrators can view and use Chatter Answers. Administrators can rename this tab.
 - Standard permission settings for Questions on user profiles so that you can grant users permissions to questions and replies.
 - Visualforce pages that you can add to a Force.com site, a tab in a Community, or a Customer Portal so that users can register, sign in, and view feed items on a zone.
 - An Apex class named `ChatterAnswersRegistration` with a method for customizing Account creation for portal users.
 - An Apex trigger for questions named `chatter_answers_question_escalation_to_case_trigger` so that questions with specified attributes are automatically escalated to cases.
 - A workflow field update named `chatter_answers_num_subscriptions_above_` so that when a question is escalated to a case, `Priority` on questions is updated.
 - Two workflow rules, `chatter_answers_no_best_reply_within_time_limit_wf` and `chatter_answers_num_subscriptions_above_limit_wf`, which you can customize and activate so that questions without best replies or questions with a specified number of followers are automatically escalated to cases.
- You can add Chatter Answers to an existing Customer Portal or Partner Portal so that portal users can access Chatter Answers zones from one of your established channels.
- Chatter Answers is designed to support one user language for each zone that you create. When you [enable Chatter Answers](#), the Visualforce pages automatically added to your organization inherit your organization's default language. However, you can change the language attribute on each Visualforce page. Users who self-register for your zone inherit your organization's default language. Guest users view your zone in the language specified in the Visualforce pages, no matter the language chosen for their browsers.
- You can rename `Customer Support` on your zones' user interface. For example, you can change "Customer Support" to "Acme Support." Just edit the Customer Support label on the Question object.
- Questions escalated to cases display a Chatter-like feed on case detail pages. The case detail page also includes a Customer View section that lets support agents reply publicly or privately to the thread posted to the zone.
- Case comments marked `Public` display as private messages from customer support in Chatter Answers. They don't display to the entire community. For example, if a support agent adds a public case comment, it displays only to the case's contact private messages in Chatter Answers. Support agents can read all private and public case comments.
- Chatter Answers sends email to users when they:

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

- Sign up for an account.
 - Follow a question (answers or comments).
 - Receive an answer or comment to their question.
 - Receive a private reply to their question from customer support.
- Internet Explorer 8 users receive a security warning if you customize with URLs that don't include https://.
- Before you make a zone public, add at least 20 frequently asked questions, answers, or articles. This content will generate conversations.
- Create Salesforce Knowledge articles that contain:
 - Your support organization's phone number so that customers can contact your support agents directly.
 - Terms and conditions for zone members, such as when support agents might delete customers' questions and comments.
- Chatter Answers uses the following API objects:
 - Case
 - ChatterAnswersActivity
 - ChatterAnswersReputationLevel
 - Community (Zone)
 - Question
 - QuestionReportAbuse
 - QuestionSubscription
 - Reply
 - ReplyReportAbuse

SEE ALSO:[Chatter Answers Best Practices](#)[Setting Up Chatter Answers](#)

Escalating a Question to a Case in Chatter Answers

If a question in Chatter Answers isn't resolved or its replies aren't satisfactory, administrators and trusted community members such as moderators can escalate the question to a case.

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After a case is created, the question detail page provides a link to the case for the life of the question. This link also shows the status of the case.

To escalate a question to a case:

1. Click the question title.
2. Click the triangle next to the question to display the drop-down menu, and click **Escalate to Case**.

 **Note:** This option only appears if the user has permission to create cases. Users created from contacts cannot escalate questions to cases.

3. Update the case fields if you want to change any default values. The question title automatically becomes the case subject.
4. Click **Save**. You are returned to the question detail page, and the case is now available for the Case Owner to resolve.

 **Note:** Closing the case does not mark the question as resolved, and resolving the question does not close the case. The case and the question must be updated separately.

Chatter Answers Best Practices

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

Consider the following tips when planning and using Chatter Answers.

- We recommend that you tell support agents that:
 - The `Case Origin` field lists Chatter Answers on any case converted from a question.
 - If they answer a question privately, they can't convert it to a public answer.
- We recommend that you assign a support agent to review public questions from the Q&A tab. Agents can't click **Flag** next to questions or replies that are spam, hateful, or inappropriate, but they can edit and delete questions or replies from a zones via the Q&A tab if they have the "Delete" permission on questions.
- To moderate many questions quickly, we recommend that support agents review questions from pinned lists on the Salesforce console (this requires adding the Q&A tab to the console's Navigation tab).
- To see a list of cases converted from questions, we recommend that administrators or support agents create a case view where Case Origin equals Chatter Answers.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view the Q&A tab:

- "Read" on questions

To ask and reply to questions:

- "Create" on questions

To create cases:

- "Create" on cases

- Because photos added to profiles display externally on Chatter Answers, we recommend that support agents choose photos that match their company's policies and branding.

SEE ALSO:

[Chatter Answers Implementation Tips](#)

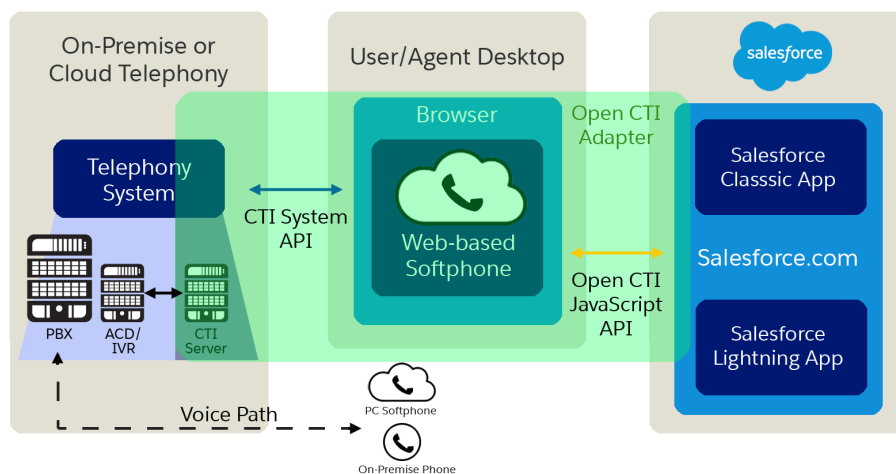
[Setting Up Chatter Answers](#)

Creating Phone Channels

Salesforce Open CTI

Open CTI is a JavaScript API that lets you build and integrate third-party computer-telephony integration (CTI) systems with Salesforce Call Center. To display CTI functionality in Salesforce, Open CTI uses browsers as clients. With Open CTI, you can make calls from a softphone directly in Salesforce without installing CTI adapters on your machines.

Here's how Open CTI connects to your telephony system.



EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Note: The way you implement Open CTI depends on your org's user interface. There are separate Open CTI APIs for Salesforce Classic and Lightning Experience. You can't swap the two Open CTI APIs in custom JavaScript code because they behave and function differently. Make sure that you think about where you want to implement your CTI system before you begin developing.

Before the introduction of Open CTI, Salesforce users could only use the features of a CTI system after they installed a CTI adapter program on their machines. These types of programs often included desktop software that required maintenance and didn't offer the benefits of cloud architecture.

Typically, CTI vendors or partners create Open CTI implementations. After you have an Open CTI implementation, it's integrated with Salesforce using the Salesforce Call Center. Keep in mind that the out-of-the-box Call Center app is a Salesforce Classic app and only supports Open CTI for Salesforce Classic. To make calls in Lightning Experience, create a Lightning Experience app and use Open CTI for Lightning Experience.

CTI vendors and partners use Open CTI in JavaScript to embed API calls and processes. With Open CTI vendors and partners can:

- Build CTI systems that integrate with Salesforce without the use of CTI adapters.

- Create customizable softphones (call-control tools) that function as fully integrated parts of Salesforce and the Salesforce console.
- Provide users with CTI systems that are browser and platform agnostic, for example, CTI for Microsoft® Internet Explorer®, Mozilla® Firefox®, Apple® Safari®, or Google Chrome™ on Mac, Linux, or Windows machines.

SEE ALSO:

[Open CTI Developer Guide](#)

[Salesforce Call Center](#)

[Supported Browsers](#)

Salesforce CTI Toolkit

The CTI Toolkit lets developers build computer-telephony integration (CTI) adapters that integrate Salesforce with third-party CTI systems. With the CTI Toolkit, developers can build CTI adapters that Salesforce Call Center users install on their machines so they can use the features of a CTI system through a softphone.

Available in: Salesforce Classic

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

 **Important:** The CTI Toolkit is retiring. Softphones built with the CTI Toolkit will stop working beginning Spring '17. To continue using your softphone, migrate your CTI implementation to [Salesforce Open CTI](#). For more information about the retirement of CTI Toolkit and how to migrate to Open CTI, see [CTI Toolkit Retirement FAQ](#).

There are three versions of the CTI Toolkit. Each version provides users with different Salesforce CRM Call Center functionality. However, Salesforce only distributes CTI Toolkit version 4.0 or higher. The following table lists the functionality available in CTI adapters built with each CTI Toolkit:

Functionality	Version 1.0 or Higher	Version 2.0 or Higher	Version 3.0 or Higher	Version 4.0 or Higher
Change the fields and order of fields that display in a SoftPhone	✓	✓	✓	✓
Change the objects and order of links to objects that display in a SoftPhone	✓	✓	✓	✓
Specify the fields that display in the SoftPhone if a single record for a particular object is found	✓	✓	✓	✓
Specify screen pop settings for inbound calls with single, multiple, or no record matches		✓	✓	✓
Specify screen pops for inbound calls to display		✓	✓	✓

Functionality	Version 1.0 or Higher	Version 2.0 or Higher	Version 3.0 or Higher	Version 4.0 or Higher
in browser windows that are already open, or in new browser windows or tabs				
Specify screen pops to Visualforce pages for inbound calls		✓	✓	✓
Specify screen pops to search pages for inbound calls with multiple record matches		✓	✓	✓
View a call center's version in a Version field (from Setup, enter <i>Call Centers</i> in the Quick Find box, then select Call Centers and choose a call center)		✓	✓	✓
View an enhanced SoftPhone user-interface in the footer of the Salesforce console			✓	✓
Log calls in the customizable interaction log of the Salesforce console			✓	✓
Support browsers that are cross-domain messaging compatible				✓
Reduce CTI adapter size and complexity				✓

For information about customizing and building CTI adapters, see:

- [CTI Toolkit Developer's Guide \(Version 4.0\)](#)
- [CTI Toolkit Developer's Guide \(Versions 1.0 to 3.0\)](#)

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

SEE ALSO:

[Salesforce Call Center](#)

Salesforce Call Center

Call Center integrates Salesforce with third-party computer-telephony integration (CTI) systems. Call center users can see Salesforce information for incoming calls, make out-going calls directly from Salesforce, and report on call outcome, duration, and more. A call center is great for boosting productivity for Salesforce users that spend time on the phone.

 **Note:** Keep in mind that the out-of-the-box Call Center app is a Salesforce Classic app and only supports Open CTI for Salesforce Classic. To make calls in Lightning Experience, create a Lightning Experience app and use Open CTI for Lightning Experience.

To set up a call center, work with a developer or partner to create a CTI implementation that uses the Open CTI API and works with your existing telephony system. Most call centers are created by installing an AppExchange package, then all you have to do is decide which users you want to access the call center.

After a call center is set up, call center users can make and receive calls with a softphone. Each softphone looks and behaves differently because each CTI implementation is unique. In the console and in Lightning Experience, softphones appear in a footer. In Salesforce Classic, softphones appear in the left sidebar of every Salesforce page.

The Call Center is all about customization. You can modify softphone layouts and assign specific layouts to selected user profiles. You can also add phone numbers to call center directories so your users all have access to key phone numbers. As your needs change, your call center can be customized and changed too. As an admin, some customization you can do yourself. However, you might want to work with your developers or partners to make functionality changes.

SEE ALSO:

[Open CTI Developer Guide](#)

[Set Up a Call Center](#)

[Creating a Call Center](#)

[Managing Call Center Users](#)

Set Up a Call Center

Before Salesforce users can access and use a call center, an administrator must complete various tasks.

 **Note:** Keep in mind that the out-of-the-box Call Center app is a Salesforce Classic app and only supports Open CTI for Salesforce Classic. To make calls in Lightning Experience, create a Lightning Experience app and use Open CTI for Lightning Experience.

1. Work with a developer or partner to create a computer-telephony integration (CTI) implementation that uses the Open CTI API and works with your existing telephony system. Most call centers are created by installing a package from the AppExchange.

If you're developing your own implementation, [define a new call center record](#) for every CTI system in use at your business.

2. [Assign Salesforce users to the appropriate call center](#). A call center user must be associated with a call center to view the softphone.
3. Optionally, you can make further customizations.
 - [Configure call center phone directories](#) with additional directory numbers and updated phone number search layouts.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To manage call centers, call center users, call center directories, and SoftPhone layouts:

- "Manage Call Centers"

- [Customize softphone layouts](#) for different user profiles, so that the softphone of a sales person might show related leads, accounts, and opportunities, while the softphone of a support rep might show related cases and solutions.

SEE ALSO:

[Open CTI Developer Guide](#)

Deploying Adapters to Call Center Machines

Except for call centers built with Open CTI, any machine that uses Salesforce CRM Call Center must have a *CTI adapter* installed. A CTI adapter is a light-weight software program that controls the appearance and behavior of a Salesforce SoftPhone. The [CTI Developer's Toolkit](#) version determines a SoftPhone's functionality.

Because a CTI adapter communicates directly with an individual CTI system, an organization must use a different CTI adapter for each type of CTI system that is in use. For example, if an organization wants to integrate one call center that runs Cisco IPCC Enterprise™ and one call center that runs Cisco IPCC Express™, the organization must have two CTI adapters available. A call center user's machine only requires the SoftPhone CTI adapter for the call center to which it connects.

To download a SoftPhone CTI adapter, visit [AppExchange](#). Adapter installation packages include both the adapter setup files and a [call center definition file](#) that can be used in conjunction with the adapter.

To install a CTI adapter on a single machine, run the CTI adapter's `Setup.exe` application as a Windows administrator user.

To deploy a CTI adapter to all the machines in a call center at once, use the `.msi` file that is packaged with the installer and your preferred Software Management System.

Once a CTI adapter is installed, you can perform the following operations:

- Start the CTI adapter application by clicking **Start > Programs > salesforce.com > <Your CTI System Name> Adapter**. You can verify that the CTI adapter is running by looking for the  icon in the system tray of the computer.
- Stop the CTI adapter application by right-clicking the CTI adapter system tray icon () and choosing **Exit**.
- Modify CTI adapter log settings by right-clicking the CTI adapter system tray icon () and choosing **Logging...**. In the CTI Log Settings dialog:
 - Select the types of messages that you want to log. Keep log levels at **Low - Errors** unless you are troubleshooting an issue with your adapter.
 - Specify the location for the two log files that the CTI adapter generates. For more information on these files, see the [CTI Toolkit Developer's Guide](#).

SEE ALSO:

[Set Up a Call Center](#)

[Managing Call Center Users](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Call Center Definition Files

A call center definition file specifies a set of fields and values that are used to define a call center in Salesforce for a particular [CTI adapter](#). Salesforce uses call center definition files in order to support the integration of Salesforce CRM Call Center with multiple CTI system vendors.

By default, any CTI adapter installation package includes a default call center definition file that works specifically with that adapter. This XML file is located in the adapter installation directory and is named after the CTI system that it supports. For example, the Cisco IPCC Enterprise™ adapter's default call center definition file is named `CiscoIPCCEnterprise7x.xml`.

The first instance of a call center for a particular CTI adapter must be defined by [importing the adapter's call center definition file](#) into Salesforce. Subsequent call centers can be created by [cloning the original call center](#) that was created with the import.

If your organization modifies an adapter or builds a new one, you must customize the adapter's call center definition file so that it includes any additional call center information that is required. For example, if you are building a CTI adapter for a system that supports a backup server, your call center definition file should include fields for the backup server's IP address and port number. CTI adapters for systems that do not make use of a backup server do not need those fields in their associated call center definition files.



Note: Once a call center definition file has been imported into Salesforce, the set of fields that were specified in the file cannot be modified. The values assigned to those fields, however, can be changed within Salesforce.

See the following topics for information about creating and importing a call center definition file:

- To create a call center definition file for a custom CTI adapter, see [Creating a Call Center Definition File](#) on page 141.
- To view a sample call center definition file, see [Sample Call Center Definition File](#) on page 142.
- To import a call center definition file into Salesforce, see [Importing a Call Center Definition File](#) on page 144.

SEE ALSO:

[Creating a Call Center](#)

[Cloning a Call Center](#)

[Call Center Definition XML Format](#)

[Required Call Center Elements and Attributes](#)

[Specifying Values for <item> Elements](#)

Creating a Call Center Definition File

If you have built a custom CTI adapter you must write a [call center definition file](#) to support it. Use a text or XML editor to define an XML file according to the guidelines outlined in the following topics:

- [Call Center Definition XML Format](#)
- [Required Call Center Elements and Attributes](#)
- [Specifying Values for <item> Elements](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

- [Sample Call Center Definition File](#)

SEE ALSO:

[Creating a Call Center](#)

[Sample Call Center Definition File](#)

[Importing a Call Center Definition File](#)

[Cloning a Call Center](#)

Sample Call Center Definition File

The following XML code makes up a sample [call center definition file](#). For more information on the XML format of a call center definition file, see [Creating a Call Center Definition File](#) on page 141.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

```
<!--
  All sections and items whose name value begins with "req" are
  required in a valid call center definition file. The sortOrder
  and label attributes can be changed for all required sections
  and items except reqGeneralInfo, reqInternalName, and
  reqDisplayName, in which only the label attribute can be altered.

  Note that the value for the reqInternalName item is limited to
  40 alphanumeric characters and must start with an alphabetic
  character. reqInternalName must be unique for all call centers
  that you define.
-->

<callCenter>

<section sortOrder="0" name="reqGeneralInfo" label="General Info">
  <item sortOrder="0" name="reqInternalName"
    label="Internal Name">callCenter001</item>
  <item sortOrder="1" name="reqDisplayName"
    label="Display Name">My Call Center</item>
  <item sortOrder="2" name="reqDescription"
    label="Description">Located in San Francisco, CA</item>
  <item sortOrder="3" name="reqProgId"
    label="CTI Connector ProgId">MyAdapter.MyAdapter.1</item>
  <item sortOrder="4" name="reqVersion"
    label="Version">4.0</item>
  <item sortOrder="5" name="reqAdapterUrl"
    label="CTI Adapter URL">http://localhost:11000</item>
</section>
```

```
<section sortOrder="1" name="ServerInfo" label="CTI Server Info">
  <item sortOrder="0" name="HostA"
    label="Host A">Host A</item>
  <item sortOrder="1" name="PortA"
    label="Port A">Port A</item>
  <item sortOrder="2" name="HostB"
    label="Host B">Host B</item>
  <item sortOrder="3" name="PortB"
    label="Port B">Port B</item>
  <item sortOrder="4" name="PeripheralID"
    label="Peripheral ID">1000</item>
</section>

<section sortOrder="2" name="DialingOptions" label="Dialing Options">
  <item sortOrder="0" name="OutsidePrefix"
    label="Outside Prefix">1</item>
  <item sortOrder="1" name="LongDistPrefix"
    label="Long Distance Prefix">9</item>
  <item sortOrder="2" name="InternationalPrefix"
    label="International Prefix">01</item>
</section>

</callCenter>
```

SEE ALSO:[Creating a Call Center](#)[Creating a Call Center Definition File](#)[Call Center Definition XML Format](#)[Required Call Center Elements and Attributes](#)[Specifying Values for <item> Elements](#)

Importing a Call Center Definition File

To create your first call center for a [CTI adapter](#) that was just installed, you can import the adapter's default [call center definition file](#) into Salesforce:

1. From Setup, enter *Call Centers* in the *Quick Find* box, then select **Call Centers**.
2. Click **Import**.
3. Next to the *Call Center Definition File* field, click **Browse** to navigate to the default call center definition file in your CTI adapter installation directory. This XML file is named after the type of CTI system that the adapter supports. For example, the Cisco™ IPCC Enterprise adapter's default call center definition file is named *CiscoIPCCEnterprise7x.xml*. Click **Open** to enter the path in the *Call Center Definition File* field.
4. Click **Import** to import the file and return to the All Call Centers page. The new call center record is listed with the other call centers in your organization.

 **Note:** If you receive the error *A call center with this internal name already exists*, a call center definition file for this CTI adapter has already been imported into Salesforce. To create additional call center records for this CTI adapter, [clone the adapter's existing call center](#), or [modify the call center definition file](#) to include a different value for *reqInternalName*.

5. Click **Edit** next to the name of the new call center to modify the call center's settings.

To create additional call centers for a particular CTI adapter, see [Cloning a Call Center](#) on page 149.

To define a new call center definition file for a CTI adapter that was customized specifically for your organization, see [Creating a Call Center Definition File](#) on page 141.

SEE ALSO:

[Creating a Call Center](#)

[Managing Call Centers](#)

Call Center Definition XML Format

A [call center definition file](#) consists of three XML elements: *callCenter*, *section*, and *item*. The following list provides details about the properties and attributes of each element:

callCenter

This element represents a definition for a single call center phone system. At least one *<callCenter>* element must be included in every call center definition file. A *<callCenter>* element consists of one or more *<section>* elements.

section

This element represents a grouping of related data fields, such as server information or dialing prefixes. When a call center is edited in Salesforce, fields are organized by the section to which they are assigned. A *<section>* element belongs to a single *<callCenter>* element, and consists of one or more *<item>* elements.

Attributes:

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To import call center definition files:

- "Customize Application"
- AND
- "Manage Call Centers"

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Name	Type	Required?	Description
<code>sortOrder</code>	Positive Integer	Required	The order in which the section should appear when the call center is edited in Salesforce. For example, a section with <code>sortOrder="1"</code> comes just before a section with <code>sortOrder="2"</code>. The values for <code>sortOrder</code> must be non-negative integers, and no numbers can be skipped within a single call center definition. For example, if there are three section elements in a call center definition file, one <code><section></code> element must have <code>sortOrder="0"</code>, one <code><section></code> element must have <code>sortOrder="1"</code>, and one <code><section></code> element must have <code>sortOrder="2"</code>.
<code>name</code>	String	Required	The internal name of the section as defined in the Salesforce database. You can use this value to refer to the section when writing custom adapter or SoftPhone code. Names must be composed of only alphanumeric characters with no white space or other punctuation. They are limited to 40 characters each. Names beginning with <code>req</code> are reserved for required Salesforce sections only (see Required Call Center Elements and Attributes on page 146). Other reserved words that cannot be used for the <code>name</code> attribute include <code>label</code>, <code>sortOrder</code>, <code>internalNameLabel</code>, and <code>displayNameLabel</code>.
<code>label</code>	String	Optional	The name of the section when viewed in Salesforce. Labels can be composed of any string of UTF-8 characters. They are limited to 1000 characters each.

item

This element represents a single field in a call center definition, such as the IP address of a primary server or the dialing prefix for international calls. When call centers are edited in Salesforce, each `<item>` element is listed under the section to which it belongs. You can have multiple `<item>` elements in a `<section>` element.

Attributes:

Name	Type	Required?	Description
<code>sortOrder</code>	Positive Integer	Required	The order in which the item should appear when the call center is edited in Salesforce. For example, an item with <code>sortOrder="1"</code> comes just before an item with <code>sortOrder="2"</code>. The values for <code>sortOrder</code> must be non-negative integers, and no numbers can be skipped within a single call center definition. For example, if there are three item elements in a call center definition file, one <code><item></code> element must have <code>sortOrder="0"</code>, one <code><item></code> element must have

Name	Type	Required?	Description
			<code>sortOrder="1"</code> , and one <code><item></code> element must have <code>sortOrder="2"</code> .
<code>name</code>	String	Required	The internal name of the item as defined in the Salesforce database. You can use this value to refer to the item when writing custom adapter or SoftPhone code. Names must be composed of only alphanumeric characters with no white space or other punctuation. They are limited to 40 characters each. Names beginning with <code>req</code> are reserved for required Salesforce sections only (see Required Call Center Elements and Attributes on page 146). Other reserved words that cannot be used for the <code>name</code> attribute include <code>label</code>, <code>sortOrder</code>, <code>internalNameLabel</code>, and <code>displayNameLabel</code>.
<code>label</code>	String	Optional	The name of the item when viewed in Salesforce. Labels can be composed of any string of UTF-8 characters. They are limited to 1,000 characters each.

SEE ALSO:

[Creating a Call Center](#)[Call Center Definition XML Format](#)[Creating a Call Center Definition File](#)[Required Call Center Elements and Attributes](#)[Specifying Values for `<item>` Elements](#)[Sample Call Center Definition File](#)

Required Call Center Elements and Attributes

There must be one `<section>` that includes `<item>` elements with the following names in every [call center definition file](#):

<code><item></code> Name	Description
<code>reqInternalName</code>	Represents the unique identifier for the call center in the database. It must have a <code>sortOrder</code> value of 0, and its value must be specified in the call center definition (see Specifying Values for <code><item></code> Elements on page 147). A value for <code>reqInternalName</code> must be composed of no more than 40 alphanumeric characters with no white space or other punctuation. It must start with an alphabetic character and must be unique from the <code>reqInternalName</code> of all other call centers defined in your organization.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

<item> Name	Description
reqDisplayName	Represents the name of the call center as displayed in Salesforce. It must have a <code>sortOrder</code> value of 1. A value for <code>reqDisplayName</code> has a maximum length of 1,000 UTF-8 characters.
reqDescription	Represents a description of the call center. A value for <code>reqDescription</code> has a maximum length of 1,000 UTF-8 characters.
reqProgId	Represents the Program ID (<code>progId</code>) of the CTI adapter that should be used for this call center. This value is specified in the default call center definition file that comes bundled with every CTI adapter installer, or in the base COM class of a custom CTI adapter.
reqVersion	Represents the version of the CTI Toolkit with which the adapter was built. This element is available for call centers built with CTI Toolkit versions 3.0 or higher.
reqAdapterUrl	Represents the location of where the CTI adapter is hosted. For example, <code>http://localhost:11000</code> . This element is available for call centers built with CTI Toolkit versions 4.0 or higher.

You can add additional <item> elements to this section if needed.

SEE ALSO:

- [Creating a Call Center](#)
- [Creating a Call Center Definition File](#)
- [Call Center Definition XML Format](#)
- [Required Call Center Elements and Attributes](#)
- [Specifying Values for <item> Elements](#)
- [Sample Call Center Definition File](#)

Specifying Values for <item> Elements

With the exception of the `reqInternalName` <item>, whose value must always be specified in a [call center definition file](#), you can specify <item> values either in the call center definition file or in Salesforce once the definition file has been imported.

To specify a value for an <item> element in a call center definition file, place the value between the opening and closing tags of the <item>. For example:

```
<item sortOrder="0" name="reqInternalName" label="Call Center Internal
Label">MyCallCenter</item>
```

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

sets the value of the `reqInternalName` <item> to `MyCallCenter`. Note that any <item> value other than the value for `reqInternalName` can be edited in Salesforce after the call center definition is imported.

SEE ALSO:

- [Creating a Call Center](#)
- [Call Center Definition XML Format](#)
- [Creating a Call Center Definition File](#)
- [Required Call Center Elements and Attributes](#)
- [Sample Call Center Definition File](#)

Creating a Call Center

A call center in [Salesforce CRM Call Center](#) corresponds to a single computer-telephony integration (CTI) system already in place at your organization. Salesforce users must be assigned to a call center record before they can use any Salesforce CRM Call Center features.

There are two ways to create a call center record in Salesforce:

- [Import a call center definition file into Salesforce](#). Use this method to create your first call center for a CTI adapter that was just installed.
- [Clone an existing call center definition](#). Use this method to create additional call centers for a particular CTI adapter. For example, if you already have a call center record for a Cisco IPCC Enterprise™ call center based in one location, you can clone that record for a Cisco IPCC Enterprise call center based in another location.

To view a list of call centers that have already been created, from Setup, enter *Call Centers* in the *Quick Find* box, then select **Call Centers**.

SEE ALSO:

- [Open CTI Developer Guide](#)
- [Set Up a Call Center](#)
- [Call Center Definition Files](#)
- [Managing Call Centers](#)
- [Displaying and Editing a Call Center](#)
- [Managing Call Center Users](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create a call center by importing or cloning:

- “Manage Call Centers”

Cloning a Call Center

To create more than one call center for a particular CTI adapter, you can clone an existing one. For example, if you already have a call center record for a Cisco IPCC Enterprise™ call center based in one location, you can clone that record for a Cisco IPCC Enterprise call center based in another location.

To clone a call center:

1. From Setup, enter *Call Centers* in the **Quick Find** box, then select **Call Centers**.
2. Click the name of the call center that you want to clone.
3. Click **Clone**. This action opens a new call center for editing with the same fields and values as the original call center. Only the **Internal Name** field is left intentionally blank to allow you to provide a new name. The **Internal Name** field is limited to 40 alphanumeric characters and must start with an alphabetic character. **Internal Name** must be unique for every call center defined in your organization. For more information, see [Call Center Fields](#) on page 150.
4. Make any additional changes to the new call center as necessary.
5. Click **Save** to save the new call center, or click **Cancel** to return to the All Call Centers page without saving the cloned call center.

 **Note:** If you have read-only access to a field, the value of that field is not carried over to the cloned record.

SEE ALSO:

[Set Up a Call Center](#)
[Creating a Call Center](#)
[Managing Call Centers](#)
[Displaying and Editing a Call Center](#)
[Importing a Call Center Definition File](#)

Displaying and Editing a Call Center

A call center in [Salesforce CRM Call Center](#) corresponds to a single computer-telephony integration (CTI) system already in place at your organization. Salesforce users must be assigned to a call center record before they can use any Salesforce CRM Call Center features.

To view call center details:

1. From Setup, enter *Call Centers* in the **Quick Find** box, then select **Call Centers**.
2. Click the name of the call center that you want to view.

From the Call Center Detail page you can:

- Click **Edit** to modify the properties of the call center.
- Click **Delete** to erase the call center record from Salesforce. When you delete a call center, all associated [directory numbers](#) are also deleted. Any users associated with the call center must be reassigned to another call center to continue using Salesforce CRM Call Center features.
- Click **Clone** to [create a duplicate copy of the call center](#) with the same fields and values as the current call center.
- Click **Manage Call Center Users** to [designate Salesforce users as members of this call center](#).

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view and clone a call center:

- “Manage Call Centers”

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view or edit a call center:

- “Manage Call Centers”

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

SEE ALSO:

[Open CTI Developer Guide](#)

[Creating a Call Center](#)

[Managing Call Centers](#)

[Enabling HTTPS in a Call Center](#)

[Call Center Definition Files](#)

Managing Call Centers

A call center in [Salesforce CRM Call Center](#) corresponds to a single computer-telephony integration (CTI) system already in place at your organization. Salesforce users must be assigned to a call center record before they can use any Salesforce CRM Call Center features.

To view a list of call centers that have already been created, from Setup, enter *Call Centers* in the **Quick Find** box, then select **Call Centers**. From this page, you can:

- Click the name of a call center to [view call center details](#).
- Click **Import** to [import a call center definition file](#) that you have already created.
- Click **Edit** next to any call center to [modify call center details](#).
- Click **Del** next to any call center to erase the call center record from Salesforce. When you delete a call center, all associated [directory numbers](#) are also deleted. Any users associated with the call center must be reassigned to another call center to continue using Salesforce CRM Call Center features.

SEE ALSO:

[Open CTI Developer Guide](#)

[Set Up a Call Center](#)

[Creating a Call Center](#)

[Call Center Definition Files](#)

[Managing Call Center Users](#)

Call Center Fields

All call centers include the following required fields, though additional fields may be available depending on the content of the [call center definition file](#) that was used to create the call center:

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To import, view, edit, or delete a call center:

- “Manage Call Centers”

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Field	Description
Internal Name	Represents the unique identifier for the call center in the database. <code>Internal Name</code> must be composed of no more than 40 alphanumeric characters with no white space or other punctuation. It must start with an alphabetic character and must be unique from the <code>Internal Name</code> of all other call centers defined in your organization. Once a value for <code>Internal Name</code> has been saved for a call center, it cannot be changed.
Display Name	Represents the name of the call center as displayed in Salesforce. It must have a <code>sortOrder</code> value of 1. <code>Display Name</code> has a maximum length of 1,000 UTF-8 characters.
Description	Represents a description of the call center. <code>Description</code> has a maximum length of 1,000 UTF-8 characters.
CTI Connector ProgId	Represents the Program ID (progId) of the CTI adapter that should be used for this call center. This value is specified in the default call center definition file that comes bundled with every CTI adapter installer, or in the base COM class of a custom CTI adapter.

SEE ALSO:

[Displaying and Editing a Call Center](#)[Creating a Call Center](#)[Managing Call Center Users](#)

Customizing a Call Center Directory

Every call center in [Salesforce CRM Call Center](#) includes a call center directory that allows users to search for phone numbers throughout your organization. You can customize call center directories by:

- [Adding additional directory numbers](#), either to a single call center or to all defined call centers in your organization
- Updating phone number search layouts

SEE ALSO:

[Open CTI Developer Guide](#)[Set Up a Call Center](#)[Managing Call Centers](#)[Managing Call Center Users](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To manage call center directories:

- “Manage Call Centers”

Adding a Number to a Call Center Directory

To customize call center directories by adding additional directory numbers, either to a single call center or to all defined call centers in your organization:

1. From Setup, enter *Directory Numbers* in the **Quick Find** box, then select **Directory Numbers**. From this page, you can:
 - Click **Edit** to edit an existing additional directory number.
 - Click **Del** to delete an existing additional directory number.
 - Click the name of an existing additional directory number to view its details in the Additional Directory Number Detail page. From this page you can click **Edit** to edit the number, click **Delete** to delete it, or click **Clone** to quickly create a new additional directory number with the same information as the existing number.
2. Click **New** to define a new additional directory number.
3. In the **Name** field, enter a label that identifies the additional directory number.
4. In the **Phone** field, enter the phone number, including any international country codes. Dialing prefixes, such as 9 or 1, do not need to be included.
5. In the **Call Center** field, select the call center directory to which you want to add the new directory number. To add the number to every call center directory in your organization, choose -- Global --.
6. In the **Description** field, optionally enter text that provides further information about the additional directory number.
7. Click **Save** to save the number and return to the All Additional Directory Numbers page. Alternatively, click **Save & New** to save the number and create another.

 **Tip:** If you have a large number of directory numbers to define, use the Data Loader to create them in one step.

SEE ALSO:

[Open CTI Developer Guide](#)

[Set Up a Call Center](#)

[Customizing a Call Center Directory](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view, add, edit, or delete an additional directory number:

- "Manage Call Centers"

Customizing SoftPhone Layouts

A SoftPhone is a customizable call-control tool that appears to users assigned to a call center with machines on which CTI adapters have been installed. Similar to page layouts, you can design custom SoftPhone layouts and assign them to Salesforce CRM Call Center users based on their user profile. See:

- [Designing a Custom SoftPhone Layout](#)
- [Assigning a SoftPhone Layout to a User Profile](#)

SEE ALSO:

[Open CTI Developer Guide](#)

[Set Up a Call Center](#)

[Managing Call Centers](#)

Designing a Custom SoftPhone Layout

In a [SoftPhone layout](#) you can control the call-related fields that are displayed and the Salesforce objects that are searched for an incoming call. To design a custom SoftPhone layout:

1. From Setup, enter *SoftPhone Layouts* in the **Quick Find** box, then select **SoftPhone Layouts**.
2. Click **New** to create a new SoftPhone layout definition, or click **Edit** next to the name of an existing layout definition to view or modify it.
3. In the **Name** field, enter a label that uniquely identifies your SoftPhone layout definition.
4. In the **Select Call Type** picklist, choose the type of call for which the currently displayed SoftPhone layout should be used. Every SoftPhone layout definition allows you to specify different layouts for inbound, outbound, and internal calls. These three layouts are grouped together in a single SoftPhone layout definition.
5. In the **Display these call-related fields** section, click **Edit** to add, remove, or change the order of fields in the currently-displayed SoftPhone layout:
 - To add a field to the SoftPhone layout, select it in the Available list and click **Add**.
 - To remove a field from the SoftPhone layout, select it in the Selections list and click **Remove**.
 - To change the order of a field in the SoftPhone layout, select it in the Selections list and click **Up** or **Down**.

Any changes that you make are automatically updated in the SoftPhone layout preview image on the right side of the page. To hide the Available and Selections lists, click **Collapse**.

Phone-related fields only appear in a user's SoftPhone if a valid value for that field is available. For example, if you add a Caller ID field to the layout of an outbound call, Caller ID will not appear.

6. In the **Display these Salesforce Objects** section, click **Add/Remove Objects** to add, remove, or change the order of links to call-related objects.
7. Below the list of selected objects, click **Edit** next to each **If single <Object> found, display** row to specify the fields that should be displayed in the SoftPhone layout if a single record for that object is the only record found. You can add, remove, or change the order of fields.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view, create, edit, or delete a SoftPhone layout:

- "Manage Call Centers"

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view, create, edit, or delete a SoftPhone layout:

- "Manage Call Centers"

8. In the **Screen Pop Settings** section (for inbound call types), click **Edit** next to each type of record-matching row to specify which screens should display when the details of an inbound call match or don't match existing record(s) in Salesforce. The following table describes each record-matching row and its screen pop options:

Record-Matching Row	Description	Screen Pop Options
Screen pops open within	Use to set where screen pops display.	Existing browser window Select to display in open browser windows. New browser window or tab Select to display in new browser windows or tabs. Users' browsers may handle these settings differently: • Internet Explorer 6.0 always displays screen pops in new windows. • Internet Explorer 7.0 displays screen pops based on what users select in its tabs settings. • Firefox 3.5 displays screen pops based on what users select in its tabs settings.
No matching records	Use to set the screen pop options for when the details of an inbound call don't match any existing Salesforce records.	Don't pop any screen Select if you don't want any screen to display. Pop to new Select to display a new record page you specify from the drop-down list. Pop to Visualforce page Select to display a specific Visualforce page. The CTI adapter passes data from the call to the Visualforce page via a URL. This includes at least ANI (the caller ID) and DNIS (the number that the caller dialed). The URL can pass additional data to the Visualforce page if necessary.
Single-matching record	Use to set the screen pop options for when the details of an inbound call match one existing Salesforce record.	Don't pop any screen Select if you don't want any screen to display. Pop detail page Select to display the matching record's detail page.

Record-Matching Row	Description	Screen Pop Options
		Pop to Visualforce page Select to display a specific Visualforce page. The CTI adapter passes data from the call to the Visualforce page via a URL. This includes at least <code>ANI</code> (the caller ID) and <code>DNIS</code> (the number that the caller dialed). The URL can pass additional data to the Visualforce page if necessary.
Multiple-matching records	Use to set the screen pop options for when the details of an inbound call match more than one existing Salesforce record.	Don't pop any screen Select if you don't want any screen to display. Pop to search page Select to display a search page. Pop to Visualforce page Select to display a specific Visualforce page. The CTI adapter passes data from the call to the Visualforce page via a URL. This includes at least <code>ANI</code> (the caller ID) and <code>DNIS</code> (the number that the caller dialed). The URL can pass additional data to the Visualforce page if necessary.

To hide expanded record-matching rows, click **Collapse**.

This section only displays if your CTI adapter was built using the [CTI Developer's Toolkit 2.0 or higher](#).

9. Configure SoftPhone layouts for any remaining call types in the `Select Call Type` picklist.

10. Click **Save**.



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

SEE ALSO:

[Open CTI Developer Guide](#)

[Set Up a Call Center](#)

[Assigning a SoftPhone Layout to a User Profile](#)

Assigning a SoftPhone Layout to a User Profile

Once you have [defined one or more custom SoftPhone layouts](#), you can assign them to user profiles:

1. From Setup, enter *SoftPhone Layouts* in the **Quick Find** box, then select **SoftPhone Layouts**.
2. Click **Layout Assignment**.
3. For each user profile that appears in the page, select the SoftPhone layout that the profile should use. Profiles are only listed in this page if they include users that are currently assigned to a call center, or if they have already been assigned a custom SoftPhone layout.
4. Click **Save**.



Note: Call center users will see their newly assigned SoftPhone layout the next time they log into Salesforce.

SEE ALSO:

[Open CTI Developer Guide](#)

[Set Up a Call Center](#)

[Customizing SoftPhone Layouts](#)

Enabling HTTPS in a Call Center

With CTI adapters built with version 4.0 of the CTI Toolkit, you can specify a secure URL, or one that uses the secure hypertext transfer protocol (HTTPS), for your call center. Using HTTPS provides added security for your call center, and also helps prevent the Mixed Content warnings that can appear in your browser if your Salesforce organization uses the HTTPS protocol but your call center does not.

To enable HTTPS:

1. From Setup, enter *Call Centers* in the **Quick Find** box, then select **Call Centers**.
2. Click the name of a call center.
3. Click **Edit**.
4. Type the secure URL for your adapter in **CTI Adapter URL**. For example, `https://localhost:11000`.
5. Click **Save**.



Important: In addition to specifying a secure URL on the Call Center Settings page, you also need to make changes to the CTI adapter's configuration file, and create and install a new certificate for the CTI adapter. For more information, see the [CTI Toolkit Developer's Guide](#).



Note: Previous versions of CTI are secure but use Windows® technologies that are different than those in CTI 4.0.

SEE ALSO:

[Salesforce CTI Toolkit](#)

[Set Up a Call Center](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To assign a SoftPhone layout to a user profile:

- "Manage Call Centers"

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable HTTPS in a call center:

- "Customize Application"
- AND
- "Manage Call Centers"

Managing Call Center Users

A Salesforce user cannot view Salesforce CRM Call Center features unless an administrator has assigned the user to a call center. See the following for instructions:

- [Adding a User to a Call Center](#)
- [Removing a User from a Call Center](#)

Every call center user has access to a set of personal SoftPhone settings that specify:

- Whether the user should be automatically logged into his or her SoftPhone when he or she logs into Salesforce
- How a record should be displayed when it is the only one that matches an incoming call

To change the default personal SoftPhone settings for all new call center users, use the Force.com API.

SEE ALSO:

[Open CTI Developer Guide](#)
[Set Up a Call Center](#)
[Creating a Call Center](#)
[Managing Call Centers](#)

Adding a User to a Call Center

To add a user to a call center in [Salesforce CRM Call Center](#):

1. From Setup, enter *Call Centers* in the **Quick Find** box, then select **Call Centers**.
2. Click the name of the call center to which you want to assign the Salesforce user.
3. In the Call Center Users related list, click **Manage Call Center Users**.
4. Click **Add More Users**.
5. Specify search criteria to find the Salesforce users who should be assigned to the call center.
6. Click **Find** to display the list of Salesforce users that meet your search criteria. All users who already belong to a call center are excluded from search results because a user can only be assigned to one call center at a time.
7. Select the checkbox next to each user who should be assigned to the call center and click **Add to Call Center**.

Alternatively, you can change a particular user's call center in the User Edit page:

1. From Setup, enter *Users* in the **Quick Find** box, then select **Users**.
2. Click **Edit** next to the name of the user.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To add or remove users from a call center:

- "Manage Call Centers"

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To add users to a call center:

- "Manage Call Centers"

3. Modify the `Call Center` field as appropriate. You can change the user's call center by clicking the lookup icon () and choosing a new call center, or you can remove the user from his or her current call center by deleting the call center name from the field.

SEE ALSO:

[Set Up a Call Center](#)

[Managing Call Center Users](#)

[Creating a Call Center](#)

Removing a User from a Call Center

To remove a user from a call center in Salesforce CRM Call Center:

1. From Setup, enter `Call Centers` in the `Quick Find` box, then select **Call Centers**.
2. Click the name of the call center from which you want to remove the Salesforce user.
3. In the Call Center Users related list, click **Manage Call Center Users**.
4. Click **Remove** next to the name of the user that you want to remove from the call center.

To remove multiple users at once, select the `Action` checkbox next to each user you want to remove and click **Remove Users**.

Alternatively, you can change a particular user's call center in the User Edit page:

1. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.
2. Click **Edit** next to the name of the user.
3. Modify the `Call Center` field as appropriate. You can change the user's call center by clicking the lookup icon () and choosing a new call center, or you can remove the user from his or her current call center by deleting the call center name from the field.

SEE ALSO:

[Set Up a Call Center](#)

[Managing Call Center Users](#)

[Creating a Call Center](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To remove users from a call center:

- "Manage Call Centers"

Creating Web-Chat Channels

Live Agent for Administrators

Welcome to Live Agent for administrators! Live Agent is a comprehensive chat solution that makes it easy for your support organization's agents and support supervisors to assist customers. With Live Agent, your support organization can leverage the comprehensive customer service tools that are available in the Salesforce console while providing real-time chat support.

As an administrator, you can set up and customize Live Agent for your users, including agents and support supervisors. Live Agent is easy to set up and highly customizable. You can enable a suite of features that your agents and supervisors can use to assist customers.

Watch a Demo: [🎥 Live Agent Configuration](#)

A few major steps are involved in enabling, setting up, and deploying Live Agent in your Salesforce org. Let's get started.

EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To set up Live Agent:

- "Customize Application"

To create user profiles or permission sets:

- "Manage Profiles and Permission Sets"

Create a Basic Live Agent Implementation

Before you customize Live Agent, you need to create the basic Live Agent implementation for your Salesforce org. After you complete the basic setup steps, you'll have a functioning Live Agent implementation that your agents can use to chat with customers.

Watch a Demo:  [Live Agent Configuration](#)

EDITIONS

Available in: Salesforce Classic

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Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To set up Live Agent:

- "Customize Application"

To create user profiles or permission sets:

- "Manage Profiles and Permission Sets"

Enable Live Agent

Get started with Live Agent by enabling it for your Salesforce org. After you enable Live Agent, you can customize it.

1. From Setup, enter *Live Agent Settings* in the Quick Find box, then select **Live Agent Settings**.
2. Select **Enable Live Agent**.
3. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To enable Live Agent:

- "Customize Application"

Create Live Agent Users

Before your users can assist customers with chat, you need to assign the users as Live Agent users. Live Agent users are support agents and supervisors who have the Salesforce permissions to assist customers with chat.

All Live Agent users need the **API Enabled** administrative permission enabled on their associated profile before they can use Live Agent.

1. From Setup, enter *Users* in the *Quick Find* box, then select **Users**.
2. Click **Edit** next to a user's name.
3. Select **Live Agent User**. If you don't see this checkbox, verify that your support organization has purchased enough Live Agent feature licenses.
4. Click **Save**.

After creating users, make sure that you assign them a Live Agent configuration and associate them with the appropriate skills.

Permissions for Live Agent Support Agents

You need to enable a few specific permissions for Live Agent support agents so that they have access to all the tools that they'll need to provide help to customers.

General Permissions

Necessary Permission	Description
"API Enabled"	Required for all Live Agent users

EDITIONS

Available in: Salesforce Classic

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Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To create or edit users:

- "Manage Internal Users"

To enable agents to use Live Agent:

- "API Enabled" administrative permission

EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

Object Permissions

Record Type	Permission	Description	Considerations
Live Agent Sessions	"Read"	Enables agents to view session records	We don't recommend giving agents the ability to create, edit, and delete session records. Session records are created automatically and are meant to provide a paper trail with information about the time that agents spend online, so we don't recommend giving agents the ability to change these records.
Live Chat Visitors	"Read"	Enables agents to view visitor records	We don't recommend giving agents the ability to create, edit, and delete visitor records. Visitor records are created automatically and are meant to provide a paper trail that associates your customers with their chat transcripts, so we don't recommend giving agents the ability to change these records.
Live Chat Transcripts	"Read"	Enables agents to view chat transcripts	We don't recommend giving agents the ability to create, edit, and delete chat transcripts. Transcripts are created automatically and are meant to provide a paper trail about your agents' interactions with customers, so we don't recommend giving agents the ability to change these records.
Quick Text	"Read"	Enables agents to view Quick Text messages and include Quick Text in chats.	Without the "Read" permission on Quick Text, agents can't access the Quick Text sidebar in the Salesforce console.
	"Create"	Enables agents to create Quick Text messages	If your Quick Text messages need to be standardized across your organization, limit your agents' ability to create Quick Text messages. In that case, give the "Create" permission to support supervisors instead.

Record Type	Permission	Description	Considerations
	"Edit"	Enables agents to edit Quick Text messages	If your Quick Text messages need to be standardized across your support organization, limit your agents' ability to edit Quick Text messages. In that case, give the "Edit" permission to support supervisors instead.
	"Delete"	Enables agents to delete Quick Text messages	If your Quick Text messages need to be standardized across your organization, limit your agents' ability to delete Quick Text messages. In that case, give the "Delete" permission to support supervisors instead.

Permissions for Live Agent Support Supervisors

You must enable certain permissions for Live Agent support supervisors so that they have all the tools they need to monitor agents' activities and review customers' information.

General Permissions

Necessary Permission	Description
"API Enabled"	Required for all Live Agent users

Optional Permission	Description
"Assign Live Agent Skills to Users"	Enables supervisors to assign skills to agents.

Object Permissions

Record Type	Permission	Description	Considerations
Live Agent Sessions	"Read"	Enables supervisors to view session records	None
	"Create"	Enables supervisors to create session records	Session records are created automatically and are meant to provide a paper trail that provides information about the time that agents

EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

Record Type	Permission	Description	Considerations
			spend online. We don't recommend tampering with these records, but you can give supervisors the ability to create them manually.
	"Edit"	Enables supervisors to edit session records	Session records are created automatically and are meant to provide a paper trail that provides information about the time that agents spend online. We don't recommend tampering with these records, but you can give supervisors the ability to edit them.
	"Delete"	Enables supervisors to delete session records	Session records are created automatically and are meant to provide a paper trail that provides information about the time that agents spend online. We don't recommend tampering with these records, but you can give supervisors the ability to delete them.
Live Chat Transcripts	"Read"	Enables supervisors to view chat transcripts	None
	"Create"	Enables supervisors to create chat transcripts	Chat transcripts are created automatically and are meant to provide a paper trail about your agents' interactions with customers. We don't recommend tampering with these records, but you can give supervisors the ability to create transcripts manually.
	"Edit"	Enables supervisors to edit chat transcripts	Chat transcripts are created automatically and are meant to provide a paper trail about your agents' interactions with customers. We don't recommend tampering with these records, but you can give supervisors the ability to edit transcripts.

Record Type	Permission	Description	Considerations
	"Delete"	Enables supervisors to delete chat transcripts	Chat transcripts are created automatically and are meant to provide a paper trail about your agents' interactions with customers. We don't recommend tampering with these records, but you can give supervisors the ability to delete transcripts.
Live Chat Visitors	"Read"	Enables supervisors to view visitor records	None
	"Create"	Enables supervisors to create visitor records	Visitor records are created automatically and are meant to provide a paper trail that associates your customers with their chat transcripts. We don't recommend tampering with these records, but you can give supervisors the ability to create them manually.
	"Edit"	Enables supervisors to edit visitor records	Visitor records are created automatically and are meant to provide a paper trail that associates your customers with their chat transcripts. We don't recommend tampering with these records, but you can give supervisors the ability to edit them.
	"Delete"	Enables supervisors to delete visitor records	Visitor records are created automatically and are meant to provide a paper trail that associates your customers with their chat transcripts. We don't recommend tampering with these records, but you can give supervisors the ability to delete them.
Quick Text	"Read"	Enables supervisors to view Quick Text messages	None
	"Create"	Enables supervisors to create Quick Text messages	None

Record Type	Permission	Description	Considerations
	"Edit"	Enables supervisors to edit Quick Text messages	None
	"Delete"	Enables supervisors to delete Quick Text messages	None

Create and Assign Live Agent Skills

Skills identify your agents' areas of expertise. When you assign an agent to a skill, that agent receives chat requests that are related to the agent's skill areas. You can also empower your supervisors to assign skills to agents.

1. From Setup, enter *Skills* in the **Quick Find** box, then select **Skills**.
2. Click **New**.
3. Enter a name for the skill.
For example, you can create a skill that's called "Accounts" for agents who specialize in questions about customer accounts.
4. In the Assign Users area, select the users whom you want to associate with the skill.
5. In the Assign Profiles area, select the profiles that you want to associate with the skill.
6. Click **Save**.

To enable supervisors to assign skills, enable the "Assign Live Agent Skills to Users" permission on their profiles, or assign it to individual users via a permission set. When supervisors have this permission, they can go to **Setup > Customize > Live Agent Skills** and update the assigned profiles or users under each skill.

EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To create skills:

- "Customize Application"

To assign skills (supervisors):

- "Assign Live Agent Skills to Users"

Create Live Agent Configurations

Live Agent configurations define the Live Agent functionality that's available to your agents and support supervisors when agents chat with customers. Create Live Agent configurations to control the functionality of Live Agent in the Salesforce console.

For efficiency, create profiles and users before you create configurations. That way, you can create a configuration and assign it to users and profiles at the same time.

Live Agent configurations enable you to control your users' access to certain Live Agent features. You can create multiple configurations that define Live Agent's functionality for multiple types of users. For example, you might create a configuration specifically for experienced agents that gives them more permissions than new agents have, or you might create a configuration for support supervisors that gives them the permissions that they need to monitor their employees.

1. To get started with creating a configuration, in Setup, enter *Live Agent Configurations* in the **Quick Find** box, then select **Live Agent Configurations**.
2. Click **New**.
3. Choose the settings for your Live Agent configuration.
4. Click **Save**.

Live Agent Configuration Settings

Live Agent configuration settings control the functionality that's available to agents and their supervisors while agents chat with customers.

Apply settings when you create or edit a Live Agent configuration.

Basic Information

Configure the basic functionality that's available to agents when they chat with customers.

Setting	What It Does
Live Agent Configuration Name	Names the configuration. This configuration name, or a version of it, automatically becomes the <code>Developer Name</code> .
Developer Name	Sets the API name for the Live Agent configuration.
Chat Capacity	Indicates how many chats an agent who is assigned to this configuration can be engaged in at the same time.

EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To create and edit configurations:

- "Customize Application"

EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

Setting	What It Does
Sneak Peek Enabled	Indicates whether agents can see what a chat customer is typing before the customer sends a chat message.
Request Sound Enabled	Indicates whether to play an audio alert when the agent receives a new chat request.
Disconnect Sound Enabled	Indicates whether to play an audio alert when a chat is disconnected.
Notifications Enabled	Indicates whether to display a desktop alert when an agent receives a new chat request.
Custom Agent Name	Sets the agent's name as it appears to customers in the chat window.
Auto Greeting	Sets a customized greeting message that the customer receives automatically when an agent accepts the customer's chat request. Optionally, use merge fields to customize the information in your greeting by using the Available Merge Fields tool. For example, you can personalize the chat experience by using merge fields to include the customer's name in the greeting.  Note: If you specify an automatic greeting message in both your Live Agent configuration and in an individual chat button, the message that's associated with your chat button overrides the message that's associated with your configuration.
Auto Away on Decline	Sets the agent's Live Agent status to "Away" automatically when the agent declines a chat request. This option applies only when agents are assigned to chat buttons that use push routing.
Auto Away on Push Time-Out	Sets an agent's Live Agent status to "Away" automatically when a chat request that's been pushed to the agent times out. This option applies only when agents are assigned to chat buttons that use push routing.
Critical Wait Alert Time	Determines the number of seconds that the agent has to answer a customer's chat before the chat tab alerts the agent to answer it.
Agent File Transfer Enabled	Indicates whether an agent can enable customers to transfer files through a chat.
Visitor Blocking Enabled	Indicates whether an agent can block visitors from an active chat within the Salesforce console. See Let Your Agents Block Visitors by IP Address .

Setting	What It Does
Assistance Flag Enabled	Indicates whether an agent can send a request for help (“raise a flag”) to a supervisor.

Chatlets

Chatlets are tools that are available only to organizations that use Live Agent in the Live Agent console. The Live Agent console is no longer supported, so we don’t recommend setting up chatlets. But don’t worry—if you use Live Agent in the Salesforce console, you don’t need chatlets.

Assign Users

Assign eligible users to the configuration to give them access to Live Agent functionality. Later, you’ll see that you can also assign profiles to a configuration. If a user is assigned a configuration at the profile and user levels, the user-level configuration overrides the configuration that’s assigned to the profile.



Warning: Users can be assigned to only one Live Agent configuration at a time. If you assign the same user to a second Live Agent configuration, the system removes that user from the first Live Agent configuration without warning you. So make sure that you know exactly which Live Agent configuration each user should be assigned to!

For example, let’s say that User A is assigned to Live Agent Configuration A. Then, you create Live Agent Configuration B and accidentally assign User A to it. Salesforce automatically removes User A from Live Agent Configuration A and reassigns the user to Live Agent Configuration B without notifying you.

Setting	What It Does
Available Users	Indicates the users who are eligible to be assigned to the configuration.
Selected Users	Indicates the users who are assigned to the configuration.

Assign Profiles

Assign eligible profiles to the configuration to give users who are associated with the profiles access to Live Agent functionality. If a user is assigned a configuration at the profile and user levels, the user-level configuration overrides the configuration that’s assigned to the profile.

Setting	What It Does
Available Profiles	Indicates the user profiles that are eligible to be assigned to the configuration.
Selected Profiles	Indicates the user profiles that are assigned to the configuration.

Supervisor Settings

Supervisor settings determine the Live Agent functionality that’s available to support supervisors. In addition, these settings determine the default filters that apply to the Agent Status list in the supervisor panel.

Setting	What It Does
Chat Monitoring Enabled	Indicates whether supervisors can monitor their agents' chats in real time while their agents interact with customers.
Whisper Messages Enabled	Indicates whether supervisors can send private messages to agents while agents chat with customers.
Agent Sneak Peek Enabled	Indicates whether supervisors can preview an agent's chat messages before the agent sends them to the customer.
Default Agent Status Filter	Determines the default agent status, such as Online, Offline, or Away, by which to filter agents in the supervisor panel. When supervisors view the Agent Status list in the supervisor panel, they see a list of agents who have that status.
Default Skill Filter	Determines the default skill by which to filter agents in the supervisor panel. When supervisors view the Agent Status list in the supervisor panel, they see a list of agents who are assigned to that skill.
Default Button Filter	Determines the default button by which to filter agents in the supervisor panel. When supervisors view the Agent Status list in the supervisor panel, they see a list of agents who are assigned to that button.
Assigned Skills	Determines the skills that are visible to supervisors in the supervisor panel. When supervisors view the Agent status list in the supervisor panel, they see a list of agents who are assigned to these skills. If you don't select any skills, the Agent Status list displays agents who are assigned to any skill.

Chat Conference Settings

Determine whether agents can invite other agents to join them in a customer chat. Chat conferencing lets your agents include multiple agents in a single chat. That way, your agents can help your customers get the solutions that they need without making your customers wait for their chats to be transferred.



Note: Chat conferencing does not support the Related Entities panel. If you attempt to use it with chat conferencing, important details might not be saved on your record.

Setting	What It Does
Chat Conferencing Enabled	Indicates whether agents can invite other agents to join them in customer chats.

Chat Transfer Settings

Determine how agents can transfer chats to other agents.

Setting	What It Does
Chat Transfer to Agents Enabled	Indicates whether agents can transfer chats to another agent directly.
Chat Transfer to Skills Enabled	Indicates whether agents can transfer chats to agents assigned to a particular skill.
Chat Transfer to Skills	Determines the skill groups to which agents can transfer chats. Agents can transfer chats to available agents who are assigned to those skills.
Chat Transfer to Live Chat Buttons Enabled	Indicates whether agents can transfer chats to a button or queue.
Chat Transfer to Live Chat Buttons	Determines the buttons to which agents can transfer chats. Agents can transfer chats to available agents who are assigned to those buttons.

Supported Browsers for Live Agent Notifications

Live Agent notifications help agents respond to chats efficiently by alerting agents when certain events occur. The types of chat notifications that are supported are determined by the web browsers your agents use.

Two types of chat notifications are available in Live Agent.

Chat request notifications

Notifies an agent when the agent receives a chat request; available as audio notifications and desktop notifications

Disconnect notifications

Notifies an agent when the agent is disconnected from Live Agent; available as audio notifications only

Browser	Version	Audio Notifications Supported?	Desktop Notifications Supported?
Google Chrome™	Most recent stable version	Yes	Yes
Mozilla® Firefox®	Most recent stable version	Yes	Yes
Apple® Safari®	6.x on Mac OS X	Yes	Yes
Windows® Internet Explorer®	9	Yes	No

EDITIONS

Available in: Salesforce Classic

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Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

Create Live Agent Deployments

A deployment is a place on your company's website that's enabled for Live Agent. Create deployments to implement Live Agent and control its functionality on your website.

To customize the chat window that your customers see, you first need to create a Force.com site to host your custom images.

A deployment consists of a few lines of JavaScript that you add to a Web page. Your organization can have a single Live Agent deployment or multiple deployments. For example, if you have a single service center that supports multiple websites, creating a separate deployment for each site enables you to present multiple chat windows to your visitors.

1. From Setup, enter *Deployments* in the **Quick Find** box, then select **Deployments**.
2. Click **New**.
3. Choose the settings for your deployment.
4. Click **Save**.
Salesforce generates the deployment code.
5. Copy the deployment code, and then paste it on each Web page where you want to deploy Live Agent. For best performance, paste the code immediately before the closing body tag (that is, `</body>`).

 **Note:** If you're using security zones in Internet Explorer 8 or 9, verify that your deployment and any website that hosts that deployment are in the same security zone. Due to an issue with Internet Explorer, it's not possible to launch a chat window from a website that's in a different security zone. For more information on security zones, refer to Internet Explorer help.

Live Agent Deployment Settings

Live Agent deployment settings control the functionality that's available to agents and their supervisors while agents chat with customers.

Apply settings when you create or edit a Live Agent deployment.

Basic Information

Configure the basic functionality that's available on a particular Live Agent deployment.

Setting	What It Does
Live Chat Deployment Name	Names the deployment. This deployment name, or a version of it, automatically becomes the <code>Developer Name</code> .
Developer Name	Sets the API name for the Live Agent deployment.
Chat Window Title	Sets the name of the chat window as it appears to customers.

EDITIONS

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USER PERMISSIONS

To create deployments:

- "Customize Application"

EDITIONS

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Setting	What It Does
Allow Visitors to Save Transcripts	Indicates whether customers can save copies of their chat transcripts after they finish chatting with an agent.
Allow Access to Pre-Chat API	Indicates whether developers can access and implement the pre-chat API.  Warning: The pre-chat API gives developers access to potentially personal information that customers provide in pre-chat forms, such as the customer's name and email address.
Permitted Domains	Determines the domains that can host the deployment. When using permitted domains: - List as many domains as you need to, but only one per line. - Use only the domain and subdomain. For example, use xyz.domain.com, domain.com, or www.domain.com. Don't include http:// or mappings to specific pages within a domain, such as domain.com/page. - Make sure that you specify all the domains that you want to allow to host the deployment. - To make the deployment usable on any domain, leave the Permitted Domains field empty.
Enable Custom Timeouts	Indicates whether a warning and timeout for the agent are enabled for when the customer is idle in a chat.
Idle Connection Warning Duration	The duration, in seconds, that the customer can remain idle or disconnected before a warning is sent to the agent. The default value is 40 seconds.
Idle Connection Timeout Duration	The duration, in seconds, that the customer can remain idle or disconnected before the chat ends. The default value is 110 seconds.

Chat Window Branding

You can optionally customize your chat windows with custom images by associating your deployment with a Force.com site and its static resources.

Setting	What It Does
Branding Image Site	Determines the Force.com site that's associated with the deployment. By associating your deployment with a Force.com site, you can customize your deployment with branding images. Store your branding images as static resources with your Force.com site.

Setting	What It Does
Chat Window Branding Image	Sets the custom graphic that appears in the customer's chat window.
Mobile Chat Window Branding Image	Sets the custom graphic that appears in the customer's chat window when the customer accesses chat from a mobile site.

Permitted Domains and Live Agent Deployments

To enhance security and minimize the number of illegitimate chat requests that you receive, use the permitted domains option when you create Live Agent deployments. There are a few considerations to keep in mind when you use permitted domains.

- List as many domains as you need to, but only one per line.
- Use only the domain and subdomain—for example, xyz.domain.com, domain.com, or www.domain.com. Don't include http:// or mappings to specific pages within a domain, such as domain.com/page.
- Specify all the domains that you want to allow to host the deployment.
- To make the deployment usable on any domain, leave the Permitted Domains field empty.

Create Chat Buttons

Create chat buttons to enable customers to request a chat with an agent directly from your website.

Before you create chat buttons, you need to:

- Create skills. Each chat button is associated with a particular skill or set of skills so that chats that are initiated from the button are routed to the appropriate agents.
- Create a Force.com site and static resources to use custom images for the online and offline versions of your button. If you don't have a Force.com site, you can specify online and offline button images or text by modifying the code that's generated when you create a button.

You need to create the buttons that visitors click to start chats. Like a deployment, a button consists of several lines of JavaScript that you copy and paste into Web pages. A single deployment can have multiple buttons; each button enables you to refine the chat experience for visitors. For example, your service deployment might have buttons for personal computer, laptop, or tablet issues. Each button is mapped to a skill or set of skills to ensure that visitors' inquiries go to only those agents who can solve the visitors' problems.

1. From Setup, enter *Chat Buttons* in the **Quick Find** box, then select **Chat Buttons & Invitations**.
2. Click **New**.
3. Select Chat Button from the **Type** field.
4. Choose the remaining settings for your chat button.
5. Click **Save**.
6. Copy the button code, and then paste it on each Web page where you've deployed Live Agent. Make sure that you paste the code in the area on the page where you want the button to appear.



Tip: Because the code changes with each modification, remember to copy and paste the code each time that you update the button.

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USER PERMISSIONS

To create and customize chat buttons:

- "Customize Application"

Chat Button Settings

Chat button settings control the behavior of the chat buttons that customers use to interact with agents.

Apply settings when you create or edit a Live Agent chat button.

Basic Information

Configure the basic functionality that's available on a particular Live Agent chat button.

Setting	What It Does
Type	Determines the type of button that you want to create.  Warning: When you create a chat button to host on your website, you must set this option to Chat Button.
Name	Names the chat button. This button name, or a version of it, automatically becomes the <code>Developer Name</code>.
Developer Name	Sets the API name for the chat button.
Language	Sets the default language for text in the chat window.
Enable Customer Time-Out	Indicates whether chats are ended if the customer doesn't respond within a specified period.
Customer Time-Out (seconds)	Sets the amount of time that a customer has to respond to an agent message before the session ends. The timer stops when the customer sends a message. The timer resets to 0 each time the agent sends a message.
Customer Time-Out Warning (seconds)	Sets the amount of time that a customer has to respond to an agent message before a warning appears and a timer begins a countdown. The warning disappears (and the timer stops) each time the customer sends a message. The warning disappears (and the timer resets to 0) each time the agent sends message. The warning value must be shorter than the time-out value (we recommend at least 30 seconds).
Custom Agent Name	Sets the agent's name as it appears to customers in the chat window.

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Setting	What It Does
Auto Greeting	Sets a customized greeting message that the customer receives automatically when an agent accepts the customer's chat request. Optionally, use merge fields to customize the information in your greeting by using the Available Merge Fields tool. For example, you can personalize the chat experience by using merge fields to include the customer's name in the greeting.  Note: If you specify an automatic greeting message in both your Live Agent configuration and in an individual chat button, the message that's associated with your chat button overrides the message that's associated with your configuration.

Routing Information

Configure how the button or invitation routes chats to the best-fit agent.

Setting	What It Does
Routing Type	Sets how chats are routed to an agent.
Skills	Associates skills with the button. Incoming chat requests that originate from the button are routed to agents with the skills that you specify.
Enable Queue	Indicates that queueing is enabled. Queueing allows incoming chat requests to wait in a queue until an agent with the appropriate skills is available to accept the chat.
Queue Size Per Agent	Determines the queue's capacity to hold chat requests per available agent. For Live Agent routing or when chats have a size of 1, this is the number of chats allowed to queue for each agent.
Overall Queue Size	Determines the queue's capacity to hold chat requests. For Live Agent routing or when chats have a size of 1, this is the maximum number of chats allowed to queue.

Chat Button Customization

You can optionally customize your chat button with custom images by associating your deployment with a Force.com site and its static resources.

Setting	What It Does
Site for Resources	Determines the Force.com site that's associated with the chat button. By associating your button with a Force.com site, you can customize the button with branding images. Store your branding images as static resources with your Force.com site.

Setting	What It Does
Online Image	Sets the custom button graphic that appears when the chat button is unavailable.
Offline Image	Sets the custom button graphic that appears when the chat button is available for customers to request new chats.
Custom Chat Page	Replaces the standard Live Agent chat window with a custom chat window page that you've developed. Use this option only to use a chat window other than the default chat window that Live Agent provides.
Pre-Chat Form Page	Directs Live Agent to the Force.com page that hosts your customized pre-chat form that customers see before they begin a chat with an agent.
Pre-Chat Form URL	Directs Live Agent to the URL of the Web page that hosts your pre-chat form.
Post-Chat Page	Directs Live Agent to your customized post-chat page that customers see after they complete a chat.
Post-Chat Page URL	Directs Live Agent to the URL of the Web page that hosts your post-chat page.

Chat Routing Options

Routing options in Live Agent enable you to specify how incoming chat requests are directed to agents.

Routing Option	Description
Choice	Incoming chat requests are added to the queue in Live Agent in the Salesforce console and are available to any agent with the required skill.
Least Active	Incoming chats are routed to the agent with the required skill who has the fewest active chats. This option is a push option, which means that incoming chats are routed, or "pushed," to agents. You can specify the amount of time that an agent has to answer a chat request before it's routed to the next available, qualified agent.
Most Available	Incoming chats are routed to the agent with the required skill and the greatest difference between chat capacity and active chat sessions. For example, if Agent A and Agent B each have a chat capacity of five, and Agent A has three active chat sessions while Agent B has one, incoming chats will be routed to Agent B.

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Routing Option	Description
	This option is a push option, which means that incoming chats are routed, or “pushed,” to agents. You can specify the amount of time that an agent has to answer a chat request before it’s routed to the next available, qualified agent.
Omni	Incoming chats are routed to agents using Omni-Channel queues (beta).

Chat Queuing Options

Queuing options in Live Agent let you control how incoming chat requests are handled when no agents are available.

For each Live Agent chat button or invitation that you create, you can enable queuing to put incoming chat requests on hold if no agents with the required skills are available to accept the requests. You can also specify the maximum number of requests in a queue. By enabling queues and setting limits for them, you can control how incoming chat requests are handled, which helps agents manage chat backlogs.

With queuing enabled, your company can accept incoming chat requests even when agents are at capacity, and you can specify the maximum number of requests to accept. This helps agents work effectively and limits the amount of time that customers spend waiting to chat.

The way that chat queuing works is determined by chat routing options. Routing options are set through your chat button or automated invitation. See [Chat Routing Options](#) to learn more about how you can route chats to the right agents.

Let’s look at how queuing and routing options work together:

Queuing Option	With This Routing Option	Results
Queuing is not enabled	Choice	- Users see the online version of your chat button and can submit new requests unless there are no agents with the required skill who are available or all online agents have reached capacity. - Incoming chat requests are added to the Live Agent widget. - When agents have capacity for new chat sessions, they can select incoming requests from the list.

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Queuing Option	With This Routing Option	Results
Queuing is not enabled	Least Active or Most Available	• Users see the online version of your chat button and can submit new requests unless there are no agents with the required skill who are available or all online agents have reached capacity. • When agents have the capacity for new chat sessions, requests are routed to them.
Queuing is enabled without a per-agent or overall limit	Choice	• Users see the online version of your chat button and can submit new requests unless there are no agents with the required skill who are available. • Incoming chat requests are added to the Chat Requests list. • When agents have capacity for new chat sessions, they can accept incoming requests from the list.
Queuing is enabled without a per-agent or overall limit	Least Active or Most Available	• Users see the online version of your chat button and can submit new requests unless there are no agents with the required skill who are available. • When agents have the capacity for new chat sessions, requests are routed to them.
Queuing is enabled with a per-agent or overall limit defined	Choice	• Users see the online version of your chat button and can submit new requests unless there are no agents with the required skill who are available or until the queue limit is reached. Users then see the offline version of the button until older chat sessions have ended. • Incoming chat requests are added to the queue until the per-agent or overall limit is reached, at which point no new requests are accepted until older chat sessions have ended. • When agents have capacity for new chat sessions, they can accept incoming requests from the list.

Queuing Option	With This Routing Option	Results
Queuing is enabled with a per-agent or overall limit defined	Least Active or Most Available	- Users see the online version of your chat button and can submit new requests unless there aren't any available agents with the required skill, or until the queue limit is reached. In those cases, users see the offline version of the button until older chat sessions have ended and an agent is available. - Incoming chat requests are added to the queue until the per-agent or overall limit is reached, at which point no new requests are accepted until older chat sessions have ended. - When agents have the capacity for new chat sessions, requests are routed to them.

Customize Your Live Agent Branding with Force.com Sites

To customize your Live Agent implementation with branding images, use a Force.com site to upload the images for your chat window and chat buttons.

To customize your chat window and chat buttons, you need to create one or more Force.com sites and then upload the images that you want to use as static resources. Static resources enable you to upload content that you can reference in a Visualforce page. Each static resource has its own URL that Salesforce uses to access the images when the chat window loads.

1. Create a Force.com site to host your images.

When you create a Force.com site for your Live Agent deployment, you need to provide only the following information.

- A site label and site name
- A site contact
- The active site's home page
- A site template

2. Upload your branding images as static resources.



Note: The maximum size for a standard chat window images is 50 pixels.

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USER PERMISSIONS

To create and edit Force.com sites:

- "Customize Application"

Customize Your Live Agent Implementation

After you set up your basic Live Agent implementation, customize it with solutions that are appropriate for your agents, supervisors, and customers. Live Agent offers several options for customizing your implementation declaratively, which means that no coding is required.

IN THIS SECTION:

[Create Live Agent Objects](#)

The first step towards getting your Live Agent implementation up and running is to create the necessary objects in Salesforce.

[Set Visibility for Live Agent Users](#)

Choose how your Live Agent users can view the Supervisor Tab and Live Agent Sessions using Profiles and Permission Sets.

[Set Privacy Options for Live Agent Users](#)

Protect your agents and the customers they assist by blocking sensitive data and unwanted visitors.

Create Live Agent Objects

The first step towards getting your Live Agent implementation up and running is to create the necessary objects in Salesforce.

IN THIS SECTION:

[Create Automated Chat Invitations](#)

Set up automated chat invitations that appear as animated pop-ups on your website to invite customers to chat with an agent.

[Pre-Chat Forms and Post-Chat Pages](#)

Pre-chat forms and post-chat pages in Live Agent enable you to exchange information with customers who contact your company through chat.

[Create Quick Text Messages](#)

Quick Text messages enable agents to include standardized notes with case updates and to send common responses to customers without having to type the responses each time. Create custom messages for your agents to use when they email and chat with customers.

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USER PERMISSIONS

To set up Live Agent:

- “Customize Application”

To create user profiles or permission sets:

- “Manage Profiles and Permission Sets”

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Create Automated Chat Invitations

Set up automated chat invitations that appear as animated pop-ups on your website to invite customers to chat with an agent.

Before you create automated invitations, you need to:

- Create skills. Each chat button is associated with a particular skill or set of skills so that chats that are initiated from the button are routed to the appropriate agents.
- Create a Force.com site and static resources to use custom images for the online and offline versions of your button. If you don't have a Force.com site, you can specify online and offline button images or text by modifying the code that's generated when you create a button.

Automated invitations can be set to trigger based on certain criteria, such as whether a customer remains on a Web page for more than a specified amount of time. Invitations can be associated with specific skills, which ensures that customers will be routed to the appropriate agent when they accept an invitation to chat.

1. From Setup, enter *Chat Buttons & Invitations* in the **Quick Find** box, then select **Chat Buttons & Invitations**.
2. Click **New**.
3. Under **Type**, select Automated Invitation.
4. Click **Save**.
5. Copy the invitation code, and then paste it on each Web page where you've deployed Live Agent. Make sure that you paste the code in the area on the page where you want the invitation to appear.



Tip: Because the code changes with each modification, remember to copy and paste the code each time that you update the invitation.

IN THIS SECTION:

[Automated Invitation Settings](#)

Automated invitation settings control the behavior of the invitations that are sent to your customers to prompt them to chat with agents while they visit your website.

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USER PERMISSIONS

To create and customize automated chat invitations:

- "Customize Application"

Automated Invitation Settings

Automated invitation settings control the behavior of the invitations that are sent to your customers to prompt them to chat with agents while they visit your website.

Apply settings when you create or edit a Live Agent automated invitation.

Basic Information

Configure the basic functionality that's available on a particular Live Agent chat button.

Setting	What It Does
Type	Determines whether to create a chat button or automated invitation.  Warning: When creating an automated chat invitation, you must set this option to Automated Invitation.
Active	Determines whether the automated invitation is "active" or can automatically be sent to customers.
Name	Names the invitation. This invitation name, or a version of it, automatically becomes the <code>Developer Name</code>.
Developer Name	Sets the API name for the invitation.
Deployments	Allows you to choose the deployments where this invitation appears.
Language	Sets the default language for text in the chat window.
Enable Customer Time-Out	Indicates whether chats are ended if the customer doesn't respond within a specified period.
Customer Time-Out (seconds)	Sets the amount of time that a customer has to respond to an agent message before the session ends. The timer stops when the customer sends a message. The timer resets to 0 each time the agent sends a message.
Customer Time-Out Warning (seconds)	Sets the amount of time that a customer has to respond to an agent message before a warning appears and a timer begins a countdown. The warning disappears (and the timer stops) each time the customer sends a message. The warning disappears (and the timer resets to 0) each time the agent sends message. The

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Setting	What It Does
	warning value must be shorter than the time-out value (we recommend at least 30 seconds).
Custom Agent Name	Sets the agent's name as it appears to customers in the chat window.
Auto Greeting	Sets a customized greeting message that the customer receives automatically when an agent accepts the customer's chat request from an invitation. Optionally, use merge fields to customize the information in your greeting by using the Available Merge Fields tool. For example, you can personalize the chat experience by using merge fields to include the customer's name in the greeting.  Note: If you specify an automatic greeting message in your Live Agent configuration and in an invitation, the message that's associated with your invitation will override the message that's associated with your configuration.

Routing Information

Specify how this invitation routes chats to the best-fit agent.

Setting	What It Does
Routing Type	Determines how incoming chat requests that originate from the invitation are routed to agents with the appropriate skills.
Queue	Selects the queue for this invitation.
Enable Queue	Indicates that queuing is enabled, allowing incoming chat requests to wait in a queue until an agent with the appropriate skills is available to accept the chat.
Queue Size Per Agent	Determines the queue's capacity to hold chat requests per available agent. For Live Agent routing or when chats have a size of 1, this is the number of chats allowed to queue for each agent.
Overall Queue Size	Determines the queue's capacity to hold chat requests. For Live Agent routing or when chats have a size of 1, this is the maximum number of chats allowed to queue.
Automatically Accept Chats	Indicates that chat requests from this invitation are automatically accepted by the first available agent.

Invitation Animation

Customize your invitation's animations to determine how the animation will appear to customers.

Setting	What It Does
Display Time	Determines how long the invitation will be displayed to customers before it disappears.
Allow invitation to be triggered again after accepting	Indicates whether the invitation can be sent to the customer again after the customer has accepted a previous invitation.
Allow invitation to be triggered again after rejecting	Indicates whether the invitation can be sent to the customer again after the customer has rejected a previous invitation.
Animation	Determines the type of animation for your invitation. Depending on which animation you choose, you'll be prompted to select the positions where the invitation will appear on-screen to customers.  Note: Animations won't render for agents using Internet Explorer versions 9 and below.

Invitation Customization

You can optionally customize your invitation with custom images by associating your deployment with a Force.com site and its static resources.

Setting	What It Does
Site for Resources	Determines the Force.com site that's associated with the invitation. By associating your invitation with a Force.com site, you can customize the invitation with branding images. Store your branding images as static resources with your Force.com site.
Invitation Image	Sets the custom button graphic that appears for this invitation.
Custom Chat Page	Replaces the standard Live Agent chat window with a custom chat window page that you've developed. Use this option only to use a chat window other than the default chat window that Live Agent provides.
Pre-Chat Form Page	Directs Live Agent to the Force.com page that hosts your customized pre-chat form that customers see before they begin a chat with an agent.
Pre-Chat Form URL	Directs Live Agent to the URL of the Web page that hosts your pre-chat form.
Post-Chat Page	Directs Live Agent to your customized post-chat page that customers see after they complete a chat.
Post-Chat Page URL	Directs Live Agent to the URL of the Web page that hosts your post-chat page.

Sending Rule

Create sending rules for your invitation to determine when to trigger and send the invitation to customers. You can include multiple criteria in your sending rule. Additionally, if your sending rule requires more complicated logic, you can apply Boolean operators to your sending rule.

Setting	What It Does
Criteria	Sets the criteria to be evaluated by the sending rule. For example, you can create a rule that sends the invitation based on how many seconds a customer has been viewing a Web page.
Operator	Sets the operator to evaluate your criteria. For example, you can create a rule that sends the invitation when a customer has been on a page for more than a specified number of seconds.
Value	Sets the value to evaluate the formula against. For example, you can create a rule that sends the invitation when a customer has been on a page for more than 30 seconds.

Pre-Chat Forms and Post-Chat Pages

Pre-chat forms and post-chat pages in Live Agent enable you to exchange information with customers who contact your company through chat.

Pre-chat forms and post-chat pages offer a standardized way of collecting information from customers who contact your company through chat. These forms and pages also offer a standardized way of sharing information with customers after their chat sessions are finished. In addition, by using these forms and pages, you can customize the chat experience for your users.

By using pre-chat forms, you can collect information from a customer, such as a name or a description of a problem, after the customer requests to chat with an agent. This information can help direct chat requests efficiently and can reduce the amount of time that agents need to spend collecting information before beginning a chat session. You can also use this information to customize a customer's experience while the customer chats with an agent, such as including the customer's first name in the chat window.

By using post-chat pages, you can share information with customers at the end of a chat session. For example, you can direct your customers to another Web page after they complete a chat with an agent, and you can forward them to a survey about their chat experience.

You have to create pre-chat forms and post-chat pages programmatically, using Live Agent's APIs. For information on creating customized pre-chat forms and post-chat pages, see the [Live Agent Developer's Guide](#) (English only).

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Create Quick Text Messages

Quick Text messages enable agents to include standardized notes with case updates and to send common responses to customers without having to type the responses each time. Create custom messages for your agents to use when they email and chat with customers.

1. Click the **Quick Text** tab.
2. Click **New**.
3. If you have more than one Quick Text record type, select a record type for the new message, and then click **Continue**.
4. Type a message name.
5. Type the message.

It can include line breaks, lists, and special characters and can be up to 4,096 characters.

6. Click **Available Merge Fields** to display the merge field selector.
7. Select the channels in which you want the message to be available.
Depending on which features are enabled in your organization, these channels might be available.
 - **Email**—the Case Feed Email action
 - **Live Agent**—Live Agent in the Salesforce console
 - **Portal**—a community or a customer portal
 - **Phone**—the Case Feed Log a Call action
 - **Internal**—the Case Feed Change Status action
8. Select a category.
9. Optionally, select a subcategory.
10. Click **Save**.

 **Tip:** Click **Test and Verify Merge Fields** to view a sample of the quick text, populated with data from records that you choose.

SEE ALSO:

[Set Up Quick Text](#)

EDITIONS

Available in: **Salesforce Classic**

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

USER PERMISSIONS

To create Quick Text messages:

- “Create,” “Read,” “Edit,” and “Delete” on Quick Text

Set Visibility for Live Agent Users

Choose how your Live Agent users can view the Supervisor Tab and Live Agent Sessions using Profiles and Permission Sets.

IN THIS SECTION:

[Set Visibility for the Supervisor Tab through Profiles](#)

The Live Agent supervisor panel is your supervisors' one-stop shop for finding information about their organizations' chat buttons and chat agents. Make the Live Agent supervisor tab visible to users who are assigned to specified profiles.

[Set Visibility for the Live Agent Sessions Tab through Permission Sets](#)

Session records store information about your agents' and customers' interactions online, such as how many chat requests were processed, how long agents spent online, or how long agents were actively engaged in chats with customers. Make the Live Agent sessions tab visible to users who are assigned to specified permission sets.

[Set Visibility for the Live Agent Sessions Tab through Profiles](#)

Session records store information about your agents' and customers' interactions online, such as how many chat requests were processed, how long agents spent online, or how long agents were actively engaged in chats with customers. Make the Live Agent sessions tab visible to users who are assigned to specified profiles.

Set Visibility for the Supervisor Tab through Profiles

The Live Agent supervisor panel is your supervisors' one-stop shop for finding information about their organizations' chat buttons and chat agents. Make the Live Agent supervisor tab visible to users who are assigned to specified profiles.

1. From Setup, enter *Profiles* in the *Quick Find* box, then select **Profiles**.
2. Click **Edit** next to the profile that you want to give access to the supervisor tab.
3. Set the visibility of the Live Agent supervisor tab to *Default On*.
4. Click **Save**.

After you give your users permission to access the Live Agent supervisor tab, set up access to the Live Agent supervisor panel in the Salesforce console.

EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To set tab visibility for Live Agent features:

- "Manage Profiles and Permission Sets"

Set Visibility for the Live Agent Sessions Tab through Permission Sets

Session records store information about your agents' and customers' interactions online, such as how many chat requests were processed, how long agents spent online, or how long agents were actively engaged in chats with customers. Make the Live Agent sessions tab visible to users who are assigned to specified permission sets.

Alternatively, you can give users access to the Live Agent sessions tab through profiles.

1. From Setup, enter *Permission Sets* in the **Quick Find** box, then select **Permission Sets**.
2. Click the name of a permission set, or create a permission set.
3. Click **Object Settings**.
4. Click **Live Agent Sessions**.
5. Click **Edit**.
6. In Tab Settings, select **Available** and **Visible**.
7. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To set tab visibility for Live Agent features:

- "Manage Profiles and Permission Sets"

Set Visibility for the Live Agent Sessions Tab through Profiles

Session records store information about your agents' and customers' interactions online, such as how many chat requests were processed, how long agents spent online, or how long agents were actively engaged in chats with customers. Make the Live Agent sessions tab visible to users who are assigned to specified profiles.

Alternatively, you can give users access to the Live Agent sessions tab through permission sets.

1. From Setup, enter *Profiles* in the *Quick Find* box, then select **Profiles**.
2. Select a support agent profile.
3. Click **Edit**.
4. Set the visibility of the Live Agent sessions tab to *Default On*.
5. Click **Save**.

Set Privacy Options for Live Agent Users

Protect your agents and the customers they assist by blocking sensitive data and unwanted visitors.

IN THIS SECTION:

[Block Sensitive Data in Chats](#)

Sensitive data rules let you block specific patterns, such as credit card, Social Security, phone and account numbers, or even profanity. You can choose to remove the text or replace it with your preferred characters.

[Let Your Agents Block Visitors by IP Address](#)

Help your agents avoid troublesome customers by blocking chats from specified IP addresses.

[Create an IP Blocking Rule to Block Chat Visitors](#)

Help your agents avoid troublesome customers by blocking chats from specified IP addresses.

EDITIONS

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Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To set tab visibility for Live Agent sessions:

- "Manage Profiles and Permission Sets"

EDITIONS

Available in: Salesforce Classic

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Block Sensitive Data in Chats

Sensitive data rules let you block specific patterns, such as credit card, Social Security, phone and account numbers, or even profanity. You can choose to remove the text or replace it with your preferred characters.

1. In Setup, enter *Sensitive Data* in the **Quick Find** box, then select **Sensitive Data Rules**.
2. Click **New**.
3. Write each pattern as a JavaScript regular expression (regex), and choose your preferred settings. The regex is case-sensitive.
4. Click **Test Your Pattern**.
5. Enter some text in the format of the data you want to block, such as 123-45-6789 for a Social Security number.
6. Preview your results to ensure that the rule is working correctly.
7. Select the roles for which you want to enforce this rule.
8. Click **Save**.

You can block the text from agents, supervisors, customers, or all of these. When a rule is triggered, it logs one or more of these chat transcript events:

- Sensitive data blocked (Agent)
- Sensitive data blocked (Supervisor)
- Sensitive data blocked (Visitor)

 **Note:** Sensitive data is visible while someone's typing, but it is masked when the person sends it. So if you want to mask customer information from agents, we recommend disabling Agent Sneak Peek (under **Setup > Customize > Live Agent > Live Agent Configurations**).

Sensitive data rules apply to the auto-greeting and any quick text that you have enabled. They don't apply to the agent name or other standard text in the chat window.

EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To create sensitive data rules:

- "Customize Application"

Let Your Agents Block Visitors by IP Address

Help your agents avoid troublesome customers by blocking chats from specified IP addresses.

You can enable your agents to block chat requests from specified IP addresses while they work in the console. For example, if a customer is using abusive language or sending spam messages, the agent can block that user from starting a new chat.

An agent action blocks chats from an individual IP address.

Blocked visitors will see a message indicating that chat isn't available.

If a customer attempts to request a chat from a blocked IP address, the chat won't enter a queue, nor will it be routed to agents. In addition, you can modify or delete blocking rules.

1. In Setup, enter *Live Agent Configurations* in the **Quick Find** box, then select **Live Agent Configurations**.
2. Click **Edit** next to the configuration that you want to modify.
3. Under **Basic Information**, select **Visitor Blocking Enabled**.
4. Click **Save**.

As a Salesforce admin, you can also block individual IP addresses. Or, if your Salesforce org is receiving spam chats from a particular region, you can block entire IP ranges. See [Create an IP Blocking Rule](#) for more information.

EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To chat with visitors in Live Agent in the Salesforce console:

- Live Agent is enabled, set up, and included in a Salesforce console app

Create an IP Blocking Rule to Block Chat Visitors

Help your agents avoid troublesome customers by blocking chats from specified IP addresses.

You can block chat requests from specified IP addresses. For example, if a customer is using abusive language or sending spam messages, you can block that user from starting a new chat. If your Salesforce org is receiving spam chats from a particular region, you can block entire ranges of IP addresses.

Blocked visitors will see a message indicating that chat isn't available.

If a customer attempts to request a chat from a blocked IP address, the chat won't enter a queue, nor will it be routed to agents. In addition, you can modify or delete blocking rules.

1. In Setup, enter *Block Visitors* in the **Quick Find** box, then select **Block Visitors**. For guidelines on entering valid IP ranges, see [Set Trusted IP Ranges for Your Organization](#).
2. Click **New** and fill in the parameters of your Blocking Rule.
3. Click **Save**.

You can also enable your agents to block chat requests from specified IP addresses while they work in the console. See [Let Your Agents Block Visitors by IP Address](#) for more information.

EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To chat with visitors in Live Agent in the Salesforce console:

- Live Agent is enabled, set up, and included in a Salesforce console app

Set Up Live Agent in the Salesforce Console

After you set up and customize your basic Live Agent implementation, add it to the Salesforce console so that your agents and supervisors can start using chat to assist customers. Additionally, you can set up some other features in the Salesforce console to create an even more robust chat experience for your agents and your customers.

IN THIS SECTION:

[Add Live Agent to the Salesforce Console](#)

Adding Live Agent to the Salesforce console enables agents and supervisors to chat with customers and access other customer service tools in one place.

[Set Up Chat Answers from Knowledge Articles](#)

If your organization uses Salesforce Knowledge, you can enable your agents to answer customer questions by using information from your knowledge base. Set up chat answers on articles so that agents can search for articles from Live Agent in the Salesforce console and include the information in chats.

[Add the Supervisor Panel to the Salesforce Console](#)

Add the supervisor panel to the Salesforce to make your support supervisors' work easier. That way, supervisors can access information about their agents without having to switch between workspaces.

[Add a Console Sidebar Lookup Component for Chats Routed with Omni-Channel \(Beta\)](#)

Provide agents with a sidebar lookup component in their Salesforce console so they can quickly look up or create associated records for chats. This component is only for chats using Omni-Channel routing (Beta).

EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To set up Live Agent:

- "Customize Application"

To create user profiles or permission sets:

- "Manage Profiles and Permission Sets"

Add Live Agent to the Salesforce Console

Adding Live Agent to the Salesforce console enables agents and supervisors to chat with customers and access other customer service tools in one place.

Before you add Live Agent to a Salesforce console app, you need to create a Salesforce console app if you don't have one set up.

After you set up Live Agent, add it to a Salesforce console app. After Live Agent is set up in the console, your agents can interact with chat customers. With the Salesforce console, your agents and supervisors can access Live Agent and other Service Cloud products in one place to provide customers fast and efficient customer service.

1. From Setup, enter *Apps* in the *Quick Find* box, then select **Apps**.
2. Click **Edit** next to the name of the Salesforce console app in which you want to set up Live Agent.
3. Select *Include Live Agent in this App*.
4. Choose the records or pages that you want to open as subtabs of chat sessions in the chat workspace.
5. Optionally, if your Salesforce org has Knowledge enabled, select *Include Suggested Articles from Knowledge in Live Agent* to display the Knowledge One widget in the chat workspace.
6. Click **Save**.

You can run multiple Salesforce apps at the same time. However, if you log in to another Salesforce app while you're logged in to a Salesforce console app, you can't accept new chat requests.

EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To add Live Agent to the Salesforce console:

- "Customize Application"

Set Up Chat Answers from Knowledge Articles

If your organization uses Salesforce Knowledge, you can enable your agents to answer customer questions by using information from your knowledge base. Set up chat answers on articles so that agents can search for articles from Live Agent in the Salesforce console and include the information in chats.

To give support agents the ability to include information from Knowledge articles in chat sessions by using the Knowledge One widget, you need to add a custom field that's called "Chat Answer" to article types. This field stores information from the article that's appropriate to share with customers during a live chat. Using this field can be helpful for articles that are too long for an agent to include easily in a response.

Create the custom field as a Text, Text Area, or Text Area (Long). The Rich Text Field option is not supported. You need to add this custom field to each article type that contains information that you want operators to access from the Knowledge One widget.

1. From Setup, enter *Knowledge Article Types* in the Quick Find box, then select **Knowledge Article Types**.
2. Create or edit an article type.
3. Click **New** in the Fields related list.
4. Select *Text*, *Text Area*, or *Text Area (Long)*.
Don't select *Text Area (Rich)*.
5. Click **Next**.
6. Enter *Chat Answer* in Field Label.
Make sure that Field Name is populated automatically with Chat_Answer. (You can use a different name for the Field Label.)
7. Click **Next**.
8. Specify security settings, and then click **Next**.
Make the Chat Answer field visible to authors, editors, and live chat agents. Hide it from portal users or other users who don't need access to it.
9. Select *Yes*, add this custom field to the layout, and then click **Save**.

EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To set up the Knowledge One widget:

- "Customize Application"
- AND
- "Manage Knowledge"

Add the Supervisor Panel to the Salesforce Console

Add the supervisor panel to the Salesforce to make your support supervisors' work easier. That way, supervisors can access information about their agents without having to switch between workspaces.

1. In Setup, enter *Apps* in the *Quick Find* box, then select **Apps**.
2. Click **Edit** next to the Salesforce console app that you want to add the supervisor panel to.
3. In the Choose Navigation Tab Items section, add *Live Agent Supervisor* to the Selected Items list.
4. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To set up Live Agent and manage apps:

- "Customize Application"

Add a Console Sidebar Lookup Component for Chats Routed with Omni-Channel (Beta)

Provide agents with a sidebar lookup component in their Salesforce console so they can quickly look up or create associated records for chats. This component is only for chats using Omni-Channel routing (Beta).

 **Note:** This release contains a beta version of Omni-Channel routing for Live Agent chats, which means it's a high-quality feature with known limitations. Omni-Channel routing for Live Agent chats isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

Before you add a sidebar component to the Salesforce console app, you need:

- A Salesforce console app with Live Agent and Omni-Channel added to it.
 - At least one chat button that uses the routing option **Omni**.
 - Edit access for Live Chat Transcript granted to agents handling chats routed through Omni-Channel.
1. From Setup, enter *Live Agent* in the *Quick Find* box, then select **Live Chat Transcripts > Page Layouts**.
 2. Click **Edit** next to the Live Chat Transcript (In Progress) Page Layout.
 3. Click **Custom Console Components**.

EDITIONS

Available in: Salesforce Classic

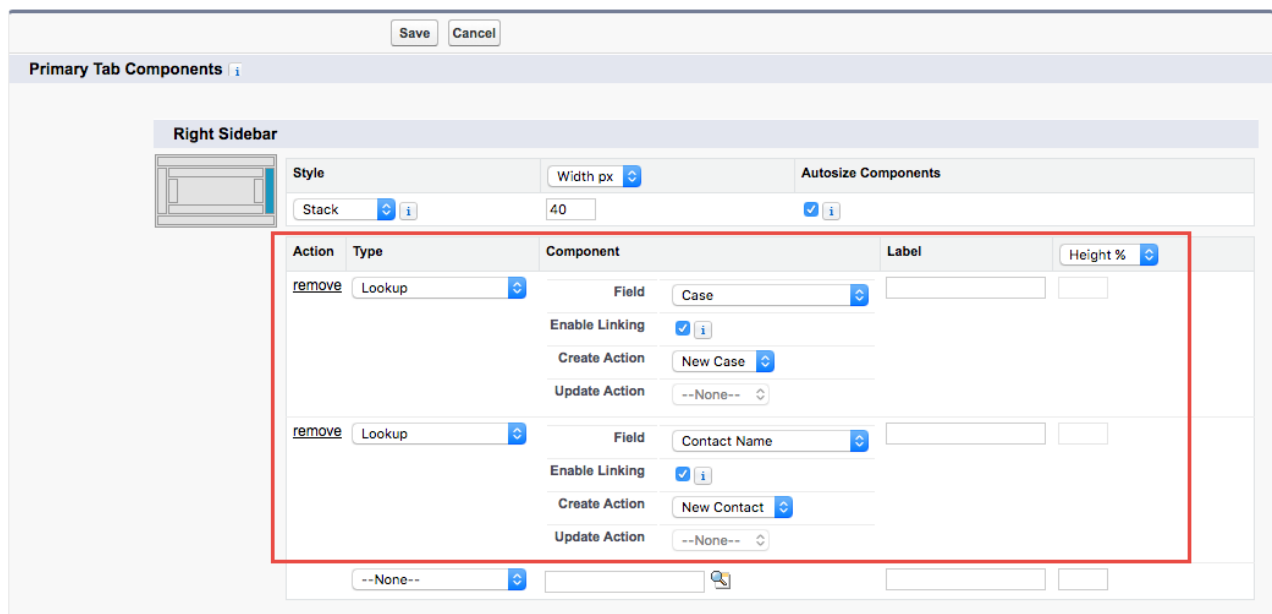
Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions



4. For the sidebar you want to add the lookup component to, enter a width. Do not choose the left sidebar, as chats appear on the left side.
5. Select **Lookup** as the **Type**.
6. Select an object type using the **Field** menu. This is the object type agents will find or create records for.
7. Select any other desired settings.
8. Repeat steps 4-7 for each object type you want to include.



9. Click **Save**.

Agents can now link and unlink records using the sidebar component.

Sidebar Lookup Component with No Linked Records

The screenshot displays the Salesforce Live Chat Transcript interface for transcript ID 00000192. The interface is divided into a main transcript area and a right-hand sidebar with three lookup components: Contact Lookup, Widget Lookup, and Case Lookup. All three components show "No [Entity] Is Linked" with a search bar below each. The transcript details include fields for Name, Request Time, Queue, Status, Deployment, Chat Button, Primary Skill, Owner, Custom Details, Attached Records, Visitor Details, and Recently Viewed Pages. The bottom of the interface shows a "Write a message..." input field and a "Send" button. The Omni-Channel status is visible in the bottom right corner.

Live Chat Transcript Detail

Live Chat Transcript Name	00000192	Status	In Progress
Request Time	8/8/2016 4:18 PM	Deployment	First Deployment
Queue	Chat Queue - Queue Disabled	Chat Button	Omni Auto-Accept
Primary Skill		Owner	Keenan Pepper

Custom Details

CheckboxDetail	true	EmailDetail	john.doe@e.com
FirstNameDetail	John	LastNameDetail	Doe

Attached Records

Case	Account Name
Contact Name	Lead

Visitor Details

Live Chat Visitor	00000004	Browser	Chrome 51.0.2704.106
Location	Unknown, Unknown, Unknown	Browser Language	en-US
Visitor IP Address	10.3.36.89	Platform	MacOSX
Referring Site		Screen Resolution	1440x900
Network	Unknown	User Agent	Mozilla/5.0 (Macintosh; Intel Mac OS X 10_11_6) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/51.0.2704.106 Safari/537.36

Recently Viewed Pages

Current Page

Viewed Pages

Contact Lookup

No Contact Is Linked

Widget Lookup

No Widget Is Linked

Case Lookup

No Case Is Linked

Omni-Channel

Sidebar Lookup Component with Linked Contact Record

The screenshot displays the Salesforce Live Chat Transcript interface for transcript ID 00000192, showing a linked contact record. The sidebar lookup components are updated: Contact Lookup shows "Name" and "Account Name" with the value "Mr. Harry Potter"; Widget Lookup shows "No Widget Is Linked"; Case Lookup shows "Contact Name" with a search bar, "Status" set to "New", "Subject" with a search bar, and "Description" with a text area. The transcript details are identical to the previous screenshot. The bottom of the interface shows a "Write a message..." input field and a "Send" button. The Omni-Channel status is visible in the bottom right corner.

Live Chat Transcript Detail

Live Chat Transcript Name	00000192	Status	In Progress
Request Time	8/8/2016 4:18 PM	Deployment	First Deployment
Queue	Chat Queue - Queue Disabled	Chat Button	Omni Auto-Accept
Primary Skill		Owner	Keenan Pepper

Custom Details

CheckboxDetail	true	EmailDetail	john.doe@e.com
FirstNameDetail	John	LastNameDetail	Doe

Attached Records

Case	Account Name
Contact Name	Lead

Visitor Details

Live Chat Visitor	00000004	Browser	Chrome 51.0.2704.106
Location	Unknown, Unknown, Unknown	Browser Language	en-US
Visitor IP Address	10.3.36.89	Platform	MacOSX
Referring Site		Screen Resolution	1440x900
Network	Unknown	User Agent	Mozilla/5.0 (Macintosh; Intel Mac OS X 10_11_6) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/51.0.2704.106 Safari/537.36

Recently Viewed Pages

Current Page

Viewed Pages

Contact Lookup

Name Account Name

Mr. Harry Potter

Widget Lookup

No Widget Is Linked

Case Lookup

Contact Name

Status New

Subject

Description

Omni-Channel

Use Omni-Channel with Your Existing Live Agent Implementation

Are you loving Live Agent and want to add Omni-Channel to the mix? Here's what changes for you and your organization (and not for your agents!).

So, you've decided to take your customer service to the next level by using Live Agent and Omni-Channel in tandem. That's great! Once everything's set up, you'll find that the two work together in perfect harmony.

Live Agent is powered by Live Agent Configurations, which control the behaviors and settings that are available to Live Agent users. Similarly, Omni-Channel uses Presence Configurations to control the behaviors and settings that are available to Omni-Channel users. You can integrate Live Agent with Omni-Channel so chats are routed just like other work items, and you can even use Omni-Channel routing for your chats (Beta). Whichever way you use Omni-Channel with Live Agent, your agents are then able to accept or reject chat requests right from the Omni-Channel widget.

When you integrate Live Agent and Omni-Channel, your Live Agent users also become Omni-Channel users, so your chat agents need to be associated with both a Live Agent Configuration and a Presence Configuration. Luckily, Salesforce does some of the heavy lifting for you when you enable Omni-Channel with your current Live Agent implementation.

For each Live Agent Configuration that you already have in your org, Salesforce:

- Creates a corresponding Presence Configuration for each of your Live Agent Configurations
- Sets the chat capacity for each Presence Configuration to what's set in its corresponding Live Agent Configuration
- Assigns your chat agents to the new corresponding Presence Configurations

If you have Live Agent enabled but don't have an implementation, when you enable Omni-Channel, Salesforce creates a Live Agent Service Channel.

Salesforce does all this automatically so there's no disruption to your agents' workflow. They can start accepting chats through the Omni-Channel widget in the console. The only difference they see is that they now use the Omni-Channel widget in the console to set their status and accept chat notifications. They may also see a change in their status options, as Omni-Channel Presence Statuses are configurable.

IN THIS SECTION:

[Compare Live Agent and Omni-Channel Routing for Chats](#)

See the benefits and limitations of using Omni-Channel routing for chats (beta) or keeping Live Agent routing for chats.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

Compare Live Agent and Omni-Channel Routing for Chats

See the benefits and limitations of using Omni-Channel routing for chats (beta) or keeping Live Agent routing for chats.

 **Note:** This release contains a beta version of Omni-Channel routing for Live Agent chats, which means it's a high-quality feature with known limitations. Omni-Channel routing for Live Agent chats isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

There's a lot to keep in mind as you decide whether to try Omni-Channel routing for chats (beta). Omni-Channel routing for chats is enabled when you enable Live Agent for the first time, or when you create a chat button that uses the routing option **Omni**.

Let's compare the two routing model options when using Live Agent and Omni-Channel together.

Live Agent Routing	Omni-Channel Routing
Agents use the Omni-Channel widget to handle their work.	Agents use the Omni-Channel widget to handle their work.
Agents use Omni-Channel Presence, including its configurable statuses.	Agents use Omni-Channel Presence, including its configurable statuses.
Use Omni-Channel sound notifications in the Presence Configuration for chats.	Use Omni-Channel sound notifications in the Presence Configuration for chats.
Agent capacity is set and consumed by Omni-Channel.	Agent capacity is set and consumed by Omni-Channel.
Chats are routed to agents using Skills.	Chats are routed to agents using Omni-Channel queues.
Chats can't be prioritized with Omni-Channel work, or relative to each other. Un-routed Omni-Channel items are always routed ahead of chats.	Chats are prioritized with Omni-Channel work, and can be prioritized relative to each other using queues.
Chats always have the size 1.	Chat size is configurable by queue.
Chat supervisors use the Live Agent Supervisor Panel to observe chats and assist agents with their chats.	Chat supervisors use Omni-Channel Supervisor (beta) to see agent activity and real-time data.
Reports and data for chats are separate from Omni-Channel data.	Chat data is included in Agent Work reports in addition to Live Agent reports.
The Live Chat Transcript is created when the chat ends.	The Live Chat Transcript is created when the chat is requested.
You can customize the Live Chat Transcript page layout for Ended chats.	You can customize the Live Chat Transcript page layout for Waiting, In Progress, and Ended chats.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

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Live Agent Routing	Omni-Channel Routing
Live Chat Transcripts aren't created for missed chats, so your reports don't include missed chats.	Live Chat Transcripts are created for missed chats, so your reports include missed chats.
Agents associate records with the chat transcript only after the chat has ended.	Agents can associate records with the chat transcript during the chat. They have the option to do this on the chat transcript itself or use a console sidebar lookup component.

However, there are a few limitations to using Omni-Channel routing for chats (beta):

- You can't transfer a chat from a button using Live Agent routing to a button using Omni-Channel routing.
- You can't use direct-to-agent routing with chats routed by Omni-Channel.
- You can't use chat conferencing with chats routed by Omni-Channel.
- Queues with multiple object types can cause problems when using Omni-Channel routing for chats. We recommend creating a queue for each object type, such as Chats, Cases, and Leads, instead of setting queues to handle multiple object types.
- Chats routed with Omni-Channel can't use supervisor whisper messages and assistance flags with Omni-Channel Supervisor.
- When an agent uses "Transfer to Agent" for a chat routed with Omni-Channel and the receiving agent has an admin profile, the agent who initiated the transfer can lose visibility of the chat transcript until the receiving agent accepts the chat request. This is because Omni-Channel changes ownership of the chat transcript when the transfer is initiated, before the chat is accepted by the next agent.

Adding Snap-Ins Chat to Your Website

Snap-Ins Chat (Beta)

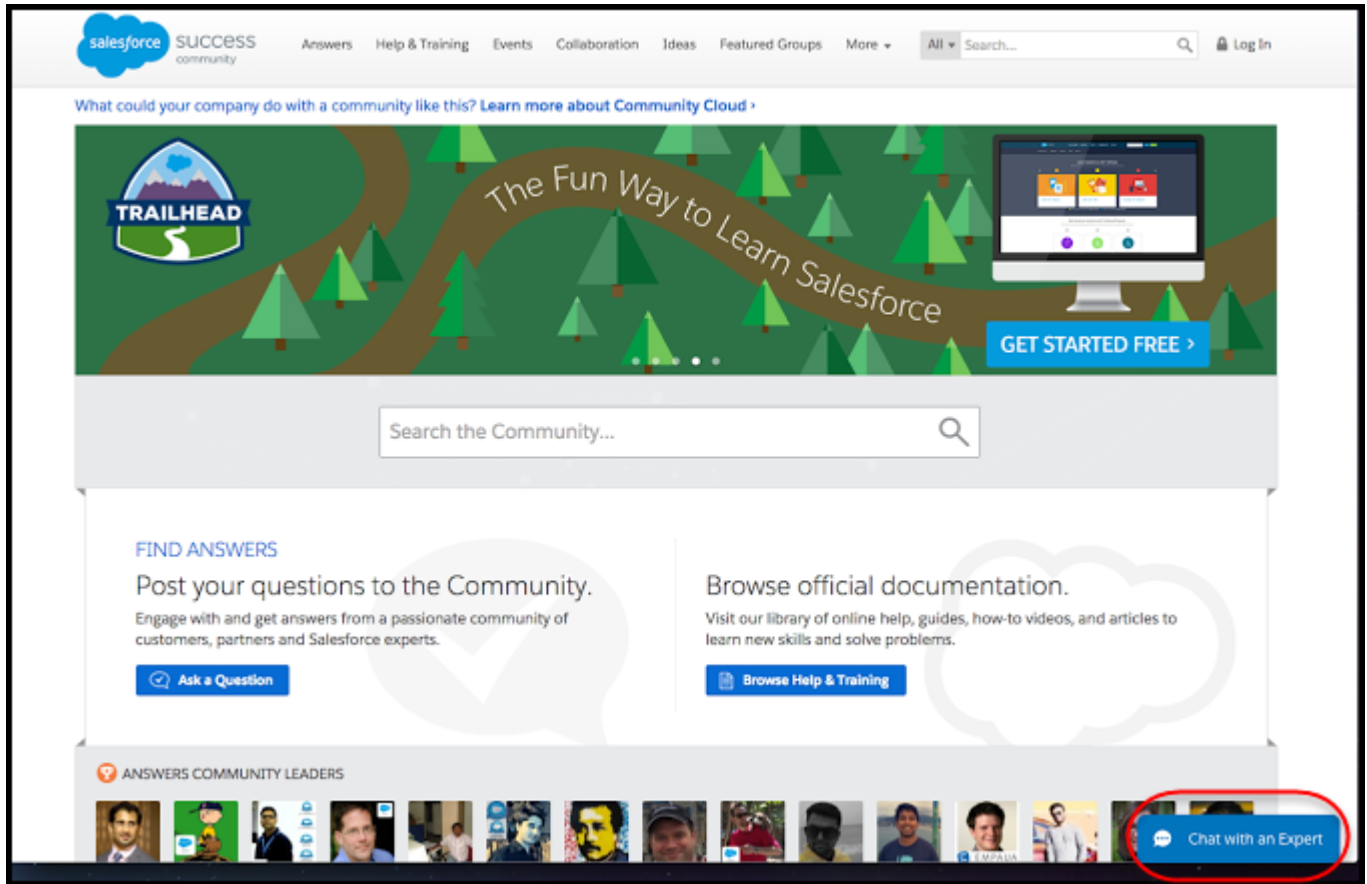
Add the Snap-Ins Chat widget to your website so customers can quickly get answers to their questions by chatting with an agent while browsing your site. Snap-Ins Chat uses Live Agent, but with a simpler setup, to power your chats.

The chat widget button sits unobtrusively on the web page. When customers want to chat, they just click the button to launch the chat.

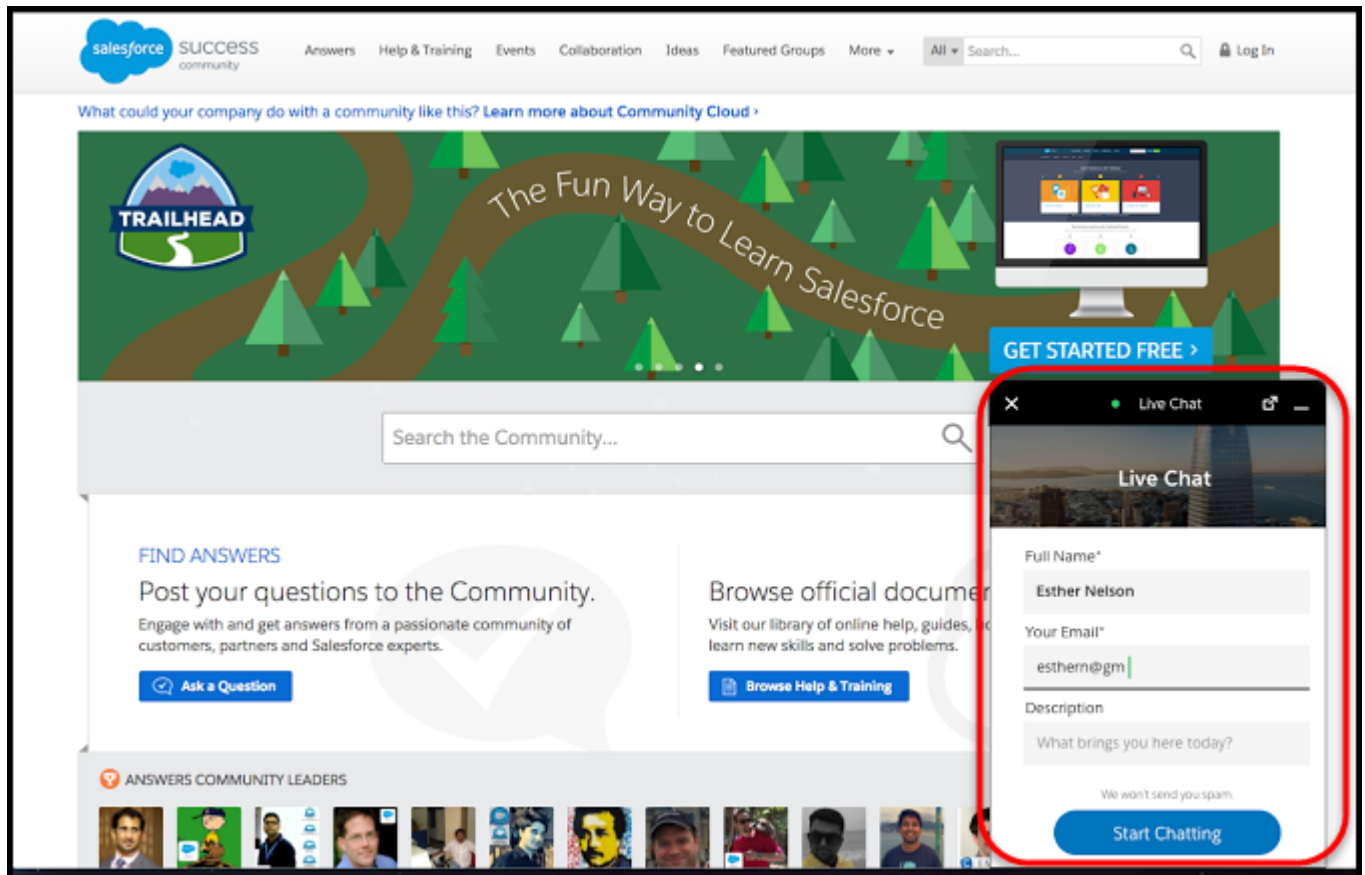
EDITIONS

Snap-ins setup node is available in: **Lightning Experience**

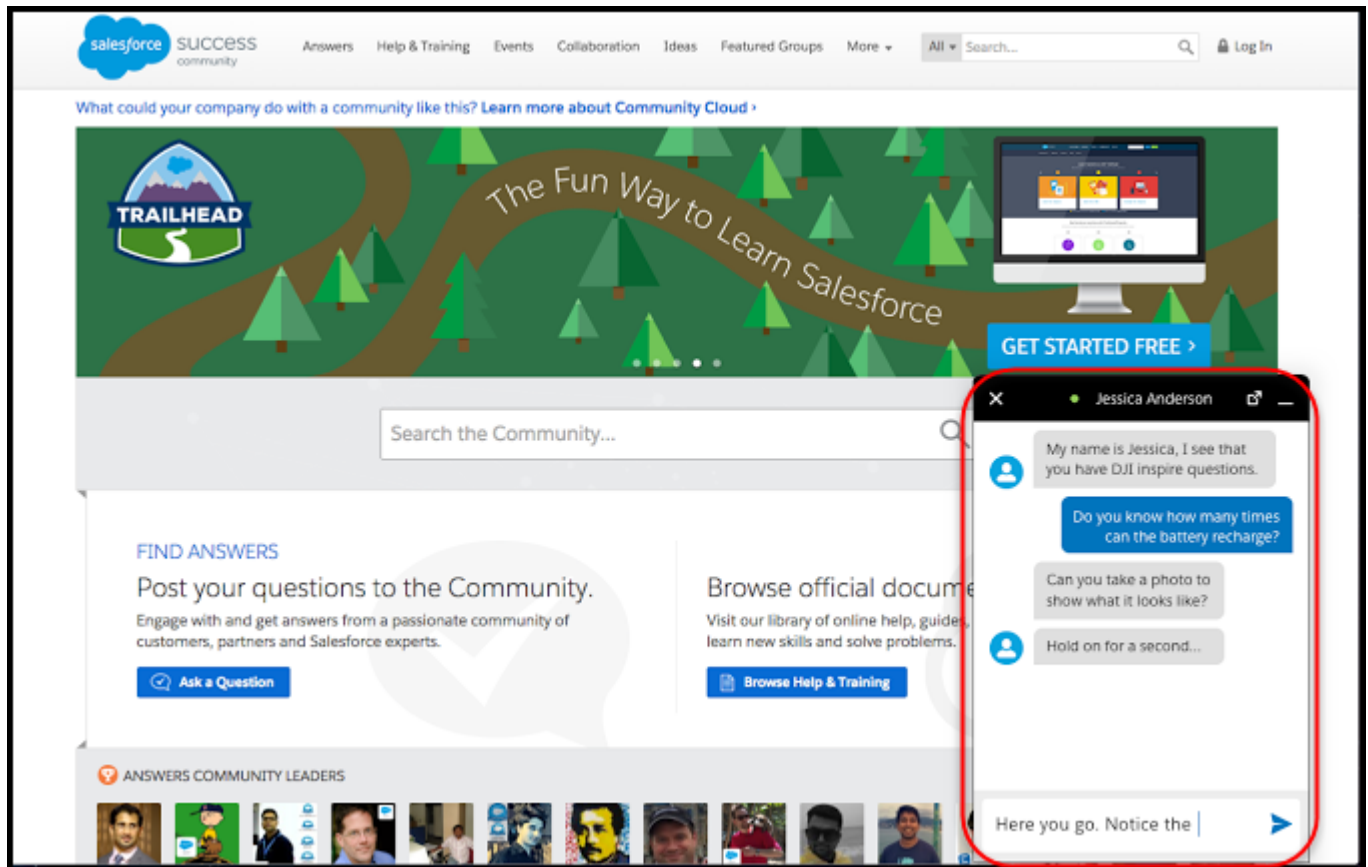
Available in: **Enterprise, Professional, Unlimited, and Developer** Editions



Customers fill out the brief pre-chat form, which helps agents gather basic information about the customer, like their contact information, and their needs.



Customers can start chatting while viewing your web page and can minimize the chat window as they browse, so it's not in their way. The chat widget persists across your web pages, so customers can continue browsing other pages on your site while chatting with an agent.



Snap-in Chat uses a lightweight Live Agent deployment that you can quickly configure and simply add the chat code to the web pages where you want the chat widget to be available. When agents chat with customers via snap-in chat, the agents use Live Agent.

 **Note:** This release contains a beta version of Snap-Ins, which means it's a high-quality feature with known limitations. The code provided to deploy Snap-Ins Chat might change. Snap-Ins aren't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for Snap-Ins in the [Success Community group for Snap-Ins](#).

SEE ALSO:

[Set Up Snap-In Chat for Your Website](#)

[Snap-In Chat \(Beta\) Limitations](#)

Set Up Snap-In Chat for Your Website

Ensure that your org meets the following prerequisites before starting to set up snap-in chat. Follow these steps to configure the snap-in chat widget and add it to your web pages. The setup node for snap-ins chat is available only in Lightning Experience.

To set up snap-ins chat, your org must meet these prerequisites:

- Lightning Experience must be enabled to set up snap-ins
- Service Cloud License
- Live Agent License
- [Live Agent must be enabled](#) in your org
- A Live Agent chat button and a Live Agent deployment must be set up and available in your org
- A Salesforce Community (preferable) or a Force.com site must be set up on your org and available for guest user access



Note: Administrators must use Lightning Experience to access the snap-ins setup pages. However, other users in the org aren't required to have access to or use Lightning Experience with snap-ins.

EDITIONS

Snap-ins setup node is available in: Lightning Experience

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

USER PERMISSIONS

To set up snap-ins chat:

- "Customize Application"

IN THIS SECTION:

[Add Your Website to the CORS Whitelist](#)

Add the URL of the web page where you intend to add the snap-ins chat to the CORS whitelist in your org. The web page where you add the snap-ins chat is the page that customers use to access chat.

[Create a Snap-In Deployment](#)

Create a snap-in deployment for each snap-in that you're using. The setup node for snap-ins chat is available only in Lightning Experience.

[Specify the Live Agent Settings for Your Snap-In Chat Deployment](#)

The snap-in chat widget uses a Live Agent deployment ID and button so customers can chat with your agents. The Live Agent details that you provide are used to generate the chat widget code that you add to your web pages.

[Copy the Snap-In Code Snippets and Paste the Code into Your Web Pages](#)

Salesforce generates a unique code snippet based on the information you provided during the snap-in setup. Copy and paste the chat code snippet so you can add the snap-in chat widget to your web pages. Copy and paste the optional meta tag code snippet to make your web pages responsive to different form factors such as mobile and desktop.

[Customize the Snap-In Chat Widget Code](#)

Use a text or HTML editor to customize the optional parameters in the chat widget code snippet.

[Customizable Parameters in the Snap-In Chat Code](#)

You can customize certain parameters that affect the appearance and behavior of the snap-in chat widget so that the chat experience reflects your company's branding. Use these parameters to customize the pre-chat banner image, logo, waiting state image, and your agent's avatar picture. You also can customize the wording that appears on the chat button and on the chat widget when the chat is loading, when agents are online, when agents are offline.

[Test the Chat Experience](#)

Now that you've embedded chat in your web pages, it's time to test it out.

Add Your Website to the CORS Whitelist

Add the URL of the web page where you intend to add the snap-ins chat to the CORS whitelist in your org. The web page where you add the snap-ins chat is the page that customers use to access chat.

You can use HTTP and HTTPS domains with snap-ins chat.

1. From Setup, enter `CORS` in the `Quick Find` box, then select **CORS**.
2. Select **New**.
3. Enter an origin URL pattern.

The origin URL pattern must include the HTTP or HTTPS protocol and a domain name. The origin URL pattern can include a port. The wildcard character (*) is supported and must be in front of a second-level domain name. For example, `https://*.example.com` adds all subdomains of `example.com` to the whitelist.

The origin URL pattern can be an IP address. However, an IP address and a domain that resolve to the same address are not the same origin, and you must add them to the CORS whitelist as separate entries.

SEE ALSO:

[Create a Snap-In Deployment](#)

Create a Snap-In Deployment

Create a snap-in deployment for each snap-in that you're using. The setup node for snap-ins chat is available only in Lightning Experience.

The snap-in setup uses a Salesforce Community or Force.com site, so that you can associate users with a guest user profile. Check if you already have any communities or sites that you can use. If a site is already available, you can use that as your endpoint. Otherwise, create a site for this purpose.

1. From Setup, enter "Snap-ins" in the Quick Find box, then select **Snap-ins (Beta)**.
2. In the Snap-ins (Beta) configuration page, click **New Deployment**.
The snap-ins deployment page is displayed.
3. In the `Snap-in Deployment Name` field, enter a name for your snap-in.
The deployment name is shown in the list of snap-ins on the Snap-in page. If you have several snap-in deployments, use a descriptive name so it's easy to distinguish this snap-in from other snap-ins.
4. The `API Name` field is automatically populated.
5. In the `Site Endpoint` menu, select a Salesforce community or Force.com site from the dropdown list.
If nothing appears in the menu, it's because there aren't any communities or sites configured in your org.
6. Click **Create**.
The snap-in deployment is created.

After you've created a snap-in deployment, configure the Live Agent settings used in the snap-in chat widget.

SEE ALSO:

[Specify the Live Agent Settings for Your Snap-In Chat Deployment](#)

EDITIONS

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

USER PERMISSIONS

To create, read, update, and delete:

- "Modify All Data"

EDITIONS

Snap-ins setup node is available in: Lightning Experience

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

USER PERMISSIONS

To set up snap-ins chat:

- "Customize Application"

Specify the Live Agent Settings for Your Snap-In Chat Deployment

The snap-in chat widget uses a Live Agent deployment ID and button so customers can chat with your agents. The Live Agent details that you provide are used to generate the chat widget code that you add to your web pages.

Before you specify the Live Agent settings, ensure that you have a Live Agent deployment and a Live Agent chat button available to use with the snap-in chat widget.

1. From Setup, enter "Snap-ins" in the Quick Find box, then select **Snap-ins (Beta)**.
2. Select the snap-in deployment that you want to work with.
3. In the Snap-ins (Beta) configuration page, go to the **Live Agent Basic Settings** section and click **Start**.
4. In the **Live Agent Deployment** menu, select the Live Agent configuration that you want to use with snap-in chat from the dropdown list.
5. In the **Live Agent Button** menu, select the Live Agent button that you want to use with the snap-in chat widget from the dropdown list.
6. Click **Save**.

After you've provided the Live Agent settings, get the code to add the snap-in chat widget to your web pages.

SEE ALSO:

[Copy the Snap-In Code Snippets and Paste the Code into Your Web Pages](#)

Copy the Snap-In Code Snippets and Paste the Code into Your Web Pages

Salesforce generates a unique code snippet based on the information you provided during the snap-in setup. Copy and paste the chat code snippet so you can add the snap-in chat widget to your web pages. Copy and paste the optional meta tag code snippet to make your web pages responsive to different form factors such as mobile and desktop.

Ensure that you have access to the web pages where you want to add the chat widget. You might need to work with your company's webmaster.

When you add the chat code snippet to your web pages, customers can see and use the snap-in chat widget. If you're not ready for customers to access the chat yet, add the code snippets to a private web page.

You can customize the code to change certain aspects of chat widget's appearance.

The `<meta>` tag code makes your web page responsive, so that the web page and the chat widget look good and perform well on different devices. For example, if a customer is looking at your web page and chat widget on a mobile phone, then the page and chat are resized to accommodate the smaller form factor.

This tag is the recommended `<meta>` tag for proper code snippet responsiveness. If your page is already responsive, then you might not need to add this snippet or change your `<meta>` tag. If you see issues with behavior on other devices, you can try updating your `<meta>` tag to code snippet that's provided. This tag is added to the head section of every page where the snap-in chat widget is used. If you don't include an appropriate `<meta>` tag, then the snap-in chat widget appears as it does on a desktop, regardless of the device used to access the page.

1. From Setup, enter "Snap-ins" in the Quick Find box, then select **Snap-ins (Beta)**.
2. Select the snap-in deployment that you want to work with.

EDITIONS

Snap-ins setup node is available in: Lightning Experience

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

USER PERMISSIONS

To set up snap-ins chat:

- "Customize Application"

EDITIONS

Snap-ins setup node is available in: Lightning Experience

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

USER PERMISSIONS

To set up snap-ins chat:

- "Customize Application"

3. In the Snap-ins (Beta) configuration page, go to the `Snap-in Code Snippets` section and click **Get Code**.
4. Copy the chat code snippet and paste it immediately above the closing `</body>` tag on your web page to add the snap-in chat widget to the page.
Paste the chat code snippet into every web page where you want the chat widget to appear. Optionally, customize the chat code snippet.
5. Optionally, copy and paste the meta code snippet into the `<meta>` tag head section in every web page where you want the chat widget to appear.
6. Click **Done**.
The code snippets page closes.

SEE ALSO:[Customize the Snap-In Chat Widget Code](#)[Customizable Parameters in the Snap-In Chat Code](#)[Test the Chat Experience](#)**Customize the Snap-In Chat Widget Code**

Use a text or HTML editor to customize the optional parameters in the chat widget code snippet.

You can customize certain [parameters](#) that affect the appearance and behavior of the snap-ins chat widget.

1. From Setup, enter "Snap-ins" in the Quick Find box, then select **Snap-ins (Beta)**.
2. Select the snap-in deployment that you want to work with.
3. In the Snap-ins (Beta) configuration page, go to the `Snap-in Code Snippets` section and click **Get Code**.
4. Copy the chat code snippet to a text editor or HTML editor.
5. In the text editor or HTML editor, specify the image URLs for the chat widget parameters.
6. Save your changes.

After modifying the chat code snippet, [add the code](#) to every web page where you want the snap-in chat widget to appear.

SEE ALSO:[Copy the Snap-In Code Snippets and Paste the Code into Your Web Pages](#)[Customizable Parameters in the Snap-In Chat Code](#)**EDITIONS**

Snap-ins setup node is available in: Lightning Experience

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

USER PERMISSIONS

To set up snap-ins chat:

- "Customize Application"

Customizable Parameters in the Snap-In Chat Code

You can customize certain parameters that affect the appearance and behavior of the snap-in chat widget so that the chat experience reflects your company's branding. Use these parameters to customize the pre-chat banner image, logo, waiting state image, and your agent's avatar picture. You also can customize the wording that appears on the chat button and on the chat widget when the chat is loading, when agents are online, when agents are offline.

Customize Images Used in the Snap-In Chat Widget

If the images are hosted in the same repository as the web page where you plan to add the chat widget, you can use either relative URL paths and names or full URLs. If the images are hosted elsewhere, use the full URLs for the images.

Before customizing the code, upload the image files that you want to use in the chat widget.

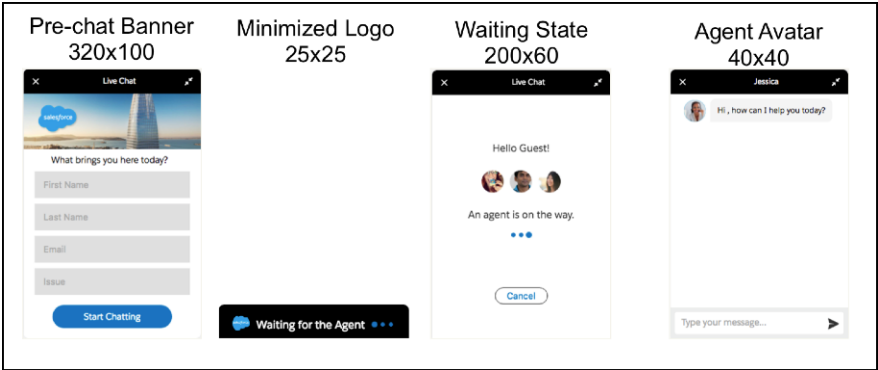
EDITIONS

Snap-ins setup node is available in: **Lightning Experience**

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

To customize this image:	Set this parameter:	Description
Pre-chat banner image	<code>embedded_svc.settings.prechatBackgroundImgURL = "..."</code>	Specify a URL to set the image shown in the pre-chat form between the greeting (for example, "Hello Guest!") and the subtext (for example, "An agent is on the way."). The recommended image size is 320x100 pixels.
Logo for minimized waiting state	<code>embedded_svc.settings.smallCompanyLogoImgURL = "..."</code>	Specify a URL to set the logo shown when the chat is minimized. The recommended image size is 25x25 pixels.
Waiting state image	<code>embedded_svc.settings.waitingStateBackgroundImgURL = "..."</code>	Specify a URL to set the background image when the chat is in a waiting state. The recommended image size is 200x60 pixels.
Agent avatar	<code>embedded_svc.settings.avatarImgURL = "..."</code>	Specify a URL to set the image of the agent that appears when the agent is chatting. The recommended image size is 40x40 pixels.

Create your images in .png format and use the following sizes to ensure that the images don't become distorted during the snap-in chat experience.



Customize the Default Chat Button Used in the Snap-In Chat Widget

Parameter	Description
<code>embedded_svc.settings.displayHelpButton =</code>	To show the default chat button that connects your customers to the chat widget, set the <code>displayHelpButton = true;</code> . The chat button lets your customers start a chat from your web page. Valid values are <code>true</code> <code>false</code> .

Customize Whether the Prechat Form Appears in the Snap-In Chat Widget

Parameter	Description
<code>embedded_svc.settings.initialInteractionState = "..."</code>	To specify whether the pre-chat form appears when a customer initiates a chat, set <code>initialInteractionState = "PRECHAT";</code> . Valid values are <code>PRECHAT</code> <code>WAITING</code> .  Note: These values are case-sensitive. By default, the parameter is set to show the pre-chat form. If you set it to <code>WAITING</code> , then the chat widget doesn't show the pre-chat form and immediately opens a chat window.

Customize Wording Used in the Snap-In Chat Widget

Parameter	Description
<code>embedded_svc.settings.onlineText = "..."</code>	To customize the text that appears in the chat button when agents are online, set the parameter <code>onlineText = "..."</code> to whatever text you want to show. If you don't specify a value, the default text shown is "Chat with an Expert."

Parameter	Description
<code>embedded_svc.settings.offlineText = "..."</code>	To customize the text that appears in the chat button when agents are offline, set the parameter <code>offlineText = "..."</code> to whatever text you want to show. If you don't specify a value, the default text shown is "Agent Offline."
<code>embedded_svc.settings.onlineLoadingText = "..."</code>	To customize the text that appears in the chat button when the chat window is loading, set the parameter <code>onlineLoadingText = "..."</code> to whatever text you want to show. If you don't specify a value, the default text shown is "Loading."

SEE ALSO:

[Copy the Snap-In Code Snippets and Paste the Code into Your Web Pages](#)

[Customize the Snap-In Chat Widget Code](#)

Test the Chat Experience

Now that you've embedded chat in your web pages, it's time to test it out.

To test the snap-in chat from the agent's perspective, login in to Salesforce as a Live Agent user with all the [Live Agent support agent permissions](#) on page 162.

1. Log in to Service Cloud and go online as the agent assigned to the appropriate button.
2. Test the chat from the customer's perspective. In another window in the same browser, initiate a chat by navigating to a web page where you've placed the code snippet and starting the chat.

The chat should be available.

3. On the customer side (that is, on your web page), verify that:
 - Pre-chat form looks how you expected
 - Chat window looks how you expected
4. On the agent side (that is, in the Salesforce Console for Service), verify that:
 - You receive a chat request when the chat is initiated

If the chat widget and experience appears as you expected, your customers can start using embedded chat to communicate with your agents.

SEE ALSO:

[Permissions for Live Agent Support Agents](#)

EDITIONS

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

Snap-In Chat (Beta) Limitations

Snap-in chat has the following limitations.

The setup node for snap-ins chat is available only in Lightning Experience.

Limitations on the pre-chat form:

- Pre-chat automatically creates a case and links to an existing or new contact. However, this behavior is not configurable.
- The pre-chat form doesn't validate fields
- You can't configure the fields on the pre-chat form

The following Live Agent features aren't supported in the snap-in chat beta. Don't enable these features in the Live Agent Configuration, Button, and Deployment that you're using with snap-in chat.

- Agent File Transfer
- Customer Idle Time-outs
- Chat Transfers
- Save Transcripts for Visitors
- Sensitive Data Rules
- Blocked Visitors

The snap-in chat window title uses the agent's name (or a custom name) instead of the Live Agent Chat Window Title setting.

Live Agent Console

The Live Agent console is a legacy feature that agents could use to chat with customers before Spring '13. Salesforce no longer supports the Live Agent console. If your support organization still uses it, we recommend migrating to Live Agent in the Salesforce console as soon as possible, because the Live Agent console will eventually be discontinued.

To upgrade to Live Agent in the Salesforce console, see [Live Agent for Administrators](#). The Salesforce Help walks you through the end-to-end process of setting up Live Agent in the Salesforce console, including implementing and customizing it for your Salesforce org.

EDITIONS

Snap-ins setup node is available in: Lightning Experience

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

EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

Live Agent Console Limitations

The Live Agent console provides only limited access to some features and doesn't include Live Agent features that were released after Spring '13.

To upgrade to Live Agent in the Salesforce console, see [Live Agent for Administrators](#). The Salesforce Help walks you through the end-to-end process of setting up Live Agent in the Salesforce console, including implementing and customizing it for your Salesforce org.

Agent Features

The Live Agent console doesn't provide support for some of the agent features that agents use during chats in the Salesforce console.

Feature	Supported?	Notes
Attaching articles to chats	Yes	None
Attaching records to transcripts	Yes	This feature is supported with the CRM chatlet, a legacy plug-in for the Live Agent console.
Quick Text	Yes	None
Transferring chat requests	Yes	None
Chat conferencing	No	None
Critical wait alert times	No	None
Knowledge chat answers	No	None
Transferring files	No	None
Autogreetings	Limited	The Live Agent console supports autogreetings that are specified in Live Agent configurations only; it doesn't support autogreetings that are specified in your chat button settings.
Custom agent names	Limited	The Live Agent console supports custom agent names that are specified in Live Agent configurations only; it doesn't support custom agent names that are specified in your chat button settings.

EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

Supervisor Features

The Live Agent console was originally designed only for agents' interactions with customers. As a result, the Live Agent console doesn't support any supervisor features that are supported in the Salesforce console.

Set Up Omni-Channel

Omni-Channel for Administrators

Omni-Channel is a comprehensive customer service solution that lets your call center route any type of incoming work item—including cases, chats, or leads—to the most qualified, available agents in your organization. Omni-Channel integrates seamlessly into the Salesforce console.

Omni-Channel is a flexible, customizable feature, and you can configure it declaratively—that is, without writing code. Use Omni-Channel to manage the priority of work items, which makes it a cinch to route important work items to agents quickly. Manage your agents' capacity to take on work items so that they're given only the number of assignments that they can handle. You can also define which agents can work on different types of assignments. For example, you can create one group of agents to respond to leads and sales inquiries, and another group that helps customers with support questions.

Best of all, Omni-Channel routes all these assignments to the correct agents automatically. Agents no longer have to pick and choose work assignments manually from a queue, which saves everyone in your call center time, effort, and brainpower. Because it's easier for agents to work on their assignments, they can assist your customers faster and more effectively and close assignments more quickly.

Let's get started!

IN THIS SECTION:

[Get to Know Omni-Channel: Walkthrough](#)

Set up Omni-Channel to push work to the most skilled and available agents in real-time.

Get to Know Omni-Channel: Walkthrough

Set up Omni-Channel to push work to the most skilled and available agents in real-time.

Welcome to Omni-Channel!

Omni-Channel enables your contact center to push work to the most qualified, available support agent in your organization in real time. Let's take a high-level tour of how to set up Omni-Channel for your contact center.



[Walk through it: Get to Know Omni-Channel](#)

Here's what the walkthrough covers: Enable Omni-Channel and create Service Channels, Routing Configurations, Queues, Presence Statuses, and Presence Configurations.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:

- "Customize Application"

To modify permission sets and profiles:

- "Manage Profiles and Permission Sets"

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Create Omni-Channel Objects

The first step towards getting your Omni-Channel implementation up and running is to create the necessary objects in Salesforce.

IN THIS SECTION:

[Enable Omni-Channel](#)

Enable Omni-Channel to gain access to the objects that you'll need to set up the feature in your organization.

[Create Service Channels](#)

Service channels let you turn nearly any Salesforce object such as a case, lead, SOS session, or even a custom object into a work record. Omni-Channel then plucks these work items from their queues like flowers from the garden of agent productivity and routes them to your agents in real time.

[Create Routing Configurations](#)

Routing configurations determine how work items are routed to agents. Use them to prioritize the relative importance and size of work items from your queues. That way, the most important work items are handled accordingly, and work is evenly distributed to your agents. To start routing work items to agents, create routing configurations and assign them to queues.

[Associate Routing Configurations and Agents with Queues](#)

Queues are a classic element of Salesforce that help your teams manage leads, cases, and custom objects. Omni-Channel supercharges your queues to be able to route work items to your agents in real time. Agents don't have to select work items manually from queues because Omni-Channel routes work items to agents automatically and in real time!

[Create Presence Configurations](#)

Let's focus on agents for a minute. Presence configurations determine how much work agents can take on and what Omni-Channel behaviors they can access while they assist customers. Your organization can have multiple configurations for different groups of agents who support different channels.

[Create Presence Statuses](#)

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Enable Omni-Channel

Enable Omni-Channel to gain access to the objects that you'll need to set up the feature in your organization.

1. From Setup, enter *Omni-Channel Settings* in the Quick Find box, then select **Omni-Channel Settings**.
2. Select **Enable Omni-Channel**.
3. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:

- "Customize Application"

Create Service Channels

Service channels let you turn nearly any Salesforce object such as a case, lead, SOS session, or even a custom object into a work record. Omni-Channel then plucks these work items from their queues like flowers from the garden of agent productivity and routes them to your agents in real time.

Service channels let you manage sources of work and their priority compared to other work items. After you create service channels, you'll associate them with queues, which determine how work items are routed to your agents. You can create service channels for support channels, such as cases or SOS calls, or for sales channels, such as leads.

- 1. In Setup, enter *Service Channels* in the Quick Find box, select **Service Channels**, then click **New**.
- 2. Specify the settings for your service channel.
- 3. Click **Save**.

IN THIS SECTION:

[Service Channel Settings](#)

Customize your service channel settings to define how your organization receives work from various sources, such as chat, email, SOS calls, or social channels.

[Supported Objects for Omni-Channel](#)

Omni-Channel turbocharges your agents' productivity by assigning records to them in real time. But which objects and records does Omni-Channel support?

Service Channel Settings

Customize your service channel settings to define how your organization receives work from various sources, such as chat, email, SOS calls, or social channels.

Setting	What It Does
Service Channel Name	Names the service channel. This service channel name, or a version of it, automatically becomes the API Name.
API Name	Sets the API name for the service channel.
Salesforce Object	The type of Salesforce standard or custom object that's associated with this service channel. For example, if you have a service channel for Web cases set the Related Object Type to <i>Case</i> . For a complete list of objects that service channels support, see Supported Objects for Omni-Channel .
Custom Console Footer Component	(Optional) Opens the specified custom console footer component when an agent accepts a work item request. For example, open a

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

- To set up Omni-Channel:
- "Customize Application"

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Setting	What It Does
	marketing campaign widget when an agent accepts a lead.

Supported Objects for Omni-Channel

Omni-Channel turbocharges your agents' productivity by assigning records to them in real time. But which objects and records does Omni-Channel support?

Omni-Channel currently supports routing for the following objects and records.

- Cases
- Chats
- SOS video calls
- Social posts
- Orders
- Leads
- Custom objects

Create Routing Configurations

Routing configurations determine how work items are routed to agents. Use them to prioritize the relative importance and size of work items from your queues. That way, the most important work items are handled accordingly, and work is evenly distributed to your agents. To start routing work items to agents, create routing configurations and assign them to queues.

Create a routing configuration for each service channel in your organization. After you create routing configurations, associate them with queues so your agents can receive work after we get Omni-Channel set up.

1. In Setup, enter *Routing* in the *Quick Find* box, select **Routing Configurations**, then click **New**.
2. Specify the settings for your routing configuration.
3. Click **Save**.

IN THIS SECTION:

[Routing Configuration Settings](#)

Customize your routing configuration settings to define how work items are pushed to agents.

[Omni-Channel Routing Model Options](#)

Specify how incoming work items are directed to agents using Omni-Channel.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:

- "Customize Application"

Routing Configuration Settings

Customize your routing configuration settings to define how work items are pushed to agents.

Basic Information

Setting	What It Does
Routing Configuration Name	Names the service routing configuration. This routing configuration name, or a version of it, automatically becomes the Developer Name.
Developer Name	Sets the API name for the service channel.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Routing Settings

Setting	What It Does
Routing Priority	The order in which work items from the queue that are associated with this routing configuration are routed to agents. Objects in queues with a lower number are routed to agents first. For example, if you set the priority for highly qualified leads to <i>1</i> and the priority for less qualified leads to <i>2</i>, highly qualified leads are routed and assigned to agents before less qualified leads. On the backend, we identify agents with available capacity; then we assign work to them based on this priority order: 1. The priority of the queue from which the work item came 2. The amount of time that the work item has been waiting in the queue 3. Members of the queue who are available to receive new work items from the queue When the work item is assigned to an agent, the owner of the object changes from the queue to the agent. If an agent declines the work item, we reassign it back to the queue with its original age so that it can be properly rerouted.
Routing Model	Determines how incoming work items are routed to agents who are assigned to the configuration's service channel.
Push Time-Out (seconds)	Sets a time limit for an agent to respond to an item before it's pushed to another agent.

Work Item Size

Setting	What It Does
Units of Capacity	Indicates the amount of an agent's overall capacity that's consumed when the agent is assigned a work item from queues that are associated with this configuration. The <code>Capacity</code> setting in the presence configuration the agent is assigned to determines the agent's overall capacity. When the agent is assigned a work item from the queue that's associated with this configuration, the <code>Capacity Weight</code> is subtracted from the agent's overall capacity. Agents can be assigned work items until their overall capacity reaches 0. You can select a <code>Capacity Weight</code> or a <code>Capacity Percentage</code>, but not both.
Percentage of Capacity	The percentage of an agent's overall capacity that's consumed when the agent is assigned a work item from queues that are associated with this configuration. The agent's overall capacity is determined by the <code>Capacity</code> setting in the presence configuration that the agent is assigned to. When the agent is assigned a work item from the queue that's associated with this configuration, the <code>Capacity Percentage</code> is deducted from the agent's overall capacity until the agent has 0% capacity remaining. You can select a <code>Capacity Weight</code> or a <code>Capacity Percentage</code>, but not both.

Omni-Channel Routing Model Options

Specify how incoming work items are directed to agents using Omni-Channel.

In Omni-Channel, work items are automatically routed or "pushed" to agents who are assigned to the appropriate queue.

Routing Option	Description	Example
Least Active	Incoming work items are routed to the agent with the least amount of open work. When work items all consume 1 capacity, the agent with the lowest number of work items receives incoming work. The example presents a scenario in which agents have work with varying capacity impacts.	- Agent A and Agent B each have an overall capacity of 5. - Agent A has 3 active work items with capacity impact of 1. Agent B has 1 active work item with capacity impact of 4. - Because Agent A has a lower capacity impact than

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Routing Option	Description	Example
		Agent B, incoming work items are routed to Agent A.
Most Available	Incoming work items are routed to the agent with the greatest difference between work item capacity and open work items. Capacity is determined by the presence configuration that the agent is assigned to.	- Agent A and Agent B each have an overall capacity of 5. - Agent A has 3 active work items while Agent B has 1. - Because Agent B has the most open capacity, incoming work items are routed to Agent B.

Associate Routing Configurations and Agents with Queues

Queues are a classic element of Salesforce that help your teams manage leads, cases, and custom objects. Omni-Channel supercharges your queues to be able to route work items to your agents in real time. Agents don't have to select work items manually from queues because Omni-Channel routes work items to agents automatically and in real time!

The work items in the queue are assigned the priority that you specified in the routing configuration that you created earlier. If your organization already uses them, you can reuse queues that are available in your organization. That way, you can route work items in real time to the agents who are assigned to those queues.

If your organization doesn't use queues, create at least one to integrate with Omni-Channel. You can also create multiple queues to handle the different types of work items. For example, you might create one queue for incoming cases and another queue for incoming leads.

For routing to work correctly, assign each of your agents to the queue from which they are receiving work items.

For more information about queues, see "Queues Overview" in the Salesforce Help.

1. In Setup, enter *Queues* in the *Quick Find* box, then select **Queues**.
2. Create a queue or edit an existing one.
3. In the *Routing Configuration* field, look up the routing configuration that you want to associate with the queue.
4. In the Queue Members section, add agents to the *Selected Users* field.
These agents will receive work items from this queue.
5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:

- "Customize Application"

Create Presence Configurations

Let’s focus on agents for a minute. Presence configurations determine how much work agents can take on and what Omni-Channel behaviors they can access while they assist customers. Your organization can have multiple configurations for different groups of agents who support different channels.

When you enable Omni-Channel in your organization, Salesforce creates a presence configuration for you, called the Default Presence Configuration. All your agents are assigned to that configuration automatically. However, you can create a presence configuration and assign individual agents to it to customize Omni-Channel settings for a subset of your agents. If you reassign agents to a custom presence configuration, they’re excluded from the Default Presence Configuration.

- 1. In Setup, enter *Presence* in the *Quick Find* box, select **Presence Configurations**, then click **New**.
- 2. Choose the settings for your presence configuration.
- 3. Click **Save**.

IN THIS SECTION:

[Presence Configuration Settings](#)

Customize your presence configuration settings to define the Omni-Channel settings that are assigned to agents.

Presence Configuration Settings

Customize your presence configuration settings to define the Omni-Channel settings that are assigned to agents.

Basic Information

These settings configure the basic functionality that’s available to agents when they’re signed in to Omni-Channel.

Setting	What It Does
Presence Configuration Name	Names the presence configuration. This configuration name, or a version of it, automatically becomes the <i>Developer Name</i> .
Developer Name	Sets the API name for the configuration.
Capacity	Determines the agent’s maximum capacity for work. The size of the work item that you specified in the routing configuration consumes the agent’s capacity.
Automatically Accept Requests	Automatically accepts work assignments that are pushed to an agent. These work items open automatically in the agent’s workspace, so the agent doesn’t have to accept these work items manually from the Omni-Channel footer widget.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

- To set up Omni-Channel:
- “Customize Application”

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Setting	What It Does
	If <code>Allow Agents to Decline Requests</code> is enabled, you can't use this setting.
<code>Allow Agents to Decline Requests</code>	Allows agents to decline incoming work items. If <code>Automatically Accept Requests</code> is enabled, agents can't decline requests.
<code>Update Status on Decline</code>	Automatically changes the agent's status to the status that you specify when the agent declines a work item. This setting is available only if <code>Allow Agents to Decline Requests</code> is enabled.
<code>Allow Agents to Choose a Decline Reason</code>	Allows agents to choose a reason when declining work assignments. This setting is available only if <code>Allow Agents to Decline Requests</code> is enabled.
<code>Update Status on Push Time-Out</code>	Automatically changes the agent's status when a work assignment that's been pushed to them times out. This setting is available only if <code>Push Time-Out</code> is enabled.
<code>Request Sound Enabled</code>	Plays a sound in the agent's widget when a work request is received.
<code>Disconnect Sound Enabled</code>	Plays a sound in the agent's widget when the agent loses connection with Omni-Channel.

Assign Users

Assign eligible users to the configuration to give them access to Omni-Channel functionality. Later, you'll see that you can also assign profiles to a configuration. If a user is assigned a configuration at the profile and user levels, the user-level configuration overrides the configuration that's assigned to the user's profile.



Warning: Users can be assigned to only one presence configuration at a time. If you assign the same user to a second presence configuration, the system removes that user from the first presence configuration without warning you. So make sure that you know which presence configuration assignment is required for each user!

For example, let's say that User A is assigned to Presence Configuration A. Then, you create Presence Configuration B and assign User A to it without realizing that the user was assigned to another presence configuration. Salesforce removes User A from Presence Configuration A and reassigns the user to Presence Configuration B without notifying you.

Setting	What It Does
<code>Available Users</code>	Indicates the users who are eligible to be assigned to the configuration.
<code>Selected Users</code>	Indicates the users who are assigned to the configuration.

Assign Profiles

Assign eligible profiles to the configuration to give users who are associated with the profiles access to Omni-Channel functionality. If a user is assigned a configuration at the profile and user levels, the user-level configuration overrides the configuration that's assigned to the user's profile.

Setting	What It Does
Available Profiles	Indicates the user profiles that are eligible to be assigned to the configuration.
Selected Profiles	Indicates the user profiles that are assigned to the configuration.

Create Presence Statuses

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline.

A presence status can encompass one or more channels of work items. For example, you might create a presence status called "Available for Web Support" that includes service channels for chats and emails. When agents are signed in to that presence status, they can receive incoming chats and emails. Genius!

1. In Setup, enter *Presence* in the Quick Find box, select **Presence Statuses**, then click **New**.
2. Choose the settings for your presence status.
3. Click **Save**.

IN THIS SECTION:

[Presence Status Settings](#)

Customize your presence status settings to define which service channels are assigned to difference statuses. Agents can sign in to Omni-Channel with different statuses depending on the types of work that they're available to receive.

Presence Status Settings

Customize your presence status settings to define which service channels are assigned to difference statuses. Agents can sign in to Omni-Channel with different statuses depending on the types of work that they're available to receive.

Basic Information

Use these settings to name your presence status.

Setting	What It Does
Status Name	Names the presence status. This presence status name, or a version of it, automatically becomes the API Name.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:

- "Customize Application"

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Setting	What It Does
API Name	Sets the API name for the presence status.

Status Options

These settings indicate whether agents are online or busy when they use this status.

Setting	What It Does
Online	Lets agents who use this status receive new work items.
Busy	Lets agents who use this status appear away and indicates that they're unable to receive new work items.

Service Channels

Assign service channels to your presence status. Agents who sign in with this presence status can receive work items from the channels that you select.

Setting	What It Does
Available Channels	Indicates the service channels that are eligible to be assigned to the presence status.
Selected Channels	Indicates the service channels that are assigned to the presence status.

Set Access to Presence Statuses

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. Once you've created your Presence Statuses for Omni-Channel, you need to set up how your users will access them. You can set access through permission sets or profiles.

IN THIS SECTION:

[Give Users Access to Presence Statuses with Permission Sets](#)

Make presence statuses available to agents who are assigned to certain permission sets.

[Give Users Access to Presence Statuses with Profiles](#)

Make presence statuses available to agents who are assigned to certain profiles.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Give Users Access to Presence Statuses with Permission Sets

Make presence statuses available to agents who are assigned to certain permission sets.

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. You can give users access to presence statuses through permission sets, or alternatively, through profiles.

1. In Setup, enter *Permission Sets* in the **Quick Find** box, then select **Permission Sets**.
2. Click the name of the permission set to which you want to give access to statuses.
3. Click **Service Presence Statuses Access**.
4. Click **Edit**.
5. Select the presence statuses that you want to associate with the permission set.
Agents who are assigned to this permission set can sign in to Omni-Channel with any of the presence statuses that you make available to them.
6. Click **Save**.

Give Users Access to Presence Statuses with Profiles

Make presence statuses available to agents who are assigned to certain profiles.

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. You can give users access to presence statuses through profiles, or alternatively, through permission sets.

1. In Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles**.
2. Click the name of the profile to which you want to give access to statuses.
Don't click **Edit** next to the profile name. If you do, you won't see the correct page section where you can enable statuses.
3. In the Enabled Service Presence Status Access section, click **Edit**.
4. Select the presence statuses that you want to associate with the profile.
Agents who are assigned to this profile can sign in to Omni-Channel with any of the presence statuses that you make available to them.
5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:

- "Customize Application"

To modify permission sets:

- "Manage Profiles and Permission Sets"

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:

- "Customize Application"

To modify profiles:

- "Manage Profiles and Permission Sets"

Add the Omni-Channel Widget to the Salesforce Console

After you get Omni-Channel all set up for your organization, it's time to add the Omni-Channel widget to the Salesforce console so that your agents can start receiving work.

The Omni-Channel widget appears in the bottom right corner of the Salesforce console. From there, agents can change their presence status and triage their incoming work assignments.



Note: If your organization uses Live Agent to manage chats, you can either use the Live Agent widget or the Omni-Channel widget to manage chats, but not both. To learn more about managing Live Agent, see [Use Omni-Channel with Your Existing Live Agent Implementation](#).

1. From Setup, enter *Apps* in the *Quick Find* box, then select **Apps**.
2. Click **Edit** next to the Salesforce console app that you want to add the Omni-Channel widget to.
3. In the Choose Console Components section, add Omni-Channel to your list of selected items.
4. Click **Save**.

IN THIS SECTION:

[Control Visible Work Item Details in the Omni-Channel Widget with Compact Layouts](#)

Ever wanted to customize the information that your agents see when they get a new work item in the Omni-Channel widget? You can! Just customize primary compact layout for that work item's object.

Control Visible Work Item Details in the Omni-Channel Widget with Compact Layouts

Ever wanted to customize the information that your agents see when they get a new work item in the Omni-Channel widget? You can! Just customize primary compact layout for that work item's object.

If you look closely, you'll notice that a few fields are visible by default on new work item requests. For example, if your agent receives a request to manage a case, the request features the case's priority, status, and case number by default. An object's primary compact layout controls all of the visible fields in the Omni-Channel widget. But what if you want to see more information, such as the case's owner or its subject? Just edit the primary compact layout so that it includes the fields that you want to appear in the widget.



Tip: The Omni-Channel widget is, well, compact, so there's only so much room to display fields on work item requests. While you can technically put up to 10 fields on a compact layout, the Omni-Channel widget will only display 4 fields. As a best practice, select up to 4 of the most important fields that you want to expose on work item requests, then add those to your compact layout.

1. Decide which object's compact layout you want to edit.
2. From the management settings for the object whose work item you want to edit, select **Compact Layouts**, and then select **New**. For example, to edit the compact layout for cases, go to the object management settings for cases, select **Compact Layouts**, then select **New**.
3. Select the settings for your compact layout, including the fields that you want it to include. The fields that you pick appear in the Omni-Channel widget when an agent receives a request.
4. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:

- "Customize Application"

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:

- "Customize Application"

5. Change the primary compact layout to your new layout by clicking **Compact Layout Assignment > Edit Assignment**.
6. Select your new compact layout from the Primary Compact Layout drop-down list.
7. Click **Save**.

Test Your Omni-Channel Implementation

Now that you've got Omni-Channel set up and enabled, test your implementation to make sure it's working correctly.

To test your implementation, route a work item to yourself through the Salesforce console.

1. Log in to the Salesforce console.
Make sure that you log in as a user who's enabled to use Omni-Channel. For the sake of testing the feature, make sure that you're the only agent who's signed in to Omni-Channel.
2. In the Omni-Channel widget, change your status so that you can receive incoming work items.
3. In the console, navigate to the record that corresponds to your current presence status's channels.
For example, if you're logged in with a status that's called "Available for Cases," navigate to a list of your open cases in the console. We'll assume that your "Available for Cases" status is associated with a cases service channel. After all, it wouldn't make much sense if your "Available for Cases" status made you available for, say, leads, would it?
4. Select the checkbox next to the record that you want to route to yourself.
5. Click **Change Owner**.
You'll be redirected to the Change Case Owner page.
6. Select *Queue* from the *Owner* list.
7. Enter the name of the queue that you associated with your routing configuration.

Sit back and relax. You'll see an incoming request notification in the Omni-Channel widget within a few seconds.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:

- "Customize Application"

Use Omni-Channel with Your Existing Live Agent Implementation

Are you loving Live Agent and want to add Omni-Channel to the mix? Here's what changes for you and your organization (and not for your agents!).

So, you've decided to take your customer service to the next level by using Live Agent and Omni-Channel in tandem. That's great! Once everything's set up, you'll find that the two work together in perfect harmony.

Live Agent is powered by Live Agent Configurations, which control the behaviors and settings that are available to Live Agent users. Similarly, Omni-Channel uses Presence Configurations to control the behaviors and settings that are available to Omni-Channel users. You can integrate Live Agent with Omni-Channel so chats are routed just like other work items, and you can even use Omni-Channel routing for your chats (Beta). Whichever way you use Omni-Channel with Live Agent, your agents are then able to accept or reject chat requests right from the Omni-Channel widget.

When you integrate Live Agent and Omni-Channel, your Live Agent users also become Omni-Channel users, so your chat agents need to be associated with both a Live Agent Configuration and a Presence Configuration. Luckily, Salesforce does some of the heavy lifting for you when you enable Omni-Channel with your current Live Agent implementation.

For each Live Agent Configuration that you already have in your org, Salesforce:

- Creates a corresponding Presence Configuration for each of your Live Agent Configurations
- Sets the chat capacity for each Presence Configuration to what's set in its corresponding Live Agent Configuration
- Assigns your chat agents to the new corresponding Presence Configurations

If you have Live Agent enabled but don't have an implementation, when you enable Omni-Channel, Salesforce creates a Live Agent Service Channel.

Salesforce does all this automatically so there's no disruption to your agents' workflow. They can start accepting chats through the Omni-Channel widget in the console. The only difference they see is that they now use the Omni-Channel widget in the console to set their status and accept chat notifications. They may also see a change in their status options, as Omni-Channel Presence Statuses are configurable.

IN THIS SECTION:

[Compare Live Agent and Omni-Channel Routing for Chats](#)

See the benefits and limitations of using Omni-Channel routing for chats (beta) or keeping Live Agent routing for chats.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

Compare Live Agent and Omni-Channel Routing for Chats

See the benefits and limitations of using Omni-Channel routing for chats (beta) or keeping Live Agent routing for chats.

 **Note:** This release contains a beta version of Omni-Channel routing for Live Agent chats, which means it’s a high-quality feature with known limitations. Omni-Channel routing for Live Agent chats isn’t generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can’t guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

There’s a lot to keep in mind as you decide whether to try Omni-Channel routing for chats (beta). Omni-Channel routing for chats is enabled when you enable Live Agent for the first time, or when you create a chat button that uses the routing option **Omni**.

Let’s compare the two routing model options when using Live Agent and Omni-Channel together.

Live Agent Routing	Omni-Channel Routing
Agents use the Omni-Channel widget to handle their work.	Agents use the Omni-Channel widget to handle their work.
Agents use Omni-Channel Presence, including its configurable statuses.	Agents use Omni-Channel Presence, including its configurable statuses.
Use Omni-Channel sound notifications in the Presence Configuration for chats.	Use Omni-Channel sound notifications in the Presence Configuration for chats.
Agent capacity is set and consumed by Omni-Channel.	Agent capacity is set and consumed by Omni-Channel.
Chats are routed to agents using Skills.	Chats are routed to agents using Omni-Channel queues.
Chats can’t be prioritized with Omni-Channel work, or relative to each other. Un-routed Omni-Channel items are always routed ahead of chats.	Chats are prioritized with Omni-Channel work, and can prioritized relative to each other using queues.
Chats always have the size 1.	Chat size is configurable by queue.
Chat supervisors use the Live Agent Supervisor Panel to observe chats and assist agents with their chats.	Chat supervisors use Omni-Channel Supervisor (beta) to see agent activity and real-time data.
Reports and data for chats are separate from Omni-Channel data.	Chat data is included in Agent Work reports in addition to Live Agent reports.
The Live Chat Transcript is created when the chat ends.	The Live Chat Transcript is created when the chat is requested.
You can customize the Live Chat Transcript page layout for Ended chats.	You can customize the Live Chat Transcript page layout for Waiting, In Progress, and Ended chats.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

Live Agent Routing	Omni-Channel Routing
Live Chat Transcripts aren't created for missed chats, so your reports don't include missed chats.	Live Chat Transcripts are created for missed chats, so your reports include missed chats.
Agents associate records with the chat transcript only after the chat has ended.	Agents can associate records with the chat transcript during the chat. They have the option to do this on the chat transcript itself or use a console sidebar lookup component.

However, there are a few limitations to using Omni-Channel routing for chats (beta):

- You can't transfer a chat from a button using Live Agent routing to a button using Omni-Channel routing.
- You can't use direct-to-agent routing with chats routed by Omni-Channel.
- You can't use chat conferencing with chats routed by Omni-Channel.
- Queues with multiple object types can cause problems when using Omni-Channel routing for chats. We recommend creating a queue for each object type, such as Chats, Cases, and Leads, instead of setting queues to handle multiple object types.
- Chats routed with Omni-Channel can't use supervisor whisper messages and assistance flags with Omni-Channel Supervisor.
- When an agent uses "Transfer to Agent" for a chat routed with Omni-Channel and the receiving agent has an admin profile, the agent who initiated the transfer can lose visibility of the chat transcript until the receiving agent accepts the chat request. This is because Omni-Channel changes ownership of the chat transcript when the transfer is initiated, before the chat is accepted by the next agent.

Reference

How Does Omni-Channel Routing Work?

Do data models make your heart skip a beat? Want to understand the ins and outs of how Omni-Channel routes work items to your agents? Then we have a treat for you. Omni-Channel pushes work items to the right agent at the right time so that your support team can efficiently help customers with their problems. But how does routing work under the hood? Let's dive in.

Omni-Channel routes work through two separate processes.

- First, when a new work item is assigned to an Omni-Channel queue, Omni-Channel attempts to route it to an agent. Omni-Channel routes work items by the priority of the queue that they're assigned to, so the most important work items are pushed to agents first. Next, items are routed based on how long they've been sitting in the queue. The oldest work items are pushed to agents before more recent ones. (We'll get into the details of how that happens in a minute.)
- Second, when an agent's ability to receive work changes (perhaps they come back from "away" status, or they finish another work item), Omni-Channel tries to find a work item that can be routed to that agent.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Routing New Work Items

When a work item is created, it gets assigned to a queue. If that queue is associated with a Routing Configuration, it's added to a list of items that are still waiting to be routed to agents.

Then Omni-Channel determines which agents are available and how much work each agent is currently working on. This information comes from the `UserServicePresence` API object, which tracks an agent's current capacity for work items.

Routing Pending Work Items

When a new work item is added to the list of pending items, Omni-Channel determines whether it can immediately route the work item to an agent.

First, we identify if any agents are online with a Presence Status that's linked to the correct Service Channel. Let's say your organization receives a new case that's assigned to an Omni-Channel queue. Omni-Channel determines if there's a Service Channel for cases. Then we check which agents are online with a status that lets them receive new cases.

Scenario	What Happens
No agents are available.	If there isn't an agent online who has the right status, we keep our work item in the list of items that need to be assigned to an agent.
Agents are available, but don't have capacity for new work.	If there are one or more agents who are available, we check to see if any of those agents have the capacity to take on a new work item. If there are no agents with enough capacity for more work, we leave the work item in the list.
Agents are available and have capacity for more work.	If there are agents that 1) are available and 2) have capacity to work on the item, we check which agent is going to be the proud parent of the work item based on your organization's routing settings. If your routing configuration uses the Least Active routing model, we look for the agent who currently has the least amount of work compared to other agents who could take on the work item. We then route the work item to that agent. If your routing configuration uses the Most Available routing model, we look for the agent who has the largest gap between the maximum amount of work that they can handle and the amount of work that they are working on. We then route the work item to that agent. But what if there's a tie between two or more agents? In that case, to the agent who has been waiting the longest amount of time for a new work item. After all, we wouldn't want anyone on our support staff getting lazy.

When an Agent's Ability to Receive Work Changes

When an agent logs in to Omni-Channel, finishes a work item, or changes status, Omni-Channel checks to see if there is any work that those agents can take on.

Scenario	What Happens
The agent is away.	We move on with our lives without performing any more checks.
The agent is available, but doesn't have capacity for work.	We quit while we're ahead.
The agent is available and has capacity for more work	We look at the list of work items that are waiting to be routed to an agent. We check to see if the agent is qualified to work on any of the objects, based on how much of the agent's capacity the objects will take up, and the service channel that's associated with

Scenario	What Happens
	the agent's status. For example, if the agent is online with a status that makes them available for cases, we check to see if there are any cases in our list. If the list has work items that the agent is qualified to work on, the item with the highest priority is routed to the agent. If two or more items have the same priority, the oldest one is routed.

Rerouting a Work Item

Sometimes an agent declines a work item or becomes unavailable before the agent can start working on it. In that case, the work item is rerouted until it finds a safe and loving home in the arms of a capable, qualified agent.

First, Salesforce automatically changes the owner of the work item to the queue from which the object was originally routed. We then try to route the work item to a different agent (Agent B) than the agent who declined it (Agent A). However, the work item can be routed to Agent A again if Agent A changes his or her status, or if we attempted to route the work item to Agent B at least once. We do this until our work item finds a safe and loving home in the arms of a capable, qualified agent.

And our agents, their work items, and your customers, live happily ever after.

Supported Objects for Omni-Channel

Omni-Channel turbocharges your agents' productivity by assigning records to them in real time. But which objects and records does Omni-Channel support?

Omni-Channel currently supports routing for the following objects and records.

- Cases
- Chats
- SOS video calls
- Social posts
- Orders
- Leads
- Custom objects

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Fields for Agent Work Records

Every time an object is routed to an agent through Omni-Channel, Salesforce creates an Agent Work record that logs information about the work assignment and how it's routed. Agent Work records contain fields that help you track information about the assignments your agents are working on. If the same work item is routed multiple times, that work item is associated with multiple Agent Work records.

An Agent Work record has the following fields, listed in alphabetical order. Depending on your page layout and field-level security settings, some fields might not be visible or editable.

Field	Definition
Accept Date	The date and time that the work item was accepted by an agent.
Agent Capacity when Declined	The amount of an agent's capacity that was available when the agent declined the work item.

Field	Definition
Agent Work ID	The Salesforce ID of the Agent Work record.
Assign Date	The date and time that the work item was assigned to an agent and pushed to the agent's Omni-Channel widget.
Close Date	The date and time that the agent closed the console tab associated with the work item, setting the Agent Work record's status to "Closed."
Created By	The name of the agent who accepted the work item.
Created Date	The date that the work item was created.
Decline Date	The date that an agent declined the work item.
Last Modified Date	The date the work item was last modified.
Name	The unique, Salesforce-generated number of the Agent Work record.
Percentage of Capacity	The percentage of capacity that the work item consumes of the agent's total, possible capacity.
Queue	The Salesforce queue from which the work item was routed.
Request Date	The date and time that the Salesforce object was assigned to the queue, creating the associated work item.
Service Channel	The Service Channel that's associated with the work item.
Speed to Answer	The amount of time in seconds between the time the work item was created (the Request Date) and the time the work item was accepted by an agent (the Accept Date).
Status	The status of the Agent Work record. Valid values are: - Assigned – The item is assigned to the agent but hasn't been opened. - Opened – The item was opened by the agent. - Unavailable – The item was assigned to the agent but the agent became unavailable (went offline or lost connection). - Declined – The item was assigned to the agent but the agent explicitly declined it. - DeclinedOnPushTimeout – The item was declined because push time-out is enabled and the item request timed out with the agent. - Closed – The item is closed. - Canceled – The item no longer needs to be routed. For example: a chat visitor cancels their Omni-Channel routed chat request before it reaches an agent.

Field	Definition
Units of Capacity	The number of units of an agent's capacity that the work item consumes of the agent's total, possible capacity.
User	The name of the agent to whom the work item was routed.
Work Item	The name of the work item that's associated with the Agent Work record—for example, "Case 123456."

Fields for User Presence Records

Every time agents change their Presence Statuses in Omni-Channel, Salesforce creates a User Presence record to log all of the agents' activities while they're signed logged in with that status. User Presence records contain fields that help you track information about your agents' availability.

A User Service Presence record has the following fields, listed in alphabetical order. Depending on your field-level security settings, some fields might not be visible or editable.

Field	Definition
At Capacity Duration	The amount of time in seconds that the agent was working at 100% of the agent's capacity, as indicated in the agent's Presence Configuration.
Configured Capacity	The agent's overall capacity, as indicated in the agent's Presence Configuration.
Created By	The name of the agent who set the Presence Status in Omni-Channel.
Created Date	The date when the User Presence record was created.
Idle Duration	The amount of time in seconds that the agent was assigned no work items.
Is Away	Indicates whether the agent's status is a "busy" status.
Is Current Status	Indicates whether the agent's Presence Status in the Service Presence Status field is the agent's current Presence Status.
Last Modified Date	The date the User Presence record was last modified.
Service Presence Status	The API name of the Presence Status the agent used to log in to Omni-Channel.
Status Duration	The amount of time in seconds that the agent's status was set to the Presence Status indicated by the Status Name field.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Field	Definition
Status End Date	The date and time that the agent logged out of Omni-Channel or changed to another Presence Status.
Status Start Date	The date and time that the agent set the Presence Status.
User	The name of the agent who is signed in to Omni-Channel.
User Presence ID	The autogenerated Salesforce ID of the User Presence record.
Alias	The agent's custom name.
Username	The agent's Salesforce username.
Status Name	The name of the Presence Status the agents used to log in to Omni-Channel.

Omni-Channel Supervisor (Beta)

Access real-time operational intelligence with Omni-Channel Supervisor (Beta).

 **Note:** This release contains a beta version of Omni-Channel Supervisor, which means it's a high-quality feature with known limitations. Omni-Channel Supervisor isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

With Omni-Channel Supervisor, real-time information about your Omni-Channel agents, queues, and work are streamed live into the panel. Yes, you read that right: live. You'll see waiting times, open work, and more with real-time updates. Omni-Channel Supervisor updates continuously to reflect the most up-to-date data so you'll always know how your agents are doing.

Monitor Omni-Channel activity for agents, queues, and work with intuitive tab views that show you the big picture of how your agents are doing. Take advantage of filtering and sorting to help you find what you need, and seamlessly drill down to see details for specific agents, queues, or work items. The best part? You never have to leave the console.

So, what are you waiting for? Let's get Omni-Channel Supervisor up and running!

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

IN THIS SECTION:

[Add Omni-Channel Supervisor to the Salesforce Console](#)

Add Omni-Channel Supervisor to the console to get your supervisors up and running.

[Get to Know the Omni-Channel Supervisor Tabs](#)

Supervisors can check the health of their call center in real time using the Agents, Queues, and Work tabs in Omni-Channel Supervisor. These tabs let supervisors survey the landscape and see what's open and active, who's assigned to what, and other details such as open capacities and average wait times for customers.

[Sort and Filter in Omni-Channel Supervisor](#)

Organize and focus your real-time data in Omni-Channel Supervisor to effortlessly find the information you need.

Add Omni-Channel Supervisor to the Salesforce Console

Add Omni-Channel Supervisor to the console to get your supervisors up and running.

Before adding Omni-Channel Supervisor to the console:

- Make sure you have Omni-Channel enabled and ready-to-go with agents and queues running.
 - Make sure you have a working console app.
1. In Setup, enter *Apps* in the *Quick Find* box, then select **Apps**.
 2. Click **Edit** next to the Salesforce console app that you want to add Omni-Channel Supervisor to. Or, create a new console app. We recommend creating a profile for your supervisors so you can customize a console just for them.
 3. In the Choose Navigation Tab Items section, add *Omni Supervisor* to the Selected Items list.
 4. Select the profiles you want to assign to this Supervisor-enabled console. The users in the selected profiles must have tab visibility in order to view Omni-Channel Supervisor in their console.
 5. Click **Save**.

Verify that Omni-Channel Supervisor is in the console by opening the console and viewing the tab selections. You should see the option **Omni Supervisor**.

EDITIONS

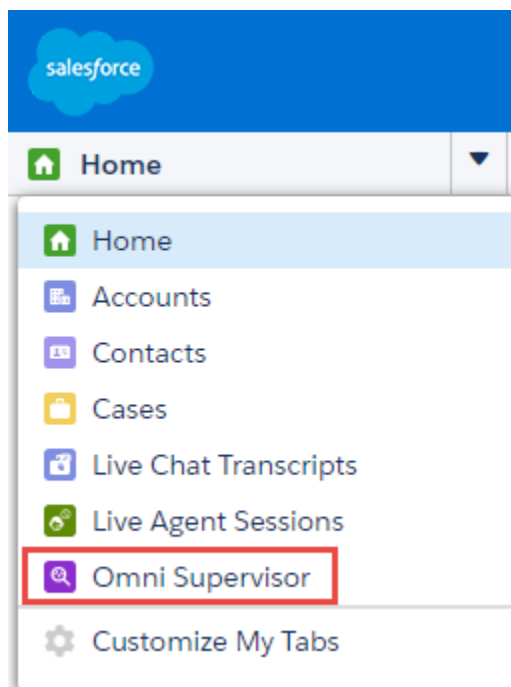
Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel and manage apps.

- "Customize Application"



Get to Know the Omni-Channel Supervisor Tabs

Supervisors can check the health of their call center in real time using the Agents, Queues, and Work tabs in Omni-Channel Supervisor. These tabs let supervisors survey the landscape and see what's open and active, who's assigned to what, and other details such as open capacities and average wait times for customers.

IN THIS SECTION:

Agents Tab

See who's working, who's available, and who's busy with the Omni-Channel Supervisor Agents tab.

Queues Tab

Gauge your backlog with the Omni-Channel Supervisor Queues tab.

Work Tab

Take a stroll through the work items that are making their way through your queues and into your agents' consoles, using the Omni-Channel Supervisor Work tab.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Agents Tab

See who's working, who's available, and who's busy with the Omni-Channel Supervisor Agents tab.

The Agents tab is a simple way to keep up with your agents' presence statuses, channels, assigned queues, and open capacity. You can even see how long your agents have been logged in and when they last accepted new work.

There are two views in the Agents tab: All Agents and Agents by Queue. All Agents lets you see the big picture of your agents' availability, capabilities, capacity, and workload. It's the default for the Agents tab because it provides the best overall picture of how your agents are doing. Agents logged in through the Omni-Channel widget appear in rows, where you can see their status, channels, queues, workload, and capacity.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Omni Supervisor										
Agents Queues Work										
Agent Summary										
All Agents Agents by Queue										
AGENT	STATUS	ACTION	TIME IN STATE	TIME SINCE LOGIN	TIME SINCE LAST ACCEPT	CHANNELS	ASSIGNED QUEUES	WORK ITEMS	WORKLOAD	CAPACITY
Agent Awesome	Online since Aug 5, 2016 2:57:02 PM	Change Status	16 s	16 s	16 s	★ 🗨 📧	Case Queue, Order Queue	1	1 / 1	100%
Agent Casey	Online since Aug 5, 2016 2:57:07 PM	Change Status	12 s	12 s	--	★ 🗨 📧	Case Queue, Order Queue	0	0 / 1	0%
Agent Colleen	Online since Aug 5, 2016 2:57:06 PM	Change Status	13 s	13 s	12 s	★ 🗨 📧	Case Lead Queue, Case Queue, Order Queue	1	1 / 1	100%
Agent Kumar	Online since Aug 5, 2016 2:57:05 PM	Change Status	14 s	14 s	--	★ 🗨 📧	Case Lead Queue, Order Queue	0	0 / 1	0%
Agent Nicholas	Online since Aug 5, 2016 2:57:01 PM	Change Status	18 s	18 s	18 s	★ 🗨 📧	Case Lead Queue, Order Queue	1	1 / 1	100%
Agent Scott	Online since Aug 5, 2016 2:57:08 PM	Change Status	11 s	11 s	--	★ 🗨 📧	Hybrid Queue, Order Queue	0	0 / 1	0%
Agent Super	Online since Aug 5, 2016 2:57:04 PM	Change Status	15 s	15 s	--	★ 🗨 📧	Hybrid Queue, Order Queue	0	0 / 1	0%
Agent Ted	Online since Aug 5, 2016 2:57:09 PM	Change Status	10 s	10 s	--	★ 🗨 📧	Hybrid Queue, Order Queue	0	0 / 1	0%
Nicolas d'André	Online since Aug 5, 2016 2:57:01 PM	Change Status	18 s	18 s	16 s	★ 🗨 📧	Case Lead Queue, Case Queue, Hybrid Queue, Order Queue	2	2 / 3	67%
Super Awesome	Online since Aug 5, 2016 2:57:04 PM	Change Status	14 s	14 s	14 s	★ 🗨 📧	Case Lead Queue, Hybrid Queue, Order Queue	1	1 / 1	100%

Here, you can also change an agent's status using the Action column. If you select Offline, keep in mind that the agent's work won't be tracked anymore.

Select an agent to see Agent Detail and the Agent Timeline to see more nuanced information about how the agent is doing. Agent Detail provides detail on the agent’s activity and timestamps, while the Agent Timeline displays the agent’s status changes and work via an intuitive calendar view.

Agent Detail view

Omni Supervisor

AgentsQueuesWork

Agent Scott

Current WorkAgent Timeline

Activity

RECENT STATUSES

Aug 5, 2016 2:59:31 PM Online

Aug 5, 2016 2:57:53 PM Offline

Aug 5, 2016 2:57:08 PM Online

Aug 5, 2016 2:55:05 PM Offline

Aug 5, 2016 2:54:19 PM Online

Configurations

QUEUES

Hybrid Queue, Order Queue

PRESENCE CONFIGURATION

Default Presence Configuration

PRESENCE STATUSES

Busy, Busy3, Online

STATUS

Online since Aug 5, 2016 2:59:31 PM

WORKLOAD

Current Capacity: 1 / 1

TIME IN STATE

3 min 17 s

TIME SINCE LOGIN

3 min 17 s

TIME SINCE LAST ACCEPT

1 min 21 s

Current Work

TYPE	DETAILS	QUEUE	WORK SIZE	STATUS	REQUESTED TIME	ASSIGNED TIME	ACCEPTED TIME	HANDLE TIME	SPEED TO ANSWER
*	Jim Steele Senior VP BigLife Inc. (555) 555-1212 info@salesforce.com	Hybrid Queue	1	Opened	Aug 5, 2016 2:59:03 PM	Aug 5, 2016 3:01:27 PM	Aug 5, 2016 3:01:27 PM	1 min 21 s	2 min 24 s

Agent Timeline

Omni Supervisor (Beta) - Console

n-kumar-itm.internal.salesforce.com:6109/console

AppsAlohaAuraL&PSCRTHow ToDOTAura docsLA Jenkins buildTWISTA: This Week...200 Chataholic (n...Home | Splunk 6.2.5Memory usage-CHI...pkg_producer_non...Wave Analytics - S...Liveagent [Jenkins]

Other Bookmarks

Omni Supervisor...

AgentsQueuesWork

Super Awesome

Current WorkAgent Timeline

STATUS

Online since Aug 10, 2016 11:18:21 AM

WORKLOAD

Current Capacity: 0 / 1

TIME IN STATE

54 s

TIME SINCE LOGIN

54 s

TIME SINCE LAST ACCEPT

--

Day:

Aug 5, 2016

Time period:

9:00 AM

To

6:00 PM

Zoom:

30 Minutes

Submit

3:54 PM - 3:55 PM

2:54 PM - 2:55 PM Case Closed

2:57 PM - 2:58 PM Online

3:00 PM

2:59 PM - 3:01 PM Case Closed

2:59 PM - 3:01 PM Online

3:11 PM - 3:13 PM Case Closed

3:13 PM - 3:16 PM Case Closed

3:16 PM - 3:18 PM Case Closed

Case

Contact Name

Status

New

Case Origin

Web

Priority

Medium

Subject

My router is not working

Description

Agents by Queue provides information about how well your queues are covered. Every queue that has at least one agent that’s Online or Away is shown. You can see how many agents are assigned to the queue and how many of them are online, away, or idle. This lets you see if you need to rearrange any agents to make sure your incoming work is covered.

Omni Supervisor...

AgentsQueuesWork

Agent Summary

All AgentsAgents by Queue

QUEUE	TOTAL	# ONLINE	% ONLINE	# AWAY	# AT CAPACITY	% AT CAPACITY	# IDLE	% IDLE	AVG CAPACITY
Case Lead Queue	2	2	100%	0	0	0%	1	50%	10%
Case Queue	1	1	100%	0	1	100%	0	0%	100%
Hybrid Queue	1	1	100%	0	0	0%	0	0%	20%
Order Queue	2	2	100%	0	0	0%	1	50%	10%

IN THIS SECTION:

Agents Tab Fields

Fields for the Omni-Channel Supervisor Agents tab.

Agents Tab Fields

Fields for the Omni-Channel Supervisor Agents tab.

All Agents Fields

The All Agents view in the Agents tab contains fields with information that lets you know how your agents are doing.

Column	Description
Agent	The first and last name of the agent.
Status	The agent’s current presence status, as set in the Omni-Channel widget.
Action	Allows you to change an agent’s status.
Time in State	Amount of time the agent has been in the current presence status.
Time Since Login	Amount of time the agent has been logged into an online or busy Omni-Channel status. This reflects the duration of the agent’s entire Omni-Channel session, which ends when the agent goes offline in Omni-Channel or closes their browser.
Time Since Last Accept	Amount of time since the agent last accepted a work item, either explicitly or through auto-accept.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Column	Description
Channels	The agent's associated Service Channels (for agents in an online status), so you know what types of work the available agent can handle.
Assigned Queues	Omni-Channel-enabled Salesforce queues that the agent can receive work through in Omni-Channel.
Work Items	All Omni-Channel work currently assigned or open with the agent. You can get an overview of the work items with popup details. - Assigned work items are in the agent's widget and waiting for acknowledgment - Open work items have been accepted and the work's tab is open in the agent's Console
Workload	The total size of all assigned and open work with the agent compared to the agent's overall capacity as set through the Presence Configuration. Work is sized through the Routing Configuration associated with the Omni-Channel-enabled queue that's used to route the work to the agent.
Capacity	Percentage calculated from the Workload column. 0-50% capacity is shown with a green icon 51-80% capacity is shown with a yellow icon 81-100% capacity is shown with a red icon

Agent Detail Fields

The All Agents view in the Agents tab contains fields that provide information about the particular agent's current work.

Column	Description
Type	Salesforce object type for the work, such as Lead, Case, SOS, etc.
Details	Information from the object's primary compact layout to provide more context about the work item.
Queue	The Omni-Channel-enabled queue used to assign and route the work to the agent.
Work Size	Size of the Omni-Channel work based on the routing configuration associated with the queue.
Status	Omni-Channel work status. It includes: - Assigned work items in the agent's widget waiting for acknowledgment - Open work items that are assigned to an agent and have an open work tab in the agent's console

Column	Description
Requested Time	Datetime the item was assigned to the Omni-Channel-enabled queue, which triggers the routing.
Assigned Time	Datetime when Omni-Channel pushed and assigned the item into the agent's Omni-Channel widget.
Accepted Time	Datetime the item was accepted, either explicitly or through auto-accept. Accepted items are opened in the agent's console.
Handle Time	How long the item has been open with the agent. It's calculated using the difference between "now" and when the agent accepted the work.
Speed to Answer	How quickly the agent responds to work requests. It's calculated using the difference between when the work was requested and when the agent accepted it.

Agents by Queue Fields

The Agents by Queue view in the Agents tab contains fields with information about the work agents are doing in your Omni-Channel queues.

Column	Description
Queue	The name of the Omni-Channel queue used to assign and route the work to the agent. Only queues containing at least one agent in an Online or Away state are displayed.
Total	Total number of agents in the queue.
# Online	Number of agents with an Online status.
% Online	Percentage of agents in the queue who have an online status.
# Away	Number of agents with an Away status.
# At Capacity	Number of agents who are at capacity.
% At Capacity	Percentage of Agents in the queue who are at capacity.
# Idle	Number of agents who are idle. Idle agents have no current work, with 0% capacity consumed.
% Idle	Percentage of agents in the queue who are idle.
Average Capacity	Average capacity among the online and away agents in the queue.

Queues Tab

Gauge your backlog with the Omni-Channel Supervisor Queues tab.

Spend some time catching up on the activity in your Omni-Channel queues using the Queues Summary view in the Queues tab. You can see your queues' priority, configured work size, type, and wait times. This high-level information can give you an idea of how efficiently work moves through the queue and to your agents, so you can determine which queues are doing well and which could use a few more agents on board.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

QUEUE	PRIORITY	WORK SIZE	TYPE	TOTAL WAITING	LONGEST WAIT TIME	AVERAGE WAIT TIME
Case Lead Queue	1	1 unit	📁 ★	1	11 min 55 s	11 min 55 s
Case Queue	1	1 unit	📁 📄	5	12 min 37 s	12 min 37 s
Hybrid Queue	1	1 unit	📁 ★	2	12 min 24 s	11 min 45 s
Order Queue	1	1 unit	📁	0	--	--
SOS Queue	1	1 unit	📁	0	--	--

The Queue Details view drills into specific queues so you can see their configurations, available agents, wait times, and work items. If you see lots of agents and not much work, you know it's time to move agents to another queue. But if you see only a few agents and long wait times... it's time to call for backup.

Hybrid Queue				AVAILABLE AGENTS	BUSY AGENTS	AGENTS AT CAPACITY	IDLE AGENTS	TOTAL WAITING	LONGEST WAIT TIME	AVERAGE WAIT TIME
PRIORITY #1 WORK SIZE : 1 unit				0	0	0	0	2	13 min 15 s	12 min 36 s

POSITION	TYPE	DETAILS	WAIT TIME	REQUESTED TIME
1	📁	My router is not working Medium New 00052078	13 min 15 s	Aug 5, 2016 2:39:14 PM
2	★	John Gardner Exec VP 3C Systems (555) 555-1212 info@salesforce.com	11 min 56 s	Aug 5, 2016 2:40:33 PM

IN THIS SECTION:

[Queues Tab Fields](#)

Fields for the Omni-Channel Supervisor Queues tab.

Queues Tab Fields

Fields for the Omni-Channel Supervisor Queues tab.

Queues Summary Fields

The Queues Summary view in the Queues tab contains fields that let you know how your agents are doing.

Column	Description
Queue	The Omni-Channel-enabled queue used to assign and route the work to the agent. You can click the queue's name to see more detail about it.
Priority	The queue's priority based on its routing configuration.
Work Size	Size of the work items in the queue based on its routing configuration.
Type	Salesforce object type for the work, such as Lead, Case, SOS, etc.
Total Waiting	Total number of items currently assigned to the Omni-Channel queue that are waiting for an available agent.
Longest Wait Time	Duration of the longest wait time.
Average Wait Time	Average wait time of all items currently assigned to the queue.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Queue Detail Fields

The Queue Details view in the Queues tab contains fields that provide information about the work items in the queue.

Column	Description
Position	The work item's position in the queue.
Type	Salesforce object type for the work, such as Lead, Case, SOS, etc.
Details	Information from the object's primary compact layout to provide more context about the work item.
Wait Time	Amount of time that the work item is waiting for an agent. It's calculated using the difference between "now" and the item's request time.
Requested Time	Datetime the item was assigned to the queue.

Work Tab

Take a stroll through the work items that are making their way through your queues and into your agents’ consoles, using the Omni-Channel Supervisor Work tab.

Use the Work Summary view in the Work tab to get a breakdown of the work that’s in your queues. See the type of work each queue can handle alongside a state-of-the-union of its active work items.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Salesforce Search Salesforce					
Omni Supervisor +					
Agents Queues Work					
Work Summary					
QUEUE ↑ ↓	TYPE ↓	ASSIGNED ↑ ↓	OPEN ↑ ↓	AHT ↑ ↓	ASA ↑ ↓
Case Lead Queue	📁 ★	0	0	—	—
Case Queue	📁 🗨	0	2	3 min 9 s	—
Hybrid Queue	📁 ★	0	1	1 min 7 s	—
Order Queue	📁	0	0	—	—
SOS Queue	🔄	0	0	—	—

If you want to take a closer look at what’s going on in a queue, click the queue to see its Work Detail.

Salesforce Search Salesforce							
Omni Supervisor +							
Agents Queues Work							
Hybrid Queue							
PRIORITY #1 WORK SIZE : 1 unit							
				TOTAL ACTIVE WORK	TOTAL ASSIGNED	TOTAL OPEN	AHT
				2	0	2	1 min 54 s
				ASA			
				—			
TYPE ↓	DETAILS	AGENT ↓	REQUESTED TIME ↑ ↓	ASSIGNED TIME ↑ ↓	ACCEPTED TIME ↑ ↓	HANDLE TIME ↑ ↓	SPEED TO ANSWER ↑ ↓
★	Jim Steele Senior VP BigLife Inc. (555) 555-1212 info@salesforce.com	Agent Scott	Aug 5, 2016 2:59:03 PM	Aug 5, 2016 3:01:27 PM	Aug 5, 2016 3:01:27 PM	57 s	2 min 24 s
★	Andy Smith Vice President Universal Technologies (555) 555-1212 info@salesforce.com	Agent Ted	Aug 5, 2016 2:59:03 PM	Aug 5, 2016 2:59:32 PM	Aug 5, 2016 2:59:32 PM	2 min 51 s	29 s

IN THIS SECTION:

[Work Tab Fields](#)

Fields for the Omni-Channel Supervisor Work tab.

Work Tab Fields

Fields for the Omni-Channel Supervisor Work tab.

Work Summary Fields

The Work Summary view in the Work tab contains fields that show you how work items are being handled.

Column	Description
Queue	The Omni-Channel-enabled queue used to assign and route the work to the agent. You can click a queue for more details about its work.
Type	Salesforce object type for the work, such as Lead, Case, SOS, etc.
Assigned	Total number of items assigned and waiting in the agent's Omni-Channel widget for acknowledgment.
Open	Total number of items accepted and opened in the agent's console.
Average Handle Time (AHT)	Average amount of time the agent's open items have been open. It's calculated using the difference between "now" and when the item was accepted.
Average Speed to Answer (ASA)	Average amount of time an item is waiting before an agent accepts it. It's calculated using the difference between the time the work was requested and accepted. When an agent accepts a work item, the item is removed from this calculation.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Work Detail Fields

The Work Details view in the Work tab contains fields that provide information about the work items in the queue.

Column	Description
Type	Salesforce object type for the work, such as Lead, Case, SOS, etc.
Details	Information from the object's primary compact layout to provide more context about the work item.
Agent	The name of the agent assigned to the work.
Requested Time	Datetime the item was assigned to the queue.

Column	Description
Assigned Time	Datetime when Omni-Channel pushed and assigned the item into the agent's Omni-Channel widget.
Handle Time	Amount of time the item has been open with the agent. It's calculated using the difference between "now" and when the agent accepted the work.
Speed to Answer	How quickly the agent opened the assigned item. It's calculated as the amount of time between when the work was requested and when the agent accepted it.

Sort and Filter in Omni-Channel Supervisor

Organize and focus your real-time data in Omni-Channel Supervisor to effortlessly find the information you need.

Now that we've seen what Omni-Channel Supervisor has to offer, we'll show you how to optimize all this great data so you can quickly find what you're looking for. Filter the tables to display particular agents, queues, work types, capacity percentages, etc. and group that information with sorting.

Use filtering to pare down what's on your screen and get what you need faster. For example, if you want to see information about one particular team of agents, go to the All Agents view and select just those agents in the filter. You can apply multiple filters to the same grid, too. Hop seamlessly from an agent's open Leads to the Tier One Queue's open Cases with a Wait Time over 5 minutes.

Use sorting to organize columns as ascending or descending. For example, if you want to see which online agents most recently accepted work, filter the All Agents view to show only agents with an Online status, and sort the Time Since Last Accept column in ascending order.

EDITIONS

Available in: Salesforce Classic

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

AGENT	STATUS	ACTION	TIME IN STATE	TIME SINCE LOGIN	TIME SINCE LAST ACCEPT	CHANNELS	ASSIGNED QUEUES	WORK ITEMS	WORKLOAD	CAPACITY
Agent Casey	Online	Change Status	1 min 30 s	1 min 30 s	--	★ 📞 📧	Case Queue, Order Queue	0	0 / 1	0%
Agent Ted	Online	Change Status	1 min 28 s	1 min 28 s	1 min 27 s	★ 📞 📧	Hybrid Queue, Order Queue	1	1 / 1	100%
Agent Scott	Online	Change Status	1 min 29 s	1 min 29 s	1 min 29 s	★ 📞 📧	Hybrid Queue, Order Queue	1	1 / 1	100%
Agent Colleen	Online	Change Status	1 min 31 s	1 min 31 s	1 min 31 s	★ 📞 📧	Case Lead Queue, Case Queue, Order Queue	1	1 / 1	100%
Agent Kumar	Online	Change Status	1 min 32 s	1 min 32 s	1 min 32 s	★ 📞 📧	Case Lead Queue, Order Queue	1	1 / 1	100%
Super Awesome	Online	Change Status	1 min 33 s	1 min 33 s	1 min 32 s	★ 📞 📧	Case Lead Queue, Hybrid Queue, Order Queue	1	1 / 1	100%
Agent Super	Online	Change Status	1 min 34 s	1 min 34 s	1 min 33 s	★ 📞 📧	Hybrid Queue, Order Queue	1	1 / 1	100%
Nicolas d'André	Online	Change Status	1 min 36 s	1 min 36 s	1 min 34 s	★ 📞 📧	Case Lead Queue, Case Queue, Hybrid Queue, Order Queue	3	3 / 3	100%
Agent Nicholas	Online	Change Status	1 min 36 s	1 min 36 s	1 min 35 s	★ 📞 📧	Case Lead Queue, Order Queue	1	1 / 1	100%

The online agents who most recently accepted work are at the top of the screen. The possibilities are as endless as your curiosity.

Set Up SOS Video Chat and Screen-Sharing

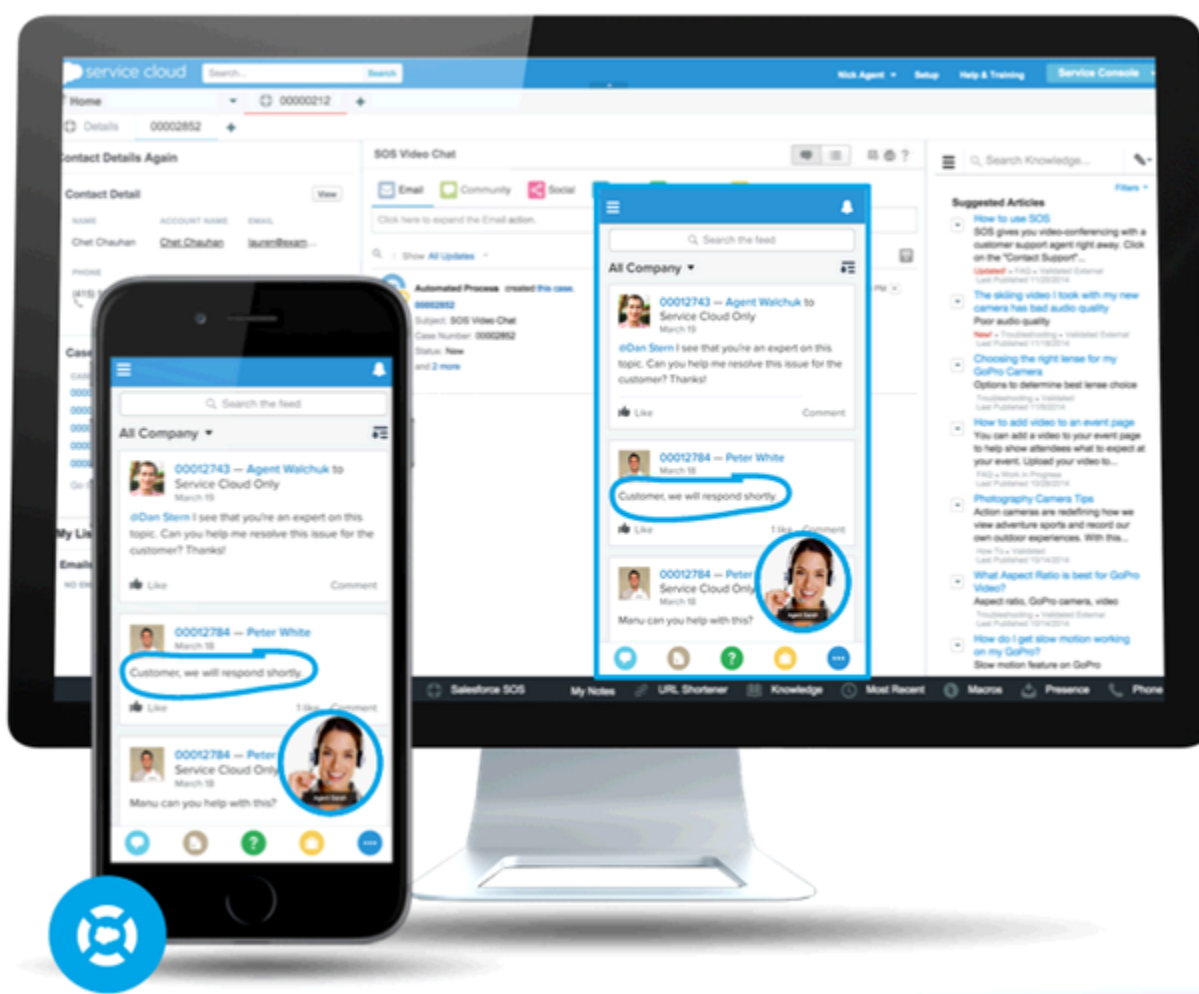
Want to connect with your customers in a whole new way? SOS is the Service Cloud's mobile support solution. With SOS, you can add a help button to your native iOS or Android mobile application so your customers can connect with agents over a one-way video and two-way audio chat.

Gone are the days when your customers had to connect with a nameless, faceless agent over the phone. With one click, your customers can video chat with agents who provide personalized, in-app guidance with screen-sharing and annotations.

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in: **Enterprise, Performance, Unlimited, and Developer Editions**



SOS is integrated into the Salesforce console for the Service Cloud. Your agents can access cases, account records, and customer information quickly and easily during their video calls. Agents can also draw on customers' screens during an SOS session, giving your customers in-app guidance to solve their problems. Your customers get a comprehensive, personal support experience, and your agents have the information they need in the console to solve customer issues.

Even better, SOS is fully integrated into Omni-Channel, the Service Cloud's routing engine. Use Omni-Channel to customize how work items—including SOS video calls—are routed to your agents. Route SOS calls to the most available, capable agents in your organization in real time.—no third-party routing engine required!

For more information on integrating SOS into your mobile applications, see the *SOS iOS SDK*.

Before you set up SOS, [enable Omni-Channel in your organization](#).

IN THIS SECTION:

1. [Assign SOS Licenses to Agents](#)

Each agent who uses SOS must have an SOS license and be part of a permission set that enables the SOS license.

2. [Enable the SOS License](#)

Use a permission set to enable the SOS license for your users.

3. [Create an SOS Presence Status](#)

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. Create a presence status that lets your agents indicate that they're online and available to receive SOS calls.

4. [Give Users Access to SOS Presence Statuses with Permission Sets](#)

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. Give SOS agents access to the SOS presence status so they can start receiving SOS calls.

5. [Give Users Access to Your SOS Presence Statuses with Profiles](#)

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. Give SOS agents access to the SOS presence status so they can start receiving SOS calls.

6. [Create an SOS Routing Configuration](#)

Routing configurations determine how work items are routed to agents. They let you prioritize the relative importance and size of work items from your queues. That way, the most important work items are handled accordingly, and work is evenly distributed to your agents. Create an SOS routing configuration to determine how SOS calls are dispersed to your agents.

7. [Create an SOS Queue](#)

Queues are a classic element of Salesforce that help your teams manage leads, cases, service contracts, and custom objects. Omni-Channel supercharges queues to route work items to agents in real time. Create an SOS queue to funnel SOS calls to SOS agents. We'll associate the SOS queue with the SOS routing configuration we created earlier.

8. [Update Your Salesforce Console Settings](#)

After you get SOS all set up for your organization, it's time to a few settings in your Salesforce console so that your agents can start receiving work.

9. [Create an SOS Deployment](#)

Create an SOS deployment to integrate your SOS settings from Salesforce into your mobile application.

Assign SOS Licenses to Agents

Each agent who uses SOS must have an SOS license and be part of a permission set that enables the SOS license.

1. From Setup, enter *Users* in the *Quick Find* box, then select **Users**.
2. Select the user that you want to assign an SOS license to.
3. Click **Permission Set License Assignments**.
4. Click **Edit Assignments**.
5. Check the **Enabled** checkbox for **SOS User**.
6. Click **Save**.

Enable the SOS License

Use a permission set to enable the SOS license for your users.

You can add only users who have been assigned the SOS license to the permission set.

1. From Setup, enter *Permission Sets* in the *Quick Find* box, then select **Permission Sets**.
2. Select the SOS permission set.
If you don't have an SOS permission set, create one. For *User License*, select *None*.
3. Click **App Permissions**.
4. Click **Edit**.
5. Select **Enable SOS Licenses**.
6. Click **Save**.

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in:
Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To set up SOS:

- "Customize Application"

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in:
Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To set up SOS:

- "Customize Application"

Create an SOS Presence Status

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. Create a presence status that lets your agents indicate that they're online and available to receive SOS calls.

A presence status can be associated with one or more channels of work items. Associate the SOS presence status with the SOS service channel. That way, your agents can receive SOS calls when they're signed in with the SOS presence status.

1. From Setup, enter *Presence* in the *Quick Find* box, select **Presence Statuses**, then click **New**.
2. Name your status.
Let's call our status "Available for SOS." A version of that name becomes the Developer Name automatically.
3. In the Status Options section, select **Online**.
4. In the Service Channels section, add SOS to the Selected Channel list.
5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in: **Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To set up SOS:

- "Customize Application"

Give Users Access to SOS Presence Statuses with Permission Sets

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. Give SOS agents access to the SOS presence status so they can start receiving SOS calls.

Alternatively, you can give users access to presence statuses through profiles.

1. From Setup, enter *Permission Sets* in the *Quick Find* box, then select **Permission Sets**.
2. Click the name of the permission set that contains your SOS agents.
3. Click **Service Presence Statuses Access**.
4. Click **Edit**.
5. Select the SOS presence status that we created earlier, "Available for SOS."
6. Click **Save**.

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in: **Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To set up SOS:

- "Customize Application"

To modify permission sets:

- "Manage Profiles and Permission Sets"

Give Users Access to Your SOS Presence Statuses with Profiles

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. Give SOS agents access to the SOS presence status so they can start receiving SOS calls.

Alternatively, you can give users access to presence statuses through permission sets.

1. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles**.
2. Click the name of the profile that contains your SOS agents.
Don't click **Edit** next to the profile name. If you do, you won't see the correct page section where you can enable statuses.
3. In the Enabled Service Presence Status Access section, click **Edit**.
4. Select your SOS presence status, "Available for SOS," to associate it with the profile.
5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in: **Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To set up SOS:

- "Customize Application"

To modify profiles:

- "Manage Profiles and Permission Sets"

Create an SOS Routing Configurations

Routing configurations determine how work items are routed to agents. They let you prioritize the relative importance and size of work items from your queues. That way, the most important work items are handled accordingly, and work is evenly distributed to your agents. Create an SOS routing configuration to determine how SOS calls are dispersed to your agents.

After you create this configuration, we'll create an SOS queue for your SOS calls. Then, we'll associate our routing configuration with our SOS queue so that your agents can receive calls after we get SOS set up.

1. From Setup, enter *Routing* in the **Quick Find** box, select **Routing Configurations**, then click **New**.
2. Name your routing configuration.
Let's call our routing configuration "SOS Routing Configuration." A version of that name becomes the Developer Name automatically.
3. Set your routing priority.
If SOS calls are the most important or the only work items your agents handle, set your routing priority to *1*. That priority ensures that SOS calls are routed to your agents before other types of work items.
4. Select your [routing model](#).
5. Set the value of the **Percentage of Capacity** field to *100*.
Agents can accept only one SOS call at a time, so SOS calls take 100% of an agent's capacity.
6. Click **Save**.

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in: **Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To set up SOS:

- "Customize Application"

Create an SOS Queue

Queues are a classic element of Salesforce that help your teams manage leads, cases, service contracts, and custom objects. Omni-Channel supercharges queues to route work items to agents in real time. Create an SOS queue to funnel SOS calls to SOS agents. We'll associate the SOS queue with the SOS routing configuration we created earlier.

The work items in the SOS queue are assigned the priority that you specified in the SOS routing configuration that you created earlier.

For routing to work correctly, assign each of your agents to a queue from which they'll be receiving work items.

For more information about queues, see "Queues Overview" in the Salesforce Help.

1. From Setup, enter *Queues* in the *Quick Find* box, then select **Queues**.
2. Click **New**.
3. In the *Label* field, name your queue.
Let's call our queue "SOS Queue." A version of this name becomes the *Queue Name* automatically.
4. In the *Routing Configuration* field, look up and select the routing configuration that you created earlier, "SOS Routing Configuration."
5. In the *Supported Objects* section, add *SOS Session* to the list of selected objects.
6. In the *Queue Members* section, add each of the agents to whom you want to route SOS calls to the *Selected Users* field.
7. Click **Save**.

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in: **Enterprise, Performance, Unlimited, and Developer Editions**

USER PERMISSIONS

To set up SOS:

- "Customize Application"

Update Your Salesforce Console Settings

After you get SOS all set up for your organization, it's time to a few settings in your Salesforce console so that your agents can start receiving work.

You need to add the Omni-Channel and SOS widgets to your console, as well as whitelist the URL *salesforceliveagent.com*.

The SOS and Omni-Channel widgets appear in the footer of the Salesforce console. From the Omni-Channel widget, agents can change their presence status and triage their incoming work assignments, including SOS calls. When an agent accepts an SOS call, the call opens in the SOS widget, where agents can view the customer's screen.

You also need to whitelist the URL *salesforceliveagent.com* to make sure your calls aren't blocked by your company's firewalls. This ensures that all of your customers' SOS calls make it safely to your agents.

1. From Setup, enter *Apps* in the *Quick Find* box, then select **Apps**.
2. Click **Edit** next to the Salesforce console app that you want to add the Omni-Channel and SOS widgets to.
3. In the *Choose Console Components* section, add Omni-Channel and SOS to your list of selected items.
4. In the *Whitelist Domain* field, add *salesforceliveagent.com* to the list of whitelisted domains.
5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in: **Enterprise, Performance, Unlimited, and Developer Editions**

USER PERMISSIONS

To customize a console app:

- "Customize Application"

Create an SOS Deployment

Create an SOS deployment to integrate your SOS settings from Salesforce into your mobile application.

When you create an SOS deployment, your deployment is assigned a unique ID number. Your mobile developers use this deployment ID to integrate your SOS settings in Salesforce into SOS in your mobile application.

1. From Setup, enter *SOS Deployments* in the **Quick Find** box, then select **SOS Deployments**.
2. Click **New**.
3. Choose the settings for your deployment.
4. Click **Save**.
5. Copy the SOS Deployment ID from the detail page and send it to your mobile developers. To integrate the SOS deployment with a mobile application, mobile developers use the *SOS iOS SDK*.

IN THIS SECTION:

[SOS Deployment Settings](#)

SOS deployment settings control how your Salesforce SOS settings integrate into your mobile application.

SOS Deployment Settings

SOS deployment settings control how your Salesforce SOS settings integrate into your mobile application.

Apply settings when you create or edit an SOS deployment.

Setting	What It Does
SOS Deployment Name	Names the deployment. This deployment name, or a version of it, automatically becomes the API Name .
API Name	Sets the API name for the Live Agent deployment.
Activate Deployment	Activates the deployment so customers can request SOS calls when SOS is deployed in your mobile application.
Voice-Only Mode	Disables video functionality and allows agents and customers to communicate with audio only.
Enable Backward-Facing Camera	Allows the customer to relay video from the customer's backward-facing mobile camera to agents.

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in: **Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To create SOS deployments:

- "Customize Application"

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in: **Enterprise, Performance, Unlimited, and Developer** Editions

Setting	What It Does
Queue	Determines the queue that you want to route incoming SOS calls to.
Session Recording Enabled	Automatically records SOS sessions.
Session Recording Storage Provider	Determines the data storage provider that stores your SOS session recordings. Available only if session recording is enabled.
Session Recording Storage Provider API Key	The ID of the access key that's associated with your Amazon S3 storage account. Available only if session recording is enabled.
Session Recording Storage Provider API Secret	The ID of the access secret that's associated with your Amazon S3 storage account. Available only if session recording is enabled.
Session Recording Storage Provider Bucket	The name of the Amazon S3 bucket where you want to store your SOS session recordings. Available only if session recording is enabled.

Setting Up Agent Console in the Console Tab

Setting up the Agent Console

Get started with the Agent console quickly.

 **Note:** As of the Spring '15 release, Agent console is not available to new organizations.

The newer Salesforce console improves the Agent console by providing you with more options and more advanced technologies. See [Salesforce Console](#).

You can quickly set up the Agent console so that users have all the information they need on one screen when working with Salesforce. To set up the Agent console:

1. [Create console layouts](#) to define what objects are available to users in the console's list view frame.
2. [Choose the related objects](#) to show in the mini view.
3. [Define mini page layouts](#) to customize the fields and related lists of the objects that display in the console's mini view.
4. [Assign profiles](#) to a console layout to provide users access to specific objects in the console's list view.
5. Add the Agent console to custom apps so that users can access the console from specific apps.

 **Note:** You can't add the Agent console to partner portals or customer portals.

Visualforce pages might not display properly in the Agent console, as there is no cross-domain communication between Salesforce and Visualforce domains.

SEE ALSO:

[Tip sheet: Using the Console](#)

EDITIONS

Agent console available in Salesforce Classic. Setup for Agent console available in Salesforce Classic and Lightning Experience.

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

USER PERMISSIONS

To set up the Agent console:

- "Customize Application"

Create Agent Console Layouts

 **Note:** As of the Spring '15 release, Agent console is not available to new organizations.

The newer Salesforce console improves the Agent console by providing you with more options and more advanced technologies. See [Salesforce Console](#).

To create a layout for the Agent console:

1. From Setup, enter *Console Layouts* in the **Quick Find** box, then select **Console Layouts**.
2. Click **New** and optionally choose an existing layout to clone.
3. Enter a name for the new layout.
4. Click **Save**.
5. Click **Edit** in the Selected List Views section.
6. To add or remove objects to the layout, select an object, and click the **Add** or **Remove** arrow.
To change the order of the objects as they appear in the console's list view frame, select an object in the Selected List box, and click the **Up** or **Down** arrow.
A user can only view objects in the console's list view frame if those objects are added to the console layout to which their profile is assigned.
7. Click **Save**.
8. Next, [choose the related objects](#) to show in the mini view of the console.

SEE ALSO:

[Managing Console Layouts for the Agent Console](#)

Customizing Agent Console Layouts

To customize layouts for the Agent console:

1. From Setup, enter *Console Layouts* in the **Quick Find** box, then select **Console Layouts**.
2. Select a layout name.
3. To modify the **Name** or **Description** of the layout, click **Edit** in the Console Layout Detail section.
4. To add or remove objects to the layout, click **Edit** in the Selected List Views section, select an object, and click the **Add** or **Remove** arrow.
To change the order of the objects as they will appear in the console's list view frame, select an object in the Selected List box, and click the **Up** or **Down** arrow.
A user can only view objects in the console's list view frame if those objects are added to the console layout to which their profile is assigned.
5. Click **Save** to finish.

SEE ALSO:

[Managing Console Layouts for the Agent Console](#)

EDITIONS

Agent console available in Salesforce Classic. Setup for Agent console available in Salesforce Classic and Lightning Experience.

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

USER PERMISSIONS

To create console layouts:

- "Customize Application"

EDITIONS

Agent console available in Salesforce Classic. Setup for Agent console available in Salesforce Classic and Lightning Experience.

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

USER PERMISSIONS

To customize console layouts:

- "Customize Application"

Deleting Agent Console Layouts

To delete a layout for the Agent console:

1. From Setup, enter *Console Layouts* in the **Quick Find** box, then select **Console Layouts**.
2. Click **Del** next to the console layout name.



Note: You cannot delete a [console layout that is assigned to a profile](#). You must first reassign the profile to another console layout or no console layout.

SEE ALSO:

[Managing Console Layouts for the Agent Console](#)

Managing Console Layouts for the Agent Console

Console layouts define what objects are available to users in the Agent console's list view frame. For example, if you want users to see list views of cases and contacts in the console, then you would add both cases and contacts to a console layout, and then assign that console layout to the appropriate user profiles. A user can only view objects in the console's list view frame if those objects are added to the console layout to which their profile is assigned.

From the console layouts list page, accessed in Setup by entering *Console Layouts* in the **Quick Find** box, then selecting **Console Layouts**, you can:

- Click **New** to [create layouts](#).
- Click **Edit** to [modify a layout](#).
- Click **Del** to [delete a layout](#).
- Click **Console Layout Assignment** to [assign console layouts to profiles](#).

SEE ALSO:

[Setting up the Agent Console](#)

EDITIONS

Agent console available in Salesforce Classic. Setup for Agent console available in Salesforce Classic and Lightning Experience.

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

USER PERMISSIONS

To delete Agent console layouts:

- "Customize Application"

EDITIONS

Agent console available in Salesforce Classic. Setup for Agent console available in Salesforce Classic and Lightning Experience.

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

USER PERMISSIONS

To create, edit, delete, and assign Agent console layouts:

- "Customize Application"

Choose Related Objects for the Agent Console's Mini View

While you can choose which related objects appear in the Agent console's mini view, you can only choose objects with a lookup or master-detail relationship on the primary object. For example, from the cases object, you can choose account and contact because cases have account and contact lookup fields.

1. From the object management settings for the object whose page layout you want to edit, go to Page Layouts.

The standard or custom object you choose in this step represents the record in the detail view of the console, and the related objects in the mini view will be records associated with it.

2. Next to a page layout name, click **Edit**.
3. In the page layout header, click **Mini Console View**.
4. To select which related objects will be displayed in the mini view, select a field name, and click **Add** or **Remove**. You can select objects only if they are defined as lookup relationships and those lookup fields are included on the page layout. To change the order of the related objects in the mini view, select a field name in Selected Relationship Fields, and click **Up** or **Down**. Click **Save** when finished.
5. Click **Save**.
6. Next, [define mini page layouts](#) to specify the fields and related lists to show for the related objects in the mini view.



Tip: The fewer related objects you add to the Agent console's mini view, the easier it is for users to read the information displayed. The console can also process data faster when fewer related objects are added to the mini view.



Note: You cannot choose related objects for the Close Case Layout or the Log a Case Page and View Cases Page layouts on the Self-Service Portal.

SEE ALSO:

[Setting up the Agent Console](#)

EDITIONS

Agent console available in Salesforce Classic. Setup for Agent console available in Salesforce Classic and Lightning Experience.

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

USER PERMISSIONS

To set up the Agent console:

- "Customize Application"

Define Mini Page Layouts for the Agent Console

You can define mini page layouts for the records that appear in the mini view of the Agent console, hover details, and event overlays. A mini page layout contains a subset of the items in an existing page layout. Mini page layouts inherit record type and profile associations, related lists, fields, and field access settings from their associated page layout. The visible fields and related lists of the mini page layout can be further customized, but the other items inherited from the associated page layout can't be changed on the mini page layout itself.

The event mini page layout is used for the event detail and edit overlays, not the Console tab. Related lists on mini page layouts only display in the Console tab, not hover details.

1. From the object management settings for the object whose page layout you want to edit, go to Page Layouts.
2. Next to a page layout name, click **Edit**.
3. In the page layout header, click **Mini Page Layout**.
4. Select which fields and related lists will be displayed for this type of record in the mini view. For each related list you select, choose which fields to display in that related list.
 - You can select all of the available fields and up to five related lists to display in the console; however, it is recommended that you only select a few so that users do not have to scroll to find information.
 - Selected fields and related lists display in the console even when they do not contain content.
 - Fields marked **Always Displayed** or **Always on Layout** on page layouts are automatically included on the mini page layout and cannot be removed unless they are removed from the page layout.
 - Field properties on the page layout determine field properties on the mini page layout. For example, if a field is read-only on the page layout, that same field will be read-only on the mini page layout. To change the field properties of fields on the mini page layout, you must change the field properties of fields on the page layout. Note that the console respects field-level security in organizations where it is available.
 - To add or remove fields, select a field name, and click **Add** or **Remove**. To change the order of the fields, select a field name in Selected, and click **Up** or **Down**. Click **Save** when finished.
 - The order of related lists on the page layout determines the order of related lists on the mini page layout. To change the order of related lists on the mini page layout, you must change the order of related lists on the page layout, then select the mini page layout and click **Save**.
5. Click **Save**.



Note: You can't define mini page layouts for the Close Case Layout or the Log a Case Page and View Cases Page layouts on the Self-Service Portal.

You can define mini page layouts for the user object; however, you cannot add standard fields or related lists. Also, a customized mini page layout won't display in the Agent console.

SEE ALSO:

[Setting up the Agent Console](#)

EDITIONS

Agent console available in Salesforce Classic. Setup for Agent console available in Salesforce Classic and Lightning Experience.

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

USER PERMISSIONS

To set up the Agent console:

- "Customize Application"

Assign Layouts for the Agent Console

After you [create console layouts](#), assign which layouts users see in the Agent console on the console tab. A user's profile determines which console layout is seen.

To assign console layouts:

1. From Setup, enter *Console Layouts* in the **Quick Find** box, then select **Console Layouts**.
2. Click **Console Layout Assignment**.
3. Select a console layout to assign to a profile via the drop-down list.
4. Select the Console tab visibility settings for a profile via the drop-down list. You can only select Console tab visibility settings for profiles assigned to a console layout.
5. Click **Save**.

 **Note:** Enterprise, Unlimited, Performance, and Developer Edition users with the "Customize Application" permission can assign a console layout to a profile via the profile detail page. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles**, select a profile name, then click **Edit** in the Console Settings section.

SEE ALSO:

[Managing Console Layouts for the Agent Console](#)

EDITIONS

Agent console available in Salesforce Classic. Setup for Agent console available in Salesforce Classic and Lightning Experience.

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

USER PERMISSIONS

To assign console layouts:

- "Customize Application"

Setting Up Case Feed

Set Up Cases for Salesforce Classic

Follow these high-level steps to set up Case Feed in Salesforce Classic.

Prerequisites and Basic Setup

Before you enable and customize Case Feed:

- Decide which actions and tools you need:
 - To use the Email action, [set up Email-to-Case](#).
 - To use the articles tool, [set up Salesforce Knowledge](#).
- [Review how cases are upgraded and know what to expect](#) when you enable Case Feed actions and feed items.

When you're ready, [enable Case Feed actions and feed items](#).

 **Note:** In organizations created before Winter '14, you also need to:

- Enable Chatter and actions in the publisher.
- Enable feed tracking on cases. On the feed tracking page, turn off tracking for the Status field. Turning off tracking for the Status field prevents duplicate feed items when agents update a case's status using the Change Status action.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up and customize Case Feed:

- "Manage Cases"
- AND
- "Customize Application"

Customizing Page Layouts

Choose what you want to appear on Case Feed page layouts based on your company's needs and how your support agents work.

- [Create layouts for case detail and close case pages](#) and [highlights panels](#).
- [Create layouts for feed view pages](#) to specify which actions, fields, and tools agents see when they're working with cases.

Giving Users Access

The easiest way to give users access to Case Feed is to assign them to profiles that use the feed-based case page layouts you create.

In organizations created before Spring '14, you may also be able to give users access in two other ways:

- [By creating permission sets](#) and [assigning them to users](#)
- [Through custom profiles](#)

Setting Up Case Feed: Adding More Functionality

Follow these optional steps to add more functionality to Case Feed.

- To let agents include short, pre-written messages in their emails, [set up Quick Text](#) and [create Quick Text messages](#).
- To give agents the option of emailing customers to let them know when questions they've posted to a portal have been answered, [enable portal email notifications](#).
- To allow agents to save email messages as drafts before sending them, and to make it possible to create approval actions for email, [enable email drafts](#).
- To help agents save time and increase consistency when sending emails to customers, create text, HTML, or Visualforce email templates.
- To let agents automate repetitive tasks, add the macros browser to the console and give agents permission to use macros.
- To give agents access to more functionality, [create and add custom actions](#).

Enable Case Feed Actions and Feed Items

Enabling Case Feed actions and feed items gives your users access to some standard actions they'll need when working with cases, such as Email and Change Status, and to feed items related to those actions.

 **Note:** In Salesforce orgs created before the Winter '14 release, you must enable feed tracking on Cases before you can enable the Case Feed actions and feed items. If feed tracking isn't enabled, then the **Enable Case Feed Actions and Feed Items** isn't visible.

In Salesforce organizations created after the Winter '14 release, feed tracking on cases and Case Feed actions and feed items are automatically enabled.

1. From Setup, enter *Support Settings* in the Quick Find box, then select **Support Settings**.
2. Click **Edit**.
3. Select **Enable Case Feed Actions and Feed Items**.
4. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To change support settings:

- "Manage Cases"
- AND
- "Customize Application"

Once you enable Case Feed actions and feed items, your cases are upgraded to the new user interface automatically. We recommend that you wait until this upgrade process is finished before giving users access to Case Feed.

SEE ALSO:

[Set Up Cases for Salesforce Classic](#)

[Case Feed Upgrade Results](#)

[Assign Case Feed to Users](#)

Create Permission Sets for Case Feed

After you enable Case Feed for your organization, create a permission set to give users access to it.

-  **Note:** The Use Case Feed permission is available only on orgs created before Winter '14 that haven't enabled feed-based layouts. Case Feed is automatically enabled and assigned to all standard profiles in Salesforce organizations created after the Winter '14 release.

1. Create a permission set for Case Feed.



[Walk Through It](#)

2. On the Permission Set page, click **App Permissions**.
3. Select **Use Case Feed**. Optionally, select any other permissions you want to include in the set.
4. Click **Save**.



Tip: If you have an existing permission set, you can edit it to include the **Use Case Feed** permission.

SEE ALSO:

[Set Up Cases for Salesforce Classic](#)

[Assign Case Feed to Users](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create permission sets:

- "Manage Profiles and Permission Sets"

Assign Case Feed to Users

After you've enabled Case Feed in your organization and created a permission set that includes it, assign that permission set to users.

1. From Setup, enter *Users* in the *Quick Find* box, then select **Users**.
2. Select a user's name.
3. In the Permission Set Assignments list, click **Edit Assignments**.
4. Select the permission set you want in the *Available Permission Sets* list, and then click **Add**.
5. Click **Save**.

SEE ALSO:

[Set Up Cases for Salesforce Classic](#)
[Create Permission Sets for Case Feed](#)

Give Users Access to Case Feed Through Custom Profiles

Instead of giving users access to Case Feed through permission sets, you can create a custom profile that includes the *Use Case Feed* user permission.

 **Note:** The *Use Case Feed* permission is available only on orgs created before Winter '14 that haven't enabled feed-based layouts. Case Feed is automatically enabled and assigned to all standard profiles in Salesforce organizations created after the Winter '14 release.

1. Create a profile.
2. On the Profile page, click **Edit**.
3. In General User Permissions, select *Use Case Feed*.
4. Click **Save**.
5. Assign users to the profile.

SEE ALSO:

[Set Up Cases for Salesforce Classic](#)

Case Feed Upgrade Results

When you enable Case Feed for your organization, an upgrade process converts active cases to the new interface and creates feed items for activity on those cases.

During the upgrade process, users won't notice anything different. After the process is complete, users for whom you've enabled Case Feed see existing and new cases in the new interface, while users without Case Feed continue to see traditional cases.

Here's what happens when cases are upgraded to the new interface:

- The 5000 most recent, active cases in your organization are converted to the Case Feed interface. How long this takes varies depending on the number of cases being converted and the

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To change support settings:

- "Manage Cases"
- AND
- "Customize Application"

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create and edit profiles:

- "Manage Profiles and Permission Sets"

EDITIONS

Available in: Salesforce Classic

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

complexity of the data they contain. For example, cases with multiple email messages or other attachments may take longer to convert than other cases.

- Older cases are also upgraded if they have comments, emails, or logged calls that were added to the case within the date range that applies to the original 5000 converted cases. You can have up to 500 cases with current comments, up to 500 with current emails, and up to 500 with current logged calls for a total of 1500 additional converted cases.
- The following items are added to the feed for each case:
 - Up to 60 email messages.
 - Up to 60 private and public comments. These are converted from comments to Chatter posts during the upgrade.
 - Up to 60 logged calls. Some logged calls that were created before you upgraded to Case Feed may appear in the feed as tasks.
- The Case Feed interface is enabled for all new cases, giving users access to the publisher and feed.
- The Case Detail view becomes available, and contains additional information about the case, including items that remain in their current related lists.

You'll receive an email message once the upgrade process has finished.

Best Practices

- For the smoothest upgrade experience, we recommend enabling Case Feed in a full-copy sandbox organization before you enable it in your production organization. This helps you determine how long the case conversion process takes and lets you review some sample cases in the new user interface.
- After you enable Case Feed in your production organization, wait until the upgrade process has finished to give users access. We recommend first assigning Case Feed to a single user, who can review some of the converted cases to be sure the upgrade process was successful, and then making it available to other users.

SEE ALSO:

[Set Up Cases for Salesforce Classic](#)

[Enable Case Feed Actions and Feed Items](#)

Enable Portal Reply Email Notifications in Case Feed

If your organization uses a portal or community, support agents can use the Community action in Case Feed to respond to customers. Enabling portal reply email notifications gives agents access to the **Send Email** option in the Community action.

1. From Setup, enter *Support Settings* in the **Quick Find** box, then select **Support Settings**.
2. Click **Edit**.
3. Select **Enable Case Comment Notification to Contacts**.
4. Select a template for email notifications.
5. Click **Save**.

Emails sent to external users include a link to the community. If the user receiving the email is a member of multiple active communities, the link goes to the oldest active community. If the user is already logged in to a community and clicks the link in the email, the link goes to that community.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To change support settings:

- "Manage Cases"
- AND
- "Customize Application"

If the user is not a member of any community, the link goes to the internal organization. If the user is a member of a portal and a community, the link goes to the community.

SEE ALSO:

[Set Up Cases for Salesforce Classic](#)

Highlight Externally Visible Feed Items in Case Feed

You can highlight feed items in Case Feed that are visible to external users. Now support agents can easily distinguish between feed items that are visible only to internal users and items that are visible to external users.

By default, Case Feed doesn't distinguish feed items according to who can see them.

Enable both the `Enable Community Case Feed` and `Highlight Externally Visible Feed Items` settings for the highlighting to work properly.

When the `Enable Community Case Feed` and `Highlight Externally Visible Feed Items` settings are enabled, the following feed items are highlighted in the case feed:

- Public emails sent to or received from the email address for contact person on a case
- Public case comments
- All social posts (such as Facebook posts)
- Questions escalated from Communities
- Tasks that have the All with Access or Public settings
- Events that have the All with Access or Public settings
- Chatter posts that have the All with Access or Public settings

When only `Highlight Externally Visible Feed Items` is enabled, then the following feed items are highlighted in the case feed:

- Incoming and outgoing email feed items that are sent to, or received from, the email address for the contact person on a case

When only `Enable Community Case Feed` is enabled, then no feed items are highlighted.

This setting is only available for compact feed.

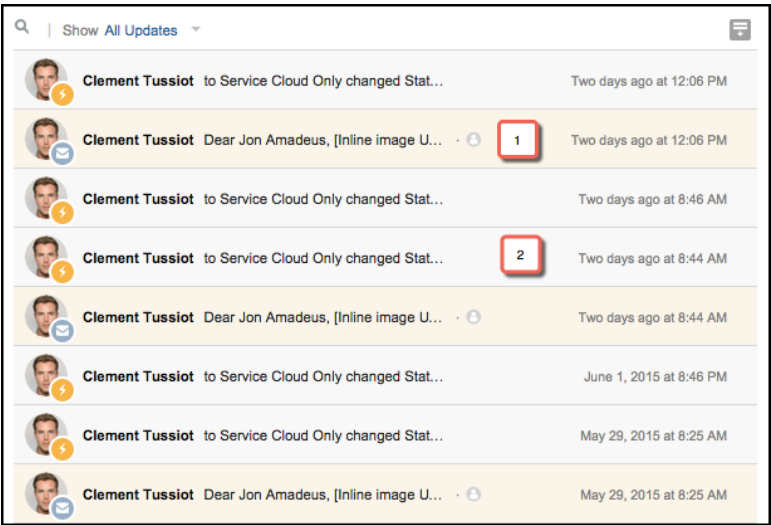
EDITIONS

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

USER PERMISSIONS

To change support settings:

- "Manage Cases"
- AND
- "Customize Application"



1. Feed items that are highlighted in orange are visible to external users, such as customers.
2. Feed items that are not highlighted are visible only to internal users, such as support agents.
1. Enable the `Highlight Externally Visible Feed Items` setting.
 - a. From your object management settings for cases, go to Page Layouts.
 - b. Select the feed-based page layout that you want to edit, and click **Edit**.
 - c. Scroll to the Feed View settings and select `Highlight Externally Visible Feed Items`.
2. Enabled the `Enable Community Case Feed` setting.
 - a. From your object management settings for cases, go to Support Settings.
 - b. Select `Enable Community Case Feed`.

Enable Email Drafts in Case Feed

Draft emails let support agents who use Case Feed write and save messages without having to send them immediately. This option also makes it possible to implement approval processes so messages can be reviewed by supervisors or senior agents before they're sent to customers.

Before enabling draft emails, [set up Email-to-Case](#) and [Case Feed](#).

1. From Setup, enter *Support Settings* in the `Quick Find` box, then select **Support Settings**.
2. Click **Edit**.
3. Select `Enable Email Drafts`.
4. Click **Save**.

 **Note:** Changes to fields other than `To`, `From`, `CC`, `BCC`, and `Subject` in the Email action aren't saved when a message is saved as a draft. We recommend removing any additional fields from the Email action if you plan to use draft emails.

SEE ALSO:

[Set Up Cases for Salesforce Classic](#)

[Create Approval Processes for Email Drafts](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To change support settings:

- "Manage Cases"

AND

"Customize Application"

Add Custom Components to Case Feed

Use Visualforce pages as custom components in Case Feed to give support agents easy access to special tools or functionality while they're working with cases.

For example, you might create a map component that lets agents see where a customer is located, or a tool agents can use to look up the products related to cases they're working on. You can use any Visualforce page that includes the standard case controller as a custom component.

Once you've created a Visualforce page to use as a custom component, add it to the Case Feed layout.

1. How you access the Case Feed Settings page depends on what kind of page layout you're working with.
 - For a layout in the Case Page Layouts section, click **Edit**, and then click **Feed View** in the page layout editor.
 - For a layout in the Page Layouts for Case Feed Users section, click  and choose **Edit feed view**. (This section appears only for organizations created before Spring '14.)
2. In the Other Tools and Components section, click **+ Add a Visualforce page** and choose the page you want.
The width of the component is determined by the width of the column it's in. To make the component look best, we recommend setting the width of the Visualforce page to 100%.
3. Set the height of the component.
4. Choose where you want the component to appear on the page.



Tip: Components in the right column are hidden when agents view the Case Detail page, so use the left column for any components you want to be accessible all the time.

SEE ALSO:

[Set Up Cases for Salesforce Classic](#)

Add Custom Actions in Case Feed

Include custom actions in the Case Feed publisher to give support agents easy access to the additional tools and functionality they need when working with cases.

Actions in Case Feed let support agents perform tasks like emailing customers, writing case notes, and changing the status of a case. Using Visualforce pages, you can create custom actions that offer agents more functionality. For example, you might create a Map and Local Search action that lets agents look up the customer's location and find nearby service centers.

You can use any Visualforce page that uses the standard case controller as a custom action.



Note: If you've opted to use the advanced page layout editor to configure the publisher for a Case Feed layout, see [Configure the Case Feed Publisher with the Enhanced Page Layout Editor](#) for instructions on adding actions.

1. From the object management settings for cases, go to Page Layouts.
2. How you access the Case Feed Settings page depends on what kind of page layout you're working with.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To change Case Feed settings:

- "Manage Cases"
- AND
- "Customize Application"

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To add custom actions to Case Feed:

- "Customize Application"

- For a layout in the Case Page Layouts section, click **Edit**, and then click **Feed View** in the page layout editor.
- For a layout in the Page Layouts for Case Feed Users section, click  and choose **Edit feed view**. (This section appears only for organizations created before Spring '14.)

3. Click **+ Add a Visualforce Page** in the list of custom actions.
4. Select the page you want to add as an action.
5. Specify the height of the action in pixels.
6. Click **Save**.

SEE ALSO:

[Set Up Cases for Salesforce Classic](#)

[Developer's Guide: Customizing Case Feed with Visualforce](#)

Create Custom Feed Filters for Case Feed

Custom feed filters help support agents focus on the items that are most relevant for them.

1. From Setup, enter *Cases* in the **Quick Find** box, then select **Feed Filters**.
2. Click **New**.
3. In the Feed Filter Information section, enter the filter label, name, and description.
4. In the Feed Filter Criteria section, define how to populate this filter. You can create more refined filters using the OR function.

Field	Description
Feed Item Type	Specifies the feed type to include in the filter. For example, the Created Record feed item type shows feed items about new records.
Related Object	Specifies the object associated with the selected feed item. The list includes all objects related to the Case object. The objects in the list vary depending on how your organization is set up. For example, if you selected Created Record as the feed item type, you might select Case as the related object. This filter then shows new Cases.
Visibility	Specifies whether to include a feed item in the filter based on the feed item's visibility. The visibility depends on the security and sharing settings for the related object. Visibility can include either All Users or Internal Users. For example, suppose that you selected Case Comment Feed as the feed item type and Internal Users as the visibility. This feed filter then shows case comments made by internal users.

5. Click **Save**.

EDITIONS

Available in: **Enterprise, Performance, Unlimited, Developer** with a Service Cloud license

USER PERMISSIONS

To create and edit page layouts:

- "Customize Application"

To assign page layouts:

- "Manage Users"

6. After you define your custom feed filters, add the filters to the list of selected filters in the Feed Filter Options section of the page layout's Feed View settings.



Example: To create a filter that shows interactions with a customer, you could define a filter named Customer Interaction that uses the following criteria.

- Criterion 1: Case Comment feed item type with visibility set to All Users
- Criterion 2: Email Message feed item type with visibility set to All Users
- Criterion 3: Chatter post feed item type with visibility set to All Users

When an agent applies this filter, the case feed shows only Case Comment, Email Message, and Chatter feed items that are visible to both external and internal users. Everything else is filtered out.

SEE ALSO:

[Create and Edit Feed Layouts in Case Feed](#)

[Settings for Feed Views in Case Feed](#)

Case Feed Page Layouts Overview

When support agents work with cases in Case Feed, they use the case page layout. To specify the fields, tools, and functionality that support agents see when working with open cases, customize the feed view, detail view, highlights panel in the case page. When agents close a case, they see the close case page layout, where agents can enter information about the case resolution. You also can customize the close case page layout.

You can customize different parts of the case page layout in Case Feed:

- Highlights panels, which appear at the top of both feeds and case detail pages. The highlights panel shows key information about a case so that the most important information is immediately visible to agents.
- Feed views, which agents see when managing and interacting with cases. The feed view shows the case history using a Chatter-like feed, so that agents can see what's happened in a case in context.
- Detail views, which agents see when they click **View Case Details**. The detail view shows useful information about the case, such as a description of the contact's company, the account's address, and related lists.

You also can customize the close case page layout in Case Feed:

- Close case pages, which appear when agents close cases. The close case page lets agents enter information about the case resolution.

From the object management settings for cases, you can create, edit, and assign all four types of layouts by going to Page Layouts.

SEE ALSO:

[Create and Edit Feed Layouts in Case Feed](#)

[Configure the Case Feed Publisher with the Enhanced Page Layout Editor](#)

[Customize the Highlights Panel in Case Feed](#)

EDITIONS

Available in: Salesforce Classic

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

Customize the Highlights Panel in Case Feed

The highlights panel appears at the top of the feed detail views and shows the most important information about a case. Edit the highlights panel to include the fields that are most important for your support agents.

1. From the object management settings for cases, go to Page Layouts.
2. In Page Layouts for Case Feed users, click  next to a layout and choose **Edit detail view**.
3. Hover your mouse pointer over the Highlights Panel until the  icon appears, then click it.
4. On the Highlights Panel Properties page, click a box to edit the fields in it.
5. Use the drop-down list to choose the type of information to include in each field. To leave a field blank, choose **None**. You can't move or delete **Case Number** or **Created Date**.
6. Click **OK**.

SEE ALSO:

[Set Up Cases for Salesforce Classic](#)

Create and Edit Feed Layouts in Case Feed

Feed view page layouts determine which actions, fields, and tools users see when they're working with cases in Case Feed. You can create different layouts and assign them to different user profiles. For example, you might have one layout for agents and another for supervisors.

 **Note:** Before creating a new feed view page layout, you need to create a new case detail page layout.

1. From the object management settings for cases, go to Page Layouts.
2. How you access the Case Feed Settings page depends on what kind of page layout you're working with.
 - For a layout in the Case Page Layouts section, click **Edit**, and then click **Feed View** in the page layout editor.
 - For a layout in the Page Layouts for Case Feed Users section, click  and choose **Edit feed view**. (This section appears only for organizations created before Spring '14.)

If you've already opted to use the advanced page layout editor to configure the publisher for a layout, choose **Edit detail view** to add, change, or remove actions.

3. [Choose the tools, components, and options for your feed view page.](#)
4. Click **Save**.

Once you've created or edited feed view page layouts, assign them to profiles.

SEE ALSO:

[Case Feed Page Layouts Overview](#)

[Configure the Case Feed Publisher with the Enhanced Page Layout Editor](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create and edit page layouts:

- "Customize Application"

To assign page layouts:

- "Manage Users"

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create and edit page layouts:

- "Customize Application"

To assign page layouts:

- "Manage Users"

Settings for Feed Views in Case Feed

Use Case Feed settings to customize the feature according to your support department's processes and business needs.

Apply these settings when you [create or update feed views for Case Feed](#).

Feed View Options

Option	Use It to...	Notes
Enable Full-Width Feed View in the Console	Expand the width of the feed to take up all available space when agents view cases in Salesforce console tabs or subtabs.	The portion of the page the feed takes up with this setting enabled depends on whether you have tools or components in the right column of the Case Feed layout, and whether you have console sidebar components. This setting is automatically enabled in organizations created after Summer '14.
Enable Compact Feed View in the Console	Update the overall look and feel of the feed view and compress feed items when agents view cases in Salesforce console tabs or subtabs.	Compact feed lets agents see more information about a case with much less scrolling than they need to do when working with cases in the standard feed view. This option is only available if you have Actions in the Publisher and Use Page Layout Editor to Configure Actions enabled.
Highlight Externally Visible Feed Items	Indicate which feed items are visible to external users by changing the background color of the feed item to orange.	This option is only available for compact feed. When this setting and the Enable Community Case Feed setting are both enabled, the following feed items are highlighted in the case feed: • Public emails sent to or received from the email address for contact person on a case • Public case comments • All social posts • Questions escalated from Communities • Tasks that have the All with Access/Public setting • Events that have the All with Access/Public setting • Chatter posts that have the All with Access/Public setting See also Set Up the Community Case Feed.

Publisher Options

Option	Use It to...	Notes
Use Page Layout Editor to Configure Actions	Make the advanced page layout editor the default for choosing the actions that appear in the Case Feed publisher.	This setting appears only if your organization has <i>Actions in the Publisher</i> enabled.
Automatically Collapse Publisher	Automatically reduce the height of the publisher when it's not in use, showing more of the feed below. The publisher expands to its normal height as soon as an agent clicks inside it.	This setting is automatically enabled in organizations created after Summer '14 and is only available if you have <i>Actions in the Publisher</i> and <i>Use Page Layout Editor to Configure Actions</i> enabled.

Choosing and Configuring Actions

Option	Use It to...	Notes
Menu Placement	Choose whether you want the publisher menu to appear in the center column or the left column.	This setting appears only if you <i>haven't</i> selected <i>Use Page Layout Editor to Configure Actions</i> .
Custom Actions	Select up to 10 custom Visualforce pages to add to the publisher as actions. Pages must use the standard case controller.	This setting appears only if you <i>haven't</i> selected <i>Use Page Layout Editor to Configure Actions</i> .
Select Action	Select actions to include in the Case Feed publisher, and choose the order in which the actions appear.	This setting appears only if you <i>haven't</i> selected <i>Use Page Layout Editor to Configure Actions</i> .

Log a Call Action

Option	Use It to...	Notes
Select Action Fields	Select fields to include in the Log a Call action.	Log a Call automatically includes the <i>Customer Name</i> field. You can't include rich text area fields in Case Feed actions.

Change Status Action

Option	Use It to...	Notes
Select Action Fields	Select fields to include in the Change Status action.	The Change Status action automatically includes the <i>Current Status</i> and <i>Change to</i> fields. If you add the <i>Status</i> field to the action, it will automatically replace these two fields.

Option	Use It to...	Notes
		You can't include rich text area fields in Case Feed actions.

Email Action

Option	Use It to...	Notes
Select Action Fields	Select fields to include in the Email action.	Any fields you add appear below the email body field in the action. You can't include rich text area fields in Case Feed actions.
Select Header Fields	Select fields to include in the header of the Email action.	The Email header automatically includes the From , To , Bcc , and Subject fields.
Select Email Tools	Choose the tools to make available to agents when they use the Email action.	The Templates, File Attachments, and Address Lookup Buttons tools are included automatically.
Enable Rich Text Editor	Make the rich text editor available to agents so they can include formatting, such as bolded or underlined text, bulleted or numbered lists, links, and inline images in their email messages.	Agents can click  in the editor's menu bar to switch to plain text mode.
Require Use of Rich Text Editor	Prevent agents from switching to plain text mode when they write email.	This setting helps ensure that agents write and send only formatted emails, not plain text messages.
Specify From Address(es)	Automatically include specific email addresses in the From field.	To use multiple addresses, separate them with commas. They'll appear as a picklist in the Email action header. You can use only Salesforce-validated email addresses as From addresses.
Allow Collapsible Body Field	Automatically collapse the email body field until an agent clicks inside it. Having the body collapsed by default makes it easier for agents to see more of what's below the email action on the page.	Once an agent expands the email body, it will stay expanded until the page is reloaded, even if the agent clicks on other actions or elsewhere on the page.
Allow Collapsible Email Header	Automatically collapse the email header until an agent clicks  to expand it.	With this setting enabled, agents can expand and collapse the header as needed while they work.
Exclude Email Thread from Drafts	Exclude the previous emails in the thread when composing emails in the feed.	This prevents the previous emails in the thread from being incorporated in the outbound email message.

Option	Use It to...	Notes
Replace Send Email Button with	Choose a button to replace the standard Send Email button. This can be useful if you want to label the button something else, change how it looks, or include custom functionality, such as triggering a workflow when an agent sends a message.	You can use any custom button you've created for cases, except those that have s-controls as content sources.

Case Feed Tools

Option	Use It to...	Notes
Select Case Feed Tools	Choose which tools to make available to agents when they use Case Feed.	The Articles tool is included by default, but it won't appear on the Case Feed page unless your organization uses Salesforce Knowledge.

Articles Tool

Option	Use It to...	Notes
Enable Email PDF Attachments	Give agents the ability to attach Knowledge articles to email messages as PDFs.	This setting appears only if your organization uses Salesforce Knowledge. If you use Knowledge and <i>don't</i> enable this setting, agents will be able to attach articles only to cases, not to email messages.
Use Case Feed Articles Tool in the Console	Replace the Knowledge sidebar in the Salesforce console with the Case Feed articles tool.	This setting appears only if your organization uses Salesforce Knowledge. If you use Knowledge and <i>don't</i> enable this setting, we recommend hiding either the Case Feed articles tool or the Knowledge sidebar in the Salesforce console so agents see only one of those tools when they're working with cases in the console.

Other Tools and Components

Option	Use It to...	Notes
Custom Components	Select up to 10 custom Visualforce pages to add as components. You can use as a custom component any Visualforce page that uses the standard case controller.	Once you add a Visualforce page, you can specify its height and choose where on the page you want it to appear.
Choose Placement	Specify where on the page you want tools and components like custom buttons, custom links,	Custom links and buttons are only available as right sidebar components on the feed view page layout if you've added them to the related case detail page layout.

Option	Use It to...	Notes
	and the followers list to appear. You can also choose to hide anything your agents don't need access to.	The Milestone Tracker is available only if you've enabled entitlement management in your organization. The Topics list is available only if you've enabled topics on cases.

Filter Options

Option	Use It to...	Notes
Filters Appear	Specify where and how feed filters appears: - As a fixed list in the left column - As a floating list in the left column - As a drop-down list in the center column	Choose "As a floating list in the left column" if you want the feed filters list to remain visible as users scroll down the page. This can be useful with long feeds, as it lets agents quickly filter case activities from anywhere on the page, without having to scroll to the top.
Select Filters	Choose the filters to include in the feed filters list, and specify the order of the list.	We recommend putting the filters agents are likely to use most often at the top of the list.

SEE ALSO:

[Configure the Case Feed Publisher with the Enhanced Page Layout Editor](#)

Add the Attachment Component to Case Feed

Add the attachment component to the Case Feed page so your support agents can quickly view and manage all of the files associated with a case.

Access to all of the files associated with a case is critical to support agents when they're helping your customers. The attachment component lets agents view and manage all of the Chatter files, attachments from emails, and case attachment related list files for a case, all on the Case Feed page. Using the attachment component, agents can quickly attach a file to an email and download a file.

Agents can toggle between a view of the most recent attachments for a case across all sources and a view of all of the files associated with a case sorted by their creation date.

1. From the object management settings for cases, go to Page Layouts.
2. How you access the Case Feed Settings page depends on what kind of page layout you're working with.
 - For a layout in the Case Page Layouts section, click **Edit**, and then click **Feed View** in the page layout editor.
 - For a layout in the Page Layouts for Case Feed Users section, click  and choose **Edit feed view**. (This section appears only for organizations created before Spring '14.)
3. In the Other Tools and Components section, select **Files**, and specify where on the page you want it to appear.

EDITIONS

Available in: **Salesforce Classic**

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

USER PERMISSIONS

To create and edit page layouts:

- "Customize Application"

To assign page layouts:

- "Manage Users"

4. Click **Save**.

Add the attachment component to your custom pages by including the `<support:caseUnifiedFiles>` component in a Visualforce page, or add it as a Salesforce console component to make it available to agents without having to take up space on a Case Feed page.

Add the Case Experts Component (Pilot) to Case Feed

Easily identify the experts on case topics so agents can collaborate to solve customer issues quickly.

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

Using the power of topics on cases, support agents can be endorsed as experts on specific topics. Agents endorsed as experts can help other agents who might be less knowledgeable on the topic. To establish case experts in your organization, you must have Chatter and topics for cases enabled. To enable Case Experts, display the Experts component on Case Feed.

1. From the object management settings for cases, go to Page Layouts.
2. How you access the Case Feed Settings page depends on what kind of page layout you're working with.
 - For a layout in the Case Page Layouts section, click **Edit**, and then click **Feed View** in the page layout editor.
 - For a layout in the Page Layouts for Case Feed Users section, click  and choose **Edit feed view**. (This section appears only for organizations created before Spring '14.)
3. In the Other Tools and Components section, select **Case Experts**, and specify where on the page you want it to appear.
4. Click **Save**.

Add the experts component to your custom pages by including the `<apex:support:caseExperts>` component in a Visualforce page.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create and edit page layouts:

- "Customize Application"

To assign page layouts:

- "Manage Users"

Configure the Case Feed Publisher with the Enhanced Page Layout Editor

If your organization uses the actions in the publisher feature, you can use the enhanced page layout editor to choose the actions that appear in the Case Feed publisher.

 **Note:** This option is selected by default for new Salesforce organizations that use Case Feed, and for organizations that enable Case Feed after the Summer '13 release.

1. From the object management settings for cases, go to Page Layouts.
2. How you access the Case Feed Settings page depends on what kind of page layout you're working with.
 - For a layout in the Case Page Layouts section, click **Edit**, and then click **Feed View** in the page layout editor.
 - For a layout in the Page Layouts for Case Feed Users section, click  and choose **Edit feed view**. (This section appears only for organizations created before Spring '14.)
3. Select **Use Page Layout Editor to Configure Actions**.
4. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To configure the Case Feed publisher:

- "Customize Application"

5. To access the page layout editor:
 - For a layout in the Case Page Layouts section, click **Edit**.
 - For a layout in the Page Layouts for Case Feed Users section, click  and choose `Edit detail view`. (This section appears only for organizations created before Spring '14.)
6. In the page layout editor, click  in the Quick Actions in the Salesforce Classic Publisher section.
7. In the palette, click **Quick Actions**.
8. Drag the actions you want to the Quick Actions in the Salesforce Classic Publisher section. You can also drag actions to change the order in which they appear and drag off actions you don't want.
On the Case Feed page, up to approximately five or six actions are displayed in the publisher; the rest are included in the More drop-down list.
9. Click **Save**.

If you've previously used the Case Feed Settings page to configure the publisher, you see these differences when you switch to the enhanced page layout editor:

- The actions list appears at the top of the publisher. You can no longer position the actions list to the left of the publisher.
- The Answer Customer action has been divided into its two component actions: Email and Portal.
- The actions list looks more like the Chatter publisher on other pages.
- The standard Chatter actions—Post, File, Link, Poll, Question, and Thanks—automatically appear in the publisher layout, and they replace the Write Case Note action. You can change the sequence of these actions and remove any you don't need.
- The Feed View/Details drop-down list replaces the View Case Detail action.
- Custom actions you previously added to the Case Feed publisher aren't available. Create new custom actions and add them to the publisher. These new actions must use `publisher.js` rather than `interaction.js`.
- The Case Detail page expands to full width, making it easier to see all of your related lists and other information.

SEE ALSO:

[Case Feed Page Layouts Overview](#)

[Create and Edit Feed Layouts in Case Feed](#)

Convert Page Layouts for Case Feed Users to Case Page Layouts

As of Spring '14, we've made creating and customizing case layouts easier by replacing page layouts for Case Feed users with feed-based layouts for case pages. By converting your older page layouts, you can use the advanced page layout editor to manage them and can assign Case Feed to users more easily.

 **Note:** Page layouts for Case Feed users are available only in organizations created prior to Spring '14.

Feed-based case layouts include the same features as page layouts for Case Feed users: a feed, which includes a publisher with actions, feed filters, tools such as an articles tool, and sidebar components such as custom buttons and links; a highlights panel; and a detail page, with related lists and other in-depth information about the case. You can use the standard page layout assignment tool to assign feed-based case page layouts to users, which means you no longer have to use permission sets or custom profiles to give users access to Case Feed.

To convert page layouts for Case Feed users to feed-based case layouts:

1. From the object management settings for cases, go to Page Layouts.
2. Click  next to a layout in the Page Layouts for Case Feed Users list and choose **Convert to case page layout**.

We recommend using this option so you can review the converted layout before you delete the original, but to save time, you can choose **Convert to page layout and delete**.

3. The converted layout appears in the Case Page Layouts list with the prefix **Converted:**. Click **Edit** next to it.
4. In the page layout editor, confirm that the layout includes the elements you want. To see and edit what's included in the feed view, including feed filters and sidebar components, click **Feed View**.
5. Once you're happy with the case page layout, click **Page Layout Assignment** in the Case Page Layouts list to assign it to the appropriate user profiles.

 **Note:** For custom profiles with the **Use Case Feed** permission, or profiles with permission sets that include **Use Case Feed**, these page assignments won't take effect until you remove the permission or permission set. If your organization was created between Winter '14 and Spring '14, you can't remove **Use Case Feed** from standard profiles, so these assignments won't take effect until you delete all of your page layouts for Case Feed users.

6. Click  next to the older version of the layout in the Page Layouts for Case Feed Users list and choose **Delete**. In the confirmation that appears, click **OK**.
7. If there are users assigned to the layout you delete, you're prompted to choose another layout as a replacement. This is only a formality: Once you assign users to a case page layout, that's what they'll see.

If you have multiple layouts for Case Feed users, we recommend converting and deleting them all at the same time. Once you delete the last of your older layouts, the Page Layouts for Case Feed Users list will disappear.

SEE ALSO:

[Create and Edit Feed Layouts in Case Feed](#)

[Configure the Case Feed Publisher with the Enhanced Page Layout Editor](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create and edit page layouts:

- "Customize Application"

To assign page layouts:

- "Manage Users"

Add Global Actions and Custom Quick Actions as Components to the Console Sidebar

You can add global actions and custom quick actions as components to the Service Console sidebar, so agents can create records, update case info, search for related info, and link to parent records—all without ever leaving the current tab. You can use quick actions to replace the Case Detail Page, so agents can see case-related information, such as contacts and assets, in their main workflow.

1. Create the global action (for the Create action) and the custom quick action (for the Update action).

Create actions must be global quick actions. Update actions must be object-specific quick actions that are based on the lookup field object type. For example, to update a contact lookup field, you must have a contact-specific update action.

2. Add the actions as components to the case page layouts so that the quick actions are available for your agents to use.
 - a. From Setup, enter “Case” in the Quick Find box, then select **Page Layouts**.
 - b. Select the page to which you want to add the quick actions and click **Edit**.
 - c. In the Case Layout page, select **Custom Console Components**.
 - d. Go to the Sidebar section where you want to add the component (for example, go to the Left Sidebar section).
 - e. For **Type**, select **Lookup**.
 - f. For **Field**, select the related field that the quick action acts on.
 - g. Select **Enable Linking** to allow support agents search for a record and link it to a related record. For example, a support agent can link a contact name to a case.
 - h. For **Create Action**, select the global action that creates a record. For example, a global action can create a contact.
 - i. For **Update Action**, select the quick action the updates a record. For example, a quick action can update a field on the contact.
 - j. Click **Save**.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** with a Service Cloud license

USER PERMISSIONS

To create actions:

- “Customize Application”

To add custom console components:

- “Customize Application”

Enable Default Email Templates in Case Feed

Use default email templates in Case Feed to give support agents easy access to the templates they need based on the types of cases they’re working on.

Before you can enable default email templates, you need to create text, HTML, or Visualforce templates, and create an Apex class that contains template selection logic.

Default email templates make it easy for support agents to respond to customers more quickly, more accurately, and with greater consistency. The email templates are preloaded, so agents don’t need to browse for the templates they need before writing email. You can create as many templates as needed and assign them based on your company’s needs. For example, if your support center handles issues related to multiple products, you can create a specific template for each product and preload the appropriate template based on a case’s origin, subject, or other criteria.

To enable default email templates:

1. From Setup, enter *Support Settings* in the Quick Find box, then select **Support Settings**.
2. Click **Edit**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable default email templates:

- “Customize Application”

3. Select **Enable default email templates**.
4. Choose the Apex class that contains your template selection logic.
5. Click **Save**.

SEE ALSO:

[Create Send Actions for Email Approval Processes](#)

[Create Approval Processes for Email Drafts](#)

Create Send Actions for Email Approval Processes

Use send actions to save your support agents time by ensuring that email messages are sent automatically at the end of an approval process.

 **Note:** Send actions are available only in organizations that have email drafts enabled.

1. From Setup, enter *Send Actions* in the **Quick Find** box, then select **Send Actions**.
2. Click **New Send Action**.
3. Select Email Message from the object drop-down list.
4. Enter a unique name for the action.
5. Optionally, enter a description for the action.
6. Click **Save**.

After you create a send action, create an approval process that includes it.

SEE ALSO:

[Enable Default Email Templates in Case Feed](#)

Create Approval Processes for Email Drafts

Approval processes determine how your organization handles draft email messages—specifying, for example, which messages require approval and whether approvers are automatically assigned. Create customized approval processes based on your company's needs.

1. [Enable draft emails](#).
Though you can create approval processes for email messages without this step, those processes won't be triggered until your organization has email drafts available.
2. [Create a send action](#).
Send actions ensure that email messages are sent once they've been approved.
3. Create approval processes.
Be sure to choose Email Message from the Manage Approval Processes For: drop-down list.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create Send actions:

- "Customize Application"

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create approval processes:

- "Customize Application"

4. To give certain users, such as senior support agents, the ability to choose whether to submit an email message for approval or simply send the message, assign them to a profile that has the `Bypass Email Approval` permission selected.

SEE ALSO:

[Enable Default Email Templates in Case Feed](#)

Rename Actions and Feed Filters in Case Feed

Rename Case Feed actions and feed filters so they match the terms your company uses.

For example, if your company refers to your portal as a customer community, you might rename the Portal action "Customer Community."

1. From Setup, enter *Rename Tabs and Labels* in the `Quick Find` box, then select **Rename Tabs and Labels**.
2. Click **Edit** next to Cases in the list of standard tabs.
3. Click **Next**.
4. Find the label you want to change in the Other Labels list.
5. Type the new name for the label in the text box next to it.
6. If the new label begins with a vowel sound, check `Starts with vowel sound`.
7. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To rename actions and feed filters:

- "Customize Application"
- OR
- "View Setup and Configuration"
- AND
- Designation as a translator

Set Up Cases for Lightning Experience

Before you can use case feed in Lightning Experience, recreate standard publishers with quick actions.

Quick actions appear on mobile devices, whereas standard case feed publishers do not. To use the feed-first design on cases, recreate these publishers as quick actions.

- [Create a Log a Call Quick Action](#)
- [Create a Change Status Quick Action](#)

SEE ALSO:

[Add Quick Actions to the Case Page Layout for Lightning Experience](#)

EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To set up cases for Lightning Experience:

- "Manage Cases"
- AND
- "Customize Application"

Create a Send Email Quick Action for Cases

Create a Send Email quick action to let agents send emails from the case feed in Lightning Experience and Salesforce1.

You must have Email-to-Case enabled to use the Send Email quick action on the Cases object.

The Send Email quick action is created by default when you enable Email-to-Case on new orgs. If your org was created before Spring '17, or if you enabled Email-to-Case before Spring '17, create a Send Email quick action.

1. Create the Send Email quick action.
 - a. From Setup, enter "Case" in the Quick Find box, then select **Buttons, Links, and Actions**.
 - b. Click **New Action**.
 - c. In the **Action Type** picklist, select **Send Email**.
 - d. In the **Standard Label Type** field, select a label for this action. When you add the action to the case page layout, this label is displayed in the actions bar.
 - e. The **Name** field is automatically populated. This name is used in the API and managed packages. It must begin with a letter and use only alphanumeric characters and underscores, and it can't end with an underscore or have two consecutive underscores. Unless you're familiar with working with the API, we suggest not editing this field.
 - f. In the **Description** field, describe what this quick action does. The description appears on the detail page for the action and in the list on the Buttons, Links, and Actions page. The description isn't visible to your users. If you're creating several actions on the same object, we recommend using a detailed description, such as "Send Email quick action for Cases."

EDITIONS

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

USER PERMISSIONS

To create and modify the Send Email quick action:

- "Manage Cases" AND "Customize Application"

To edit a page layout:

- "Customize Application"

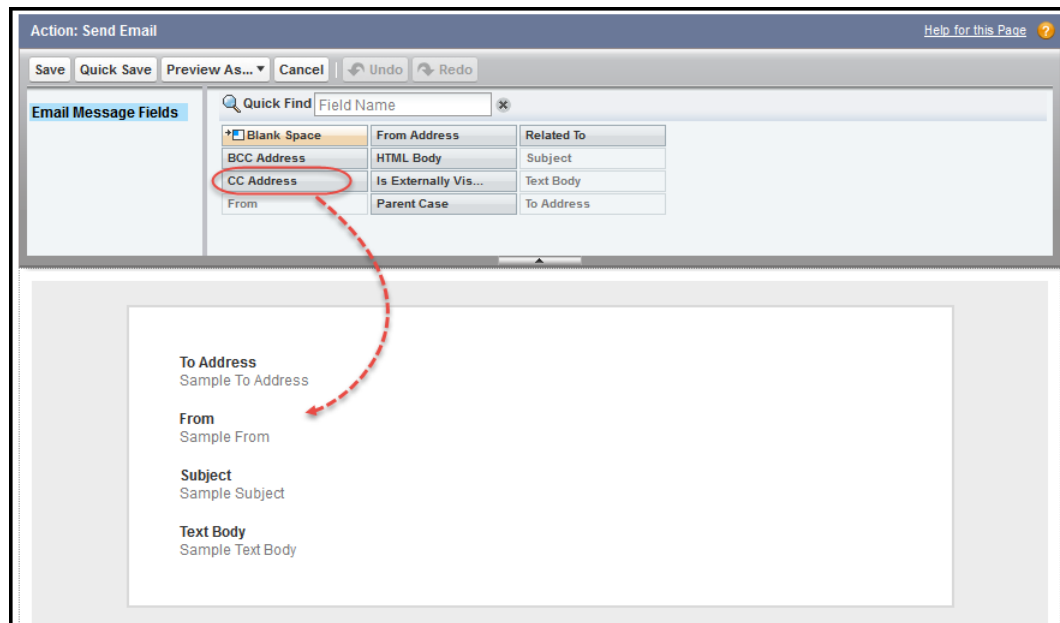
The screenshot shows the 'New Action' form in Salesforce Lightning Experience. The form is titled 'Case Actions' and 'New Action'. It contains the following fields and options:

- Object Name:** Case
- Action Type:** Send Email
- Default Email Template:** (empty field with a search icon)
- Don't Apply Template Subject:** (checkbox)
- Standard Label Type:** Send Email
- Name:** Send_Email
- Description:** Send Email quick action for Cases
- Icon:** Change Icon

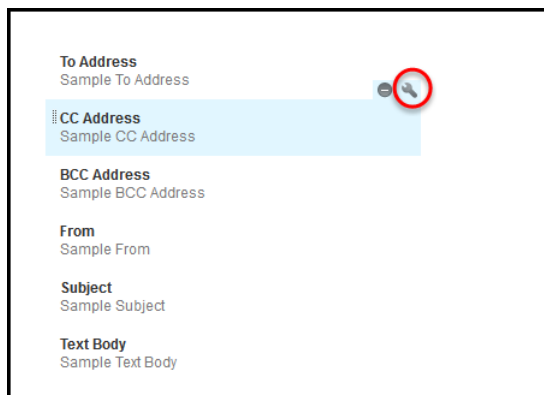
There are 'Save' and 'Cancel' buttons at the top and bottom of the form.

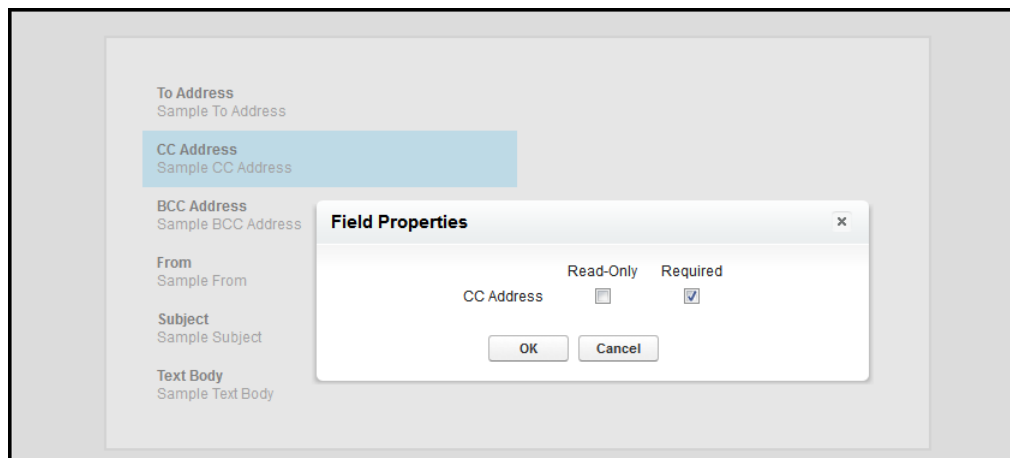
- g. Click **Save**.
The email layout page opens, where you can specify the fields shown in the email action.
2. Arrange the email fields in the order that you want. When an agent selects the quick action, the email fields are displayed in this order.
 - a. From the Email Message Fields menu, drag fields into the email layout. To remove fields, drag them from the email layout to the Email Message Fields section.

The To Address, From picklist, Subject, and Text Body fields are added by default. For information about the fields, see Fields Available on the Send Email Quick Action



- b. To make a field read-only or required, click the wrench icon and specify the field properties.





- c. To save the field properties, click **OK**.
- d. Click **Save**.

After you define the Send Email quick action, [add it to the case page layout](#) so it's available for agents to use.

SEE ALSO:

[Add Quick Actions to the Case Page Layout for Lightning Experience](#)

Apply a Default Email Template Using the Send Email Quick Action

Help agents incorporate branding and ensure consistency when writing emails to customers in Lightning Experience and Salesforce1 by using default email templates. Email templates help ensure that agents include common information, such as greetings, announcements, disclaimers, and company contact information, in customer emails.

You must have Email-to-Case enabled to use the Send Email quick action on the Cases object.

Before creating a Send Email quick action that specifies a default email template, create an email template of the type Custom. Only Custom type templates are supported. Attachments specified on an email template aren't supported. However, agents can manually add attachments when they use the email quick action.

1. Create a Send Email quick action or modify an existing Send Email quick action.
 - a. From Setup, enter "Case" in the Quick Find box, then select **Buttons, Links, and Actions**.
 - b. Click **New Action**, or select the quick action that you want to change.
 - c. In the **Action Type** picklist, select **Send Email**.
 - d. In the **Default Email Template** field, click the lookup button and select a template.
Only email templates of the type Custom are shown in the lookup menu.
 - e. Optionally, select **Don't Apply Template Subject** to ignore the email template subject.

By default, the Send Email quick action applies the subject specified in the default email template. For example, if the template's subject line is "Thanks for your email," then that subject is applied when the agent uses the email action to write or reply to an email. If **Don't Apply Template Subject** is selected, then the subject defined in the email isn't applied in the email. For example, if a customer sends an email with the subject "Please help," the agent can use the default email template to reply but keep the customer's subject line.

EDITIONS

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

USER PERMISSIONS

To create and modify the Send Email quick action:

- "Manage Cases" AND "Customize Application"

To edit a page layout:

- "Customize Application"

- f. Specify a label for the action. You can use a standard label type, which supplies a default label, or you can select *None* in the `Standard Label Type` field, and specify your own label. When you add the action to the case page layout, this label is displayed in the actions bar.
 - g. The `Name` field is automatically populated. This name is used in the API and managed packages. It must begin with a letter and use only alphanumeric characters and underscores, and it can't end with an underscore or have two consecutive underscores. Unless you're familiar with working with the API, we suggest not editing this field.
 - h. In the `Description` field, describe what this quick action does. The description appears on the detail page for the action and in the list on the Buttons, Links, and Actions page. The description isn't visible to your users. If you're creating several actions on the same object, we recommend using a detailed description, such as "Send Email to Customer with Holiday Branding."
 - i. Click **Save**.
The email layout page opens, where you can specify the fields shown in the email action.
2. Check that you have the appropriate email body field for your template.
- The `Text Body` field is added to the Send Email quick action layout by default. If your email template uses images or HTML formatting, remove the `Text Body` field and add the `HTML Body` field to the email layout.

3. Click **Save**.

After you define the Send Email quick action, [add it to the case page layout](#) so it's available for agents to use.

SEE ALSO:

- [Add Quick Actions to the Case Page Layout for Lightning Experience](#)
- [Fields Available on the Send Email Quick Action](#)

Fields Available on the Send Email Quick Action

You can drag fields from the Email Message Fields palette to the email layout.

Table 1: Fields Available on the Send Email Quick Action

Field	Description
Blank Space	Adds empty space to the email layout. This field can be used multiple times within the email layout.
BCC Address	Email header field where agents can enter BCC addresses. If <code>BCC Address</code> is added to an email layout that includes the <code>To Address</code> field, the <code>BCC Address</code> field is collapsed and appears as a link in the email layout on the case page layout. When an agent clicks the BCC link, the field expands and doesn't collapse again. If the field is required, a red line appears next to it and the field is always expanded.
CC Address	Email header field where agents can enter CC addresses.

EDITIONS

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

Field	Description
	If <code>CC Address</code> is added to an email layout that includes the <code>To Address</code> field, the <code>CC Address</code> field is collapsed and appears as a link in the email layout on the case page layout. When an agent clicks the CC link, the field expands and doesn't collapse again. If the field is required, a red line appears next to it and the field is always expanded.
<code>From</code>	Email header field where agents can enter a From email address from a picklist (dropdown list). Agents can select from org-wide email addresses, Email-to-Case email addresses, and the agent's own email address. The <code>From</code> picklist is added by default in the Send Email action in new orgs created in Winter 17 or later. If you create a Send Email action after Winter 17, then the <code>From</code> picklist is added to the email layout by default.
<code>From Address</code>	Email header field where agents can enter a From email address. The <code>From Address</code> field is a text field.
<code>HTML Body</code>	Email body field that supports HTML formatting and images. If you set a default email template that contains HTML formatting on the Send Email quick action, then add the <code>HTML Body</code> field to the email layout.
<code>Is Externally Visible</code>	If the community case feed is enabled, <code>IsExternallyVisible</code> controls the external visibility of emails in communities. For more information, see <code>EmailMessage</code> in the API Guide.
<code>Parent Case</code>	Field for the parent case record ID.
<code>Related To</code>	Field for the record ID of related objects, such as accounts, opportunities, campaigns, cases, or custom objects. For more information, see <code>EmailMessage</code> in the API Guide.
<code>Subject</code>	Email header field where agents can enter a subject.
<code>Text Body</code>	Email body field that supports only plain text.
<code>To Address</code>	Email header field where agents can enter To email addresses.

SEE ALSO:

[Create a Send Email Quick Action for Cases](#)

[Apply a Default Email Template Using the Send Email Quick Action](#)

Create a Log a Call Quick Action

Before you can use case feed in Lightning Experience, you must recreate the Log a Call publisher as a quick action.

1. From the object management settings for cases, go to Buttons, Links, and Actions.
2. Click **New Action**.
3. Under **Action Type**, select Log a Call.
4. Under **Standard Label Type**, select Log a Call.
5. Click **Save**.
6. To choose the fields users see, customize the action's layout, then click **Save**.
7. On case page layouts, drag the new quick action to the Salesforce1 and Lightning Experience Actions section, then click **Save**.

SEE ALSO:

[Set Up Cases for Lightning Experience](#)

[Add Quick Actions to the Case Page Layout for Lightning Experience](#)

EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To set up cases for Lightning Experience:

- "Manage Cases"

AND

"Customize Application"

Create a Change Status Quick Action

Before you can use case feed in Lightning Experience, you must recreate the Change Status publisher as a quick action.

1. From the object management settings for cases, go to Buttons, Links, and Actions.
2. Click **New Action**.
3. Under **Action Type**, select Update a Record.
4. Under **Standard Label Type**, select Change Status.
5. Click **Save**.
6. To choose the fields users see, customize the action's layout, then click **Save**.
7. On case page layouts, drag the new quick action to the Salesforce1 and Lightning Experience Actions section, then click **Save**.

SEE ALSO:

[Set Up Cases for Lightning Experience](#)

[Add Quick Actions to the Case Page Layout for Lightning Experience](#)

EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To set up cases for Lightning Experience:

- "Manage Cases"

AND

"Customize Application"

Create a Quick Action to Change the Case Owner

Make it simpler for agents to reassign cases in Lightning Experience by adding an Update a Record quick action to the case page layout.

Cases can be reassigned to the following:

- Community partner user
- Community portal user
- Queue
- User

 **Note:** When you use a quick action to change the Case Owner, only the owner of the case is changed. The owner of related activities, notes, and tasks that are attached to the case isn't changed.

1. From Setup, enter "Case" in the Quick Find box, then select **Buttons, Links, and Actions**.
2. Click **New Action**.
3. In the **Action Type** picklist, select **Update a Record**.
4. In the **Standard Label Type** picklist, select *None*.
5. In the **Label** field, enter a name for this action. When you add the action to the case page layout, this label is displayed in the actions bar.

For example, *Transfer Case* or *Update Case Owner*.

6. The **Name** field is automatically populated. This name is used in the API and managed packages. It must begin with a letter and use only alphanumeric characters and underscores, and it can't end with an underscore or have two consecutive underscores. Unless you're familiar with working with the API, we suggest not editing this field.
7. In the **Description** field, describe what this quick action does. The description appears on the detail page for the action and in the list on the Buttons, Links, and Actions page. The description isn't visible to your users. If you're creating several actions on the same object, we recommend using a detailed description.
8. Click **Save**.
The action layout page opens, where you can specify the fields shown in the quick action.
9. In the action layout, drag the **Case Owner** field from the palette into the quick action layout.
To make a field read-only or required, click the wrench icon and specify the field properties.

10. Click **Save**.

After you define the update quick action, [add it to the case page layout](#) so it's available for agents to use.

SEE ALSO:

[Add Quick Actions to the Case Page Layout for Lightning Experience](#)

EDITIONS

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

USER PERMISSIONS

To create and modify the Send Email quick action:

- "Manage Cases" AND "Customize Application"

To edit a page layout:

- "Customize Application"

Add Quick Actions to the Case Page Layout for Lightning Experience

Make actions available to your agents by adding them to the Salesforce1 and Lightning Experience Actions section in the case page layout.

You can add standard actions and custom actions to the page layout. When you create a custom action, it appears in the palette.

You can drag and drop actions from the palette to the page layout.

1. Add quick actions to the case page layout.
 - a. From Setup, enter “Case” in the Quick Find box, then select **Page Layouts**.
 - b. Select the page layout that you want to add the action to, and click **Edit**.
 - c. Click **Salesforce1 & Lightning Actions**.
 - d. Drag the action into the Salesforce1 and Lightning Experience Actions section, and place the action where you want it to appear.

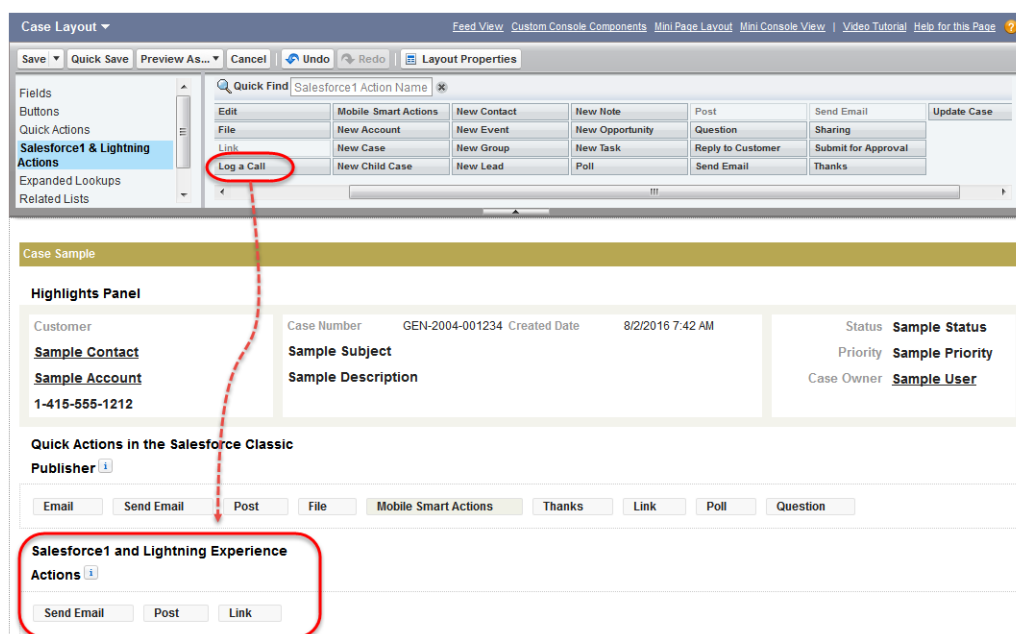
EDITIONS

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

USER PERMISSIONS

To edit a page layout:

- “Customize Application”



- e. Click **Save**.

Automating Contact Centers

Set Up Customer Support

If your organization uses cases and solutions, set up automated support features to make your support processes more efficient.

From Setup:

- Enter *Business Hours* in the Quick Find box, then select **Business Hours** to set your organization's support hours.
- Enter *Assignment Rules* in the Quick Find box, then select **Case Assignment Rules** to create rules for automatically routing cases.
- Enter *Escalation Rules* in the Quick Find box, then select **Escalation Rules** to create rules for automatically escalating cases.
- Enter *Support Settings* in the Quick Find box, then select **Support Settings** to customize email templates and defaults for automated support features.
- Enter *Auto-Response Rules* in the Quick Find box, then select **Case Auto-Response Rules** to set up rules that send email to customers when they submit cases from one of the following.
 - A Web-to-Case form
 - An Email-to-Case message
 - An On-Demand Email-to-Case message
 - A Customer Portal
 - A Self-Service portal
- Enter *Email-to-Case* in the Quick Find box, then select **Email-to-Case** to set up the ability to capture customer emails as cases. The setup specifies how the content of each customer email automatically populates case fields.

For support features related to solutions, from Setup, enter *Solution* in the Quick Find box, then:

- Select **Solution Categories** to set up categories so your users can categorize the solutions they create.
- Select **Solution Settings** to enable specific options for solutions.

For additional support features, from Setup, enter *Self-Service* in the Quick Find box, then:

- Select **Public Solutions** to set up public solutions for your customers to use when searching for solutions.
- Select **Web-to-Case** to set up the ability to capture cases from your website.
- Select **Settings** under Self-Service Portal to set up your organization's web portal for your customers to log cases and search for solutions.



Note: Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

For support features related to a Salesforce Customer Portal, from Setup, enter *Customer Portal* in the Quick Find box, then:

- Select **Customer Portal Settings** to set up your organization's Customer Portal so that your customers can log cases, search for solutions, and access any custom objects you may have created for them.

For support features related to [Salesforce CRM Call Center](#), from Setup, enter *Call Center* in the Quick Find box, then:

- Select **Call Centers** to set up new call centers and manage the users who are assigned to them.
- Select **Directory Numbers** to set up additional phone numbers that can be searched in a call center user's phone directory.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

The available support setup options vary according to which Salesforce Edition you have.

- Select **SoftPhone Layouts** to set up the layouts that are used to display call information in a call center user's SoftPhone.

To create support queues for cases or custom objects, from Setup, enter *Queues* in the *Quick Find* box, then select **Queues**.

The support features include the ability to notify customers when their case is created manually or via the web, or when their case is resolved. You can also automatically notify users when a case is escalated, created, or reassigned. To use notification emails, you must create email templates for each type of notification.

SEE ALSO:

- [Administrator tip sheet: Setting Up Customer Support](#)
- [Administrator tip sheet: Getting the Most from Your Self-Service Portal](#)
- [Administrator setup guide: Self-Service Implementation Guide](#)
- [Administrator setup guide: Case Management Implementation Guide](#)

Customize Support Settings

Turn on or set various support processes to automate case management. Choose email templates, default case owner, case notifications, and more.

To work with these settings, from Setup, enter *Support Settings* in the *Quick Find* box, then select **Support Settings** and click **Edit**.

Field	Description
Default Case Owner	The user or queue automatically assigned to all cases that don't match any case assignment rule entries. This user must be <i>Active</i> .
Notify Default Case Owner	Select this checkbox to notify the default case owner when a case is assigned to him or her. If the new owner is a queue, the notification is sent to the queue email address. Notifications are system-generated and can't be modified.
Record Type Setting	Indicates which record type to assign to cases created by users applying assignment rules. Select either: • Keep the existing record type if you want new cases to keep the creator's record type • Override the existing record type with the assignee's default record type if you want to overwrite the creator's record type on new cases
Automated Case User	The user listed in the Case Feed feed items and Case History related list for automated case changes. Automated case changes can occur from assignment rules, escalation rules,

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To change support settings:

- "Manage Cases"
- AND
- "Customize Application"

Field	Description
	On-Demand Email-to-Case, or cases logged in the Self-Service portal. You can: • Select <i>System</i> to indicate that an automated process performed an action, such as creating a case or changing a case's status. When you select System, the lookup field is grayed out. • Select <i>User</i> to use the lookup field to specify a user, such as an administrator, to be the Automated Case User. This user must have the System Administrator profile or the "Modify All Data" and "Send Email" permissions.
Case Creation Template	The template used to notify contacts that their case was created manually by a support agent. The notification is optional; it's triggered by a checkbox on the case edit page. This template must be Available for Use .
Case Assigned Template	The template used to notify users that a case was manually assigned to them by an administrator or another user. The notification is optional; it's triggered by a checkbox on the Change Case Owner page. This template must be Available for Use .
Case Close Template	The template used to notify contacts that a case has been closed. The notification is optional; it's triggered by a checkbox on the Close Case page. This template must be Available for Use .
New Cases Visible in Portal	Automatically selects the Visible in Self-Service Portal checkbox for all new cases, including cases created via Web-to-Case, Email-to-Case, and On-Demand Email-to-Case. Regardless of this default, users creating new cases can manually set the Visible in Self-Service Portal checkbox. If you're using Salesforce Communities, this setting does not apply for partner or customer users viewing cases in communities. New case visibility in communities is controlled by sharing rules.
Enable Case Comment Notification to Contacts	Select this checkbox to notify contacts who aren't Self-Service portal users when a case comment has been modified or added to a case. If you select this setting, click Case Comment Template and choose the email template to use for these notifications. This template must be Available for Use .
Notify Case Owner of New Case Comments	Select this checkbox to notify the case owner when a user adds a public or private comment to a case. If you select this setting, case owners can't opt out of receiving these notices. (Notices aren't sent to inactive case owners.)

Field	Description
Early Triggers Enabled	Select this checkbox to enable early triggers for escalation rules and their actions. You can set up an escalation rule to perform an action when a case has been unresolved for a specific number of hours. The Age Over hour you specify determines when Salesforce performs the escalation action. Enable early triggers to ensure that your escalation actions are triggered before the Age Over hour you specify.
Enable Suggested Solutions	Select this checkbox to enable the Suggested Solutions button on case detail pages so agents can propose specific solutions to help resolve cases.
Enable Suggested Articles	Select this option to provide suggested articles on the Articles related list. You can make suggested articles available in all Salesforce Knowledge channels except the public knowledge base.
Send Case Notifications from System Address	Select this checkbox to specify that case comment, attachment, and assignment notifications sent to case owners are sent from a system address, rather than the address of the user who updated the case. System notifications display a "From" email address of "noreply@salesforce.com", and an email "Name" related to the message, such as "Case Comment Notification". You can select this checkbox to prevent Self-Service or Customer Portal users who update their cases from receiving "out-of-office" emails from case owners.
Notify Case Owners when Case Ownership Changes	Select this checkbox to automatically select Send Notification Email on cases when users change a case owner to another user. This helps prevent users from forgetting to notify other users that they're the new owner of a case. Selecting this setting <i>doesn't</i> automatically select Send Notification Email when users change a case owner to a queue.
Show Closed Statuses in Case Status Field	Select this checkbox to add closed statuses to the Status field on cases so agents can close cases without having to click the Close Case button and update information on close case page layouts. Selecting Show Closed Statuses in Case Status Field doesn't remove the Close button from case list views. Instead, it adds Closed to the list of statuses available for users to choose from when they select multiple cases and click Change Status on case list views.

Field	Description
Hide Save & Close Button and CIs Links	After selecting Show Closed Statuses in Case Status Field as described above, you can select this checkbox so that the Save & Close button on case edit pages and CIs links on Cases related lists don't display unnecessarily. Instead, users close cases via the Status field and Save button.
Enable Case Feed Actions and Feed Items	Use this setting to turn on Case Feed-specific actions and feed items. When you select this option, existing cases are upgraded to the Case Feed user interface.
Size of Email Feed Item Body	Control the size of email feed items by setting a character limit on the email feed item body. You can set the character limit to: • Small = 400 characters (default) • Medium = 1200 characters • Large = 5000 characters • Custom = a value between 400 and 5000 characters If an email feed item body exceeds the character limit, users can click More to see the rest of the email feed item body.
Blank Lines in Email Feed Item Body	Select this checkbox to save space in Case Feed by removing blank lines in the body of email feed items.
Collapse Previous Emails in Email Feed Item Body	Select this checkbox to show only the most recent email in the email feed item body. Users can click More to see previous emails in the thread.
Enable Default Email Templates or the Default Handler for Email Action	Select this checkbox to specify an Apex class that loads a default email template in the Case Feed. Or, you can select this checkbox to specify the default values for the email fields that the Case Feed can automatically populate in emails.
Enable Email Drafts	Use this setting to enable email draft functionality.
Enable Question-to-Case in Salesforce	Let moderators create cases from Chatter questions in your organization.
Create Auto-Response Record After Customer's First Email	Change the order of case feed items and records, so feed items that are automatically generated appear after the customer's first email to your support center.



Note: Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

SEE ALSO:

[Set Up Customer Support](#)

Set Business Hours

Specify the hours when your support team is available to serve customers. This helps make your department's processes, such as escalations and milestones, more accurate.

Setting business hours lets you apply specific time zones and locations to:

- Milestones in entitlement processes
- Entitlement processes
- Cases
- Case escalation rules

You can also make the `Business Hours` field available on the Case Layout page so that your support agents can set the times a support team is available to work on the case. By default, business hours are set 24 hours, seven days a week in the default time zone specified in your organization's profile.

Additionally, users with the "Customize Application" permission can add business hours to escalation rules so that when the details of a case match the criteria of an escalation rule, the case is automatically updated and escalated with the times and location on the rule. For example, a case updated with Los Angeles business hours escalates only when a support team in Los Angeles is available.

To set business hours:

1. From Setup, enter `Business Hours` in the `Quick Find` box, then select **Business Hours**.
2. Click **New Business Hours**.
3. Type a name for the business hours.

We recommend using a name that will remind users of a location or time zone when they view business hours on a case, entitlement process, or milestone. For example, if your business hours are for a support center in San Francisco, you could use the name `San Francisco Business Hours`.

4. Click **Active** to allow users to associate the business hours with cases, escalation rules, milestones, and entitlement processes.
5. Optionally, click `Use these business hours as the default` to set the business hours as the default business hours on all new cases.

Default business hours on cases can be updated with business hours on escalation rules if the cases match escalation rule criteria and the rule is set to override business hours.

6. Choose a time zone to associate with the business hours in the `Time Zone` drop-down list.
7. Set your business hours for each day of the week.
 - If your support team is available during the entire day every day of the week, select the `24 hours` checkbox.
 - Choose the start and end times for the business hours. If the time you want isn't available, click the field and type it in.
 - Leave the business hours start and end times blank and the `24 hours` checkbox deselected to indicate that the support team is not available at all that day.

8. Click **Save**.

After you have set business hours, you can associate them with:

- Escalation rules, so that when the details of a case match the criteria of an escalation rule, the case is updated and escalated with the business hours on the rule.

EDITIONS

Available in: Salesforce Classic

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

Entitlements and milestones available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions** with the Service Cloud

USER PERMISSIONS

To set business hours:

- "Manage Business Hours Holidays"

- Holidays, so that business hours and any escalation rules associated with business hours are suspended during the dates and times specified in holidays.
- Milestones, in entitlement processes so that business hours can change with the severity of a case.
- Entitlement processes, so that you can use the same entitlement process for cases with different business hours.

 **Note:** All users, even those without the “View Setup and Configuration” user permission, can view business hours via the API.

SEE ALSO:

[Guidelines for Setting Business Hours](#)

[Set Up Support Holidays](#)

[Set Up Customer Support](#)

Guidelines for Setting Business Hours

To make your support processes more accurate, define when your support team is available to help customers. There are a few guidelines to keep in mind as you set business hours.

- After you set business hours, add the `Business Hours` lookup field to case layouts and set field-level security on the `Business Hours` field. This lets users view and update the business hours on a case.
- Business hours on a case are automatically set to your organization's default business hours, unless the case matches the criteria on an escalation rule associated with different business hours.
- Salesforce automatically calculates daylight savings times for the time zones available for business hours, so you don't have to configure rules to account for time zones.
- Business hours on a case include hours, minutes, and seconds. However, if business hours are less than 24 hours, the system ignores the seconds for the last minute before business hours end. For example, suppose it is 4:30 PM now, and business hours end at 5:00 PM. If you have a milestone with a 30-minute target, it's more common to say that the target is 5:00 PM, not 4:59 PM. To accommodate this, the system stops counting seconds after 5:00. If seconds were counted from 5:00:00-5:00:59, the 30-minute target would occur after the 5:00:00 PM target cut-off and would roll over to the next day.
- Escalation rules only run during the business hours they're associated with.
- You can update cases associated with business hours that are no longer active. without having to reactivate business hours.
- You can't include the `Business Hours` field in list views or reports.
- You can create multiple business hours for support teams that operate in the same time zone but at different hours.
- For simplicity, we recommend that you create one set of business hours per support center.
- You can't deactivate business hours that are included in escalation rules. You must first remove them from the escalation rules.
- You can associate up to 1000 holidays with each set of business hours.
- On cases that include entitlements, business hours are applied according to a hierarchy. For details, see [How Business Hours Work in Entitlement Management](#).

EDITIONS

Available in: Salesforce Classic

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

Entitlements and milestones available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud

 **Note:** All users, even those without the “View Setup and Configuration” user permission, can view business hours via the API.

SEE ALSO:

[Set Business Hours](#)

[Set Up Support Holidays](#)

Set Up Support Holidays

Holidays let you specify the dates and times your customer support team is unavailable. After you create a holiday, you can associate it with business hours to suspend business hours and escalation rules during holiday dates and times.

For example, you could create a holiday called New Year’s Day that begins at 8 p.m. on December 31 and ends at 9 a.m. on January 2. Escalation rules and entitlement milestones wouldn’t apply during the holiday.

1. From Setup, enter *Holidays* in the *Quick Find* box, then select **Holidays**.

2. Click **New**, or click **Clone** next to the name of an elapsed holiday.

You can only clone elapsed holidays.

3. Type a name for the holiday.

4. Type a date for the holiday.

If you want the holiday to span more than one day:

- a. Select the *Recurring Holiday* checkbox.
- b. Enter the first day of the holiday in the *Start Date* field.
- c. Deselect the *No End Date* checkbox in the *End Date* field.
- d. Enter the last day of the holiday in the *End Date* field.

5. Optionally, you can:

- Specify the exact times at which the holiday takes place by deselecting the *All Day* checkbox next to the *Time* field and entering the exact times.
- Select the *Recurring Holiday* checkbox to schedule the holiday to recur during specific dates and times:
 - In the *Frequency* field, select the frequency at which the holiday recurs. When you click the *Daily*, *Weekly*, or *Monthly* fields, more options display that allow you to refine frequency criteria.
 - In the *Start Date* and *End Date* fields, specify the dates during which you wish the holiday to recur.

The following error message displays if you select a start date and end date that does not correspond with the frequency you selected: *The recurring holiday has no occurrence.*

6. Click **Save**.

7. Click **Add/Remove** on the Business Hours related list.

8. Use the **Add** and **Remove** to choose the business hours you want to associate with the holiday. You can associate the holiday with multiple business hours.

EDITIONS

Available in: Salesforce Classic

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

Entitlements and milestones available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions** with the Service Cloud

USER PERMISSIONS

To set holidays:

- “Manage Business Hours Holidays”

 **Note:** All users, even those without the “View Setup and Configuration” user permission, can view holidays via the API.

SEE ALSO:

[Guidelines for Creating Support Holidays](#)

[Set Business Hours](#)

[Set Up Customer Support](#)

Guidelines for Creating Support Holidays

Holidays let you specify the dates and times your customer support team is unavailable. There are a few guidelines to keep in mind as you set up and work with holidays.

- You can associate up to 1000 holidays with each set of business hours.
- Holidays automatically acquire the time zone of the business hours with which they are associated. For example if you associate a holiday to business hours that are in Pacific Standard Time, the holiday will take effect for those business hours in Pacific Standard Time
- You can only add business hours marked as `Active` to holidays.
- Holiday names don't need to be unique. For example, you could create multiple holidays named *New Year's Day*.
- Currently, report results do *not* take holidays into account.
- If you schedule a holiday to recur on a specific day of every month, the holiday will only recur on months that have that specific day. For example, if you schedule a holiday on the 31st day of every month, then the holiday will only recur on months that have 31 days. If you want a holiday to recur on the last day of every month, choose last from the `On day of every month` drop-down list.
- All users, even those without the “View Setup and Configuration” user permission, can view holidays via the API.

EDITIONS

Available in: Salesforce Classic

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

SEE ALSO:

[Set Up Support Holidays](#)

[Set Business Hours](#)

Set Up Assignment Rules

Define conditions that determine how leads or cases are processed.

1. From Setup, enter *Assignment Rules* in the **Quick Find** box, then select either **Lead Assignment Rules** or **Case Assignment Rules**.
2. Choose **New**, and then give the rule a name. Specify whether you want this to be the active rule for leads or cases created manually and via the web and email. Then click **Save**.
3. To create the rule entries, click **New**. For each entry, you can specify:

Field	Description
Order	Sets the order in which the entry will be processed in the rule, for example, 1, 2, 3. Salesforce evaluates each entry in order and tries to match the criteria of the entry. As soon as a match is found, Salesforce processes the item and stops evaluating the rule entries for that item. If no match is found, the item is reassigned to either the default Web-to-Lead owner, the administrator doing a lead import, or the default case owner.
Criteria	Specifies conditions that the lead or case must match for it to be assigned. Enter your rule criteria. • Choose <code>criteria are met</code> and select the filter criteria that a record must meet to trigger the rule. For example, set a case filter to <code>Priority equals High</code> if you want case records with the <code>Priority</code> field marked High to trigger the rule. If your organization uses multiple languages, enter filter values in your organization's default language. You can add up to 25 filter criteria, of up to 255 characters each. When you use picklists to specify filter criteria, the selected values are stored in the organization's default language. If you edit or clone existing filter criteria, first set the <code>Default Language</code> on the <code>Company Information</code> page to the same language that was used to set the original filter criteria. Otherwise, the filter criteria may not be evaluated as expected. • Choose <code>formula evaluates to true</code> and enter a formula that returns a value of "True" or "False." Salesforce triggers the rule if the formula returns "True." For example, the formula <code>AND (ISCHANGED (Priority), ISPICKVAL (Priority, "High"))</code> triggers a rule that changes the owner of a case when the <code>Priority</code> field is changed to High. If your condition uses a custom field, the rule entry will be deleted automatically if the custom field is deleted.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Lead Assignment Rules available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Case Assignment Rules available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To create assignment rules:

- "Customize Application"

Field	Description
User	Specifies the user or queue to which the lead or case will be assigned if it matches the condition. Users specified here cannot be marked “inactive” and they must have “Read” permission on leads or cases.  Note: You can't revoke the “Read” permission on leads or cases for users assigned to a rule. If your organization uses divisions, leads are assigned to the default division of the user or queue specified in this field. Cases inherit the division of the contact to which they are related, or are assigned to the default global division if no contact is specified.
Do Not Reassign Owner	Specifies that the current owner on a lead or case will not be reassigned to the lead or case when it is updated.
Email Template	Specifies the template to use for the email that is automatically sent to the new owner. If no template is specified, no email will be sent. When assigning a lead or case to a queue, the notification goes to the Queue Email address specified for the queue and all queue members.
Predefined Case Teams	Specifies the predefined case team(s) to add to a case when it matches the condition. Case teams help groups of people work together to solve a case, such as a support agent, support manager, and a product manager. Click the Lookup icon () to select a predefined case team to add to the assignment rule. To add more predefined case teams, click Add Row to add a new row with which you can add a predefined case team.
Replace any existing predefined case teams on the case	Specifies that any existing predefined case teams on the case are replaced with the predefined case teams on the condition, when a case matches the condition.

After creating the entry, click **Save**, or **Save & New** to save the entry and create more entries.



Tip: Create an error-proof rule by always creating the last rule entry with no criteria. This rule entry catches any leads or cases that the previous rule entries didn't assign.

SEE ALSO:

[Viewing and Editing Assignment Rules](#)

[Managing Assignment Rules](#)

Viewing and Editing Assignment Rules

To view and edit assignment rules:

- To edit the name of a rule, click **Rename** next to the rule name.
- To edit the entries for a rule, choose the rule name from the list of rules. Click **New** to add an entry; choose **Edit** or **Del** to edit or delete an entry; select **Reorder** to change the order in which the entries apply.

SEE ALSO:

[Set Up Assignment Rules](#)

[Managing Assignment Rules](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Lead Assignment Rules available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Case Assignment Rules available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To change assignment rules:

- "Customize Application"

To view assignment rules:

- "View Setup and Configuration"

Managing Assignment Rules

Create assignment rules to automate your organization’s lead generation and support processes.

- **Lead Assignment Rules**—Specify how leads are assigned to users or queues as they are created manually, captured from the web, or imported via the Data Import Wizard.
- **Case Assignment Rules**—Determine how cases are assigned to users or put into queues as they are created manually, using Web-to-Case, Email-to-Case, On-Demand Email-to-Case, the Self-Service portal, the Customer Portal, Outlook, or Lotus Notes.

Typically, your organization will have one rule for each overall purpose—for example, one lead assignment rule for importing and a different lead assignment rule for web-generated leads; or one case assignment rule for standard use and one case assignment rule for holiday use. For each rule type, only one rule can be in effect at any time.

Each rule consists of multiple rule entries that specify exactly how the leads or cases are assigned. For example, your standard case assignment rule may have two entries: cases with “Type equals Gold” are assigned to “Gold Service” queue, and cases with “Type equals Silver” are assigned to “Silver Service” queue.

To create an assignment rule, from Setup, enter *Assignment Rules* in the Quick Find box, then select **Lead Assignment Rules** or **Case Assignment Rules**.

Sample Assignment Rule

The following case assignment rule assigns a case to a specific queue based on the account rating:

Rule Name — *Hot Account Assignment*

Rule Entries:

Order	Criteria	Assign To
1	<i>ISPICKVAL (Account.Rating, "Hot")</i>	<i>Tier 1 Support Queue</i>
2	<i>OR(ISPICKVAL (Account.Rating, "Warm") , Tier 2 Support Queue ISPICKVAL (Account.Rating, "Cold"))</i>	

SEE ALSO:

- [Set Up Assignment Rules](#)
- [Viewing and Editing Assignment Rules](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Lead Assignment Rules available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Case Assignment Rules available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To create or change assignment rules:

- “Customize Application”

Set Up Auto-Response Rules

Send automatic email responses to lead or case submissions based on the record's attributes. Set up auto-response rules to send quick replies to customers to let them know someone at your company received their inquiry or details about their issue.

Create auto-response rules for leads captured through a Web-to-Lead form and for cases submitted through a:

- Self-Service portal
- Customer Portal
- Web-to-Case form
- Email-to-Case message
- On-Demand Email-to-Case message

Create as many response rules as you like based on any attribute of the incoming lead or case. Keep in mind that you can activate only one rule for leads and one for cases at a time. Sales and service reps can find the email responses in the Activity History related list of the lead or contact and in the Email related list on cases.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create auto-response rules:

- "Customize Application"

Creating Auto-Response Rules

To create a Web-to-Lead response rule, from Setup, enter *Auto-Response Rules* in the Quick Find box, then select **Lead Auto-Response Rules**. To create a response rule for cases, from Setup, enter *Auto-Response Rules* in the Quick Find box, then select **Case Auto-Response Rules**. On the Auto-Response Rules page:

1. Click **New**.
2. Enter the rule name.
3. Check the active box to make this rule the only one activated.
4. Click **Save**.
5. Create rule entries.

Creating Response Rule Entries

1. Click **New** from the rule detail page.
2. Enter a number to specify the order this entry should be processed.

The rule processes entries in this order and stops processing at the first matching entry and then sends the email using the specified email template. If no response rules apply, the rule uses the default template you specify on the Web-to-Case or Web-to-Lead Settings page.



Note: To create an error-proof rule, always create the last rule entry with no criteria. This rule entry will catch any leads or cases that the previous rule entries did not. This is especially important for Email-to-Case and On-Demand Email-to-Case which don't have default templates.

3. Enter your rule criteria:

- Choose *criteria are met* and select the filter criteria that a record must meet to trigger the rule. For example, set a case filter to *Priority equals High* if you want case records with the *Priority* field marked High to trigger the rule.

If your organization uses multiple languages, enter filter values in your organization's default language. You can add up to 25 filter criteria, of up to 255 characters each.

When you use picklists to specify filter criteria, the selected values are stored in the organization's default language. If you edit or clone existing filter criteria, first set the `Default Language` on the Company Information page to the same language that was used to set the original filter criteria. Otherwise, the filter criteria may not be evaluated as expected.

- Choose `formula evaluates to true` and enter a formula that returns a value of "True" or "False." Salesforce triggers the rule if the formula returns "True." For example, the formula `AND (ISPICKVAL (Priority, "High"), Version<4.0)` triggers a rule that automatically responds with the selected template if the `Priority` field on a case is set to High and the value of a custom field named `Version` on the case is less than four.
4. Enter the name to include on the From line of the auto-response message.
 5. Enter the email address to include on the From line of the auto-response message. This must be either one of your verified organization-wide email addresses or the email address in your Salesforce user profile, and must be different from the routing addresses you use for Email-to-Case.
 6. If you want, enter a reply-to address.
 7. Select an email template.
 8. If you're creating a response rule entry for Email-to-Case, select `Send response to all recipients` to send auto-response messages to anyone included in the `To` and `Cc` fields in the original message.
 9. Save your work.

SEE ALSO:

[Differences Between Auto-Response Rules and Workflow Email Alerts](#)

Differences Between Auto-Response Rules and Workflow Email Alerts

Auto-response rules and workflow email alerts provide similar functionality. The following table lists some of the differences between workflow alerts and auto-response rules to help you determine which process to use:

Type of Process	Designed For	Runs When	Sends Email To	Number of Emails Sent
Workflow email alerts	Notifications to interested parties.	A case or lead is created or edited.	Anyone you choose.	Sends one email per email alert. Each workflow rule can have up to: • 10 email alerts as immediate actions • 10 email alerts per time trigger as time-dependent actions • 10 time triggers

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Auto-response rules are available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Workflow is available in: **Enterprise, Performance, Unlimited, Developer, and Database.com** Editions

Type of Process	Designed For	Runs When	Sends Email To	Number of Emails Sent
Auto-response rules	Initial response to the contact who created a case or the person who submitted the lead on the Web.	A case or lead is created.	Contact on a case or the person who submitted the lead on the Web.	Sends one email based on the first rule entry criteria it matches in a sequence of rule entries.

SEE ALSO:

[Set Up Auto-Response Rules](#)

Set Up Escalation Rules

Escalation rules automatically escalate cases when the case meets the criteria defined in the rule entry. You can create rule entries, which define criteria for escalating a case, and escalation actions, which define what happens when a case escalates.

Before you get started:

- If you want to assign cases to queues, create [queues](#).
- If you want to send notification emails when a case escalates, create email templates.

When Salesforce applies an escalation rule to a case, it inspects the case and compares the case to the criteria in the rule entry. If the case matches the criteria defined in the rule entry, Salesforce runs the escalation actions.

Orgs typically use one escalation rule that consists of multiple rule entries. For example, your standard case escalation rule could have two entries: cases with `Type` set to Gold are escalated within two hours, and cases with `Type` set to Silver are escalated within eight hours.

1. From Setup, enter *Escalation Rules* in the Quick Find box, then select **Escalation Rules**.
2. Create the escalation rule.
 - a. Click **New** and name the rule. Specify whether you want this rule to be the active escalation rule.
You can have only one active escalation rule at a time.
 - b. Click **Save**.
3. On the Case Escalation Rules page, select the rule that you want to work with.
The rule detail page is displayed.
4. Create the rule entries. Rule entries define the criteria used to escalate the case.
 - a. In the Rule Entries section, click **New**. For each rule entry, you can specify:
 - Order in which rule entries are evaluated
 - Criteria for escalating a case
 - How business hours affect when cases escalate
 - How escalation times are determined
 - b. Click **Save**.
The Escalation Actions page is displayed.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create or edit escalation rules:

- “Customize Application”

5. Define the escalation actions. Escalation actions specify when the case escalates and what happens when the case escalates. You can add up to five actions for each rule entry to escalate the case over increasing periods of time.
 - a. In the Escalation Actions section, click **New**. For each escalation action, you can:
 - Specify when the case escalates: In the **Age Over** field, enter the number of hours after which a case escalates if it hasn't been closed. You can enter the number of hours and either 0 minutes or 30 minutes. For example, 1 hour and 0 minutes or 1 hour and 30 minutes.
 - Reassign the case to another user or queue, and select an email template that sends the new assignee (the new case owner) a notification email.
 - Send notification emails to other users, the current case owner, or other recipients.
 - b. Click **Save**.

SEE ALSO:

[Escalation Rule Entries](#)

[Escalation Actions](#)

[Monitor the Case Escalation Rule Queue](#)

Escalation Rule Examples and Best Practices

See examples of how different options in the escalation rule entries and actions affect how and when cases escalate.

SEE ALSO:

[Escalation Rule Entries](#)

[Escalation Actions](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Escalation Rule Entries

Escalation criteria specify the conditions under which a case escalates. We store your criteria in a rule entry.

When Salesforce applies an escalation rule to a case, it inspects the case and compares the case to the criteria in the rule entry. If the case matches the criteria defined in the rule entry, Salesforce runs the escalation actions.

Let's break down the parts of an escalation rule entry and go over the best practices for each step:

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Rule Entry Edit
Support Escalation Rule

Help for this Page ?

Enter the rule entry [Save] [Save & New] [Cancel]

Step 1: Set the order in which this rule entry will be processed [Required Information]

Sort Order [1] 1

Step 2: Select the criteria for this rule entry

Run this rule if the following criteria are met 2.1

Field 2.2 Operator Value

Case: Priority	equals	High	AND
Account: Account Name	equals	Acme, Global Media	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Add Filter Logic... 2.3

Step 3: Specify the business hours criteria for this escalation rule

☐ Ignore business hours

☒ Use business hours specified on case 3

☐ Set business hours

Step 4: Specify how escalation times are set

☒ Based on when the case is created 4

☐ Based on when the case is created, and disable after the case is first modified

☐ Based on last modification time of the case

[Save] [Save & New] [Cancel]

Step 1: Rule Entry Order

The `Sort Order` determines the sequence in which Salesforce evaluates rule entries [1]. Typically, orgs use one escalation rule that's made up of several rule entries.



Tip: As a best practice, put the most complex rule entries at the beginning of the sort order. Put more generic rule entries at the end of the sort order.

Suppose that you have five rule entries. Salesforce looks at the first rule entry to see if its criteria matches the case. If the criteria matches, then Salesforce stops evaluating and escalates the case. If the criteria doesn't match, then Salesforce looks at the second rule entry to see if it matches, and so on, until it finds a match.

If the first rule entry is generic, then Salesforce finds a match and escalates the case without continuing to evaluate later rule entries.

It's a good practice to put a generic "catch-all" rule entry at the end of the rule entry order. The catch-all rule entry is designed to escalate cases that don't meet the criteria specified in the other rule entries. For example, perhaps you want to escalate cases that have been open for more than 48 hours. Create a rule entry that contains no criteria so that it catches all remaining cases, and specify that cases escalate 48 hours after they were created.

Step 2: Rule Entry Criteria

The rule entry criteria define the case field values that trigger an escalation. When Salesforce evaluates the rule entry, it looks at the criteria and sees if the criteria match the field values set on the case. If the criteria match, the case is escalated.

Run this rule if the criteria are met

You can define escalation criteria using field values by selecting **criteria are met** [2.1].

Select the field, select the operator, and select the value [2.2]. For example, suppose that we want to escalate cases that are high priority and from our two biggest customers, Acme and Global Media. We can create a

rule entry that escalates cases where the Priority field equals *High* and the Account: Account Name field equals *Acme* or *Global Media*.

You can specify more field values by filling out the rows.



Tip: By default, the filter concatenates the rows using AND. However, if you want to use a different filter operator, click **Add Filter Logic** [2.3]. You can refine the filter using parentheses, AND, and OR. For example, (1 AND 2) or (3 AND 4).

Run this rule if the criteria are met

You can define escalation criteria using a formula by selecting **formula evaluates to true**.

Enter a formula that returns a value of True or False. Salesforce triggers the rule if the formula returns "True."

Step 3: Business Hours Criteria

Business hours let you specify when your support team is available [3]. If business hours are specified on the escalation rule, then escalation actions occur only during business hours.

Let's look at some examples. Let's say that your support team is based in San Francisco and works from 9 AM-5 PM Monday-Friday, Pacific time.

Ignore business hours

If you don't want to use business hours when calculating when cases are escalated, select **Ignore business hours**. In this situation, a case is escalated without consideration of the support team's business hours or the case's business hours. For example, a case might escalate at 3 AM Pacific time, even though the support team isn't available.

Use business hours specified on the case

A case might have different business hours than your support team. If business hours are specified on the case, then the case escalates during the case's business hours.

Suppose that your support team is located in San Francisco and works 9-5 Pacific time, but your customer is located in New York and operates on Eastern time. You could specify Eastern business hours on the case, so that your support team knows to contact the customer during Eastern business hours. If **Use business hours specified on the case** is selected, then the case escalates during East Coast business hours. So, a case could escalate at 6 AM Pacific, because that's within Eastern business hours (9 AM -5 PM Eastern, which is 6 AM-2 PM Pacific).

Set business hours

Use the lookup to select the business hours that are defined for your company. If you select this option, then cases are escalated during these hours. Perhaps you've defined business hours as 9 AM-5 PM Pacific time. If you select the 9-5 Pacific time business hours, then cases would only be escalated during that time period.

Step 4: How Escalation Times Are Set

Specify when the escalation clock starts ticking by specifying how escalation times are set [4]. Your selection here affects when the time period specified in the **Age Over** field begins to run. You can set the **Age Over** field on the Escalation Actions page.

When case is created

The escalation clock starts ticking when the case is created, and the case escalates when the time period set in the **Age Over** field expires.

If **Age Over** is set to 5 hours, then the case escalates five hours after the case is created. If the case is created at 9 AM on Monday morning, it would escalate at 2 PM on Monday afternoon.

When case is created

The escalation clock starts ticking when the case is created, and the case escalates when the time period set in the Age Over field expires.

If **Age Over** is set to 5 hours, then the case escalates five hours after the case is created. If the case is created at 9 AM on Monday morning, it would escalate at 2 PM on Monday afternoon.

When case is created, and disable after case is first modified

The escalation clock starts ticking when the case is created but stops when the case is modified, provided that the case is modified before the Age Over time period expires.

If **Age Over** is set to 5 hours, then the case escalates five hours after the case is created unless the case is modified before five hours elapse. If the case is created at 9 AM on Monday morning and isn't modified within the five-hour period, then the case would escalate at 2 PM on Monday afternoon. However, if the case is created at 9 AM on Monday and a support agent modifies the case at 10 AM, then the case wouldn't escalate.

Based on last modification time

The escalation clock starts ticking when the case is modified.

If **Age Over** is set to 5 hours, then the case escalates five hours after the case is last modified. Suppose that the case is created at 9 AM on Monday morning and an agent modifies the case at 10 AM. The case would escalate at 3 PM on Monday afternoon, which is five hours after the 10 AM modification.

SEE ALSO:

[Set Up Escalation Rules](#)[Escalation Actions](#)

Escalation Actions

Escalation actions specify when the case escalates and what happens when the case escalates. An escalation rule can reassign the case to another support agent (user) or support queue (queue). An escalation rule also can send notification emails to the new assignee, to the current case owner, and to other recipients.

Let's break down the parts of an escalation action and go over best practices for each step:

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Escalation Action Edit

[Help for this Page](#)

Save Cancel

Escalation Action Edit

= Required Information

Specify the time criteria for this rule

Age Over 0 minutes

Choose one or more of the following actions:

Auto-reassign cases to

Queue Notification Template

Select the user to notify

Notify This User Notification Template

Notify Case Owner ☒

You can enter up to five (5) email addresses to be notified. Please put each address on its own line.

Additional Emails

Save Cancel

Age Over

Salesforce escalates the case if the case hasn't been closed within this time period [1]. For example, escalate the case if it hasn't been closed within five hours.

This time is calculated from the date field set in the `Specify how escalation times are set` field in the rule entry. No two escalation actions can have the same number in this field.

The `Age Over` field is required, because escalation rules are time-based.

Auto-Reassign Cases

When a case escalates, Salesforce can reassign the case to a different user or queue [2].

- `Queue` or `User`—Select a user or queue to reassign the case to. When a case is reassigned, the queue or user becomes the new case owner. Companies typically reassign cases to a queue instead of a specific user. For example, if Level 1 support doesn't resolve a case within 24 hours, the case is reassigned to the Level 2 support queue.
- `Notification Template`—Select a notification template to use to send a notification email to the assignee.

If you select a `Notification Template`, then Salesforce sends a notification email to the new case owner. The template controls which fields are included in the notification email. For example, the email template might include the case number, case contact, account name, and case reason so that the new case owner can quickly understand the situation.

Notify Users

When a case escalates, Salesforce can send a notification email so that a user, the current case owner, or other email recipients know that the case is escalating [3].

- `Notify This User`—Select a user to notify. For example, you might want to notify the support manager.

- **Notify Case Owner**—Send an email to the current case owner to remind them that the case is escalating. Select this checkbox when you want to notify the case owner but haven't reassigned the case.
- **Additional Emails**—You can send notification emails to other people when a case is escalated. Enter up to five email addresses, each on a separate line. For example, you can set up an escalation rule to notify support managers or executives so that they know that a case is escalating.
- **Notification Template**—If you select **Notify This User**, **Notify Case Owner**, or **Additional Emails**, then you must select a notification template to send a notification email to the user, case owner, or additional recipients. The template controls which fields are included in the notification email.

SEE ALSO:

[Set Up Escalation Rules](#)

[Escalation Rule Entries](#)

When do rules execute?

Salesforce processes rules in a certain order.

1. Validation rules
2. Assignment rules
3. Auto-response rules
4. Workflow rules (with immediate actions)
5. Escalation rules

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Set Up Quick Text

Quick Text lets users create messages, such as greetings, answers to common questions, and short notes, which support agents can easily insert into case updates and communications with customers to save time and increase standardization. When you set up Quick Text, you enable it, set the user permissions so agents can use it, and create standardized messages.

1. [Enable Quick Text](#).

Quick Text is automatically enabled for organizations that have enabled Live Agent, but you might not see it enabled in your Quick Text settings. If you encounter this, manually enable Quick Text.

2. Optionally, customize Quick Text settings.
3. [Grant permissions to users so that they can create Quick Text messages](#).
4. [Create Quick Text messages](#).
5. If your organization uses Live Agent, [give agents access to the Quick Text sidebar in the Live Agent console](#).

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up Quick Text:

- "Customize Application"

Enable Quick Text

Enable Quick Text for your organization so your agents can use pre-defined messages to respond to your customers and update cases quickly and easily.

 **Note:** Once you enable Quick Text, you can't disable it.

- 1. From Setup, enter *Quick Text Settings* in the Quick Find box, then select **Quick Text Settings**.
- 2. Click **Enable Quick Text**.
- 3. Click **Save**.

After enabling Quick Text, give support agents access to Quick Text by updating the user permissions.

SEE ALSO:

- [Set Up Quick Text](#)
- [Create Quick Text Messages](#)

Give Support Agents Access to Quick Text

Giving agents access to Quick Text lets them choose standard messages to include in their chats and emails with customers, and in their case notes and updates.

To allow agents to use Quick Text in the Live Agent console, in Live Agent in the Salesforce console, or in the Email, Portal, Log a Call, and Change Status actions in Case Feed:

- Give them “Read” permission on Quick Text, and
- Do one of the following:

Option	Steps
Give agents ownership of at least one Quick Text message	– Transfer ownership of existing Quick Text messages to the agents (click Change next to Owner on the record), or – Have agents create new messages
Change your organization-wide default sharing setting for Quick Text	1. From Setup, enter <i>Sharing Settings</i> in the Quick Find box, then select Sharing Settings. 2. In Organization-Wide Defaults, click Edit. 3. Select Public Read Only or Public Read-Write in the Default Access dropdown list for Quick Text. 4. Click Save.
Use sharing rules	If you don't want to change your organization-wide default sharing settings, create sharing rules to specify which groups

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable Quick Text:

- “Customize Application”

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up Quick Text:

- “Customize Application”

Option	Steps
	of users should have at least read-only access to Quick Text messages.

After giving support agents access to Quick Text, you optionally can create standardized messages that they can use.

SEE ALSO:
[Set Up Quick Text](#)

Create Quick Text Messages

Quick Text messages enable agents to include standardized notes with case updates and to send common responses to customers without having to type the responses each time. Create custom messages for your agents to use when they email and chat with customers.

1. Click the **Quick Text** tab.
2. Click **New**.
3. If you have more than one Quick Text record type, select a record type for the new message, and then click **Continue**.
4. Type a message name.
5. Type the message.
It can include line breaks, lists, and special characters and can be up to 4,096 characters.
6. Click **Available Merge Fields** to display the merge field selector.
7. Select the channels in which you want the message to be available.
Depending on which features are enabled in your organization, these channels might be available.
 - **Email**—the Case Feed Email action
 - **Live Agent**—Live Agent in the Salesforce console
 - **Portal**—a community or a customer portal
 - **Phone**—the Case Feed Log a Call action
 - **Internal**—the Case Feed Change Status action
8. Select a category.
9. Optionally, select a subcategory.
10. Click **Save**.

 **Tip:** Click **Test and Verify Merge Fields** to view a sample of the quick text, populated with data from records that you choose.

SEE ALSO:
[Set Up Quick Text](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create Quick Text messages:

- “Create,” “Read,” “Edit,” and “Delete” on Quick Text

Monitoring Support Processes

Monitor Automated Article Process Actions

Salesforce Knowledge users can schedule articles to be published or archived on a specific date. Use the automated-process actions queue to view these pending actions and cancel them if necessary.

1. From Setup, enter *Automated Process Actions* in the **Quick Find** box, then select **Automated Process Actions**.
2. Click **Search** to view all pending actions for any article, or set the filter criteria and click **Search** to view only the pending actions that match the criteria.

The filter options are:

Process Definition

The process that is triggering the action. This value is always "KBWorkflow."

Object

The object that triggered the pending action. This value is always "Knowledge Article."

Scheduled Date

The date the pending actions are scheduled to occur.

Create Date

The date the article that triggered the pending action was created.

Created By

The user who created the article that triggered the pending action.

Record Name

The name of the article that triggered the pending action.

The filter is not case-sensitive.

To cancel pending actions, select the box next to the pending actions you want to cancel and click **Delete**.

Monitor the Case Escalation Rule Queue

When Salesforce triggers a case escalation rule that has time-dependent actions, use the escalation rule queue to view pending actions and cancel them if necessary.

To view pending actions:

1. From Setup, enter *Case Escalations* in the **Quick Find** box, then select **Case Escalations**.
2. Click **Search** to view all pending actions for any active case escalation rule, or set the filter criteria and click **Search** to view only the pending actions that match the criteria. The filter options are:

Case To Escalate

The **Case Number** of the escalated case. The **Case Number** is a unique, automatically generated number used for identifying the case.

Escalation Rule

The name of the rule used to escalate the case.

EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

USER PERMISSIONS

To manage automated-process actions:

- "Modify All Data"

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To manage the case escalation rule queue:

- "Modify All Data"

Rule Entry

The order in which the rule entry will be processed. A rule entry is a condition that determines how a case escalation rule is processed. Each escalation rule can have a maximum of 3000 rule entries.

Escalation Action

The time criteria specified for the case to escalate as defined in the rule entry.

Ignore Business Hours

Indicates if the `Ignore Business Hours` checkbox is selected on the rule entry, meaning that the rule entry is in effect at all times and ignores your organization's business hours.

Escalate At

The date and time at which the case will escalate as defined in the rule entry. Dates and times display in the time zone of the user viewing the escalation rule queue.

Added Date

The date and time at which the case was added to the queue. Dates and times display in the time zone of the user viewing the escalation rule queue.

The filter is not case-sensitive.

To cancel pending actions:

1. Select the box next to the pending actions you want to cancel.
2. Click **Delete**. Salesforce cancels the pending action.

SEE ALSO:

[Set Up Escalation Rules](#)

[Escalation Rule Examples and Best Practices](#)

Monitor the Entitlement Process Queue

When Salesforce triggers an entitlement process that has time-dependent milestone actions, use the entitlement process queue to view pending actions and cancel them, if necessary.

To view pending actions:

1. From Setup, enter *Entitlement Processes* in the `Quick Find` box, then select **Entitlement Processes**.
2. Click **Search** to view all pending actions for any active workflow rules, or set the filter criteria and click **Search** to view only the pending actions that match the criteria. The filter options are:

Entitlement Process Name

The entitlement process.

Case Number

The case's automatically generated identifying number.

Milestone Name

The milestone that triggered the action.

Evaluation Date

The date the evaluated actions are scheduled to occur.

Created Date

The creation date of the case that triggered the entitlement process.

EDITIONS

Available in: Salesforce Classic

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

Entitlement process monitoring is not available in Professional Edition orgs.

USER PERMISSIONS

To manage the entitlement process queue:

- "Modify All Data"

Username

The user who updated the case to trigger an entitlement process.

The filter is not case-sensitive.

To cancel pending actions:

1. Select the box next to the pending actions you want to cancel.
2. Click **Delete**.

Adding Entitlements and Service Agreements

What Is Entitlement Management?

Entitlement management helps you provide the correct support to your customers. It includes a variety of features that let you define, enforce, and track service levels as part of your support management process.

Entitlement management features include:

- *Entitlements*, which let support agents determine whether a customer is eligible for support.
- *Entitlement processes*, which let you design timelines that include all the steps that your support team must complete to resolve support records like cases or work orders.
- *Service contracts*, which let you represent different kinds of customer support agreements like warranties, subscriptions, or maintenance agreements. You can restrict service contracts to cover specific products.
- *Community access to entitlements*, which lets community users view entitlements and service contracts and create support records from them.
- *Reporting on entitlement management*, which lets you track the way entitlements are used in your Salesforce org and whether service contract terms are being met.

Because entitlement management is highly customizable, you have full control of which features you use and how you set them up to reflect your customer support model. We'll walk you through important planning decisions and setup steps to help you make the most of entitlement management. To get started, we recommend that you check out the Entitlement Management Trailhead module: [Entitlement Management](#).

 **Important:** Only users in orgs with the Service Cloud can enable, create, and update entitlement management items.

SEE ALSO:

[Planning for Entitlement Management](#)

[Entitlement Management Setup Checklist](#)

EDITIONS

Available in: Salesforce Classic

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

Planning for Entitlement Management

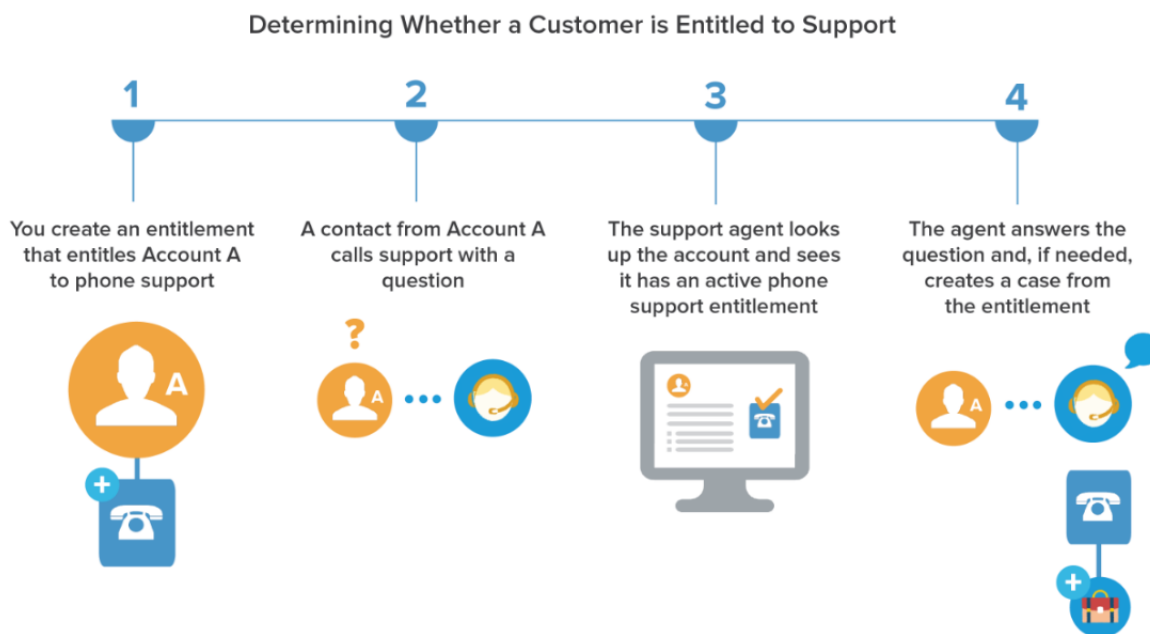
Entitlement management is highly customizable, which means you have many choices during setup. Before you begin the setup process, it's essential to choose an entitlement management model.

Choose What Determines Support Eligibility

You can set up entitlement management so customers are eligible for support based on one or several of the following types of records:

- *Accounts*: Any contact on the account is eligible for support.
- *Contacts*: Specific contacts are eligible for support.
- *Assets*: Specific assets (purchased products) are eligible for support.
- *Service contracts*: Customers are eligible for support based on a specific service contract.
- *Contract line items*: Specific products covered by a service contract are eligible for support.

Your approach depends on how detailed you want your support process to be. If you prefer to keep it simple, just have your support agents determine support eligibility based on accounts. Here's what this approach looks like:



Choose a Setup Model

There are three general ways to set up entitlement management. Once you've decided what should determine support eligibility, review the three models and select the one that best meets your business needs. You can always change which model you're using.

EDITIONS

Available in: Salesforce Classic

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

Entitlement model	What determines support eligibility	Use this model if
Entitlements only (simplest option)	Support agents determine whether a customer is eligible for support at the account, contact, or asset level.	• There's no need to manage your customers' entitlements as part of a service contract • Your entitlements don't have a renewal process • Entitlements aren't purchased by your customers; they're bundled with products (warranties) • Your customers' entitlements are short term and managed independently of each other
Entitlements + service contracts	Support agents determine whether a customer is eligible for support based on their service contract.	• Entitlements are purchased and managed separately from the products they cover and are part of a service contract • Your customers' entitlements are renewed at a contract level • You use Salesforce for customer support but not necessarily for service contract management
Entitlements + service contracts + contract line items (most complex option)	Support agents determine whether a customer is eligible for support based on the products covered in their service contract.	• You use Salesforce for customer support and to manage your customers' service contracts • Your support team manages service contract transactions, such as transfers, mergers, and renewals • Warranties, subscriptions, or other support products appear as line items on your sales orders and map to one or more entitlements • Entitlements are created and updated through an integration with your order management system

Regardless of the setup model you choose, you can enhance your support process with other entitlement management features. For example, you can:

- Create entitlement processes to enforce required, time-dependent steps in your support process
- Use entitlement versioning to create and maintain multiple versions of entitlement processes
- Add entitlements to communities
- Report on entitlements

After you select a setup model, head to the invaluable [Entitlement Management Setup Checklist](#).

SEE ALSO:

[What Is Entitlement Management?](#)

Entitlement Management Setup Checklist

When you set up entitlement management, you decide which features to use. Use this checklist to confirm that you've set up entitlement management in a way that fits your support processes.

Step	Complete if...
☐ Read Planning for Entitlement Management	You're thinking about using entitlements in your org.
☐ Set Up Entitlements	You want customer support eligibility to be determined at the account or contact level.
☐ Enable Entitlements	You want to use entitlements in your org.
☐ Customize Entitlements	You want to control which fields users see on entitlements, and how and where users associate entitlements with other records.
☐ Set Up Entitlement and Asset Lookup Filters on Cases	You want to control which entitlements and assets users can link to a case.
☐ Give Users Access to Entitlement Management	You want to give users the appropriate user permissions, field access, and tab access.
☐ Set Up an Entitlement Template	You want to predefine the terms of support for specific products.
☐ Automatically Add Entitlements to Cases from Web, Email, and Communities	You want the correct entitlement to be added automatically to cases created using Web-to-Case, Email-to-Case, or communities.
☐ Set Up Milestones	You want to define required steps that support agents must complete to close a support record.
☐ Customize Milestone Page Layouts	You want to control which milestone-related fields users see.
☐ Enable Milestone Feed Items	You want automatic notifications to be added to the feed and the record owner's profile page when a milestone is completed or violated.
☐ Set Up the Milestone Tracker	You want your support team to be able to see a list of upcoming and closed milestones and countdowns for active and overdue milestones.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up entitlement management

- "Manage Entitlements"

Step	Complete if...
☐ Limit User Updates to Milestones	You want to prevent users from updating milestones unless certain criteria are met.
☐ Create a Milestone	You want to define a required step in your support process.
☐ Auto-Complete Case Milestones	You want milestones to be automatically marked Completed on cases that match unique criteria.
☐ Set Up an Entitlement Process	You want to be able to apply the required steps in your support process to specific records.
☐ Create an Entitlement Process	You want to create a timeline that includes all of the steps that your support team must complete to resolve support records.
☐ Customize Entitlement Process Fields	You want to control which entitlement process fields users see.
☐ Add a Milestone to an Entitlement Process	You want to specify which required support steps occur, and when, on your timeline.
☐ Add a Milestone Action to an Entitlement Process	You want to define time-dependent workflow actions that occur at every step (milestone) in an entitlement process when the milestone is nearing violation, violated, or completed.
☐ Apply an Entitlement Process to an Entitlement	You want a specific entitlement's support records to follow the steps defined in your entitlement process.
☐ Create a New Version of an Entitlement Process	You want to update an entitlement process.
☐ Use a New Version of an Entitlement Process	You want to apply a new version of an entitlement process to new or existing entitlements.
☐ Set Up Service Contracts	You want customer support eligibility to be determined at the service contract level.
☐ Set Up Contract Line Items	You want to be able to limit a service contract to cover specific products.
☐ Set Up Entitlement Management in Communities	You want customers or partners to be able to view their entitlements and service contracts and create support records from them.
☐ Report on Entitlements	You want to view and share data on entitlements and service contracts.
☐ Give your support team entitlement management guidelines.	You want your support team to understand: • How to verify that a customer is entitled to support • How to link cases or work orders to entitlements

Step	Complete if...
	How entitlement processes affect the way they resolve cases or work orders

SEE ALSO:

[Planning for Entitlement Management](#)

Entitlement Management Limitations

The following limitations apply to entitlements and their related features.

Entitlement Limitations

- Every entitlement must be associated with an account.
- You can't share entitlements. Entitlements inherit their parent account's sharing settings.
- If you're using entitlement processes, manage customers' work orders and cases on separate entitlements. This is because an entitlement process only runs on records that match its type. For example, when a Case entitlement process is applied to an entitlement, the process only runs on cases associated with the entitlement. If a work order is also associated with the entitlement, the process won't run on the work order.
- Merge fields for entitlements on cases aren't supported. For example, if you add the `Entitlement Name {!Case.Entitlement}` merge field to an email template, the field is not populated on the template.
- Entitlement contacts don't have page layouts, search layouts, buttons, links, or record types.
- Entitlements don't automatically apply to cases created with Web-to-Case or Email-to-Case. If needed, you can add entitlements to these features using Apex code. For a sample trigger, see [Automatically Add Entitlements to Cases from Web, Email, and Communities](#).

EDITIONS

Available in: Salesforce Classic

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

Milestone Limitations

- You can't add milestones to support records without using entitlement processes. Entitlement processes apply milestones to support records.
- An org can have up to 1,000 entitlement processes, with up to 10 milestones per process. If your org was created before Summer '13, its maximum number of entitlement processes may be lower, but you can ask Salesforce to increase it.
- Milestones aren't marked completed automatically. If you'd like, you can set up automation to auto-complete milestones on support records that match unique criteria. To learn more, see [Auto-Complete Case Milestones](#).
- After an entitlement process is activated, you can't delete its milestones or create milestone actions. However, you can create versions of entitlement processes with different milestone settings and apply the new version to existing entitlements.
- Only one instance of a milestone can count down on a record at a time. For example, if a Response Time milestone begins counting down on a case, a second Response Time milestone can't be created until the first is completed.
- Business hours on entitlement processes aren't supported in change sets. To transfer an entitlement process with business hours from one Salesforce org to another, use one of these approaches:
 - Create the entitlement process from scratch in the new org
 - Use an alternative method to transfer the entitlement process, such as the Force.com Migration Tool
 - Remove the business hours from the entitlement process before adding it to a change set

Contract Line Item Limitations

- You can only use contract line items if your org uses the Product object.
- You can't create list views for contract line items.
- You can't share contract line items. Contract line items inherit their parent service contract's sharing settings. For example, users with the "Read" permission on service contracts inherit the "Read" permission on contract line items.

SEE ALSO:

[Entitlement Management Setup Checklist](#)

[Set Up an Entitlement Process](#)

Set Up Entitlements

Entitlements are units of customer support in Salesforce, such as "phone support" or "web support". Set up entitlements in your Salesforce org to help support agents determine whether a customer is eligible for support.

IN THIS SECTION:

1. [Enable Entitlements](#)
Enable entitlements in your Salesforce org to help support agents deliver the correct service level to your customers.
2. [Customize Entitlements](#)
Customize entitlement fields and page layouts based on your business needs and how your agents work.
3. [Set Up Entitlement and Asset Lookup Filters on Cases](#)
Set up lookup filters on entitlement-related case fields to restrict the entitlements that users can select on a case.
4. [Give Users Access to Entitlement Management](#)
After you set up entitlement management, make sure that users have the appropriate user permissions, field access, and tab access.
5. [Set Up an Entitlement Template](#)
Entitlement templates let you predefine terms of support that users can add to products.
6. [Automatically Add Entitlements to Cases from Web, Email, and Communities](#)
Entitlements don't automatically apply to cases created using Web-to-Case, Email-to-Case, or communities. However, you can add entitlements to these features using Apex code.

EDITIONS

Available in: Salesforce Classic

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

Enable Entitlements

Enable entitlements in your Salesforce org to help support agents deliver the correct service level to your customers.

1. From Setup, enter *Entitlement Settings* in the Quick Find box, then select **Entitlement Settings**.
2. Select **Enable Entitlement Management**.
3. Click **Save**. This takes you to a page where you can customize entitlement management settings. You'll come back to those settings later on in the entitlement management setup process.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable entitlements:

- "Customize Application"

Customize Entitlements

Customize entitlement fields and page layouts based on your business needs and how your agents work.

1. Customize entitlements fields.

This lets you control what information users add to entitlements.



Tip: Create custom entitlement fields that are specific to your industry or your support processes. For example:

- Customize the values for the **Type** field to match the types of entitlements your team provides or sells, like online support or online training.
- If your business charges for entitlement renewals, create a currency field on entitlements named **Cost to Renew**.

2. Customize entitlement page layouts.

This lets you specify which fields and related lists users see on entitlements. Consider making the following customizations:

- Add the **Status Icon** field so users can easily see whether the entitlement is active, expired, or inactive.
- Add the Cases, Contacts, and Work Orders related lists so users can:
 - View cases, contacts, and work orders associated with entitlements
 - Create cases or work orders automatically associated with the correct entitlements
 - Add contacts to entitlements

3. Set field history tracking on entitlements.

This lets you see when field values were changed. Changes are listed in the Entitlement History related list on entitlements. From the object management settings for entitlements, go to the fields section and click **Set History Tracking**.

4. Customize other objects' page layouts.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To edit page layouts and set field history tracking:

- "Customize Application"

- Add the `Entitlement Name` lookup field to case and work order page layouts. This lets users add entitlements to cases or work orders.
-  **Important:** To let a user create cases from entitlements or change a case’s assigned entitlement, make the `Entitlement Name` field on cases editable for their profile.
- Add the Entitlements related list to other objects’ page layouts:

Add the Entitlements related list to this object’s page layouts...	So users can view and create entitlements when...
Accounts	Any contact on the account is eligible for support
Contacts	Specific contacts are eligible for support
Assets	Specific assets (purchased products) are eligible for support

5. **Make the Entitlements tab visible in Salesforce and any custom apps.**

The Entitlements tab is where users create and edit entitlements. Add the tab to an app or instruct your users to add it to an existing tab set in Salesforce. Users need the “Read” permission on entitlements to see the Entitlements tab.

Set Up Entitlement and Asset Lookup Filters on Cases

Set up lookup filters on entitlement-related case fields to restrict the entitlements that users can select on a case.

For example, when community users create a case and use the lookup on the `Entitlement Name` field, you can set up lookup filters so they can choose only entitlements registered to their account or contact.

1. From Setup, enter `Entitlement Settings` in the Quick Find box, then select **Entitlement Settings**.
2. Choose the item(s) you'd like returned in the lookup fields.

Lookup Field on Cases	Click...	To Return...
Asset	Same account on the case	Assets registered to the account on the case.  Tip: If you want the lookup field to return all assets that share an account with the case, select only this option.
	Same contact on the case	Assets registered to the contact on the case.
	Entitlements on the case's account	Assets associated with entitlements that belong to the case’s account.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up entitlement-related lookups on cases: “Manage Entitlements”

- “Manage Entitlements”

Lookup Field on Cases	Click...	To Return...
	Entitlements on the case's contact	Assets associated with entitlements related to the case's contact.
Entitlement	Active status	Entitlements with an Active Status.
	Same account on the case	Entitlements associated with the account on the case.
	Same asset on the case	Entitlements associated with the asset on the case.
	Same contact on the case	Entitlements associated with the contact on the case.

Choosing multiple items acts as an AND function, so the more items you select, the more it restricts the options returned. For example, choosing `Same account on the case` and `Same contact on the case` means the `Asset` lookup field only returns assets registered to both the account and the contact on the case.

 **Tip:** Choose items that match the way your support agents verify support eligibility. For example, choose the account-related items if your support agents verify support eligibility based on accounts.

3. Click **Save**.

 **Note:** Equivalent lookup filters aren't available for work orders.

Give Users Access to Entitlement Management

After you set up entitlement management, make sure that users have the appropriate user permissions, field access, and tab access.

1. Assign entitlement management permissions to users.

Users Who Will	Need These Permissions	Permissions Are Auto-Enabled on These Standard Profiles
Set up entitlement management, including milestones, entitlement processes, and entitlement templates	"Manage Entitlements" AND "Customize Application"	System Administrator
Provide entitlement management to a community	"Customize Application" AND "Create and Set Up Communities"	System Administrator

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create and edit users:

- "Manage Internal Users"

Users Who Will	Need These Permissions	Permissions Are Auto-Enabled on These Standard Profiles
Create or update custom report types that include entitlement management	"Manage Custom Report Types"	System Administrator
Create and run reports based on entitlement management custom report types	"Create and Customize Reports"	Read Only, Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Create cases with entitlements	"Create" on cases AND "Read" on entitlements	Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Change a case's entitlement	"Edit" on cases AND "Read" on entitlements	Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Create work orders with entitlements	"Create" on work orders AND "Read" on entitlements	Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Change a work order's entitlement	"Edit" on work orders AND "Read" on entitlements	Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Verify or view entitlements	"Read" on entitlements	Read Only, Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Create entitlements	"Create" on entitlements	None: enable the permission in a permission set or custom profile
Change entitlements	"Edit" on entitlements	None: enable the permission in a permission set or custom profile
View entitlement contacts	"Read" on entitlement contacts	Read Only, Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Change entitlement contacts	"Create" on entitlement contacts AND "Delete" on entitlement contacts	None: enable the permissions in a permission set or custom profile
Verify or view service contracts	"Read" on service contracts	Read Only, Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator

Users Who Will	Need These Permissions	Permissions Are Auto-Enabled on These Standard Profiles
Create service contracts	"Create" on service contracts	None: enable the permission in a permission set or custom profile
Change service contracts	"Edit" on service contracts	None: enable the permission in a permission set or custom profile
Verify or view contract line items	"Read" on contract line items	Read Only, Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Add contract line items to service contracts	"Edit" on service contracts AND "Create" on contract line items and "Read" on products and price books	None: enable the permissions in a permission set or custom profile
Change contract line items on service contracts	"Edit" on service contracts AND "Edit" on contract line items and "Read" on products and price books	None: enable the permissions in a permission set or custom profile



Tip: If a standard profile doesn't include a certain user permission, you can create a permission set and enable the permission in it. Or, clone the standard profile and enable the permission in the custom profile.

2. Set field-level security.

Choose which entitlement management fields users can view and edit. Field-level security settings let you specify users' access to fields in several areas of the user interface:

- Detail and edit pages
- Related lists
- List views
- Reports
- Search results
- Email and mail merge templates
- Communities

You can set field-level security from a permission set, profile, or a particular field.



Important: To let a user create cases from entitlements or change a case's assigned entitlement, make the `Entitlement Name` field on cases editable for their profile.

Set Up an Entitlement Template

Entitlement templates let you predefine terms of support that users can add to products.

You can create entitlement templates for specific products so support agents can quickly add the right entitlement whenever a customer purchases the product. For example, you can create entitlement templates for web or phone support so agents can easily add entitlements to products offered to customers.

Purchased or installed products are represented in Salesforce as assets. That means:

- A *product* (for example, “Laser Scanner”) is linked to an entitlement template
- A corresponding *asset* (for example, the laser scanner purchased by ABC Labs) is linked to an entitlement that was created from the entitlement template

 **Note:** Entitlement templates are only available if entitlements and products are enabled in your org.

 **Tip:** The Entitlement Management Trailhead module introduces you to common terms and walks you through the process of creating an entitlement template. And, it’s fun! To get started, see [Entitlement Management](#).

1. Add the Entitlement Templates related list to product page layouts.
2. Optionally, add the `Type` and `Business Hours` fields to the Entitlement Templates related list. This lets users view the type of entitlement, such as Web or phone support, and any business hours that apply to the entitlement.
3. Create an entitlement template.
 - a. From Setup, enter *Templates* in the Quick Find box, then select **Entitlement Templates**.
 - b. Click **New Template**.
 - c. Enter any details:

Field	Description
Entitlement Template Name	The name of the entitlement template. Use a descriptive name, like <i>Phone Support</i> . This helps users better understand entitlement templates when they see them on related lists for products.
Term (Days)	The number of days the entitlement is in effect. For example, if you want the entitlement template to entitle all customers who purchase this product to 90 days of phone support, enter <i>90</i> .
Entitlement Process	The entitlement process associated with the entitlement.
Per Incident	Lets you limit the number of cases the entitlement supports. The admin determines whether this field is visible.
Cases Per Entitlement	The total number of cases the entitlement supports. This field is only available if <code>Per Incident</code> is selected.
Business Hours	The entitlement’s supported business hours.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create entitlement templates:

- “Manage Entitlements”

Field	Description
Type	The type of entitlement, such as Web or phone support. Admins can customize this field's values.

4. Click **Save**.
5. Add the entitlement template to a product.
 - a. Go to the product detail page.
 - b. Click **Add Entitlement Template** on the Entitlement Templates related list.
 - c. Select the entitlement template.
 - d. Click **Insert Selected**.
 - e. Click **Done**.

Now when a user creates an asset and links it to that product, the Entitlements related list on the asset includes an entitlement created from the entitlement template. That way, support agents responding to a call about the asset can quickly see what kind of support the customer is entitled to receive.

 **Note:** All users, even those without the “View Setup and Configuration” user permission, can view entitlement templates via the API.

Automatically Add Entitlements to Cases from Web, Email, and Communities

Entitlements don't automatically apply to cases created using Web-to-Case, Email-to-Case, or communities. However, you can add entitlements to these features using Apex code.

When a case is created via Web-to-Case, Email-to-Case, or a community, it isn't automatically associated with an entitlement. When a case's `Entitlement` field is empty, this sample trigger checks whether the case contact has an active entitlement. If the contact has an active entitlement, the entitlement is added to the case. If the contact doesn't have an active entitlement, the trigger then checks whether the case account has an active entitlement. If the case account has an active entitlement, the entitlement is added to the case. The trigger helps ensure that cases are resolved according to your customer support agreements.

To define this case trigger in your Salesforce org:

1. From Setup, enter *Case Triggers* in the Quick Find box, then select **Case Triggers**.
2. Click **New**.
3. Copy the text below and paste it in the text field.
4. Click **Save**.

```
trigger DefaultEntitlement on Case (Before Insert, Before Update) {
    List <EntitlementContact> entlContacts =
        [Select e.EntitlementId,e.ContactId,e.Entitlement.AssetId
        From EntitlementContact e
        Where e.ContactId in :contactIds
        And e.Entitlement.EndDate >= Today
        And e.Entitlement.StartDate <= Today];
```

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To define Apex triggers:

- “Author Apex”

```

        if(entlContacts.isEmpty()==false){
            for(Case c : Trigger.new){
                if(c.EntitlementId == null && c.ContactId != null){
                    for(EntitlementContact ec:entlContacts){
                        if(ec.ContactId==c.ContactId){
                            c.EntitlementId = ec.EntitlementId;
                            if(c.AssetId==null && ec.Entitlement.AssetId!=null)
                                c.AssetId=ec.Entitlement.AssetId;
                            break;
                        }
                    }
                }
            }
        }
    } else{
        List <Entitlement> entls = [Select e.StartDate, e.Id, e.EndDate,
                                   e.AccountId, e.AssetId
                                   From Entitlement e
                                   Where e.AccountId in :acctIds And e.EndDate >= Today
                                   And e.StartDate <= Today];
        if(entls.isEmpty()==false){
            for(Case c : Trigger.new){
                if(c.EntitlementId == null && c.AccountId != null){
                    for(Entitlement e:entls){
                        if(e.AccountId==c.AccountId){
                            c.EntitlementId = e.Id;
                            if(c.AssetId==null && e.AssetId!=null)
                                c.AssetId=e.AssetId;
                            break;
                        }
                    }
                }
            }
        }
    }
}

```

SEE ALSO:

[Set Up an Entitlement Process](#)

Milestones

Milestones represent required, time-dependent steps in your support process, like first response or case resolution times. Milestones are added to entitlement processes to ensure that agents resolve support records correctly and on time.

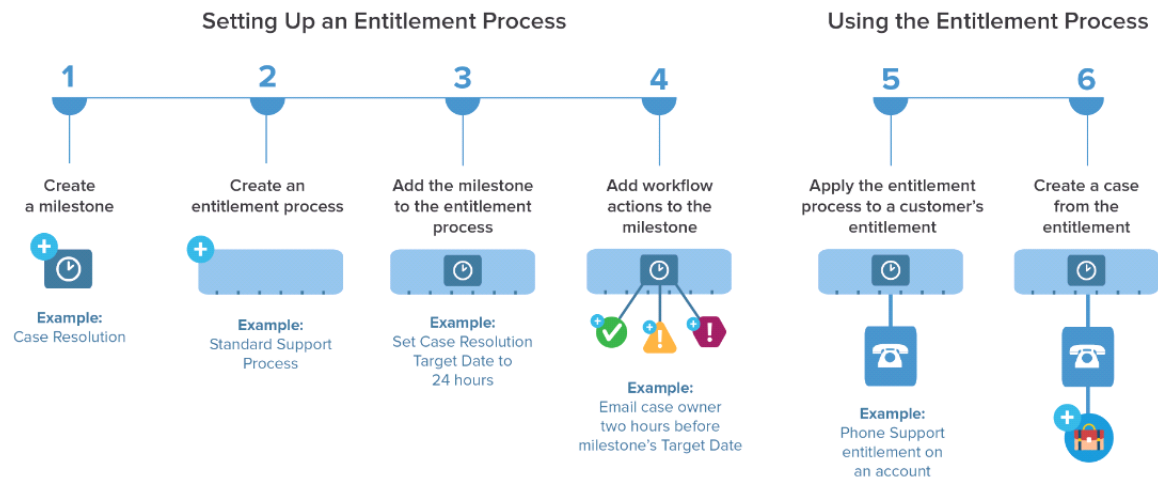
An entitlement process can have up to 10 milestones. You can set up a milestone to occur once in an entitlement process, or to recur until the entitlement process exits.

Here's how milestones fit into your support process:

EDITIONS

Available in: Salesforce Classic

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



View existing milestones in your org on the Milestones page under Entitlement Management in Setup. The Milestones related list on entitlements and entitlement processes also lists associated milestones.

- Tip:** There are several ways that you can view a list of records with milestones in your org:
- To view work orders with milestones, create a work order report using the Object Milestones custom report type
 - To view cases with milestones, create a case report using the Cases with Milestones custom report type
 - Create list views that filter on milestone fields

Before using milestones in your support process, review [Milestone Limitations](#) on page 322.

- Tip:** The Entitlement Management Trailhead module introduces you to common terms and walks you through the process of creating milestones. And, it's fun! To get started, see [Entitlement Management](#).

SEE ALSO:

- [Set Up Milestones](#)
- [Milestone Statuses](#)
- [Milestone Recurrence Types](#)
- [Milestone Actions](#)

Milestone Statuses

Milestones on support records display one of three statuses.

Status	What It Means	Example
Compliant	Milestones on the record are either complete or not in violation.	The first response on a case is complete or not in violation.
Important: New records display as compliant because they're not in violation.		

EDITIONS

Available in: Salesforce Classic

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

Status	What It Means	Example
 Open Violation	One or more milestones on the record have been violated, and steps in the support process are incomplete.	The assigned agent didn't complete the first response on a case before the milestone expired.
 Closed Violation	One or more milestones on the record were violated, but the steps in the support process were still completed.	The assigned agent completed the first response on a case after the milestone expired.

SEE ALSO:

[Entitlement Processes](#)[Add a Milestone to an Entitlement Process](#)[Milestone Actions](#)

Milestone Actions

Milestone actions are time-dependent workflow actions that occur on milestones in an entitlement process. Actions can be added to milestones after the milestone is added to an entitlement process.

For example, you can create a milestone action that:

- Sends an email alert to certain users an hour before a First Response milestone is near violation
- Updates certain fields on a case one minute after a First Response milestone successfully completes

You can add three types of actions to milestones:

Action Type	Description
 Success Actions	The actions to take when a milestone successfully completes. Success actions still fire on milestones that are closed late.
 Warning Actions	The actions to take when a milestone is near violation.
 Violation Actions	The actions to take when a milestone is violated.

You can automate the following actions for each action type:

Workflow Action	What It Does	Example
New Task	Create a workflow task	Create a task for a support agent to call a customer when a First Response milestone is violated.
New Email	Create an email alert	Notify case owners when a First Response milestone on their case is near violation.
New Field Update	Define a field update	Update the case Priority field to High when a First Response milestone is near violation.

EDITIONS

Available in: Salesforce Classic

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

Workflow Action	What It Does	Example
New Outbound Message	Define an outbound message	Send data about parts or services to an external system after a First Response milestone is completed.
Select Existing Action	Select an existing action	Use an existing email alert to notify a case owner when their case is near violation of a first response.

SEE ALSO:

[Add a Milestone Action to an Entitlement Process](#)

[Entitlement Processes](#)

[How a Record Moves Through an Entitlement Process](#)

Milestone Recurrence Types

When you create a milestone, you must choose its recurrence type. Learn what each recurrence type means and when to use it.

There are three milestone recurrence types in Salesforce:

Recurrence Type	What It Means	How the Start Date is Determined	Examples
No Recurrence	The milestone only occurs once on the support record*.	The Start Date is the time when the milestone criteria are met on the record.	"First Response" "Resolution Time"
Independent	The milestone occurs whenever the milestone criteria match the record criteria.  Note: Only one occurrence of an independently recurring milestone can be active at a time.	The Start Date is the time when the milestone criteria are met on the record, regardless of when the previous occurrence was completed.	"Response Time"
Sequential	The milestone occurs on repeat whenever the milestone criteria	For the first occurrence, the Start Date is the time when the milestone criteria are met on the case.	"Customer Contact Made"

EDITIONS

Available in: Salesforce Classic

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

Recurrence Type	What It Means	How the Start Date is Determined	Examples
	match the record criteria.  Note: Only one occurrence of a sequentially recurring milestone can be active at a time.	For future occurrences: - The Start Date is the time when the milestone criteria are met on the record, as long as it's later than the previous occurrence's Target Date. - If an occurrence is completed <i>before</i> its Target Date and the milestone criteria are met on the record again, the next occurrence starts at the previous occurrence's Target Date. - If an occurrence is completed <i>after</i> its Target Date, the next occurrence's Start Date is the time when the milestone criteria are met on the record.	

*In these definitions, a support record includes cases and work orders.



Example:

No Recurrence Type

A milestone named "Resolution Time" is set up to ensure that cases are resolved within 4 hours. The milestone has one criterion: *Case: Status EQUALS New, Working, Escalated*.

Here's how this milestone can be used:

- At 10 a.m., a case is created whose Status is *New*, causing the milestone criteria to match the case criteria.
- The "Resolution Time" milestone is automatically created with these settings:
 - Start Date = 10 a.m. (the current time)
 - Target Date = 2 p.m. (4 hours from the Start Date)
- At 1 p.m., the support agent resolves the customer's issue and closes the case, and the milestone is marked complete.

Independent

A milestone named "Engineer Solution Proposed" is set up to track case escalation to Engineering. When this milestone occurs, the support agent expects a proposed solution from Engineering within 4 hours. The milestone has one criterion: *Case: Status EQUALS Waiting on Engineer* (a custom status).

Here's how this milestone can be used:

- At 10 a.m., the support agent escalates a case to Engineering, causing the milestone criteria to match the case criteria.
- An occurrence of the "Engineer Solution Proposed" milestone is automatically created with these settings:

- Start Date = 10 a.m. (the current time)
 - Target Date = 2 p.m. (4 hours after the Start Date)
3. At 11 a.m., well before the Target Date, an engineer proposes a solution that's sent to the customer. The milestone is marked complete manually or via a workflow.

If the proposed solution works, there may be no other occurrences of the "Engineer Solution Proposed" milestone on the case. However, if the solution doesn't solve the customer's issue, another occurrence would be created:

1. At 1 p.m., the support agent re-escalates the case to Engineering, causing the milestone criteria to match the case criteria.
2. A second occurrence of the "Engineer Solution Proposed" milestone is created with these settings:
 - Start Date = 1 p.m. (the current time)
 - Target Date = 5 p.m. (4 hours after the Start Date)

The case now has two "Engineer Solution Proposed" milestones:

- One completed milestone that started at 10 a.m.
- One incomplete milestone that started at 1 p.m. and has a Target Date of 5 p.m.

The milestone can recur as many times as necessary until the entitlement process is completed.

Sequential

A milestone named "Customer Contact Made" is set up to track daily contact with a customer as part of an SLA. When this milestone occurs, the support agent has 24 hours to communicate with the customer.

Here's how this milestone can be used:

1. At 10 a.m. on Monday, a case is created whose entitlement process includes the "Customer Contact Made" milestone. The milestone has these settings:
 - Start Date = 10 a.m. Monday (the current time)
 - Target Date = 10 a.m. Tuesday (24 hours after the Start Date)
2. At 11 a.m. on Monday, the support agent communicates with the customer. This means that the milestone can be marked complete, and milestone's second occurrence is created. However, because the previous occurrence's Target Date is still in the future, the Start Date of the second occurrence is 10 a.m. Tuesday.

The case now has two "Customer Contact Made" milestones:

- One completed milestone that started at 10 a.m. Monday
- One incomplete milestone that is scheduled to start at 10 a.m. Tuesday with a Target Date of 10 a.m. Wednesday

If the support agent communicates with the customer multiple times on Monday, it doesn't affect the Tuesday milestone.

SEE ALSO:

[Entitlement Processes](#)

[Add a Milestone to an Entitlement Process](#)

Milestones: Supported Objects

Milestones represent required support steps that your team must complete to resolve a customer issue. Find out where you can use milestones in Salesforce.

What types of records can I add milestones to?

- Cases
- Work orders

How do I add milestones to a record?

Here are the general steps you'll follow:

1. Create "master" milestones in Setup that represent required steps in your support process.
2. Add the milestones to an entitlement process, which is a customizable timeline of milestones.
3. Apply the entitlement process to a customer entitlement.

When you link a support record, such as a work order, to an entitlement that includes an entitlement process, the process—with its milestones—is automatically applied to the record. To learn more, see [Set Up Milestones](#).

Can I use the same entitlement for work orders and cases?

If the entitlement has an entitlement process associated with it, don't use the entitlement for multiple types of support records. Every entitlement process has a type—Case or Work Order—and a process only works on records that match its type. For example, when a Case entitlement process is applied to an entitlement, the process runs only on cases associated with the entitlement. If a work order is also associated with the entitlement, the process doesn't run on the work order.

When I create a milestone, can I add it to both types of entitlement processes?

Yes. For example, if you create a First Response milestone in Setup, you can add it to both Case and Work Order entitlement processes.

How do I set the type of an entitlement process?

You select the type when you create the entitlement process. Entitlement processes created before Summer '16 use the Case type. You can see an entitlement process's type on its detail page.

Can I change the type of an entitlement process?

No. Once an entitlement process is created, all its versions must use the same type. Want to make the most of a particularly awesome entitlement process? Remember that you can easily create a similar process of a different type using the same milestones.

Are milestones supported in Lightning Experience?

Case milestones aren't supported in Lightning Experience. Milestones on work orders are available in Lightning Experience with some limitations:

- The Object Milestones related list and milestone tracker are not available on work orders in Lightning Experience
- Updates to entitlement processes and milestones must be made in Salesforce Classic
- Clicking a milestone-related feed item on a work order in Lightning Experience redirects you to Salesforce Classic

Where do I manage milestones in my org?

- View and create milestones from the Milestones node in Setup under Entitlement Management
- Manage **case** milestone page layouts and validations rules from the Case Milestones node in Setup
- Manage **work order** milestone page layouts and validation rules from the Object Milestones node in Setup

EDITIONS

Available in: Salesforce Classic

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

Set Up Milestones

Milestones represent required steps in your support management process, like first response times. Set up and customize milestones in your org so they can be added to entitlement processes and applied to support records like cases and work orders.

IN THIS SECTION:

1. [Customize Milestone Page Layouts](#)

Milestones appear in the Case Milestones related list on cases, and the Object Milestones related list on work orders. Customize your page layouts to help support agents and supervisors track support progress.

2. [Enable Milestone Feed Items](#)

Help support agents monitor support activity by enabling milestone feed items. This option posts a notification to the feed and the record owner's profile page when a milestone is completed or violated.

3. [Set Up the Milestone Tracker](#)

The milestone tracker gives support agents a complete view of upcoming and closed milestones, and displays countdowns for active and overdue milestones. Add it to the case feed, work order feed, a custom page, or the service console.

4. [Limit User Updates to Milestones](#)

Add validation rules to milestones to prevent users from updating milestones unless certain criteria are met.

5. [Create a Milestone](#)

Milestones represent required steps in your support process, such as case resolution time and first response time. You'll create "master" milestones in your org, then add them to entitlement processes to enforce different service levels on support records like cases and work orders.

6. [Auto-Complete Case Milestones](#)

Create an Apex trigger that automatically marks milestones Completed on cases that match unique criteria. In your trigger, define which events and related case criteria must be satisfied for a milestone to be marked Completed. You can implement a similar trigger to auto-complete work order milestones.

SEE ALSO:

[Milestones](#)

[Entitlement Management Setup Checklist](#)

[Milestones: Supported Objects](#)

EDITIONS

Available in: Salesforce Classic

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

Customize Milestone Page Layouts

Milestones appear in the Case Milestones related list on cases, and the Object Milestones related list on work orders. Customize your page layouts to help support agents and supervisors track support progress.

1. Add any of the following fields to case and object milestone detail pages.
 - To edit case milestone detail page layouts, from Setup, enter *Case Milestones* in the Quick Find box, then click **Page Layouts** under Case Milestones.
 - To edit object milestone detail page layouts (which apply to work order milestones), from Setup, enter *Object Milestones* in the Quick Find box, then click **Page Layouts** under Object Milestones.

Field	Description
Actual Elapsed Time	The amount of time that it took to complete a milestone. (Elapsed Time) – (Stopped Time) = (Actual Elapsed Time)  Note: If you want to be able to display this field, Enable stopped time and actual elapsed time must be selected on the Entitlement Settings page.
Completed	Icon (✓) that indicates a milestone completion.
Completion Date	The date and time the milestone was completed.
Elapsed Time	The time it took to complete a milestone. Automatically calculated to include any business hours on the support record. Elapsed time is calculated only after the Completion Date field is populated.
Entitlement Process	The entitlement process that is being used for the record. Entitlement processes are optional.
Start Date	The date and time that the milestone tracking started.
Stopped Time	How long an agent has been blocked from completing a milestone. For example, an agent might wait for a customer to reply with more information.  Note: Enable stopped time and actual elapsed time must be selected on the Entitlement Settings page.
Target Date	The date and time to complete the milestone.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create and edit page layouts:

- “Customize Application”

To create milestones:

- “Manage Entitlements”

AND

“Customize Application”

To enable the “Stopped Time” and “Actual Elapsed Time” fields:

- “Manage Entitlements”

Field	Description
Target Response	The time to complete the milestone. Automatically calculated to include any business hours on the support record.
Time Remaining	The time that remains before a milestone violation. Automatically calculated to include any business hours on the support record.
Time Since Target	The time that has elapsed since a milestone violation. Automatically calculated to include any business hours on the support record.
Violation	Icon (🚫) that indicates a milestone violation.

2. Add milestone elements to case and work order page layouts:

a. Add milestone fields:

Field	Description
Milestone Status	The milestone's status.
Milestone Status Icon	An icon that corresponds to the milestone status: • 🟢 Compliant • 🚫 Open Violation • ⚠️ Closed Violation
Entitlement Process Start Time	The time the record enters the entitlement process.
Entitlement Process End Time	The time the record exits the entitlement process.

b. Add the Case Milestones or Object Milestones related list to display the record's milestones.

Enable Milestone Feed Items

Help support agents monitor support activity by enabling milestone feed items. This option posts a notification to the feed and the record owner's profile page when a milestone is completed or violated.

Important:

- Chatter and entitlements must be enabled in your org.
- Enabling milestone feed items doesn't create feed items for milestones that have already been completed or violated.
- If you add entitlement management to a community, enabling milestone feed items also makes feed items visible to community users.

1. From Setup, enter *Entitlement Settings* in the Quick Find box, then select **Entitlement Settings**.
2. Select **Enable milestone feed items**. This enables feed items for both cases and work orders.

Set Up the Milestone Tracker

The milestone tracker gives support agents a complete view of upcoming and closed milestones, and displays countdowns for active and overdue milestones. Add it to the case feed, work order feed, a custom page, or the service console.

Often, support agents' performance is measured by how often they meet milestones. The milestone tracker helps agents be prepared for support deadlines by showing them:

- The time remaining until an active milestone reaches its Target Date
- The time passed since an overdue milestone's Target Date
- A list of upcoming milestones
- A list of closed milestones

When a milestone is in progress, the milestone is represented by a green circle. The circle winds down clockwise as time elapses. The remaining time is shown in the center of the circle. When the time to complete the milestone expires, the circle turns red. The amount of time that the milestone is overdue is shown in the center of the circle.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable milestone feed items:

- "Manage Entitlements"

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create and edit page layouts:

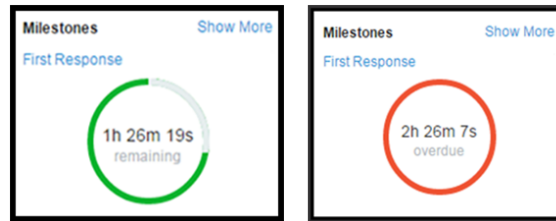
- "Customize Application"

To assign page layouts:

- "Manage Users"

To set how time displays in the milestone tracker:

- "Manage Entitlements"



If more than 24 hours remain on a milestone, the countdown displays in days (for example, 1d). When fewer than 24 hours remain, the countdown format switches to hours/minutes/seconds.

1. Expose the milestone tracker to support agents.

You can expose the tracker in one of three ways:

- Add it to the case feed. If you plan to use milestones on work orders, follow the same steps to add the tracker to the work order feed.
 - a. From the object management settings for cases, go to Page Layouts.
 - b. In the Case Page Layouts section, click **Edit**, and then click **Feed View** in the page layout editor.
 - c. In the Other Tools and Components section, select the Milestone Tracker and specify where on the page you want it to appear.
 - d. Click **Save**.
- Add it to a custom Visualforce page using the `<apex:milestoneTracker>` component.
- Add it as a component to the service console.

2. Set how the milestone tracker displays time remaining or time overdue on milestones.

By default, the tracker uses actual hours. To make it display time remaining or time overdue in business hours, follow these steps.

- a. From Setup, enter *Entitlement Settings* in the Quick Find box, then select **Entitlement Settings**.
- b. In the Milestone Tracker section, deselect **Show the time remaining in actual hours, not business hours**.
- c. Click **Save**.



Example: Suppose an active milestone's business hours are 9 a.m. to 5 p.m. Right now, it's 4:30 p.m. and the milestone's Target Date is 11:00 a.m. tomorrow.

- If the milestone tracker shows the remaining time in **business hours** (the default setting), it displays a countdown of 2 hours and 30 minutes (4:30 to 5 p.m. today and 9 to 11 a.m. tomorrow).
- If the milestone tracker shows the remaining time in **actual hours**, it displays a countdown of 18 hours and 30 minutes (4:30 p.m. today to 11:00 a.m. tomorrow).

Limit User Updates to Milestones

Add validation rules to milestones to prevent users from updating milestones unless certain criteria are met.

1. From the object management settings for case milestones, go to Validation Rules.
2. Click **New**.
3. Enter the rule details.
4. Save your changes.



Example: This validation rule prevents users from selecting milestone completion dates that are earlier than the case creation date. You can create a similar validation rule for work orders from the object management settings for Object Milestones in Setup.

Field	Value
Rule Name	<i>milestone_completion_date</i>
Description	<i>A milestone's completion date must be later than the case creation date.</i>
Error Condition Formula	<i>CompletionDate < Case.CreatedDate</i>
Error Message	<i>Error: The milestone completion date must be later than the case creation date.</i>
Error Location	<i>Top of Page</i>

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To define or change field validation rules:

- "Customize Application"

To create or edit milestones:

- "Manage Entitlements"

Create a Milestone

Milestones represent required steps in your support process, such as case resolution time and first response time. You'll create "master" milestones in your org, then add them to entitlement processes to enforce different service levels on support records like cases and work orders.



Follow these steps to create a milestone. [Walk Through It: Create a Milestone.](#)

 **Tip:** The Entitlement Management Trailhead module introduces you to common terms and walks you through the process of creating milestones. And, it's fun! To get started, see [Entitlement Management](#).

1. From Setup, enter *Milestones* in the Quick Find box, then select **Milestones** under Entitlement Management.
2. Click **New Milestone**.
3. Enter a name and description. Try to name milestones after common support tasks, like "First Response Time" or "Resolution Time". Descriptive names help users understand milestones when they see them on cases, work orders, or entitlement processes.
4. Select a recurrence type.

Recurrence Type	Description	Example
No Recurrence	The milestone occurs only once on the record.	"First Response" "Resolution Time"
Independent	The milestone occurs whenever the milestone criteria are met on the record.	"Response Time"
Sequential	The milestone occurs <i>on repeat</i> whenever the milestone criteria are met on the record.	"Customer Contact Made"

5. Click **Save**.

You can't apply milestones to a record by themselves; they must be part of an entitlement process. So after you create your milestone, [add it to an entitlement process](#).

 **Tip:** You can add validation rules to milestones so users can only update a milestone if it meets specific standards. For details, see [Limit User Updates to Milestones](#).

SEE ALSO:

[Milestone Recurrence Types](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create milestones:

- "Manage Entitlements"
- AND
- "Customize Application"

Auto-Complete Case Milestones

Create an Apex trigger that automatically marks milestones Completed on cases that match unique criteria. In your trigger, define which events and related case criteria must be satisfied for a milestone to be marked Completed. You can implement a similar trigger to auto-complete work order milestones.

The following triggers mark specific types of milestones Completed when the case they are on meets unique criteria. We've also provided a milestone utility Apex class and accompanying unit tests. Define the milestone utility class before you use any of the triggers.

Milestone Utility Apex Class

Apex classes reduce the size of your triggers and make it easier to reuse and maintain Apex code. To define this Apex class in your org:

1. From Setup, enter *Apex Classes* in the Quick Find box, then click **Apex Classes**.
2. Click **New**.
3. Copy the class text and paste it into the text field.
4. Click **Save**.

```
public class MilestoneUtils {
    public static void completeMilestone(List<Id> caseIds,
        String milestoneName, DateTime complDate) {
        List<CaseMilestone> cmsToUpdate = [select Id, completionDate
            from CaseMilestone cm
            where caseId in :caseIds and cm.MilestoneType.Name=:milestoneName
            and completionDate = null limit 1];
        if (cmsToUpdate.isEmpty() == false){
            for (CaseMilestone cm : cmsToUpdate){
                cm.completionDate = complDate;
            }
            update cmsToUpdate;
        }
    }
}
```

Apex Class Unit Test

You can set up Apex unit tests in the developer console to scan your code for any issues.

```
/**
 * This class contains unit tests for validating the behavior of Apex classes
 * and triggers.
 *
 * Unit tests are class methods that verify whether a particular piece
 * of code is working properly. Unit test methods take no arguments,
 * commit no data to the database, and are flagged with the testMethod
 * keyword in the method definition.
 *
 * All test methods in an organization are executed whenever Apex code is deployed
 * to a production organization to confirm correctness, ensure code
 * coverage, and prevent regressions. All Apex classes are
 * required to have at least 75% code coverage in order to be deployed
 * to a production organization. In addition, all triggers must have some code coverage.
 */
```

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To define Apex triggers and classes:

- "Author Apex"

```

* The @isTest class annotation indicates this class only contains test
* methods. Classes defined with the @isTest annotation do not count against
* the organization size limit for all Apex scripts.
*
* See the Apex Language Reference for more information about Testing and Code Coverage.
*/
@isTest
private class MilestoneTest {

    static testMethod void TestCompleteMilestoneCase(){

        List<Account> acts = new List<Account>();
        Account myAcc = new Account(Name='TestAct', phone='1001231234');
        acts.add(myAcc);

        Account busAcc = new Account(Name = 'TestForMS', phone='4567890999');
        acts.add(busAcc);
        insert acts;
        Contact cont = new Contact(FirstName = 'Test', LastName = 'LastName', phone='4567890999',
            accountid = busAcc.id);
        insert(cont);

        Id contactId = cont.Id;

        Entitlement entl = new Entitlement(Name='TestEntitlement', AccountId=busAcc.Id);
        insert entl;

        String entlId;
        if (entl != null)
            entlId = entl.Id;

        List<Case> cases = new List<Case>{};
        if (entlId != null){
            Case c = new Case(Subject = 'Test Case with Entitlement ',
                EntitlementId = entlId, ContactId = contactId);
            cases.add(c);
        }
        if (cases.isEmpty()==false){
            insert cases;
            List<Id> caseIds = new List<Id>();
            for (Case cL : cases){
                caseIds.add(cL.Id);
            }
            milestoneUtils.completeMilestone(caseIds, 'First Response', System.now());
        }
    }

    static testMethod void testCompleteMilestoneViaCase(){

        List<Account> acts = new List<Account>();
        Account myAcc = new Account(Name='TestAct', phone='1001231234');
        acts.add(myAcc);

        Account busAcc = new Account(Name = 'TestForMS', phone='4567890999');

```

```

acts.add(busAcc);
insert acts;
Contact cont = new Contact(FirstName = 'Test', LastName = 'LastName', phone='4567890999',
    accountid = busAcc.id);
insert(cont);

Id contactId = cont.Id;

Entitlement entl = new Entitlement(Name='TestEntitlement', AccountId=busAcc.Id);
insert entl;

String entlId;
if (entl != null)
    entlId = entl.Id;

List<Case> cases = new List<Case>{};
for(Integer i = 0; i < 1; i++){
    Case c = new Case(Subject = 'Test Case ' + i);
    cases.add(c);
    if (entlId != null){
        c = new Case(Subject = 'Test Case with Entitlement ' + i,
            EntitlementId = entlId);
        cases.add(c);
    }
}

```

Sample Trigger 1

You can create a milestone named Resolution Time that requires cases to be closed within a certain length of time. It's a great way to enforce case resolution terms in SLAs. This sample case trigger marks each Resolution Time milestone Completed when its case is closed. This way, the support agent doesn't have to manually mark the milestone completed after closing the case.



Note: This trigger references the milestone utility test class, so be sure to define the test class first.

To define this trigger in your org:

1. From Setup, enter *Case Triggers* in the Quick Find box, then click **Case Triggers**.
2. Click **New**.
3. Copy the trigger text and paste it into the text field.
4. Click **Save**.

```

trigger CompleteResolutionTimeMilestone on Case (after update) {
    if (UserInfo.getUserType() == 'Standard'){
        DateTime completionDate = System.now();
        List<Id> updateCases = new List<Id>();
        for (Case c : Trigger.new){
            if (((c.isClosed == true) || (c.Status == 'Closed')) && ((c.SlaStartDate
                <= completionDate) && (c.SlaExitDate == null)))
                updateCases.add(c.Id);
        }
        if (updateCases.isEmpty() == false)
            milestoneUtils.completeMilestone(updateCases, 'Resolution Time', completionDate);
    }
}

```

```
}
}
```

Sample Trigger 2

You can create a milestone named First Response that requires agents to get in touch with a case contact within X minutes or hours of the case's creation. It's a nice way to ensure that your support team is communicating with case contacts as soon as possible. This sample email trigger marks a First Response milestone Completed when an email is sent to the case contact. That way, the support agent doesn't have to manually mark the First Response milestone Completed after they email the case contact.

 **Note:** This trigger references the milestone utility test class, so be sure to define the test class first.

To define this trigger in your org:

1. From Setup, enter *Email Triggers* in the Quick Find box, then click **Email Triggers**.
2. Click **New**.
3. Copy the trigger text and paste it into the text field.
4. Click **Save**.

```
trigger CompleteFirstResponseEmail on EmailMessage (after insert) {
    if (UserInfo.getUserType() == 'Standard'){
        DateTime completionDate = System.now();
        Map<Id, String> emIds = new Map<Id, String>();
        for (EmailMessage em : Trigger.new){
            if(em.Incoming == false)
                emIds.put(em.ParentId, em.ToAddress);
        }
        if (emIds.isEmpty() == false){
            Set <Id> emCaseIds = new Set<Id>();
            emCaseIds = emIds.keySet();
            List<Case> caseList = [Select c.Id, c.ContactId, c.Contact.Email,
                                c.OwnerId, c.Status,
                                c.EntitlementId,
                                c.SlaStartDate, c.SlaExitDate
                                From Case c where c.Id IN :emCaseIds];
            if (caseList.isEmpty()==false){
                List<Id> updateCases = new List<Id>();
                for (Case caseObj:caseList) {
                    if ((emIds.get(caseObj.Id)==caseObj.Contact.Email)&&
                        (caseObj.Status == 'In Progress')&&
                        (caseObj.EntitlementId != null)&&
                        (caseObj.SlaStartDate <= completionDate)&&
                        (caseObj.SlaStartDate != null)&&
                        (caseObj.SlaExitDate == null))
                        updateCases.add(caseObj.Id);
                }
                if(updateCases.isEmpty() == false)
                    milestoneUtils.completeMilestone(updateCases,
                        'First Response', completionDate);
            }
        }
    }
}
```


Sample Trigger 3

While the previous trigger dealt with email messages, this sample case comment trigger marks a First Response milestone Completed when a public comment is made on the case. You can use it if a public case comment is a valid first response in your support terms.



Note: This trigger references the milestone utility test class, so be sure to define the test class first.

To define this trigger in your org:

1. From Setup, enter *Case Comment Triggers* in the Quick Find box, then click **Case Comment Triggers**.
2. Click **New**.
3. Copy the trigger text and paste it into the text field.
4. Click **Save**.

```
trigger CompleteFirstResponseCaseComment on CaseComment (after insert) {
    if (UserInfo.getUserType() == 'Standard'){
        DateTime completionDate = System.now();
        List<Id> caseIds = new List<Id>();
        for (CaseComment cc : Trigger.new){
            if(cc.IsPublished == true)
                caseIds.add(cc.ParentId);
        }
        if (caseIds.isEmpty() == false){
            List<Case> caseList = [Select c.Id, c.ContactId, c.Contact.Email,
                                   c.OwnerId, c.Status,
                                   c.EntitlementId, c.SlaStartDate,
                                   c.SlaExitDate
                                   From Case c
                                   Where c.Id IN :caseIds];
            if (caseList.isEmpty() == false){
                List<Id> updateCases = new List<Id>();
                for (Case caseObj:caseList) {
                    if ((caseObj.Status == 'In Progress')&&
                        (caseObj.EntitlementId != null)&&
                        (caseObj.SlaStartDate <= completionDate)&&
                        (caseObj.SlaStartDate != null)&&
                        (caseObj.SlaExitDate == null))
                        updateCases.add(caseObj.Id);
                }
                if(updateCases.isEmpty() == false)
                    milestoneUtils.completeMilestone(updateCases,
                                                       'First Response', completionDate);
            }
        }
    }
}
```

Entitlement Processes

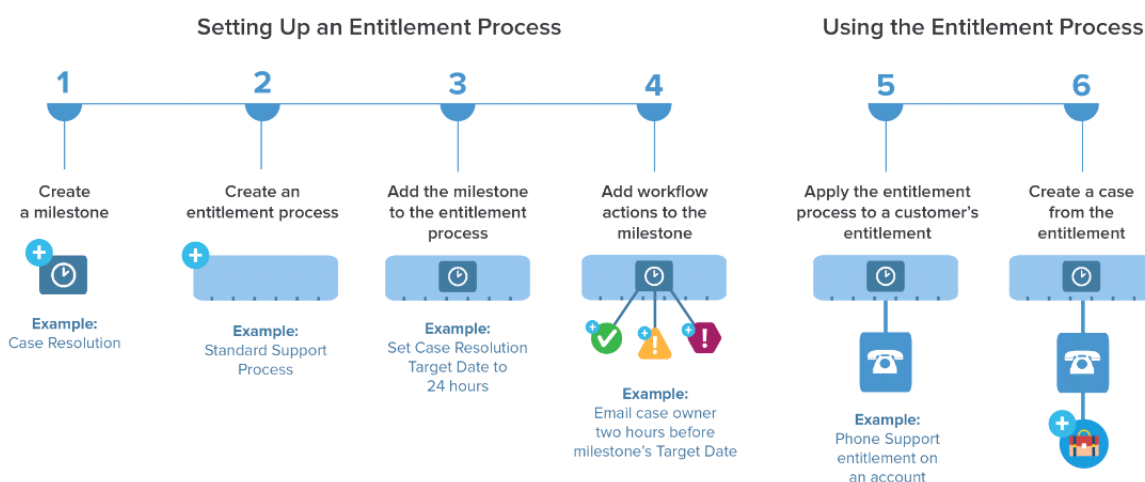
Entitlement processes are timelines that include all the steps (or milestones) that your support team must complete to resolve support records like cases or work orders. Each process includes the logic necessary to determine how to enforce the correct service level for your customers.

Not all entitlements require entitlement processes. For example, an entitlement might just state that a customer is eligible for phone support and business hours define phone support to be 24/7. If you need to add more to that definition—for example, if certain people must be emailed after a customer's case goes unresolved for two hours—use an entitlement process.

EDITIONS

Available in: Salesforce Classic

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



You can create up to 1,000 entitlement processes total, with up to 10 milestones per process. If your org was created before Summer '13, its maximum entitlement processes can be lower. Contact Salesforce to increase it.



Note: If you're using entitlement processes, manage customers' work orders and cases on separate entitlements. This is because an entitlement process only runs on records that match its type. For example, when a Case entitlement process is applied to an entitlement, the process only runs on cases associated with the entitlement. If a work order is also associated with the entitlement, the process won't run on the work order.

To view or cancel active entitlement processes, from Setup, enter *Entitlement Processes* in the **Quick Find** box, then select **Entitlement Processes**. You can also use the entitlement process queue to view or cancel active entitlement process actions. (Entitlement process monitoring isn't available in Professional Edition orgs.)



Tip: Entitlement process versioning lets you update existing entitlement processes, even if they're assigned to active entitlements and cases. This can be useful if the business rules behind your entitlement processes change, for example, or if you need to create multiple versions of the same entitlement process that have only minor differences.



Note: All users, even those without the “View Setup and Configuration” user permission, can view entitlement processes via the API.

SEE ALSO:

[Set Up an Entitlement Process](#)

[Updating an Entitlement Process](#)

[How a Record Moves Through an Entitlement Process](#)

Set Up an Entitlement Process

Entitlement processes are timelines that include all of the steps (milestones) that your support team must complete to resolve cases or work orders. Set up an entitlement process to apply to entitlements in your Salesforce org.

IN THIS SECTION:

1. [Create an Entitlement Process](#)

Create an entitlement process to give support agents a timeline of required steps to follow when solving support records. Each process includes the logic necessary to determine how to enforce the correct service level for your customers.

2. [Customize Entitlement Process Fields](#)

If you intend to use entitlement processes in your Salesforce org, customize page layouts to ensure that support agents can see and interact with entitlement processes.

3. [Add a Milestone to an Entitlement Process](#)

Add milestones to entitlement processes to define required steps in your support process.

4. [Add a Milestone Action to an Entitlement Process](#)

Milestone actions are time-dependent workflow actions that occur at every step (milestone) in an entitlement process. After you create an entitlement process and add milestones to it, add milestone actions to the milestones.

5. [Apply an Entitlement Process to an Entitlement](#)

You’ve created an entitlement process; now it’s time to use it! Apply an entitlement process to a customer’s entitlement so all support records linked to the entitlement use that process.

SEE ALSO:

[Entitlement Management Setup Checklist](#)

EDITIONS

Available in: Salesforce Classic

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

Create an Entitlement Process

Create an entitlement process to give support agents a timeline of required steps to follow when solving support records. Each process includes the logic necessary to determine how to enforce the correct service level for your customers.

 **Note:** You must create milestones before you create an entitlement process.

 **Tip:** The Entitlement Management Trailhead module introduces you to common terms and walks you through creating an entitlement process. And, it’s fun! To get started, see [Entitlement Management](#).

1. From Setup, enter *Entitlement Processes* in the **Quick Find** box, then select **Entitlement Processes** under Entitlement Management.
2. Click **New Entitlement Process**.
3. Select an entitlement process type. If you intend to use the process to enforce milestones on cases, select Case. If you intend to use the process to enforce milestones on work orders, select Work Order. (If work orders aren’t enabled in your org, you only see the Case option.)

 **Note:** If you’re using entitlement processes, manage customers’ work orders and cases on separate entitlements. This is because an entitlement process only runs on records that match its type. For example, when a Case entitlement process is applied to an entitlement, the process only runs on cases associated with the entitlement. If a work order is also associated with the entitlement, the process won’t run on the work order.

4. Enter a name—for example, *Standard Support Process*—and a description.
5. If you want to enable the process, select **Active**.

 **Tip:** We recommend waiting to activate an entitlement process until you add milestone actions to it. You can’t update or delete milestone actions on a process after it’s activated and applied to a record.

6. Optionally, if entitlement versioning is enabled, select **Default Version** to make this version of the entitlement process the default.
7. Choose the criteria for records to enter and exit the entitlement process.

Field	Description	More Actions to Take?
Record* enters the process	Based on record created date Select if records should enter the process when they’re created.	No
	Based on a custom date/time field on the record Select if you want the value of a custom date/time field on the record to determine when the record enters the process.	Yes, a drop-down list displays for selecting the custom date/time. You can only choose a custom date/time, not a custom date.
Record exits the process	Based on when record is closed Select if records should exit the process when they’re closed.	No

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

- To view entitlements:
- “Read” on entitlements
- To change entitlements:
- “Edit” on entitlements
- To create and update entitlement processes:
- “Manage Entitlements”

Field	Description	More Actions to Take?
	Based on custom criteria Select if records should exit the process based on criteria you define.	Yes, select one of the following: - Choose <code>criteria</code> are met and select the filter criteria that a record must meet for it to exit the process. For example, set a case filter to <code>Priority equals Low</code> if you want cases with the <code>Priority</code> field marked Low to exit the process. Choose <code>formula</code> evaluates to <code>true</code> and enter a formula that returns a value of "True" or "False." Salesforce triggers the rule if the formula returns "True." - Choose <code>formula</code> evaluates to <code>true</code> and enter a formula that returns a value of "True" or "False." Records exit the process if the formula returns "True." For example, the formula <code>(Case: Priority equals Low) AND (Case: Case Origin equals Email, Web)</code> moves cases out of the process if their <code>Priority</code> field is Low and the <code>Case Origin</code> field is marked Email or Web.

*The field names you see will reflect the entitlement process type you selected.

8. Optionally, choose the business hours you'd like to apply to the entitlement process. The business hours you set here calculate the Target Date for all the milestones on this entitlement process. To learn more, see [How Business Hours Work in Entitlement Management](#).
9. Save your changes.

Customize Entitlement Process Fields

If you intend to use entitlement processes in your Salesforce org, customize page layouts to ensure that support agents can see and interact with entitlement processes.

- 1. Add these fields to case and work order page layouts:

Field	Description
Timeline (available only on case page layouts)	How far along a case is to reaching an entitlement process's milestones. You can click or hover your mouse pointer over each milestone to view its details. These icons represent milestones:  Completed milestone  Violated milestone You can drag the Handle icon () along the Timeline Zoom tool to view past and future milestones. If an entitlement process applies to the case, this field appears.
Stopped	Lets you stop an entitlement process on a record, which might be necessary if you're waiting for a customer's reponse.
Stopped Since	The date and time the entitlement process was stopped on the record.

- 2. Save your changes.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

- To edit page layouts:
- "Customize Application"

Add a Milestone to an Entitlement Process

Add milestones to entitlement processes to define required steps in your support process.

- 1. From Setup, enter *Entitlement Processes* in the Quick Find box, then select **Entitlement Processes**.
- 2. Click the name of an entitlement process.
- 3. If you’re using versioning, click the name of the entitlement process again under Entitlement Process Versions.
- 4. Click **New** on the Milestones related list.
- 5. Choose the milestone.
- 6. In *Time Trigger (Minutes)*, enter the number of minutes in which users must complete the milestone before it triggers an action.

Or, if you’d like the trigger time for the milestone to be calculated dynamically based on the milestone type and properties of the case or work order, click **Enable Apex Class for the Time Trigger (Minutes)**.

 **Note:** You must have a custom Apex class that implements the `Support.MilestoneTriggerTimeCalculator` Apex interface to use this option.

- 7. If you selected **Enable Apex Class for the Time Trigger (Minutes)**, use the lookup to specify an Apex class for the dynamically calculated milestone.
- 8. Choose when the milestone starts:

Select	To	Use If
Milestone Criteria	Calculate the milestone <i>Target Date</i> when the milestone is applied to a support record (matches the record criteria).	A milestone’s <i>Target Date</i> is based on when it’s applied to a record. Use if the milestone is recurring.  Note: An entitlement process usually starts when the record is created, but its milestones aren’t always applied right away.
Entitlement Process	Calculate the milestone <i>Target Date</i> when the entitlement process starts (by default, when a support record is created).	A milestone’s <i>Target Date</i> is based on the start of the entitlement process. For example, first response and resolution times on a case always calculate their <i>Target Date</i> when the entitlement process starts.

- 9. Optionally, select the business hours that you want to apply to the *Target Date* calculation for this milestone. If you don’t specify business hours for the milestone, then the Entitlement Process business hours are used. If neither are specified, then the business hours on the case or work order are used.
- 10. Specify the order in which Salesforce should process the milestones. This applies to situations where a support record matches the criteria of multiple milestones at the same time.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To add milestones to entitlement processes:

- “Manage Entitlements”

11. Enter the criteria a record must match for the milestone to apply to it:

- Choose `criteria are met` and select the filter criteria that a record must meet for a milestone to apply to it. For example, set a case filter to `Priority equals High` if you want the milestone to apply to cases with the `Priority` field marked High.

Choose `formula evaluates to true` and enter a formula that returns a value of “True” or “False.” Salesforce triggers the rule if the formula returns “True.”
- Choose `formula evaluates to true` and enter a formula that returns a value of “True” or “False.” The milestone applies to records if the formula returns “True.” For example, the formula `(Case: Priority equals High) AND (Case: Case Origin equals Email, Web)` applies the milestone to cases where the `Priority` field is High and the `Case Origin` field is marked Email or Web. You can’t use the `Case Owner` field in formulas.

12. Click **Save**.

 **Note:** Milestones are measured in minutes and seconds, but their start and end times are only accurate to the minute. For example, suppose a milestone is triggered at 11:10:40 a.m. and the time to complete the milestone is 10 minutes. In this case, the milestone target time is 11:20:00 am, not 11:20:40. As a result, the remaining time for the agent to complete the milestone is 9 minutes and 20 seconds, not the full 10 minutes.

SEE ALSO:

- [Milestone Statuses](#)
- [Milestone Actions](#)

Add a Milestone Action to an Entitlement Process

Milestone actions are time-dependent workflow actions that occur at every step (milestone) in an entitlement process. After you create an entitlement process and add milestones to it, add milestone actions to the milestones.

- From Setup, enter *Entitlement Processes* in the Quick Find box, then select **Entitlement Processes**.
- Click the name of an entitlement process.
- Click the name of a milestone on the Milestones related list.
- If you want to add a warning or violation action, add a time trigger first. After you add a trigger, the option to add a workflow action appears. Success actions use the milestone’s time trigger.

 **Tip:** If you want a violation action to fire immediately after the milestone is violated, set the time trigger to 0 minutes.

- Click **Add Workflow Action** and select an option.

Workflow Action	What It Does	Example
New Task	Create a workflow task	Create a task for a support agent to call a customer when a First Response milestone is violated.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To add milestone actions to entitlement processes:

- “Manage Entitlements”
AND
“Customize Application”

Workflow Action	What It Does	Example
New Email	Create an email alert	Notify case owners when a First Response milestone on their case is near violation.
New Field Update	Define a field update	Update the case Priority field to <code>High</code> when a First Response milestone is near violation.
New Outbound Message	Define an outbound message	Send data about parts or services to an external system after a First Response milestone is completed.
Select Existing Action	Select an existing action	Use an existing email alert to notify a case owner when their case is near violation of a first response.

 **Note:** Time-triggered actions only occur during your Salesforce org's business hours. You can add up to 10 actions and 10 time triggers to each type of milestone action.

SEE ALSO:

[Milestone Actions](#)

Apply an Entitlement Process to an Entitlement

You've created an entitlement process; now it's time to use it! Apply an entitlement process to a customer's entitlement so all support records linked to the entitlement use that process.

1. Go to the entitlement.
2. In the `Entitlement Process` lookup field, select the process you want to apply.

 **Important:** If you're using entitlement processes, manage customers' work orders and cases on separate entitlements. This is because an entitlement process only runs on records that match its type. For example, when a Case entitlement process is applied to an entitlement, the process only runs on cases associated with the entitlement. If a work order is also associated with the entitlement, the process won't run on the work order.

3. Click **Save**.

 **Tip:** If you've set up entitlement templates, you can associate an entitlement process with a template so all entitlements created using that template automatically use the selected entitlement process.

SEE ALSO:

[How a Record Moves Through an Entitlement Process](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To edit entitlements:

- "Edit" on entitlements

How a Record Moves Through an Entitlement Process

When an entitlement process is applied to an entitlement, the entitlement process runs on all support records linked to the entitlement. Learn how support records like cases and work orders move through an entitlement process.

1. A support agent linked a record to an entitlement that has an entitlement process. This can be done in several ways:
 - The support agent creates the record from the Cases or Work Orders related list on the entitlement.
 - The support agent creates the record, then uses the Entitlement lookup field on the record to select the proper entitlement.
2. The record enters the process based on its creation date or a custom date/time field. A custom date/time field lets users edit a date on the record to trigger when it enters the process.
3. Salesforce assigns milestones with matching criteria to the record. For example, if a milestone's criteria is *Priority equals High*, and a case has a Priority of *High*, Salesforce assigns it to the *Priority equals High* milestone. A record associates with one milestone at a time. It can associate with many milestones as it moves through the process.
4. Milestone actions determine when and if warning, violation, or success workflow actions fire for the record.
5. A support agent updates the record to complete a milestone action.
6. After a record is updated, it cycles through the entitlement process and initiates any milestones that match its criteria.
7. The record exits the process based on custom criteria or when it's closed.

You can view records with assigned entitlements by creating case or work order list views that filter on entitlement process fields.

 **Important:** Milestones are not automatically marked Completed when a record exits an entitlement process. To write an Apex trigger that auto-completes milestones that meet unique criteria, see [Auto-Complete Case Milestones](#).

SEE ALSO:

[Set Up Entitlements](#)

[Entitlement Management Setup Checklist](#)

EDITIONS

Available in: Salesforce Classic

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

Report on Entitlements

Use custom report types to define report criteria that users can use to run and create reports on entitlements, service contracts, and contract line items.

After you set up entitlement management, your Salesforce org automatically includes the following custom report types:

Custom Report Type	Description	Report Type Location
Accounts with entitlements with contacts	Lists accounts with entitlements that include contacts (named callers).	Accounts & Contacts
Service contracts with contract line items	Lists service contracts with contract line items (products).	Customer Support Reports
Service contracts with entitlements	Lists service contracts with entitlements.	Customer Support Reports
Cases with milestones	Lists cases with milestones.  Note: This report type can't be customized.	Customer Support Reports

To customize entitlement management custom report types:

1. From Setup, enter *Report Types* in the Quick Find box, then select **Report Types**.
2. From the All Custom Report Types page, you can:
 - Define a new custom report type. You can't select entitlements as a primary object.
 - Update a custom report type's name, description, report type category, and deployment status.
 - Delete a custom report type.

 **Important:** When you delete a custom report type, all the data stored in the custom report type is deleted and cannot be restored from the Recycle Bin.

 **Tip:** If you want to view a list of work orders with milestones in your org, use the Object Milestones custom report type to create a work order report.

SEE ALSO:

[Set Up Entitlements](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create or update entitlement management custom report types:

- "Manage Custom Report Types"

To create and run reports based on entitlement management custom report types:

- "Create and Customize Reports"

How Business Hours Work in Entitlement Management

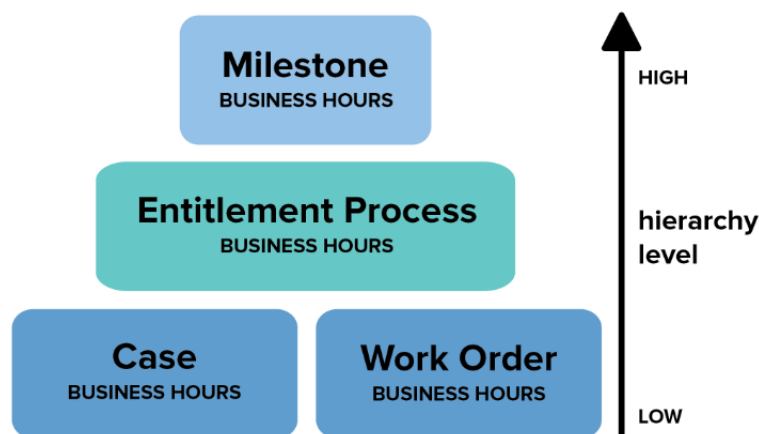
When a support record is linked to an entitlement, the record, its milestones, its entitlement process, and the entitlement itself can each use different business hours. Learn how Salesforce approaches business hours in these situations.

On records that include entitlement processes, business hours are applied according to a hierarchy. Salesforce uses the business hours specified at the highest level.

EDITIONS

Available in: Salesforce Classic

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



So a milestone's business hours override the entitlement process' business hours, which override the case or work order's business hours. If no business hours are set on the milestone, then the entitlement process business hours are used. And if business hours aren't specified on the milestone or the entitlement process, the case or work order business hours are used.

You can also set business hours on entitlements. If you create a record from an entitlement, it inherits the entitlement's business hours. However, if the entitlement is part of an entitlement process, we recommend leaving the entitlement's business hours field blank. Related records automatically use the entitlement process' business hours.

When setting business hours, follow these best practices:

- If you want to use the same entitlement process for records that have different business hours, set business hours at the entitlement process level. For example, suppose that you set the business hours on an entitlement process to weekdays from 9 to 5. If a customer requests evening and weekend updates to their case, you can create an "Update Customer" milestone with its own 24/7 business hours.
- If you want to use different business hours for different severity levels, set business hours at the milestone level. For example, if the severity level of a case increases, the customer may need to be contacted more frequently. You can create a "Last Touch" milestone that changes business hours according to severity level while the other milestones in the entitlement process remain unchanged.

SEE ALSO:

[Set Up an Entitlement Process](#)

Updating an Entitlement Process

Entitlement versioning lets you create multiple versions of an entitlement process, even if it's assigned to active entitlements and support records.

 [Watch a Demo](#) (2:20 minutes)

Use entitlement versioning if:

- You want to make several versions of an entitlement process that have minor differences
- You want to update an entitlement process to reflect changes in your business processes

You might find that an entitlement process needs to be updated seasonally, or that you need to roll back to a previous version.

 **Note:** To create multiple versions of entitlement processes, entitlement versioning must be enabled in your org. Select **Enable Entitlement Versioning** on the Entitlement Settings page in Setup.

When you create versions of entitlement processes with the same name, the version number and notes help you differentiate between versions. Salesforce prevents you from disabling entitlement versioning so you always know which version you're working with.

When you create a new version of an entitlement process, you can change any of the following:

- Name
- Description
- Whether the process is active
- Whether the version is the default
- Entry criteria
- Exit criteria

You can also add notes about the version. This makes it easy to differentiate between multiple versions of the same process, especially if they have the same name.

On new versions of entitlement processes that are currently in use, you can add new milestones, but you can't edit existing ones. On new versions of processes that aren't currently in use, you can both add new milestones and edit existing ones.

Once you create a new version of an entitlement process, you can choose to apply it to all entitlements and support records assigned to the previously used version, or only to new entitlements and support records. All versions of an entitlement process must be the same type: Case or Work Order.

SEE ALSO:

[Create a New Version of an Entitlement Process](#)

[Use a New Version of an Entitlement Process](#)

EDITIONS

Available in: Salesforce Classic

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

Create a New Version of an Entitlement Process

Entitlement versioning lets you create multiple versions of an entitlement process, even if it's assigned to active entitlements and support records. You can use multiple versions of an entitlement process at the same time in your Salesforce org.

 [Watch a Demo](#) (2:20 minutes)

 **Note:** To create multiple versions of entitlement processes, entitlement versioning must be enabled in your org. Select **Enable Entitlement Versioning** on the Entitlement Settings page in Setup.

When you create versions of entitlement processes with the same name, the version number and notes help you differentiate between versions. Salesforce prevents you from disabling entitlement versioning so you always know which version you're working with.

1. From Setup, enter *Entitlement Processes* in the **Quick Find** box, then select **Entitlement Processes**.
2. Click the name of the entitlement process for which you want to create a new version.
3. In the Entitlement Process Versions list, click the version of the process from which you want to create a new version.
4. On the Entitlement Process Detail page, click **Create New Version**.
5. Add details about the new version. Follow these best practices:
 - Use the **Version Notes** field to explain what makes the version you're creating different from others. This makes it easier to differentiate between multiple versions of the same entitlement process.
 - Leave the name as is.
 - Click **Active** to be able to use the new version.
 - Click **Default** if you want to make the new version the default version of the process. This makes it easier to find in lookup field searches.
6. Click **Save**.

After saving, you can modify the entitlement process' milestones if needed.

 Important:

- On new versions of entitlement processes that are currently in use, you can add new milestones, but you can't edit existing ones. On new versions of processes that aren't currently in use, you can both add new milestones and edit existing ones.
- All versions of an entitlement process must be the same type.

When you create a new version of an entitlement process, it isn't automatically applied to entitlements that were using the previous version. To learn how to apply a new version of an entitlement process to existing and new entitlements, see [Use a New Version of an Entitlement Process](#).

SEE ALSO:

[Updating an Entitlement Process](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create and update entitlement processes:

- "Manage Entitlements"

Use a New Version of an Entitlement Process

After you create a new version of an entitlement process, you can choose to apply it to all entitlements assigned to the previous version, or only to new entitlements. When you apply an entitlement process to an entitlement, it also applies the process to that entitlement's active support records.

 [Watch a Demo](#) (2:20 minutes)

 **Note:** To create multiple versions of entitlement processes, entitlement versioning must be enabled in your org. Select **Enable Entitlement Versioning** on the Entitlement Settings page in Setup.

When you create versions of entitlement processes with the same name, the version number and notes help you differentiate between versions. Salesforce prevents you from disabling entitlement versioning so you always know which version you're working with.

Applying an Entitlement Process to a New Entitlement

Scenario: You're creating an entitlement and want to apply a particular version of an entitlement process to it.

1. Choose the entitlement process you want in the Entitlement Process lookup field on the entitlement.

 **Tip:** After you click the lookup icon on the Entitlement Process field, select "All Versions" in the lookup dialog box. Otherwise, you can only choose from the default versions of existing entitlement processes.

Applying an Entitlement Process to an Existing Entitlement

Scenario: You made a new version of an entitlement process, and you want to switch all the entitlements that were using the previous version over to your new version.

1. From Setup, enter *Entitlement Processes* in the *Quick Find* box, then select **Entitlement Processes**.
2. Click the name of the entitlement process you want to work with.
The list on the main Entitlement Processes page shows the default version of each process. Click the name of a process to see a list of all available versions of it.
3. On the detail page for the entitlement process, click the name of the new version that you want to apply to existing entitlements (and by default, to cases or work orders linked to those entitlements).
4. Click **New Update Rule**.
5. Choose the version of the entitlement process you want to update from.
You can update from any other version of the process, whether or not it's active.
6. Depending on the differences between the old and new versions of the entitlement process, updating an entitlement to the new version can trigger milestone warning and violation actions on that entitlement's support records (such as cases or work orders). To avoid such warnings and violation actions, select **Don't Trigger New Milestone Warnings and Violations**. We recommend selecting this so you don't trigger violation warnings on old entitlements and support records.
7. Click **Save**.
The update rule detail page shows the estimated number of entitlements and support records that will be updated to use the new process.
8. Click **Start** to begin the update process.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create and update entitlement processes:

- "Manage Entitlements"

Usually the update process completes within an hour, but it depends on the number of entitlements and records being updated. Throughout the update process, the update rule detail page refreshes periodically to show the number of entitlements and records processed. To stop the update at any time, click **Stop**.

When the update rule displays a **Completed** status, all related entitlements and support records have been updated to use the new version of the entitlement process. If the status is **Completed With Exceptions**, some records couldn't be updated to the new version because of errors. To find out which records weren't updated and why, contact Salesforce Support.

SEE ALSO:

[Set Up an Entitlement Process](#)

[Updating an Entitlement Process](#)

[Create a New Version of an Entitlement Process](#)

Set Up Service Contracts

Service contracts are agreements between you and your customers for a type of customer support. Service contracts can represent different kinds of customer support, such as warranties, subscriptions, or service level agreements (SLAs).

 **Note:** Entitlements must be enabled in your org for you to set up service contracts.

From the object management settings for service contracts:

1. Customize service contract fields.

This lets you control what information users add to service contracts. You can create custom service contract fields that are specific to your industry or support process.

2. Customize service contract page layouts.

This lets you specify which fields and related lists users see on service contracts. Consider making the following customizations:

- Add the **Status Icon** field so users can easily see whether the service contract is active, expired, or inactive.
- To let users make one service contract the parent of another, add the **Parent Service Contract** field and **Child Service Contracts** related list. You can also add the read-only **Root Service Contract** field so users can see the top-level service contract in a service contract hierarchy. A service contract hierarchy can contain up to 10,000 service contracts.

3. Set field-level security on service contract fields.

This lets you choose which service contract fields users can access.

4. Set field history tracking on service contracts.

This lets you see when field values were changed. Changes are listed in the **Service Contract History** related list on service contracts. From the object management settings for service contracts, go to the fields section, and then click **Set History Tracking**.

5. Make the Service Contracts tab visible in Salesforce and any custom apps.

The Service Contracts tab is where users create and edit service contracts and contract line items. Add the tab to an app or instruct your users to add it to an existing tab set in Salesforce. Users need the "Read" permission on service contracts to see the Service Contracts tab.

6. Add the Service Contracts related list to account and contact page layouts.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up service contracts:

- "Manage Entitlements"
- AND
- "Customize Application"

This lets users create, update, and verify service contracts from accounts and contacts.

SEE ALSO:

[Entitlement Management Setup Checklist](#)

[Set Up Contract Line Items](#)

Set Up Contract Line Items

Set up contract line items to be able to specify which products a service contract covers. Contract line items only display to users on the Contract Line Items related list on service contracts (not on contracts!). You can only use contract line items if your Salesforce org uses products.



Note: Entitlements must be enabled in your org for you to set up contract line items.

From the object management settings for contract line items:

1. Customize contract line item fields.

This lets you control what information users add to contract line items. You can create custom contract line item fields that are specific to your industry or support process.

2. Customize contract line item page layouts.

This lets you specify which fields and related lists users see on contract line items. Consider making the following customizations:

- Add the `Status Icon` field so users can easily see whether the line item is active, expired, or inactive.
- To let users make one line item the parent of another, add the `Parent Contract Line Item` field and `Child Contract Line Items` related list. You can also add the read-only `Root Contract Line Item` field, which lists the top-level line item in a contract line item hierarchy. A contract line item hierarchy can contain up to 10,000 line items.

3. Customize other objects' page layouts.

This lets you choose how users can associate contract line items with other records. Consider making the following customizations:

- (Required) Add the Contract Line Items related list to service contract page layouts. This lets users create, edit, and delete contract line items from service contracts.
- Add the Contract Line Items related list to asset layouts. This lets users view and change associations between assets and contract line items.
- Add the `Contract Line Item` lookup field to entitlement page layouts. This lets users associate a line item with a particular entitlement.

4. Set field-level security on contract line items.

This lets you choose which contract line item fields users can access.

5. Set field history tracking on contract line items.

This lets you see when field values were changed. Changes are listed in the Contract Line Item History related list on contract line items. From the object management settings for contract line items, go to the fields section, and then click **Set History Tracking**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up service contracts and contract line items with entitlements:

- "Manage Entitlements"
- AND
- "Customize Application"

 **Note:** Schedules aren't available for contract line items, and community users can't access them.

SEE ALSO:

[Entitlement Management Setup Checklist](#)

Set Up Entitlement Management in Communities

Add entitlement management to your communities to let customers or partners view their entitlements and service contracts. Contract line items don't display in communities.

Follow these steps to expose entitlements and/or service contracts in a community.

1. Update user profiles.
 - a. Clone the Customer Community User, Customer Community Plus User, or Partner Community User profiles and enable the "Read" permission on entitlements and/or service contracts.

 **Note:** Remember to click **Edit Profiles** at the bottom of the detail page to activate the new profiles.
 - b. Optionally, on the profiles of delegated community moderators, enable the "Create" and "Delete" permissions on entitlement contacts. This lets moderators update entitlement contacts.
 - c. Verify that the tab visibility for the Entitlements and/or Service Contracts tabs is Default On.
2. Add the Entitlements and/or Service Contracts tabs to the community.
3. Add the `Entitlement Name` field to case and work order page layouts assigned to community users. This lets users add entitlements to cases and work orders. Work orders are not available in communities built using the self-service community templates.

 **Note:** To avoid exposing your internal support processes, we recommend **not** adding the following fields to case and work order page layouts for community users:

 - `Entitlement Process Start Time`
 - `Entitlement Process End Time`
 - `Stopped`
 - `Stopped Since`
4. Optionally, add the Entitlements related list to account and contact page layouts assigned to community moderators. This lets moderators create cases automatically associated with the right entitlements.

EDITIONS

Available in: Salesforce Classic

Communities are available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud

Entitlement Management is available in **Professional, Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities" AND is a member of the community they're updating

To set up entitlement management:

- "Manage Entitlements"

To assign user licenses:

- "Manage Internal Users"

Setting Up a Field Service Hub

Field Service Lightning

Want to manage your field service in one place? Field Service Lightning is a powerful set of features that lets you set up and customize a field service hub in Salesforce.

Field Service Lightning includes the following features, which you can pick and choose from to fit your business needs.

- The Field Service Lightning **standard features** are available when Field Service Lightning is enabled in your org. The standard features offer:
 - **Work order management:** *Work orders* represent tasks to be performed for your customers. You can attach Knowledge articles to work orders, split them into sub-tasks called *work order line items*, and track terms in service-level agreements using milestones. *Service appointments* can be associated with work orders and work order line items, and include details about the appointment schedule. And, time-saving templates called *work types* help you standardize your work orders.
 - **Resource management:** *Service resources* are users who can perform field service work. You can assign service resources to service appointments and specify each resource's skills, service territory, and hours of operation. *Service territories* represent regions in which field service work can be performed. You can assign service resources to a territory and create territory hierarchies.
 - **Schedule management:** *Operating hours* let you define when your service resources are available to work, and when work can be performed in service territories. You can also track service resource absences.
- The Field Service Lightning **managed packages** build on the standard features and include:
 - A scheduling optimizer that allocates resources to appointments in the most efficient way possible by accounting for technician skill level, travel time, location, and other factors
 - A dynamic scheduling console that gives dispatchers and supervisors a bird's-eye view of all scheduled service appointments
 - A robust toolbox of work rules and scheduling policies that help you define your ideal scheduling model
 - Out-of-the-box triggers that make it easy to customize your scheduling and display preferences

Field Service Lightning gives you the tools to plan, perform, and track all your field service work, from installations to repairs and maintenance. Let's get started!

SEE ALSO:

[Planning for Field Service Lightning](#)
[Set Up Field Service Lightning](#)
[Field Service Lightning Considerations](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

- Field Service Lightning features are available in **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud. Work orders are also available in **Professional** Edition.
- The Field Service Lightning managed packages are available for an additional cost in **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud.

Planning for Field Service Lightning

Field Service Lightning is a powerful set of features which you can customize to meet your own unique field service needs. Before setting up Field Service Lightning, consider these essential planning questions.

What types of field service tasks do you want to track?

If many of your business's appointments involve similar tasks, it's a good idea to create work order templates, known as *work types*. On each work type, you can specify how long each type of appointment takes and which skills are required to complete it. Then, you can quickly create work orders or work order line items that inherit their settings from the work type. Work types save you time and helps you standardize your field service work.

How do you want to track technicians' skills?

You can assign skills to all service resources in your org to indicate their certifications and areas of expertise. You can also specify each resource's skill level from 0 to 99.99. For example, you can assign Maria the "Welding" skill, level 50. In addition, you can add required skills to work types, work orders, and work order line items to let dispatchers know which skills are required to complete the job.

If you intend to use the skills feature, decide which skills you want to track and how skill level is to be determined. For example, you may want the skill level to reflect years of experience, certification levels, or license classes.

How do you want to model territories?

You can create *service territories* in your org to represent the geographical regions in which your team works. Territories have their own operating hours and child territories, and service resources can be assigned to territories as members.

If you want to use service territories in Salesforce, determine which territories you want to create. Depending on how your business works, you can create territories based on cities, counties, or other factors.

How do you manage your team's calendars?

A service resource has *operating hours* for each service territory they belong to which indicate when they're available to work in that territory. Similarly, a service territory's operating hours indicate when appointments can take place in the territory. If a resource's operating hours aren't defined for a territory, they inherit their service territory's operating hours. Resource absences are tracked in the Absences related list on their detail page.

While you can assess a service resource's schedule by reviewing their scheduled service appointments, absences, and operating hours, a calendar view isn't available for individual service resources, unless you're using the Field Service Lightning managed packages.

Do you want a customizable dispatcher console and automatic scheduling optimization?

If so, consider using the Field Service Lightning managed packages. The packages build on the standard Field Service Lightning features and include:

- A scheduling optimizer that allocates resources to appointments in the most efficient way possible by accounting for technician skill level, travel time, location, and other factors
- A dynamic scheduling console that gives dispatchers and supervisors a bird's-eye view of all scheduled service appointments
- A robust toolbox of work rules and scheduling policies that help you define your ideal scheduling model
- Out-of-the-box triggers that make it easy to customize your scheduling and display preferences

EDITIONS

Available in: Salesforce Classic and Lightning Experience

- Field Service Lightning features are available in **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud. Work orders are also available in **Professional** Edition.
- The Field Service Lightning managed packages are available for an additional cost in **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud.

Do you want to give your customers a way to track their service progress?

If so, you can add standard Field Service Lightning objects like work orders to your communities built using the Salesforce Tabs + Visualforce template. Only work orders, work order line items, and service appointments are available in communities built on the Customer Service (Napili) template. Make sure to double-check which fields are visible in your communities so customers see only the information they need to.

SEE ALSO:

[Field Service Lightning Considerations](#)[Set Up Field Service Lightning](#)

Set Up Field Service Lightning

Set up Field Service Lightning in a way that fits your business needs.

 **Important:** Before you get started, get informed! We recommend reading:

- [Planning for Field Service Lightning](#)
- [Field Service Lightning Considerations](#)

IN THIS SECTION:

1. [Enable Field Service Lightning](#)
Enable Field Service Lightning to start using field service features like work orders, service appointments, and more.
2. [Assign Field Service Lightning Permission Sets](#)
To give your team access to Field Service Lightning features, assign the necessary object permissions to users with the help of permission set licenses.
3. [Set Up the Field Service Lightning Managed Packages](#)
The Field Service Lightning managed packages build on Salesforce's standard field service features to deliver a rich, highly customizable experience for dispatchers and technicians.
4. [Set Up Service Territories](#)
A service territory represents a region in which field service can be performed. Learn how to configure service territory settings and create territories that fit your business processes.
5. [Set Up Service Resources](#)
A service resource represents a Salesforce user who can perform field service work. Learn how to create service resources and track their skills and availability.
6. [Set Up Work Orders](#)
A work order represents work to be performed on your customers' products. Learn how to configure work order settings and create time-saving templates called work types.
7. [Set Up Skills for Field Service](#)
Assign skills to service resources to indicate the type of work that they can perform. You can also add required skills to work orders and work types so only resources with certain skills can be assigned to complete the work.
8. [Create Operating Hours](#)
Define operating hours and assign them to service territories, service territory members, or accounts to indicate their field service hours.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

- Field Service Lightning features are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud. Work orders are also available in **Professional** Edition.
- The Field Service Lightning managed packages are available for an additional cost in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud.

9. [Create Field Service Lightning Reports](#)

Create report types to track field service progress in your org.

SEE ALSO:

[Field Service Lightning Guidelines](#)

Enable Field Service Lightning

Enable Field Service Lightning to start using field service features like work orders, service appointments, and more.

1. From Setup, enter *Field Service Settings* in the Quick Find box, then select **Field Service Settings**.
 2. Click **Enable Field Service Lightning**.
 3. If you want, select the option to turn on in-app notifications for Salesforce1 and Lightning Experience users when any of the following actions occurs on a work order or work order line item that they own or follow:
 - A text or file post is added
 - A tracked field is updated
 - The record owner changes
 - The resource assignments change on a related service appointment
-  **Note:** If the option to track all related objects is selected in your feed tracking settings for work orders, users are also notified when child records of work orders—such as service appointments—are created or deleted.
4. When you set up work types, which are templates for work orders, you can opt to automatically add a service appointment to new work orders or work order line items associated with a work type. Optionally, configure the Due Date on auto-created service appointments by indicating how many days past the created date it should fall.

Enabling Field Service Lightning makes the following tabs available in Salesforce:

- **Work types:** Templates that help you standardize your work orders.
- **Service appointments:** Appointments to perform field service work for customers. You can specify the number of resources needed to complete an appointment, the skills required, and the appointment schedule.
- **Service territories:** Regions in which field service can be performed. You can assign resources to a territory and create territory hierarchies.
- **Service resources:** Users who can perform field service work. You can assign resources to service appointments and specify each resource's skills, service territory, and more.
- **Operating hours:** Field service hours that you can define for service territories, service resources, and accounts.

Enabling Field Service Lightning also turns on geocoding (location data) for supported features. To learn more, see [Location Tracking in Field Service Lightning](#).

 **Note:**

- Work orders, which are an additional Field Service Lightning feature, are available whether or not Field Service Lightning is enabled.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

- Field Service Lightning features are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud. Work orders are also available in **Professional** Edition.
- The Field Service Lightning managed packages are available for an additional cost in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud.

USER PERMISSIONS

To enable Field Service Lightning:

- “Customize Application”

- The Field Service Lightning managed packages, which include scheduling optimization, an interactive dispatcher console, and more, are offered at an additional cost.

Assign Field Service Lightning Permission Sets

To give your team access to Field Service Lightning features, assign the necessary object permissions to users with the help of permission set licenses.

There are three available Field Service Lightning permission set licenses:

License Name	Object Permissions Included
Field Service Standard	“Read,” “Edit,” “Create,” and “Delete” on: • Service Appointments • Service Resources • Service Territories • Operating Hours • Work Types
Field Service Dispatcher	“Read,” “Edit,” “Create,” and “Delete” on: • Service Appointments • Service Resources • Service Territories • Operating Hours • Work Types If the Field Service Lightning managed packages are installed, users with this permission set license have access to the dispatcher console.
Field Service Scheduling	“Read,” “Edit,” “Create,” and “Delete” on: • Service Appointments • Service Resources • Service Territories • Operating Hours • Work Types If the Field Service Lightning managed packages are installed, users with this permission set license are included in scheduling optimization.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To assign a permission set license:

- “Manage Users”

To create a permission set:

- “Manage Profiles and Permission Sets”

1. Create a permission set for each Field Service Lightning license. Creating a permission set gives the object permissions to users with the license.
 - a. From Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets**.
 - b. Click **New**.

- c. Enter a label, API name, and description for your permission set. To keep it simple, we suggest using the same name as the permission set license you plan to associate it with.
 - d. Select the corresponding Field Service Lightning permission set license.
 - e. Click **Save**.
 - f. Repeat the previous steps until you have create a permission set for each Field Service Lightning permission set license.
2. Assign the permission sets you created to users who need access to Field Service Lightning features. Assigning a permission set automatically assigns the associated permission set license to the user.
 - a. Navigate to the permission set you created.
 - b. Click **Manage Assignments**.
 - c. Click **Add Assignments** and select the users who need the permission set.
 - d. Click **Assign**.

 **Note:** Users don't need a Field Service Lightning permission set to access work orders.

Set Up the Field Service Lightning Managed Packages

The Field Service Lightning managed packages build on Salesforce's standard field service features to deliver a rich, highly customizable experience for dispatchers and technicians.

When you implement Field Service Lightning, you select which features to use. Most features are available when Field Service Lightning is enabled in your org, but you can also choose to install the two Field Service Lightning managed packages. The managed packages come with:

- A scheduling optimizer that allocates resources to appointments in the most efficient way possible by accounting for technician skill level, travel time, location, and other factors
- A dynamic scheduling console that gives dispatchers and supervisors a bird's-eye view of all scheduled service appointments
- A robust toolbox of work rules and scheduling policies that help you define your ideal scheduling model
- Out-of-the-box triggers that make it easy to customize your scheduling and display preferences

To learn how to install and set up the managed packages, see the [Field Service Lightning Managed Packages Guide](#). To review release notes for the managed packages, see [Getting Started with the Field Service Lightning Managed Packages](#).

EDITIONS

Available in Salesforce Classic

Available for an additional cost in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

Set Up Service Territories

A service territory represents a region in which field service can be performed. Learn how to configure service territory settings and create territories that fit your business processes.

IN THIS SECTION:

1. [Configure Service Territory Settings](#)
Control how your users work with service territories.
2. [Create Service Territories](#)
Create service territories to track your field service work and ensure that service resources are assigned to service appointments near their home base.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Configure Service Territory Settings

Control how your users work with service territories.

 **Note:** Field Service Lightning must be enabled in your org.

- 1. Assign user permissions.

Users Who Will...	Need These Permissions
Enable Field Service Lightning	"Customize Application"
View the Service Territories tab and service territories	"Read" on service territories
Create or clone service territories	"Create" on service territories
Edit service territories	"Edit" on service territories
Delete service territories	"Delete" on service territories
Create service territory members	"Edit" on service resources

- 2. Make the Service Territories tab visible to your users.
Users create and manage service territories from the Service Territories tab. You can add the tab to a custom app or instruct users to add the tab in Salesforce.

Create Service Territories

Create service territories to track your field service work and ensure that service resources are assigned to service appointments near their home base.

 **Tip:** If you plan to build out a hierarchy of service territories, create the highest-level territories first.

- 1. From the Service Territories tab, click **New**.
- 2. Select **Active** if you want to be able to add members to the territory or associate it with work orders, work order line items, or service appointments.
- 3. Enter a name and description for your territory. The name you select will depend on how your field service business is organized. For example, it might be the name of a particular county or district.
- 4. Optionally, enter an address. You may want to enter the address of the territory's headquarters.
- 5. If your territory is part of a larger territory, select a parent territory.

 **Note:** A hierarchy of service territories can have up to 500 territories total.

- 6. Select operating hours for the territory, which indicate when service appointments within the territory should take place. To create operating hours:
 - a. In a separate browser window, click the Operating Hours tab, then click **New**.
 - b. Enter a name, description, and time zone.
 - c. Click **Save**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To edit page layouts and set field history tracking:

- "Customize Application"

To create and edit users:

- "Manage Internal Users"

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create service territories:

- "Create" on service territories

- d. In the Time Slots related list on the operating hours, create time slots for each day. For example, if the operating hours should be 8 AM to 5 PM Monday through Friday, create five time slots, one per day. To reflect breaks such as lunch hours, create multiple time slots in a day: for example, *Monday 8:00 AM – 12:00 PM* and *Monday 1:00 PM – 5:00 PM*. To establish 24/7 operating hours, create a time slot for each day of the week that starts at 12:00 AM and ends at 11:59 PM.

7. Click **Save**.

8. Optionally, assign service resources to your territory via the Service Territory Members related list. Service territory members are resources who are available to work within the territory. If you haven't created service resource yet, know that you can also define a service resource's territories from the resource's detail page.

When you add a member, indicate whether this territory is the member's primary, secondary, or relocation territory. The primary territory is typically the territory where they work most often—for instance, near their home base—while secondary territories are territories where they can be assigned to appointments if needed. Relocation territories represent temporary moves.



Example: You can create a hierarchy of territories to represent the areas where your team works in California. Include a top-level territory named *California*, three child territories named *Northern California*, *Central California*, and *Southern California*, and a series of third-level territories corresponding to California counties. Assign service resources to each county territory to indicate who is available to work in that county.

SEE ALSO:

[Guidelines for Using Service Territories](#)

[Service Territory Fields](#)

Set Up Service Resources

A service resource represents a Salesforce user who can perform field service work. Learn how to create service resources and track their skills and availability.

IN THIS SECTION:

1. [Configure Service Resource Settings](#)
Set up service resource settings and user permissions in your org.
2. [Create Service Resources](#)
Service resources are users who can perform field service work. Create service resources so you can assign them to service appointments.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Configure Service Resource Settings

Set up service resource settings and user permissions in your org.

 **Note:** Field Service Lightning must be enabled in your org.

1. Customize page layouts.

a. Decide which related lists to include on the service resource detail page layout. The following related lists are specific to field service:

- Absences: View and manage the service resource’s absences.
- Capacities: View and manage the service resource’s capacity, or how much they can work in a specified time period.
- Service Appointments: View and manage the service appointments assigned to the service resource.
- Service Territories: View and manage the service territories where the service resource is available to work.
- Skills: View and manage the service resource’s skills, which represent certifications and areas of expertise.

b. Decide which fields to include on service resource page layouts. The following fields can be removed from the layouts if desired:

- **Active:** When selected, this option means that the resource can be assigned to work orders. For service tracking purposes, resources can’t be deleted, so deactivating a resource is the best way to send them into retirement.
- **Capacity-Based:** Capacity-based resources are limited to a certain number of hours or appointments in a specified time period. A resource’s capacity is defined in the Capacities related list.
- **Description:** A description of the resource.
- **Include in Scheduling Optimization:** When selected, this option means that the service scheduling optimizer can assign this resource to work orders during the optimization process. Use only if the Field Service Lightning managed packages are installed.

2. Assign user permissions.

Users Who Will...	Need These Permissions
Enable Field Service Lightning	“Customize Application”
View the Service Resources tab and service resources	“Read” on service resources
Create service resources	“Create” on service resources
Edit or deactivate service resources	“Edit” on service resources

3. Make the Service Resources tab visible to your users.

Users create and manage service resources from the Service Resources tab. You can add the tab to a custom app or instruct users to add the tab in Salesforce.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To edit page layouts and set field history tracking:

- “Customize Application”

To create and edit users:

- “Manage Internal Users”

Create Service Resources

Service resources are users who can perform field service work. Create service resources so you can assign them to service appointments.

1. From the Service Resources tab, click **New**.
2. Enter a name and description. You'll likely want the name to be the name or title of the associated user.
3. Select **Active** if you want the resource to be able to be assigned to service appointments.
4. Select **Capacity-Based** if the resource will be limited to working a certain number of hours or appointments in a specified time period. Contractors would likely be capacity-based.
5. If you're using the Field Service Lightning managed packages with scheduling optimization, select **Include in Scheduling Optimization** to allow the scheduling optimizer to assign the resource to service appointments during the optimization process. Only users with the Field Service Scheduling permission set license can be included in scheduling optimization.
6. Select the user that the resource is associated with.
7. Indicate whether the resource is a technician or dispatcher. Resources who are dispatchers can't be capacity-based or included in scheduling optimization. Only users with the Field Service Dispatcher permission set license can be dispatchers.

 **Note:** If a user is both a technician and a dispatcher, you can create two service resource records for them.

8. Click **Save**.

Once a resource is created, add information about their capabilities.

1. In the Service Territories related list, select the territories where the resource is available to work.

Indicate whether each territory is the resource's primary, secondary, or relocation territory. The primary territory is typically the territory where they work most often—for instance, near their home base—while secondary territories are territories where they can be assigned to appointments if needed. Relocation territories represent temporary moves.

For example, a service resource might have the following territories:

- Primary territory: *West Chicago*
 - Secondary territories:
 - *East Chicago*
 - *South Chicago*
 - Relocation territory: *Manhattan*, for a three-month period
2. If the resource is capacity-based, define their capacity.
 - a. In the Capacity related list, click **New Resource Capacity**.
 - b. Enter a start date and an end date to indicate when the capacity is in effect for the resource. For example, if the capacity represents a six-month contract, enter the contract's start and end dates.
 - c. Specify how much the resource can work:
 - Select the **Time Period** that the capacity is based on: hours, days, or months. For example, if the resource can work 80 hours per month, select **Month**.
 - If you want the resource's capacity to be based on the number of hours worked, fill out **Hours per Time Period**. For example, if the resource can work 80 hours per month, enter *80*.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create service resources:

- "Create" on service resources

- If you want the resource's capacity to be based on the number of service appointments they are assigned to, fill out **Work Items per Time Period**. For example, if the resource can complete 20 appointments per month, enter **20**.

 **Note:** If you're using the Field Service Lightning managed packages and would like to measure capacity both in hours and in number of work items, enter a value for both. The resource is considered to reach their capacity based on whichever term is met first—hours or number of work items.

- d. Click **Save**. You can set multiple capacities for a resource as long as their start and end dates do not overlap.

 **Important:** If you aren't using the Field Service Lightning managed packages, capacity serves more as a suggestion than a rule. Resources can still be as scheduled beyond their capacity, and you aren't notified when a resource exceeds their capacity.

3. In the Skills related list, assign skills to indicate the resource's areas of expertise. For details, see [Assign Skills to Service Resources](#).

SEE ALSO:

[Guidelines for Using Service Resources](#)

[Service Resource Fields](#)

Set Up Work Orders

A work order represents work to be performed on your customers' products. Learn how to configure work order settings and create time-saving templates called work types.

IN THIS SECTION:

1. [Configure Work Order Settings](#)

Control how your users work with work orders by customizing page layouts, user permissions, and more.

2. [Create Work Types](#)

Chances are, your business performs the same tasks for multiple customers. Work types are work order templates that save you time and make it easier to standardize your field service work.

3. [Create Work Orders](#)

Create work orders to track work to be performed for a customer.

4. [Choose Preferred Service Resources on Work Orders](#)

You can designate certain service resources as preferred, required, or excluded on specific accounts or work orders. Work orders inherit their associated account's resource preferences.

5. [Create Service Appointments](#)

Service appointments help you track field service work to be performed for customers. You can associate them with several types of records.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Configure Work Order Settings

Control how your users work with work orders by customizing page layouts, user permissions, and more.

1. Customize page layouts.

- a. To let users view and create work orders that are related to other records, add the Work Orders related list to other objects' page layouts. These objects' page layouts can include the related list:
 - Account
 - Asset
 - Case
 - Contact
 - Entitlement
 - Service Contract
 - Custom objects
- b. To let users view work order line items that are associated with a particular asset, add the Work Order Line Items related list to Asset page layouts.
- c. To let users make one work order the parent of another, add the `Parent Work Order` field and Child Work Orders related list to work order page layouts. To let users see the top-level work order in a work order hierarchy, you can also add the read-only `Root Work Order` field.
- d. To let users make one work order line item the parent of another line item, add the `Parent Work Order Line Item` field and Child Work Order Line Items related list to work order line item page layouts. To let users see the top-level line item in a work order line item hierarchy, you can also add the read-only `Root Work Order Line Item` field.
- e. If you want to be able to designate certain service resources as preferred, required, or excluded on a work order, add the Resource Preferences related list to work order page layouts. You can also establish resource preferences on accounts so every work order associated with the account inherits its resource preferences. To do so, add the Resource Preferences related list to account page layouts as well.

2. Assign user permissions.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To edit page layouts and set field history tracking:

- "Customize Application"

To create and edit users:

- "Manage Internal Users"

Users Who Will...	Need These Permissions	Permissions Are Auto-Enabled on These Standard Profiles
Enable Field Service Lightning	"Customize Application"	System Administrator
View the Work Orders tab, work orders, and work order line items	"Read" on work orders	Read Only, Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Create or clone work orders	"Create" on work orders	Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Edit work orders	"Edit" on work orders	Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Delete work orders	"Delete" on work orders	System Administrator

Users Who Will...	Need These Permissions	Permissions Are Auto-Enabled on These Standard Profiles
Create, clone, edit, or delete work order line items	"Edit" on work orders	Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator

3. Make the Work Orders tab visible to your users.

Users create and manage work orders from the Work Orders tab. You can add the tab to a custom app or instruct users to add the tab in Salesforce.



Note: The Work Orders tab is default ON for the following user profiles: Read Only, Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator.

4. Optionally, add work orders as a navigation tab item in the service console.

5. If your org was created before Summer '16 and you want to use milestones on work orders, set field-level security on the following work order fields to expose them to specific user profiles:

- Business Hours
- Entitlement Process End Time
- Entitlement Process Start Time
- Is Closed
- Milestone Status
- Milestone Status Icon
- Stopped
- Stopped Since



Tip: To set field-level security, from Setup, enter *Field Accessibility* in the Quick Find box, then click **Field Accessibility**. Click **Work Order**, then click **View by Fields** and select a field. Click **Hidden** next to a profile to view and update the field visibility settings.

6. Optionally, add your own custom values to the `Status` picklist field on work orders or work order line items. The Status field comes with these default values:

- New
- In Progress
- On Hold
- Completed
- Cannot Complete
- Closed
- Canceled

When you create a custom value, select a status category that the value falls into. The available status categories match the default status values. For example, if you create a `Waiting for Response` value, you may decide that it belongs in the `On Hold` category.

The `Status Category` field can be useful to reference in custom apps, triggers, and validation rules. Status categories let you extend and customize the work life cycle while still maintaining a consistent work classification for tracking, reporting, and business process management.

7. If you want your team to be able to attach Knowledge articles to work orders or work order line items, add the Articles related list and the Knowledge One console component to your layouts.



Note: Knowledge must already be set up in your org.

- a. To let users view and modify linked articles from the console, navigate to work order page layouts in Setup. In the layout editor, select Custom Console Components and add the Knowledge One widget to the console sidebar (recommended).
- b. To let users view and modify linked articles from a work order's detail page, add the Articles related list to the work order detail page layout (recommended).
- c. To let users attach Knowledge articles to work order line items, follow the previous two steps for work order line items layouts.

Create Work Types

Chances are, your business performs the same tasks for multiple customers. Work types are work order templates that save you time and make it easier to standardize your field service work.

1. From the Work Types tab, click **New**.
2. Enter a name and description. Try to use a name that helps users quickly understand the type of work orders that can be created from the work type. For example, *Annual Refrigerator Maintenance* or *Valve Replacement*.
3. Add an `Estimated Duration`, which is how long the work is estimated to take, and a `Duration Type` of Minutes or Hours.
4. If you'd like a service appointment to be automatically created on work orders and work order line items that use the work type, select **Auto-Create Service Appointment**.



Note: By default, the Due Date on auto-created service appointments is seven days after the created date. Admins can adjust this offset from the Field Service Settings page in Setup.

5. Click **Save**.
6. If the task represented by the work type requires certain skills or certifications, define them in the Skill Requirements related list.
 - a. In the related list, click **New Skill Requirement**.
 - b. Select a skill. Skills must be created before they can be added as a required skill; to learn how, see [Create Skills](#).
 - c. Enter a skill level from 0 to 99.99 based on how your business measures skill level.
 - d. Click **Save**. Now, any work orders or work order line items linked to the work type inherits these required skills.
7. To apply a work type to a work order or work order line item, select the work type in the `Work Type` lookup field on the record. When you add a work type, the work order or work order line item inherits the work type's duration values and required skills.



Note:

- If needed, you can update the duration values and required skills on a work order or work order line item after they're inherited from the work type.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create work types:

- "Create" on work types

To apply work types to work orders or work order line items:

- "Edit" on work orders

- If a work order or work order line item already has required skills, associating it with a work type doesn't cause it to inherit the work type's required skills.
- Customizations to required skills, such as validation rules or Apex triggers, are not carried over from work types to work orders and work order line items.



Example: Suppose you own a window company that often installs windows. Your window installations typically last 90 minutes. You can create a work type with the following settings:

- Name: *Window Installation*
- Description: *Standard installation of single- or double-paned windows*
- Estimated Duration: *90*
- Duration Type: *Minutes*
- Skill Requirements:
 - "Window Installation" with a skill level of 50
 - "Window Cleaning" with a skill level of 10
- The option to auto-create a service appointment is selected

When a customer needs a window installed, create a work order for them and select the *Window Installation* work type in the **Work Type** lookup field. This auto-populates the work order's duration and skill values and automatically creates a service appointment on the work order. High-five for efficiency!

SEE ALSO:

[Guidelines for Using Work Orders](#)

[Work Type Fields](#)

Create Work Orders

Create work orders to track work to be performed for a customer.

You can create and edit work orders from the Work Orders tab or the Work Orders related list on supported objects. Some of the following settings may not be available to you depending on your page layouts and field-level security settings.

1. From the Work Orders tab or the Work Orders related list on a record, click **New**.
2. Optionally, select a work type. Work types are templates that auto-populate the work order's **Duration** and **Duration Type** fields and Skill Requirements related list.
3. Enter the address where the work order is taking place. Work orders inherit their address from the associated account. The work order's service appointments and line items inherit its address, though the address on line items can be updated.
4. Select an associated account and contact.
5. If applicable, select a parent work order.
6. If applicable, select an associated case.
7. Optionally, select a price book. This lets you select a corresponding price book entry (product) for each work order line item.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create or clone work orders:

- "Create" on work orders

To create work order line items:

- "Edit" on work orders

8. If you're tracking pricing on work orders, enter the tax amount. For example, in a work order whose total price is \$200, enter *20* to apply a 10 percent tax. You can enter a number with or without the currency symbol and you can use up to two decimal places.
 9. Select a priority level.
 10. Select the service territory where the work order is taking place.
 11. Enter a duration and select a duration type. A duration of *3* and a duration type of *Hours* means the work order is expected to be completed in 3 hours.
 12. If the work order involves a customer's asset, add it in the **Asset** field.
 13. Add a subject and description. Try to describe the nature and purpose of the work to be completed.
 14. Click **Save**.
 15. Optionally, add further details in the work order's related lists.
 - a. Create line items via the Work Order Line Items related list. Work order line items represent specific tasks that a technician must perform to complete the work order. They can be marked as completed one by one, and can each have their own active service appointment. Pricing details like discounts and unit price are set at the line item level on work orders.
 - b. Specify which skills are required to complete the work order via the Skill Requirements related list. For details, see [Add Required Skills to Work Orders or Work Types](#).
 - c. Create a service appointment via the Service Appointments related list. Service appointments are where you assign service resources and add scheduling details. Work orders and work order line items can have multiple service appointments.
-  **Note:** If **Auto-Complete Service Appointment** is selected on the associated work type, a service appointment is automatically created when you create the work order.

Choose Preferred Service Resources on Work Orders

You can designate certain service resources as preferred, required, or excluded on specific accounts or work orders. Work orders inherit their associated account's resource preferences.

Add preferences to an account or work order via the Resource Preferences related list. Simply select the service resource, select a preference level, and save your changes.

 **Note:** You can't add preferences for service resources who are inactive or dispatchers.

Resource preferences serve more as a suggestion than a requirement. You can still assign a service appointment to any resource regardless of the related work order's resource preferences.

If you don't want to establish resource preferences at the account level, you can also create them on individual work orders if needed.

Example:

- If your customer, ABC Labs, has had positive experiences with Alicia, a service resource, you can create a resource preference on the ABC Labs account that designates Alicia as "Preferred"
- If ABC Labs had a bad experience with Nigel, a service resource, you can create a resource preference on the ABC Labs account that designates Nigel as "Excluded"
- If ABC Labs purchased a challenging piece of equipment which was installed by Evan, a service resource, you can create a resource preference on the ABC Labs account that designates Evan as "Required"

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create resource preferences on accounts:

- "Edit" on accounts

To create resource preferences on work orders:

- "Edit" on work orders

When a work order is created for ABC Labs, it automatically lists those three preferences. When the time comes to schedule the work order, the dispatcher knows to assign the corresponding service appointment to Evan and, if a second technician is needed, to Alicia if she is available. The dispatcher also knows *never* to assign the account's service appointments to Nigel.

Create Service Appointments

Service appointments help you track field service work to be performed for customers. You can associate them with several types of records.

Service appointments can be added to work orders, work order line items, opportunities, accounts, or assets. To create a service appointment:

1. Navigate to the record that the appointment is associated with.
2. In the Service Appointments related list, click **New Service Appointment**.
3. Fill out the General Information section:
 - a. Add an appointment subject and description.
 - b. If needed, update the duration. If the parent record is work order or work order line item, the appointment inherits its duration from its parent.
 - c. Fill out the **Earliest Start Permitted** and **Due Date** fields, which together represent the window during which the appointment must be completed. These fields typically represent terms in the customer's service-level agreement.
4. Fill out the Scheduled Times section:
 - a. Add scheduled start and end times. If you're using the Field Service Lightning managed packages with the scheduling optimizer, these fields are populated when the appointment is scheduled.
 - b. Define an arrival window, which is the window of time when the technician is expected to arrive at the site. This window is typically larger than the scheduled start and end window to allow time for delays and scheduling changes. You may choose to share the arrival window start and end with the customer, but keep the scheduled start and end internal-only.
5. Assign service resources to the appointment in the Assigned Resources related list. If the parent record is a work order, work order line item, or account, check the parent for any resource preferences.



Note: Service resource who are dispatchers can't be assigned to service appointments.

6. When the technician completes the appointment, have them fill out the Actual Times section to indicate when the appointment started and ended. In addition, they can enter the number of minutes it took to travel to the appointment in the **Actual Travel Time** field on their assigned resource record.



Note: You can also create service appointments from the Service Appointments tab.

SEE ALSO:

[Guidelines for Using Service Appointments](#)

[Service Appointment Fields](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create service appointments:

- "Create" on service appointments

Set Up Skills for Field Service

Assign skills to service resources to indicate the type of work that they can perform. You can also add required skills to work orders and work types so only resources with certain skills can be assigned to complete the work.

IN THIS SECTION:

- [1. Configure Skill Settings](#)
Before you create skills, add skill related lists to field service page layouts and specify who can view and create skills.
- [2. Create Skills](#)
To get started with skills, create basic skills in your org. When you assign skills to service resources or mark them as required on work orders and work types, you can add details like skill level and duration.
- [3. Assign Skills to Service Resources](#)
Assign skills to service resources to represent their certifications and areas of expertise.
- [4. Add Required Skills to Work Orders or Work Types](#)
Add required skills to work orders, work order line items, or work types to ensure that the assigned service resources possess the right skills.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Configure Skill Settings

Before you create skills, add skill related lists to field service page layouts and specify who can view and create skills.

 **Note:** Field Service Lightning must be enabled in your org.

- Customize page layouts.
 - To be able to specify required skills on work types, add the Skill Requirements related list to work type page layouts.
 - To be able to specify required skills on work orders, add the Skill Requirements related list to work order page layouts.
 - To be able to specify required skills on work order line items, add the Skill Requirements related list to work order line item page layouts.
 - To be able to assign skills to service resources, add the Skills related list to service resource page layouts.
- Assign user permissions.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

- To edit page layouts:
- “Customize Application”
- To create and edit users:
- “Manage Internal Users”

Users Who Will...	Need These Permissions
Enable Field Service Lightning	“Customize Application”
Create, update, and delete skills in Setup	“Customize Application”
Assign skills to service resources	“Edit” on service resources
View resources’ skills	“Read” on service resources

Users Who Will...	Need These Permissions
Add required skills to work orders, work order line items, or work types	"Edit" on work orders, work order line items, or work types
View required skills on work orders, work order line items, or work types	"Read" on work orders, work order line items, or work types

3. Decide how skill levels should be determined.

Skills assigned to a service resource or to a work order, work order line item, or work type can have a skill level from 0 to 99.99. For example, you can:

- Use the `Skill Level` field to indicate years of experience.
- Create a matrix that corresponds professional license classes to skill level numbers.



Tip:

- If you'd like to limit potential skill level values, create a validation rule that, for example, only allows multiples of 10.
- Create field-level help that lets your users know how skill level is determined.

Create Skills

To get started with skills, create basic skills in your org. When you assign skills to service resources or mark them as required on work orders and work types, you can add details like skill level and duration.

1. From Setup, enter `Skills` in the Quick Find box, then select **Skills** under Field Service.
2. Enter a name. For example, *Electrician Certification*.
3. Enter a description.
4. Skip the "Assign Users" and "Assign Profiles" sections, which are specific to Live Agent.
5. Click **Save**.

You can now assign the skill to service resources or list it as required on work types, work orders, and work order line items.

SEE ALSO:

[Skill Fields for Field Service](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create skills:

- "Customize Application"

Assign Skills to Service Resources

Assign skills to service resources to represent their certifications and areas of expertise.

1. Navigate to the resource that needs a skill assigned.
2. In the Skills related list, click **New Service Resource Skill**.
3. Select a skill. Skills must be created before they can be assigned to a resource; to learn how, see [Create Skills](#).
4. Enter a skill level from 0 to 99.99 based on how your business measures skill level.
5. Enter a start date and, if needed, an end date. For example, if a technician must be recertified in a particular skill every six months, you can enter an end date that's six months later than the start date.
6. Click **Save**. The resource's skill now appears in their Skills related list.



Tip: To make it easier to track a resource's abilities, upload photos of licenses and certifications in the Files section on the resource's detail page.

SEE ALSO:

[Skill Fields for Field Service](#)

Add Required Skills to Work Orders or Work Types

Add required skills to work orders, work order line items, or work types to ensure that the assigned service resources possess the right skills.

If a work order or work order line item can only be completed by a service resource with a particular set of skills, add *required skills* to the record. Required skills help dispatchers assign the record to a service resource with the proper expertise. You can still assign a work order, work order line item, or related service appointment to a service resource that does *not* possess the required skills, so required skills serve more as a suggestion than a rule.



Note: If you're using the Field Service Lightning managed packages, you can use matching rules to ensure that appointments are only assigned to service resources who possess the required skills listed on the parent work order.

If many of your work orders require the same skills, we recommend adding required skills to *work types* to save yourself some time and keep your processes consistent. When you add a required skill to a work type, work orders and work order line items that use that type automatically inherit the required skill. For example, if you know that all annual maintenance visits for your Classic Refrigerator product require a Refrigerator Maintenance skill level of at least 50, you can add that required skill to the Annual Maintenance Visit work type. When it's time to create a work order for a customer's annual fridge maintenance, adding that work type to the work order adds the required skill as well.



Note:

- When you create a work order from a work type, it inherits the work type's required skills, but you can then add or remove required skills on the work order.
- Changing the required skills on a work type doesn't affect the required skills on work orders that were created from that work type.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To assign skills to resources:

- "Edit" on service resources

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To add required skills to work orders, work order line items, or work types:

- "Edit" on work orders, work order line items, or work types

- If you add a work type to an existing work order, the work order only inherits the work type's required skills if the work order didn't yet have required skills. The same is true for work order line items.
- Work order line items don't inherit their parent work order's required skills.

To add a required skill to a work order, work order line item, or work type:

1. Navigate to the record that needs required skills.
2. In the Skill Requirements related list, click **New Skill Requirement**.
3. Select a skill. Skills must be created before they can be added as a requirement; to learn how, see [Create Skills](#).
4. Enter a skill level from 0 to 99. 99 based on how your business measures skill level.
5. Click **Save**. The skill now appears in the Skill Requirements related list on the record.

SEE ALSO:

[Skill Fields for Field Service](#)

[Guidelines for Using Work Orders](#)

Create Operating Hours

Define operating hours and assign them to service territories, service territory members, or accounts to indicate their field service hours.

Note:

- By default, only System Administrators can view, create, and assign operating hours.
- Service resource detail pages don't list operating hours because a service resource's hours can vary depending on which territory they're working in. To view a service resource's operating hours for a particular territory, navigate to their Service Territories related list and click the Member Number for the territory. This takes you to the service territory member detail page, which lists the member's operating hours and dates during which they belong to the territory.
- If you're using the Field Service Lightning managed packages, the scheduling optimizer only assigns service resources to service appointments that fall within the operating hours listed on the resource's territory member record. If you're not using the managed packages, operating hours serve as a suggestion rather than a rule.

1. Click the Operating Hours tab, then click **New**.
2. Enter a name, description, and time zone.
3. Click **Save**.
4. In the Time Slots related list on the operating hours, create time slots for each day. For example, if the operating hours should be 8 AM to 5 PM Monday through Friday, create five time slots, one per day. To reflect breaks such as lunch hours, create multiple time slots in a day: for example, *Monday 8:00 AM – 12:00 PM* and *Monday 1:00 PM – 5:00 PM*. To establish 24/7 operating hours, create a time slot for each day of the week that starts at 12:00 AM and ends at 11:59 PM.



Tip: Time slots don't come with any built-in rules, but you can create Apex triggers that limit time slot settings in your org. For example, you may want to restrict the start and end times on time slots to half-hour increments, or to prohibit end times later than 8 PM.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create operating hours:

- "Create" on operating hours

To assign operating hours to service resources:

- "Edit" on service resources

To assign operating hours to service territories:

- "Edit" on service territories

To assign operating hours to accounts:

- "Edit" on accounts

5. Assign the operating hours to one or more service territories.

- a. Navigate to the service territory's detail page.
 - b. Select the desired hours in the `Operating Hours` lookup field on the territory detail page, and save your changes.

6. If needed, assign different operating hours to one or more service territory members.

Service territory members—which are service resources who can work in the territory—automatically use their service territory's operating hours. If a resource needs different operating hours than their territory, create separate operating hours for them from the `Operating Hours` tab. Then, select the desired hours in the `Operating Hours` lookup field on the service territory member detail page.



Note: If a resource's operating hours are similar to their territory's hours, the resource's operating hours only need time slots for the days that differ from the territory's hours. For example, suppose a resource's territory's hours are 8:00 AM to 5:00 PM Monday through Friday, but the resource works 10:00 AM to 7:00 PM on Fridays. When you create operating hours for the resource, create only one time slot: *Friday 10:00 AM to 7:00 PM*. The resource automatically uses its territory's time slots for Monday through Thursday, then uses its own special time slot on Fridays.

7. Optionally, assign operating hours to one or more accounts via the `Operating Hours` lookup field on the account detail page. An account's operating hours help dispatchers know when to schedule service appointments for the account. For example, if ABC Labs only allows technicians to visit their office Monday through Friday from 8 AM to noon, you can create operating hours for them that reflect this preference.

SEE ALSO:

[Operating Hours Fields](#)

Create Field Service Lightning Reports

Create report types to track field service progress in your org.

You can create a variety of custom report types to stay informed about field service records.

1. From Setup, enter *Report Types* in the Quick Find box, then select **Report Types** and click **New Custom Report Type**.
2. In the Primary Object drop-down menu, select the field service object you want to report on:

Primary Object	Description	Available Secondary Objects
Operating Hours	View the operating hours of service territories and their members.	Service Territories Time Slots
Service Appointments	Compare the differences between scheduled and actual appointment times, and analyze trends in resource assignment on appointments.	Assigned Resources
Service Resources	Compare service resources' capacities, absences, and skills, and view the territories they belong to and service appointments they are assigned to. And, see which accounts or work orders list resources as preferred.	Assigned Resources Resource Absences Resource Capacities Resource Preferences Service Resource Skills Service Territory Members
Service Territories	Compare the number and types of service appointments, work orders, and work order line items across service territories, and view the service resources who belong to each territory.	Service Appointments Service Territory Members Work Orders Work Order Line Items
Work Orders	Compare information such as the number of appointments or line items per work order, or work order service territories. And, analyze how resource preferences and skill requirements vary between work orders.	Resource Preferences Service Appointments Skill Requirements Work Order Line Items
Work Order Line Items	Compare information such as work order line items' owners, duration, and subject, and view service appointments	Service Appointments Skill Requirements

EDITIONS

Available in: Salesforce Classic and Lightning Experience

- Field Service Lightning features are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud. Work orders are also available in **Professional** Edition.
- The Field Service Lightning managed packages are available for an additional cost in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud.

USER PERMISSIONS

To create or update custom report types:

- "Manage Custom Report Types"

To create a public reports folder:

- "Manage Public Reports"

Primary Object	Description	Available Secondary Objects
	and skill requirements associated with work order line items.	
Work Types	Compare information such as work type duration and skill requirements.	Skill Requirements
Accounts	Compare accounts' resource preferences and work orders.	<i>Field service objects:</i> Resource Preferences Work Orders
Assets	Compare the number and characteristics of work orders associated with assets.	<i>Field service objects:</i> Work Orders
Cases	Compare the number and characteristics of work orders associated with cases.	<i>Field service objects:</i> Work Orders
Contacts	Analyze the service appointments and work orders associated with contacts.	<i>Field service objects:</i> Service Appointments Work Orders
Entitlements	Compare the number and characteristics of work orders associated with entitlements.	<i>Field service objects:</i> Work Orders
Service Contracts	Compare the number and characteristics of work orders associated with service contracts.	<i>Field service objects:</i> Work Orders

3. Complete the required fields and click **Next**.



Tip: In the **Store in Category** drop-down menu, we recommend choosing **Customer Support Reports** or **Other Reports**. This is the category where users find the custom report type on the Reports tab. You can also create your own field service report folder. Make your choices on the Define Report Records Set page.

4. Click **Save**.
5. As needed, remove and rearrange fields from your report layout.

Field Service Lightning Considerations

Before you set up Field Service Lightning, review these important considerations about its features.

IN THIS SECTION:

[Field Service Lightning Limits and Limitations](#)

Learn about the limits and limitations that exist for Field Service Lightning.

[Location Tracking in Field Service Lightning](#)

When you add a street address to certain types of field service records, Salesforce calculates the address's latitude, longitude, and location accuracy. You can reference this data, which is visible only in the API, in any custom field service applications.

[Considerations for Using Work Orders](#)

Gain insight into the ways you can and should use work orders to make your business run smoothly.

Field Service Lightning Limits and Limitations

Learn about the limits and limitations that exist for Field Service Lightning.

Linked Articles

Linked articles are Knowledge articles attached to work orders or work order line items. They include the following limitations.

- The Article widget and Feed Articles Tool aren't available in the feed view.
- Quick actions and global actions aren't supported for linked articles.
- The Article Toolbar on the Knowledge home page doesn't include the option to attach articles to work orders or work order line items.
- The Linked Work Orders and Linked Work Order Line Items related lists on articles aren't available in Lightning Experience or Salesforce1.
- Linked articles are view-only in Lightning Experience and Salesforce1.
- In Lightning Experience, clicking an article link in a feed item redirects you to the article page in Salesforce Classic. In Salesforce1, linked articles can't be accessed from feed items.

Operating Hours

You can't create custom fields on operating hours or time slots.

Service Territories

- A service territory hierarchy can contain up to 500 territories.

Work Orders

- A work order hierarchy can have up to 10,000 work orders.
- A work order line item hierarchy can have up to 10,000 work order line items.

Lightning Experience

The Field Service Lightning managed packages aren't available in Lightning Experience.

Salesforce1

The Field Service Lightning standard features and managed packages are available in all versions of the Salesforce1 mobile app. They include the following limitations:

- In the Salesforce1 downloadable app for iOS:
 - You can't create service appointments, and the Recent related list isn't available.
 - You can't create new service resources or absences, and the Recent related list isn't available on service resources or absences.
- On field service records created via a related list, the field that lists the parent record doesn't populate until you save the record. This issue applies to all versions of Salesforce1. For example, when you create a service appointment from the Service Appointments related list on a work order, the `Parent Record` field is blank until you tap **Save**. Once the record is created, the parent record field lists the parent work order as expected.
- The dispatcher console, which is part of the managed packages, isn't available in Salesforce1.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

- Field Service Lightning features are available in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud. Work orders are also available in **Professional** Edition.
- The Field Service Lightning managed packages are available for an additional cost in **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud.

Location Tracking in Field Service Lightning

When you add a street address to certain types of field service records, Salesforce calculates the address's latitude, longitude, and location accuracy. You can reference this data, which is visible only in the API, in any custom field service applications.

This location data feature, known as “geocoding”, is enabled for all supported field service objects when you enable Field Service Lightning. In the API, you'll notice values in the following three fields on work orders, work order line items, service appointments, service territories, resource absences, and service territory members:

Field Name	Description
Latitude	The latitude of the street address.
Longitude	The longitude of the street address.
GeocodeAccuracy	The accuracy of the latitude and longitude. This field contains one of the following values, listed in order from most to least accurate: • Address—In the same building • NearAddress—Near the address • Block—Midway point of the block • Street—Midway point of the street • ExtendedZip—Center of the extended zip code area • Zip—Center of the zip code area • Neighborhood—Center of the neighborhood • City—Center of the city • County—Center of the county • State—Center of the state • Unknown—No match for the address was found (for instance, the address is invalid)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Keeping Geocoding Data Current

Salesforce periodically refreshes these three geocoding fields to ensure their accuracy. The refreshes are managed by a feature known as “clean rules” (because they keep your data clean and current!). A record's geocoding fields are refreshed when:

- The record is created or updated
- The record type's clean rule is deactivated and reactivated



Note:

- Allow some time for the geocoding fields to refresh. The amount of processing time varies based on how many records are being updated at once.
- If bulk geocoding is turned off for a clean rule, deactivating or reactivating the rule does not refresh the geocoding fields. Bulk geocoding is enabled by default.

You can keep an eye on the status of a record's geocoding data in several ways.

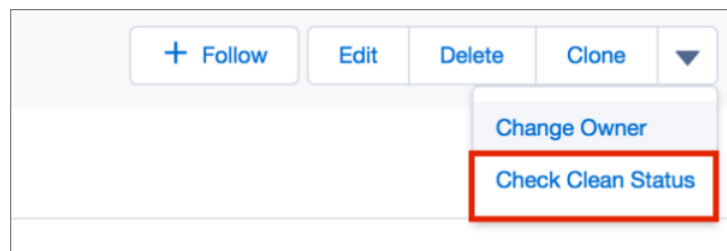
- *If you're using Salesforce Classic:*

Add the Clean This Record with Data.com related list to the detail page layout of the records you'd like to track. The related list includes:

- The time the record's geocoding data was last refreshed.
- The record's geocoding status. To learn what each status means, see [Data.com Clean Statuses](#). The **In Sync** status means that your geocoding data is current.
- A **Clean** link which lets you manually run an instant refresh.

- *If you're using Lightning Experience*

On the record, select **Check Clean Status** in the action drop-down menu to view its geocoding status.



How to Opt Out

If you're already using another geocoding service and prefer not to use this feature, you can opt out of Field Service Lightning geocoding.

1. From Setup, enter *Data.com* in the Quick Find box, then select **Clean Rules** under Data.com Administration.
2. Find the entries for Field Service Lightning and click **Deactivate** next to each rule:
 - Geocodes for Work Order Address
 - Geocodes for Work Order Line Item Address
 - Geocodes for Service Appointment Address
 - Geocodes for Service Territory Address
 - Geocodes for Service Territory Member Address
 - Geocodes for Resource Absence Address

Note:

- If you're using the Field Service Lightning managed packages, opting out of geocoding means that latitude, longitude, and geocode accuracy are no longer calculated for field service records. Without this geocoding data, the scheduling optimizer doesn't function properly.
- If you were using work orders before Winter '17, enabling Field Service Lightning automatically turns on geocoding for all existing work orders in your org and populates their geocoding fields. If you don't enable Field Service Lightning, the geocoding feature isn't available for work orders.

SEE ALSO:

[Set Up Field Service Lightning](#)

[Field Service Lightning Guidelines](#)

Considerations for Using Work Orders

Gain insight into the ways you can and should use work orders to make your business run smoothly.

IN THIS SECTION:

[How Work Orders Fit Into Your Support Process](#)

Work orders are a handy support tool, particularly if you offer field service. You can incorporate work orders into your support process in several ways.

[How Pricing Works on Work Orders](#)

Work orders and work order line items have several price-related fields. Find out how they interact and how to use them.

[Apex Code Samples for Work Orders](#)

Use these Apex samples to customize and automate the role of work orders in your support process.

How Work Orders Fit Into Your Support Process

Work orders are a handy support tool, particularly if you offer field service. You can incorporate work orders into your support process in several ways.

Here are some recommended approaches:

Situation	How to Use Work Orders to Address the Situation
Fixing a broken asset: A customer purchases an asset (like a car) from you. They experience a problem with the asset, so they call you to report the problem. An agent creates a case from the call, and determines that a technician must be sent to the customer to repair the asset.	1. The agent creates a "Repair Asset" work order for the asset with a brief description of the problem. 2. The agent creates a service appointment on the work order and assigns it to an available service resource. 3. The service resource is dispatched to repair the asset. 4. The service resource learns that a crucial replacement part is missing. She changes the status of the service appointment to <code>Completed</code> and creates a second service appointment on the work order to install the replacement part. 5. When the part is installed and the second appointment is completed, the assigned service resource changes the status on both the service appointment and its parent work order to <code>Completed</code>. 6. The agent closes the case.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Situation	How to Use Work Orders to Address the Situation
Performing preventive maintenance: A customer purchases an asset from you and covers it with a five-year preventive maintenance contract. The contract entitles the customer to one preventive maintenance checkup each year. The annual maintenance checkup is represented in Salesforce by an entitlement that's linked to the asset record.	1. A service agent creates an "Annual Maintenance Checkup" work order on the asset. 2. The agent adds line items to the work order which represent the maintenance tasks that the technician must complete. 3. The agent creates a service appointment on the work order and assigns it to a service resource. 4. The service resource is dispatched to complete the maintenance check. 5. As each line item on the work order is completed, the resource changes the line item status to <i>Completed</i>. When all line items are complete, the resource changes the status of both the service appointment and its parent work order to <i>Completed</i>. 6. For the following annual maintenance on the asset, the agent can quickly create a clone of this work order.

While these approaches reflect typical uses of work orders, there are many ways to customize the way you use work orders. Here are some examples.

- Create a "New Work Order" quick action on assets, cases, and accounts.
-  **Note:** Entitlements and service contracts don't support quick actions.
- Set up a quick action on work orders that automatically updates new work orders' account, asset, and contact fields to match their parent record.
- If your org uses hierarchical assets, track specific subtasks more accurately by associating work order line items with different assets. For example, a work order linked to the "automobile" asset can have a line item linked to the child "headlight" asset. You can add the Work Order Line Items related list to asset page layouts to let users view all line items associated with an asset.

For Apex code samples that you can use to customize work orders in your org, see [Apex Code Samples for Work Orders](#).

SEE ALSO:

[Guidelines for Using Work Orders](#)

[Set Up Work Orders](#)

How Pricing Works on Work Orders

Work orders and work order line items have several price-related fields. Find out how they interact and how to use them.

Work orders contain the following price-related fields. If you intend to use these fields, add them to work order page layouts.

Work Order Field	What It Represents
Discount	(Read only) The weighted average of the discounts on all line items on the work order. It can be any positive number up to 100.
Subtotal	(Read only) The total of the work order line items before discounts and taxes are applied.
Total Price	(Read only) The total of the work order line items' price after discounts but before tax is added.
Grand Total	(Read only) The total price of the work order with tax added.
Price Book	The price book associated with the work order. Adding a price book to the work order lets you link each work order line item to a product included in the price book.
Tax	The total tax on the work order in a currency format. (Do not enter a percentage.) For example, in a work order whose total price is \$100, enter \$10 to apply a 10 percent tax. You can enter a number with or without the currency symbol and you can use up to two decimal places.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

And *work order line items* contain these price-related fields. If you intend to use these fields, add them to work order line item page layouts.

Work Order Line Item Field	What It Represents
Discount	The percent discount to be applied to the line item's subtotal. You can enter a number with or without the percent symbol and you can use up to two decimal places.
Subtotal	(Read only) The line item's unit price multiplied by the quantity.
Total Price	(Read only) The line item's subtotal with discounts applied. This field is blank until you add a unit price and save the line item.

Work Order Line Item Field	What It Represents
List Price	(Read only) The price of the line item (product) as listed in its corresponding price book entry. If a product isn't selected, the list price defaults to zero.  Note: When you select a product to link to the line item, you can see the product's list price next to its name and ID in the lookup window. The list price field populates when you save the line item.
Product	The name of the product associated with the line item. The lookup only lists products that are included in the parent work order's price book. When you select a product and save the line item, the following fields are populated on the line item: - List Price - Unit Price - Subtotal - Total Price  Note: Inline editing isn't supported on the Product field. To change the product on a line item, click Edit. Adding a product updates the list price, unit price, subtotal, and total price based on the related entry in the work order's price book.
Unit Price	By default, the unit price for a work order line item is the line item's list price from the price book, but you can change it.

When filling out price fields on work orders and their line items, keep these guidelines in mind:

- To apply a discount to a work order, apply the discount at the line item level. If your work order doesn't have line items, its discount is zero.
- When filling out price fields on a work order, just fill out the `Price Book` and `Tax` fields. The `Discount`, `Subtotal`, `Total Price`, and `Grand Total` fields are all automatically calculated based on line item fields.
- When filling out price fields on a work order line item, just fill out the `Product` and `Discount` fields. The `Subtotal`, `Total Price`, `List Price`, and `Unit Price` fields are all automatically calculated based on other line item fields.
- Work order line items don't have to be linked to a product. For example, you might prefer to use work order line items to track tasks. Just keep in mind that if the `Product` field is blank, you can't use the `List Price`, `Unit Price`, `Discount`, `Quantity`, `Subtotal`, or `Total Price` fields.

 Note:

- You can't delete a price book that's linked to a work order.
- You can't delete a product that's linked to a work order line item.
- You can't delete a price book entry that's linked to a work order line item. Price book entries are linked to work order line items via the `Product` lookup field.
- You can't remove a price book from a work order if its line items are linked to products from that price book.

- Products cannot be added to work order line items in Lightning Experience. Use Salesforce Classic or the API. If a work order line item was created in Salesforce Classic and includes a product, the quantity and unit price can be updated in Lightning Experience, but the product can't be updated.

SEE ALSO:

[Work Order Fields](#)

[Work Order Line Item Fields](#)

[Set Up Work Orders](#)

Apex Code Samples for Work Orders

Use these Apex samples to customize and automate the role of work orders in your support process.



Tip: New to Apex? Check out the [Force.com Apex Code Developer's Guide](#).

Sample Trigger 1

This trigger prevents users from closing a work order unless all its line items have been closed. It's a good way to ensure that all scheduled tasks are completed.

To define a work order trigger in your org:

1. From Setup, enter *Work Orders* in the Quick Find box, then click **Triggers** under Work Orders.
2. Click **New**.
3. Copy the trigger text and paste it into the text field.
4. Click **Save**.

```
trigger ValidateWorkOrderLineItem on WorkOrder (before update) {
    for(WorkOrder w : Trigger.New) {
        if(w.Status == 'Closed'){
            List<WorkOrderLineItem> woLineItemList = [Select wo.Status
                                                        From WorkOrderLineItem wo where wo.WorkOrderId=:w.Id];
            if(woLineItemList.isEmpty()==false){
                for(WorkOrderLineItem woLineItem : woLineItemList){
                    if(woLineItem.Status != 'Closed'){
                        w.addError('You cannot close a work order until all of its
line items are closed.');
```

Sample Trigger 2

This trigger automatically closes a case when a work order on the case is marked Closed. If a case has multiple work orders, the trigger fires when the first work order is marked Closed. That way, the support agent doesn't have to manually close the case after the related work is complete.

```
trigger CloseCaseWhenWoId on WorkOrder (after update) {
    for (WorkOrder wo: Trigger.new) {
```

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

```

        try {
            if (wo.Status == 'closed') {
                Case ca = [SELECT Status from case where id = :wo.CaseId];
                ca.Status = 'closed';
                update ca;
            }
        } catch (Exception e) {

        }
    }
}

```

Trigger 2 Unit Test

You can set up Apex unit tests in the developer console to scan your code for any issues. To keep things running smoothly, Salesforce requires at least three-quarters of your Apex code lines to be covered by tests. This unit test applies to Sample Trigger 2.

```

@isTest
private class WOTriggerTest {
    static testMethod void validateWO() {
        Case ca = new Case();
        ca.Origin = 'Phone';
        ca.Status = 'new';
        insert(ca);
        WorkOrder wo = new WorkOrder();
        wo.Subject = 'test';
        wo.Status = 'closed';
        wo.CaseId = ca.Id;
        insert(wo);
        update(wo);
        Case cal = [SELECT Status from Case where id= :ca.Id];
        System.assertEquals('Closed', cal.Status);
    }
}

```

Work Order Apex Class

Apex classes reduce the size of your triggers and make it easier to reuse and maintain Apex code. This class, which you can reference in triggers, creates a work order with one line item.

```

public class CreateWorkOrderLineItem{
    public WorkOrderLineItem createWorkOrderLineItem(){
        WorkOrder wo = new WorkOrder();
        wo.subject = 'title';
        insert wo;
        WorkOrderLineItem woli = new WorkOrderLineItem();
        woli.workOrderId = wo.Id;
        woli.description = 'abcd';
        return woli;
    }
}

```

Work Order Apex Class Unit Test

This unit test applies to the Work Order Apex Class.

```

@isTest
public class TestWorkOrderLineItem {

```

```
static testMethod void testCreateWorkOrderLineItem()  
{  
    CreateWorkOrderLineItem cwoLi = new CreateWorkOrderLineItem();  
    cwoLi.createWorkOrderLineItem();  
}  
}
```

SEE ALSO:[Considerations for Using Work Orders](#)[Work Order Fields](#)

Field Service Lightning Guidelines

Learn how and when to use Field Service Lightning features.

IN THIS SECTION:[Guidelines for Using Service Appointments](#)

A service appointment is an appointment for a field service technician to perform work for a customer. Learn how to create and manage service appointments.

[Guidelines for Using Service Resources](#)

Service resources are users who can perform field service work. Learn how to create and manage service resources.

[Guidelines for Using Service Territories](#)

Service territories represent regions in which your team performs field service work. Learn how to create and manage service territories.

[Guidelines for Using Work Orders](#)

Work orders help you track tasks to be performed on a product. Learn how to create and manage work orders.

[Guidelines for Using Knowledge with Work Orders](#)

You can attach Knowledge articles to work orders and work order line items to help technicians in the field access important procedural info, guidelines, specs, and more.

Guidelines for Using Service Appointments

A service appointment is an appointment for a field service technician to perform work for a customer. Learn how to create and manage service appointments.

Viewing Service Appointments

View service appointments on the Service Appointments tab. Service appointments also appear on several record detail pages:

- A service resource's assigned appointments appear in the Service Appointments related list on the resource detail page.
- A record's related service appointments appear in the Service Appointments related list on the record detail page. Accounts, assets, opportunities, work orders, and work order line items can have service appointments.

Creating Service Appointments

Create service appointments via the Service Appointments tab or from the Service Appointments related list on a supported record. You can't create service appointments from the Service Appointments related list on a service resource, but you can assign the resource to existing service appointments.

Deleting Service Appointments

You can delete a service appointment to indicate that it has been canceled. Deleting a record deletes its child service appointments.

Associating Service Appointments with Other Records

Service appointments always have a parent record, which can be a work order, work order line item, opportunity, account, or asset. The type of parent record tells you about the nature of the service appointment:

- Service appointments on *work orders* and *work order line items* offer a more detailed view of the work being performed. While work orders and work order line items let you enter general information about a task, service appointments are where you add the details about scheduling and ownership.
- Service appointments on *assets* represent work being performed on the asset.
- Service appointments on *accounts* represent work being performed for the account.
- Service appointments on *opportunities* represent work that is related to the opportunity.

For example, suppose you create a work order to track a customer's annual refrigerator maintenance. In the Service Appointments related list on the work order, you create an Annual Maintenance appointment.

During the appointment, the technician completes most of the maintenance but determines that a replacement part must be ordered and installed. The technician changes the appointment status to `Cannot Complete`, and a second service appointment is created on the work order to track the installation. When the second appointment is completed and it is determined that the fridge is fully repaired, the second appointment and the work order can then be closed. Easy as pie!

SEE ALSO:

[Service Appointment Fields](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view service appointments:

- "Read" on service appointments

To create service appointments:

- "Create" on service appointments

To delete service appointments:

- "Delete" on service appointments

To assign service resources to service appointments:

- "Edit" on service appointment AND "View" on service resources

Guidelines for Using Service Resources

Service resources are users who can perform field service work. Learn how to create and manage service resources.

Viewing Service Resources

View service resources on the Service Resources tab. In addition:

- Resources that are assigned to a service appointment appear in the Assigned Resources related list on the appointment detail page
- Resources that belong to a service territory appear in the Service Territory Members related list on the territory detail page

Creating Service Resources

Create service resources from the Service Resources tab. A user can have up to two associated service resource records if each record is a different Resource Type (Technician or Dispatcher)/

Assigning Service Resources to Service Appointments

Assign a resource to a service appointment via the Assigned Resources related list on the appointment detail page. If needed, you can modify the related list layout from the Assigned Resources node in Setup. You can assign multiple resources to an appointment.

Deactivating Service Resources

For tracking purposes, resources can only be deactivated, not deleted. To deactivate a user, deselect **Active** on their detail page.

Deactivating a user deactivates the related service resource. You can't create a service resource that is linked to an inactive user.

Viewing Service Resource Schedules

The Service Appointments related list shows all appointments that a resource is assigned to, while the Absences related list on a resource lets you define periods of time when a resource is unavailable to work. Unless you're using the Field Service Lightning managed packages with the scheduling optimizer, resources can still be assigned appointments that conflict with their absences.



Tip: Create a trigger that sends an approval request to a supervisor when a resource creates an absence.

If you're not using the Field Service Lightning managed packages, a calendar view isn't available for individual service resources.

Adding Preferred Service Resources to Accounts

You can designate certain service resources as preferred, required, or excluded on specific accounts or work orders. Work orders inherit their associated account's resource preferences.

Add preferences to an account or work order via the Resource Preferences related list. Simply select the service resource, select a preference level, and save your changes.

Resource preferences serve more as a suggestion than a requirement. You can still assign a service appointment to any resource regardless of the related work order's resource preferences.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view service resources:

- "Read" on service resources

To create service resources:

- "Create" on service resources

To assign service resources to service appointments:

- "Edit" on service appointments AND "View" on service resources

To deactivate service resources:

- "Edit" on service resources

SEE ALSO:

[Set Up Service Resources](#)

[Service Resource Fields](#)

Guidelines for Using Service Territories

Service territories represent regions in which your team performs field service work. Learn how to create and manage service territories.

Viewing Service Territories

View service territories on the Service Territories tab. You can also view a service resource's territories on the Service Territories related list on the resource detail page.

Creating Service Territories

If you want to use service territories, determine which territories you need to create. Depending on how your business works, you may decide to create territories based on cities, counties, or other factors. If you plan to build out a hierarchy of service territories, create the highest-level territories first. Service territory hierarchies can contain up to 500 territories.

Create service territories from the Service Territories tab in Salesforce. After you create a territory, you can add members to it via the Service Territory Members related list. Service territory members are resources who work within the territory, and associating them with a territory ensures that they're assigned to appointments near their home base.

Assigning Service Territories to Service Resources

You can link a service resource to multiple territories to indicate where they are available to work. Assign territories to a resource via the Service Territories related list on the resource detail page, or via the Service Territory Members related list on the territory detail page.

When you assign a territory to a resource, use the **Type** field to indicate whether the territory is a primary, secondary, or relocation territory for the resource.

- The *primary* territory is typically the territory where the resource works most often—for instance, near their home base. Resources can have only one primary territory.
- *Secondary* territories are territories where the resource can be assigned to appointments if needed. A resource can have more than one secondary territory.
- *Relocation* territories represent temporary moves. If you're using the Field Service Lightning managed packages with the scheduling optimizer, resources with relocation territories are always assigned to services within their relocation territories during the specified relocation dates. If they don't have a relocation territory, the primary territories are favored over the secondary.

Deleting Service Territories

You can't delete a service territory with service appointments. If you try to delete it, you're prompted to assign the appointments to a different territory.

If you delete a service territory with members, the resources who were members no longer have any connection to the territory.



Example: You can create a hierarchy of territories to represent the areas where your team works in California. Include a top-level territory named *California*, three child territories named *Northern California*, *Central California*, and *Southern California*, and a series of third-level territories corresponding to California counties. Assign service resources to each county territory to indicate who is available to work in that county.

SEE ALSO:

[Set Up Service Territories](#)

[Service Territory Fields](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view service territories:

- "Read" on service territories

To create service territories:

- "Create" on service territories

To delete service territories:

- "Delete" on service territories

To assign service resources to service territories:

- "Edit" on service territories

Guidelines for Using Work Orders

USER PERMISSIONS

To view the Work Orders tab, work orders, and work order line items:	"Read" on work orders
To create or clone work orders:	"Create" on work orders
To edit work orders:	"Edit" on work orders
To delete work orders:	"Delete" on work orders
To create, edit, and delete work order line items:	"Edit" on work orders

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Work orders help you track tasks to be performed on a product. Learn how to create and manage work orders.

Viewing Work Orders

Work orders can be associated with accounts, assets, cases, contacts, entitlements, service appointments, service contracts, and other work orders. View work orders on the Work Orders tab. The Work Orders related list on the following record detail pages also lists the work orders associated with a record:

- Accounts
- Assets
- Cases
- Contacts
- Entitlements
- Service contracts

 **Tip:** If your Salesforce admin has set up the console to include work orders, click the Console tab to view and edit work orders and their associated records in one place.

Creating Work Orders

You can create and edit work orders from the Work Orders tab or the Work Orders related list on supported objects. Depending on how work orders are set up in your organization, this related list may not be available on some records.

 **Tip:** When you create a work order, add *line items* to the work order via the Work Order Line Items related list. Work order line items represent specific tasks that a technician must perform to complete the work order. They can be marked as completed one by one, and make it easier to track and improve field service processes. Pricing details like discounts and unit price are set at the line item level on work orders.

Deleting Work Orders

Delete work orders on the work order’s detail page or the Work Orders related list. Deleting a work order moves it to the Recycle Bin. Any notes, attachments, activities, line items, and service appointments associated with the work order are also deleted. If you undelete the work order, the associated items are undeleted.

Sharing Work Orders

You may be able to grant extra access to work orders beyond what your org’s default sharing model allows. However, you can't make the sharing model more restrictive than the default.

To see who has access to a work order, click **Sharing** on the work order’s detail page. Work order line items inherit their parent work order’s sharing settings.

To learn how to set up sharing rules to control work order sharing, see Create Work Order Sharing Rules.

How Work Orders and Service Appointments Work Together

Service appointments on work orders and work order line items offer a more detailed view of the work being performed. While work orders and work order line items let you enter general information about a task, service appointments are where you add the details about scheduling and ownership.

For example, suppose you create a work order to track a customer's annual refrigerator maintenance. In the Service Appointments related list on the work order, you create an Annual Maintenance appointment.

During the appointment, the technician completes most of the maintenance but determines that a replacement part must be ordered and installed. The technician changes the appointment status to `Cannot Complete`, and a second service appointment is created on the work order to track the installation. When the second appointment is completed and it is determined that the fridge is fully repaired, the second appointment and the work order can then be closed. Easy as pie!

How Work Orders and Assets Work Together

Linking work orders to assets helps you track the work that is performed on the asset, whether it's installation, repair, or preventive maintenance. You can link a work order to an asset via the Work Orders related list on the asset detail page or the Asset lookup field on the work order. When you're linking work orders to assets, follow these guidelines:

- If a work order is related to a particular asset, link the work order to the asset in Salesforce so you can easily track the work.
- If a case is opened because a customer experiences a problem with an asset, you may need to create a work order to inspect or repair the asset. Link the work order to the case so the case owner can track its progress.
- If you need to track periodic standard maintenance on assets, link the related work order to the entitlement or service contract that accounts for the maintenance.

Reporting on Work Orders

Create custom report types to keep track of work orders in your org. For details, see [Create Field Service Lightning Reports](#).



Note: You can also use the Object Milestones custom report type to view work orders with milestones in your org. The `Milestone Status` and `Milestone Status Icon` fields are not available in work order reports.

Attaching Knowledge Articles to Work Orders

You can attach Knowledge articles to work orders and work order line items so field technicians can quickly access product specs, instructions, and more. To learn more, see [Guidelines for Using Knowledge with Work Orders](#).

SEE ALSO:

[Set Up Work Orders](#)

[Considerations for Using Work Orders](#)

[Work Order Fields](#)

Guidelines for Using Knowledge with Work Orders

You can attach Knowledge articles to work orders and work order line items to help technicians in the field access important procedural info, guidelines, specs, and more.

Attaching an Article

You can attach an article to a work order or work order line item in two ways:

- Navigate to the record to which you want to attach the article. In the Knowledge One widget in the console, search for an article. In the article's action menu, click **Attach to Work Order** or **Attach to Work Order Line Item**.
- Navigate to the record to which you want to attach the article. In the Articles related list, click **Find Articles**. Use the search to locate your article, then click **Attach to Work Order** or **Attach to Work Order Line Item** in the article's action menu.

Viewing an Attached Article

Articles attached to a work order or work order line item appear in the Knowledge One widget and the Articles related list on the record. View an article by clicking its title. You can also navigate to attached articles from the feed of a work order or work order line item if feed tracking for related lists is enabled.

On article detail pages, the Linked Work Orders and Linked Work Order Line Items related lists show which records an article is attached to.

Detaching an Article

You can detach an article from a work order or work order line item in two ways:

- Navigate to the record that the article is attached to. In the Knowledge One widget in the console, click **Detach from Work Order** or **Detach from Work Order Line Item** in the article's action menu.
- Navigate to the record that the article is attached to. In the Articles related list, click **Detach** next to the article.

Updating an Attached Article

If an article is out of date, you can publish a new version by navigating to the article and clicking **Edit**.

When you attach an article to a record, that version of the article stays associated with the record even if later versions are published. If needed, you can detach and reattach an article to a record to ensure that the record is linked to the latest version of the article. The `Linked Article Version` field on the linked article detail page leads to the attached version.

Managing Linked Articles

Customize linked articles' page layouts, fields, validation rules, and more from the Linked Articles node in Setup under Knowledge.

To learn how to configure your console and page layouts so articles can be attached to work orders and work order line items, see [Set Up Work Orders](#).

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To attach or detach an article on a work order or work order line item:

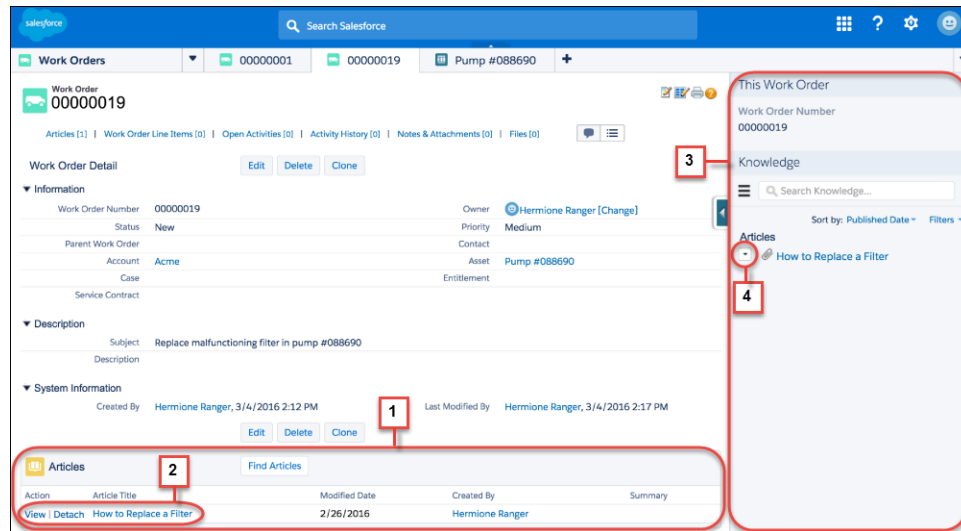
- "Read" on work orders AND "Read" on the article type AND Knowledge enabled

To edit page layouts:

- "Customize Application"

To edit console layouts:

- "Customize Application" AND "Service Cloud User"



- (1) View and change the articles attached to a record from the Articles related list.
- (2) View an article's properties by clicking **View**, or view the article itself by clicking its title. Click **Detach** to remove the article from the record.
- (3) The Knowledge One widget in the console sidebar lets you manage attached articles, view suggested articles, and search the Knowledge base.
- (4) Each article's action menu contains the option to attach or detach it.

Warning:

- The Article widget and Feed Articles Tool aren't available in the feed view.
- Quick actions and global actions aren't supported for linked articles.
- In the Article Toolbar on the Knowledge home page, you can't attach an article to a work order or work order line item.
- The Linked Work Orders and Linked Work Order Line Items related lists on articles aren't available in Lightning Experience or Salesforce1.
- Linked articles are view-only in Lightning Experience and Salesforce1.
- In Lightning Experience, clicking an article link in a feed item redirects you to the article page in Salesforce Classic. In Salesforce1, linked articles can't be accessed from feed items.

SEE ALSO:

[Linked Article Fields](#)

Field Service Lightning Object Fields

Learn about the fields available on Field Service Lightning standard objects.

IN THIS SECTION:

[Service Appointment Fields](#)

Service appointments have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Service Resource Fields](#)

Service resources and their related objects have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Service Territory Fields](#)

Service territories and service territory members have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Work Order Fields](#)

Work orders have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Work Order Line Item Fields](#)

Work order line items have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Work Type Fields](#)

Work types have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Linked Article Fields](#)

A linked article is a Knowledge article that is attached to a work order or work order line item. Linked articles have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Operating Hours Fields](#)

Operating hours and time slots have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Skill Fields for Field Service](#)

Skills represent certifications and areas of expertise in your field service workforce. Skills and their related objects have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Service Appointment Fields

Service appointments have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Field Name	Description
Account	(Read only) The account associated with the appointment. If the parent record is a work order or work order line item, this field's value is inherited from the parent. Otherwise, it remains blank.
Actual Duration (Minutes)	The number of minutes that it took the resource to complete the appointment after arriving at the address. When values are first added to the Actual Start and Actual End fields, the Actual Duration is automatically populated to list the difference between the Actual Start and Actual End. If the Actual Start and Actual End fields

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Field Name	Description
	are subsequently updated, the <code>Actual Duration</code> field doesn't re-update, but you can manually update it.
<code>Actual End</code>	The actual date and time the appointment ended.
<code>Actual Start</code>	The actual date and time the appointment started.
<code>Address</code>	The address where the appointment is taking place. The address is inherited from the parent record if the parent record lists an address.
<code>Appointment Number</code>	An auto-assigned number that identifies the appointment.
<code>Arrival Window End</code>	The end of the window of time in which the technician is scheduled to arrive at the site. This window is typically larger than the <code>Scheduled Start</code> and <code>End</code> window to allow time for delays and scheduling changes. You may choose to share the <code>Arrival Window Start</code> and <code>End</code> with the customer, but keep the <code>Scheduled Start</code> and <code>End</code> internal-only.
<code>Arrival Window Start</code>	The beginning of the window of time in which the technician is scheduled to arrive at the site. This window is typically larger than the <code>Scheduled Start</code> and <code>End</code> window to allow time for delays and scheduling changes. You may choose to share the <code>Arrival Window Start</code> and <code>End</code> with the customer, but keep the <code>Scheduled Start</code> and <code>End</code> internal-only.
<code>Contact</code>	The contact associated with the appointment. If the parent record is a work order or work order line item, this field's value is inherited from the parent.
<code>Description</code>	The description of the appointment.
<code>Due Date</code>	The date by which the appointment must be completed. <code>Earliest Start Permitted</code> and <code>Due Date</code> typically reflect terms in the customer's service-level agreement.
<code>Duration</code>	The estimated length of the appointment. If the parent record is work order or work order line item, the appointment inherits its parent's duration, but it can be manually updated. The duration is in minutes or hours based on the value selected in the <code>Duration Type</code> field.
<code>Duration Type</code>	The unit of the duration: Minutes or Hours.
<code>Earliest Start Permitted</code>	The date after which the appointment must be completed. <code>Earliest Start Permitted</code> and <code>Due Date</code> typically reflect terms in the customer's service-level agreement.
<code>Parent Record</code>	The parent record associated with the appointment.

Field Name	Description
Parent Record Status Category	(Read only) The Status Category of the parent record. If the parent record is a work order or work order line item, this field is populated; otherwise, it remains blank.
Parent Record Type	(Read only) The type of parent record: Account, Asset, Opportunity, Work Order, or Work Order Line Item.
Scheduled End	The time at which the appointment is scheduled to end. If you are using the Field Service Lightning managed packages with the scheduling optimizer, this field is populated once the appointment is assigned to a resource. $\text{Scheduled End} - \text{Scheduled Start} = \text{Estimated Duration}$.
Scheduled Start	The time at which the appointment is scheduled to start. If you are using the Field Service Lightning managed packages with the scheduling optimizer, this field is populated once the appointment is assigned to a resource.
Service Territory	The service territory associated with the appointment. If the parent record is a work order or work order line item, the appointment inherits its parent's service territory.
Status	The status of the appointment. The picklist includes the following values, which can be customized: • None—Default value. • Scheduled—Appointment has been assigned to a service resource. • Dispatched—Assigned service resource has been notified about their assignment. • In Progress—Work has begun. • Completed—Work is complete. • Cannot Complete—Work could not be completed. • Canceled—Work is canceled, typically before any work began
Status Category	The category that each Status value falls into. The Status Category field has seven values which are identical to the default Status values. If you create custom Status values, you must indicate which category it belongs to. For example, if you create a <i>Customer Absent</i> value, you may decide that it belongs in the <i>Cannot Complete</i> category. The Status Category field can be useful to reference in custom apps, triggers, and validation rules. Status categories let you extend and customize the work life cycle while still maintaining a consistent work classification for tracking, reporting, and business process management.

Field Name	Description
Subject	A short phrase describing the appointment.

SEE ALSO:

[Guidelines for Using Service Appointments](#)

Service Resource Fields

Service resources and their related objects have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Service resources are users who can complete field service work. They have the following fields.

Field Name	Description
Active	When selected, this option means that the resource can be assigned to work orders. For service tracking purposes, resources can't be deleted, so deactivating a resource is the best way to send them into retirement.
Capacity-Based	Capacity-based resources are limited to a certain number of hours or appointments in a specified time period.  Tip: The Capacities related list shows a resource's capacity.
Description	The description of the resource.
Include in Scheduling Optimization	When selected, this option means that the service scheduling optimizer can assign this resource to work orders during the optimization process. Use only if the Field Service Lightning managed packages are installed. Only users with the "Field Service Scheduling" permission set license can be included in scheduling optimization.
Name	The resource's name. You'll likely want this to be the name or title of the associated user.
Resource Type	Indicates whether a resource is a technician or a dispatcher. Resources who are dispatchers can't be capacity-based or included in scheduling optimization. Only users with the "Field Service Dispatcher" permission set license can be dispatchers.  Note: You can't add additional resource types.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Field Name	Description
User	The associated user.

Resource absences are periods of time in which a service resource isn't available to work. They have the following fields.

Field Name	Description
Absence ID	(Read only) An auto-generated number identifying the absence.
Absence Type	The type of absence: <i>Meeting</i> , <i>Training</i> , <i>Medical</i> , or <i>Vacation</i> . You can add custom values if needed.
Address	The address associated with the absence.
Description	The description of the absence.
End Time	The date and time when the absence ends.
Resource Name	The absent service resource.
Start Time	The date and time when the absence begins.

A service resource's *capacity* indicates how much work the resource can perform in a specified time period. Capacity records have the following fields.

Field Name	Description
End Date	The date the capacity ends; for example, the end date of a contract.
Name	(Read only) An auto-generated number identifying the capacity record.
Hours per Time Period	The number of hours that the resource can work per time period.
Service Resource	The associated resource.
Start Date	The date the capacity goes into effect.
Time Period	Days, Hours, or Months. For example, if a resource can work 80 hours per month, the capacity's <i>Time Period</i> would be <i>Month</i> and <i>Hours per Time Period</i> would be <i>80</i> .
Work Items per Time Period	The total number of service appointments that the resource can complete per time period.

SEE ALSO:

[Set Up Service Resources](#)

[Guidelines for Using Service Resources](#)

Service Territory Fields

Service territories and service territory members have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Service territories represent regions in which field service work can be performed. They have the following fields.

Field Name	Description
Active	Indicates whether the service territory is meant to be used. If a territory is inactive, you can't add members to it or link it to work orders, work order line items, or service appointments.
Address	An address to associate with the territory. You may want to list the address of the territory's headquarters.
Description	The description of the territory.
Name	The name of the territory.
Operating Hours	The territory's operating hours, which indicate when service appointments within the territory should occur. Service resources who are members of a territory automatically inherit the territory's operating hours unless different hours are specified on the service territory member record.
Parent Territory	The territory's parent service territory, if it has one. For example, a <i>Northern California</i> territory can have a <i>State of California</i> territory as its parent.
Top-Level Territory	(Read only) The top-level territory in a hierarchy of service territories. Depending on where a territory lies in the hierarchy, its top-level territory might be the same as its parent.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Service territory members are service resources who are available to work in the service territory. They have the following fields.

Field Name	Description
Address	The member's address. You may want to list the related service resource's address in this field.
End Date	The date when the service resource is no longer a member of the territory. If the resource will be working in the territory for the foreseeable future, leave this field blank. This field is mainly useful for indicating when a temporary relocation ends.

Field Name	Description
Member Number	(Read only) An auto-generated number identifying the service territory member.
Operating Hours	The member's operating hours, which are inherited from the service territory.
Service Resource	The service resource assigned to the service territory.
Service Territory	The service territory that the service resource is assigned to.
Start Date	The date when the service resource becomes a member of the service territory.
Territory Type	Primary, Secondary, or Relocation. • The primary territory is typically the territory where the resource works most often—for example, near their home base. Service resources can only have one primary territory. • Secondary territories are territories where the resource can be assigned to appointments if needed. Service resources can have multiple secondary territories. • Relocation territories represent temporary moves for service resources. If you're using the Field Service Lightning managed packages with the scheduling optimizer, resources with relocation territories are always assigned to services within their relocation territories during the specified relocation dates; if they don't have a relocation territory, the primary territories are favored over the secondary. For example, a service resource might have the following territories: • Primary territory: <i>West Chicago</i> • Secondary territories: – <i>East Chicago</i> – <i>South Chicago</i> • Relocation territory: <i>Manhattan</i>, for a three-month period

SEE ALSO:

[Set Up Service Territories](#)
[Guidelines for Using Service Territories](#)

Work Order Fields

Work orders have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Field	Description
Account	The account associated with the work order.
Address	The compound form of the address where the work order is completed. The work order inherits its address from the associated account. The work order's service appointments and line items inherit its address, though the address on line items can be updated.
Asset	The asset associated with the work order.
Business Hours	The business hours associated with the work order.
Case	The case associated with the work order.
City	The city where the work order is completed. Maximum length is 40 characters.
Contact	The contact associated with the work order.
Country	The country where the work order is completed. Maximum length is 80 characters.
Currency ISO Code	The ISO code for any currency allowed by the organization. Available only for orgs with the multicurrency feature enabled.
Description	The description of the work order. We recommend describing the steps a user must complete to mark the work order <i>Completed</i> .
Discount	(Read Only) The weighted average of the discounts on all line items on the work order. It can be any positive number up to 100.
Duration	The estimated time required to complete the work order. Specify the duration unit in the <code>Duration Type</code> field.
Duration Type	The unit of the duration: Minutes or Hours.
End Date	The date when the work order is completed. This field is blank unless you set up automation to configure it. For a sample workflow rule that configures the <code>Start Date</code> field (a similar field), see below.
Entitlement	The entitlement associated with the work order.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Field	Description
Entitlement Process End Time	The time the work order exits an entitlement process. If an entitlement process applies to a work order, this field appears.
Entitlement Process Start Time	The time the work order entered an entitlement process. If an entitlement process applies to a work order, this field appears.
Geocode Accuracy	The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the address's latitude and longitude coordinates.
Grand Total	(Read Only) The total price of the work order with tax added.
Is Closed	Indicates whether the work order is closed.  Tip: Use this field to report on closed versus open work orders.
Last Modified Date	The date when the work order was last modified.
Last Viewed Date	The date when the work order was last viewed.
Latitude	Used with Longitude to specify the precise geolocation of the address where the work order is completed. Acceptable values are numbers between -90 and 90 with up to 15 decimal places.
Line Items	(Read Only) The number of work order line items on the work order.
Longitude	Used with Latitude to specify the precise geolocation of the address where the work order is completed. Acceptable values are numbers between -180 and 180 with up to 15 decimal places.
Milestone Status	A milestone is a step in an entitlement process. It can have one of three statuses: Compliant, Open Violation, and Closed Violation. If an entitlement process applies to a work order, this field appears. To learn more, see Milestone Statuses .
Milestone Status Icon	An icon that corresponds to the milestone status. •  Compliant •  Open Violation •  Closed Violation
Owner	The work order's assigned owner.
Parent Work Order	The work order's parent work order, if it has one.  Tip: View, create, and delete a work order's child work orders in the Child Work Orders related list.
Postal Code	The postal code where the work order is completed. Maximum length is 20 characters.

Field	Description
Price Book	The price book associated with the work order. Adding a price book to the work order lets you assign different price book entries (products) to the work order's line items. This field is only available if products are enabled.
Priority	The priority of the work order. The picklist includes the following values, which can be customized: • <i>Low</i> • <i>Medium</i> • <i>High</i> • <i>Critical</i>
Root Work Order	(Read Only) The top-level work order in a work order hierarchy. Depending on where a work order lies in the hierarchy, its root might be the same as its parent.
Service Contract	The service contract associated with the work order.
Service Territory	The service territory where the work order is taking place.
Start Date	The date when the work order goes into effect. This field is blank unless you set up automation to populate it. For a sample workflow rule that configures this field, see below.
State	The state where the work order is completed. Maximum length is 80 characters.
Status	The status of the work order. The picklist includes the following values, which can be customized: • <i>New</i>—Work order was created, but there hasn't yet been any activity. • <i>In Progress</i>—Work has begun. • <i>On Hold</i>—Work is paused. • <i>Completed</i>—Work is complete. • <i>Cannot Complete</i>—Work could not be completed. • <i>Closed</i>—All work and associated activity is complete. • <i>Canceled</i>—Work is canceled, typically before any work began. Changing a work order's status does not affect the status of its work order line items or associated service appointments.
Status Category	The category that each status value falls into. The Status Category field has eight default values: seven values which are identical to the default <i>Status</i> values, and a <i>None</i> value for statuses without a status category. If you create custom <i>Status</i> values, you must indicate which category it belongs to. For example, if you create a <i>Waiting</i>

Field	Description
	for <code>Response</code> value, you may decide that it belongs in the <code>On Hold</code> category. The <code>Status Category</code> field can be useful to reference in custom apps, triggers, and validation rules. Status categories let you extend and customize the work life cycle while still maintaining a consistent work classification for tracking, reporting, and business process management.
Street	The street number and name where the work order is completed.
Subject	The subject of the work order. Try to describe the nature and purpose of the job to be completed. For example, "Annual on-site well maintenance." The maximum length is 255 characters.
Subtotal	(Read Only) The total of the work order line items' subtotals before discounts and taxes are applied.
Tax	The total tax on the work order. For example, in a work order whose total price is \$100, enter \$10 to apply a 10 percent tax. You can enter a number with or without the currency symbol and you can use up to two decimal places.
Total Price	(Read Only) The total of the work order line items' price after discounts but before tax is added.
Work Order Number	An auto-generated number that identifies the work order.
Work Type	The work type associated with the work order. When a work type is selected, the work order automatically inherits the work type's <code>Duration</code> , <code>Duration Type</code> , and required skills.



Example: The `Start Date` and `End Date` fields are blank by default, but you can set up workflow rules to configure them. The following rule populates the `Start Date` field with the current date and time when the `Status` field is changed to *In Progress*:

1. Create a workflow rule on the Work Order object:
 - Under Evaluation criteria, select **Created**.
 - Under Rule Criteria, enter *Work Order: Status EQUALS In Progress*.
2. Add a New Field Update workflow action:
 - Under Field to Update, select **Start Date**.
 - Under Date Options, select the option to use a formula and enter the formula *NOW()*.

3. Save and activate your rule.

SEE ALSO:

[Guidelines for Using Work Orders](#)
[Considerations for Using Work Orders](#)
[Set Up Work Orders](#)
[Work Order Line Item Fields](#)

Work Order Line Item Fields

Work order line items have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Field	Description
Address	The address of the line item. The line item inherits its address from its parent work order, but it can also be updated manually.
Asset	The asset associated with the line item. If your org uses hierarchical assets (available after Spring '16), you may want to link a work order's line items with different assets. For this reason, line items do not automatically inherit their parent work order's asset value.
Currency ISO Code	The ISO code for any currency allowed by the organization. Available only for orgs with the multicurrency feature enabled.
Description	The description of the line item. We recommend describing the steps a user must follow to mark the line item <i>Completed</i> .
Discount	The percent discount to be applied to the line item. You can enter a number with or without the percent symbol and you can use up to two decimal places.
Duration	The estimated time required to complete the line item. Specify the duration unit in the <code>Duration Type</code> field.
Duration Type	The unit of the duration: Minutes or Hours.
End Date	The date when the line item is completed.
Geocode Accuracy	The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Field	Description
	based on the address's latitude and longitude coordinates.
Is Closed	Indicates whether the line item has been closed. Changing the line item's status to <code>Closed</code> causes this checkbox to be selected in the user interface.
Latitude	Used with <code>Longitude</code> to specify the precise geolocation of the address where the work order is completed. Acceptable values are numbers between <code>-90</code> and <code>90</code> with up to 15 decimal places.
Line Item Number	An auto-generated number that identifies the line item.
List Price	The price of the line item (product) as listed in its corresponding price book entry. If a product isn't specified, the list price defaults to zero. (Read only)
Longitude	Used with <code>Latitude</code> to specify the precise geolocation of the address where the work order is completed. Acceptable values are numbers between <code>-180</code> and <code>180</code> with up to 15 decimal places.
Order	The order associated with the line item. For example, you may need to order replacement parts before you can complete the line item.
Parent Work Order Line Item	The line item's parent line item, if it has one.  Tip: View, create, and delete a line item's child line items in the Child Work Order Line Items related list.
Product	The product (price book entry) associated with the line item. This field's lookup search only returns products that are included in the work order's price book.
Quantity	The line item's quantity.
Root Work Order Line Item	The top-level line item in a line item hierarchy. Depending on where a line item lies in the hierarchy, its root might be the same as its parent. (Read only)
Service Territory	The service territory where the line item work is taking place.
Start Date	The date when the line item goes into effect.
Status	The status of the line item. The picklist includes the following values, which can be customized: • <code>New</code>—Line item was created, but there hasn't yet been any activity. • <code>In Progress</code>—Work has begun. • <code>On Hold</code>—Work is paused. • <code>Completed</code>—Work is complete. • <code>Cannot Complete</code>—Work could not be completed.

Field	Description
	• Closed—All work and associated activity is complete. • Canceled—Work is canceled, typically before any work began.
Status Category	The category that each status value falls into. The Status Category field has eight default values: seven values which are identical to the default Status values, and a None value for statuses without a status category. If you create custom Status values, you must indicate which category it belongs to. For example, if you create a Waiting for Response value, you may decide that it belongs in the On Hold category. The Status Category field can be useful to reference in custom apps, triggers, and validation rules. Status categories let you extend and customize the work life cycle while still maintaining a consistent work classification for tracking, reporting, and business process management.
Subject	The line item's subject. For example, "Tire Check."
Subtotal	The line item's unit price multiplied by the quantity. (Read only)
Total Price	The line item's subtotal with discounts applied. (Read only)
Unit Price	By default, the unit price for a line item is the product's list price from the price book, but you can change it.
Work Order	The parent work order of the line item. Because work order line items must be associated with a work order, this field is required.
Work Type	The work type associated with the line item. When a work type is selected, the work order line item automatically inherits the work type's Duration, Duration Type, and required skills.

SEE ALSO:

[Set Up Work Orders](#)[Work Order Fields](#)

Work Type Fields

Work types have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Field Name	Description
Description	The description of the work type. Try to add details about the task or tasks that this work type represents.
Duration Type	The unit of the Estimated Duration: Minutes or Hours.
Estimated Duration	The estimated length of the work. The estimated duration is in minutes or hours based on the value selected in the Duration Type field.
Name	The name of the work type. Try to use a name that helps users quickly understand the type of work orders that can be created from the work type. For example, "Annual Refrigerator Maintenance" or "Valve Replacement."

SEE ALSO:

[Work Order Fields](#)

[Work Order Line Item Fields](#)

[Set Up Work Orders](#)

Linked Article Fields

A linked article is a Knowledge article that is attached to a work order or work order line item. Linked articles have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Field	Description
Article ID	The ID of the linked article record, which is created when an article is attached to a record.
Article Title	The title of the attached article.
Article Version	The version of the article that is attached to the record. This field displays the title of the attached version, and links to the version. When you attach an article to a work order, that version of the article stays associated with the work order, even if later versions are published. If needed, you can detach and reattach an article to a work order to link the latest version.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Field	Description
	For example, if an article was entitled “How to Replace a Filter” when it was attached to the record, this field displays that title and links to the attached version.
Knowledge Article ID	The ID of the article that is attached to the record.
Last Viewed	The date the article was last viewed.
Linked Object Type	(Read only) The type of record that the article is attached to. For example, if the article is attached to a work order, this field displays “Work Order.”
Linked Record ID	The ID of the record that the article is attached to. For example, if the article is attached to a work order, this field displays the ID of the work order.
Record Type ID	The record type of the linked article. This field is populated only if record types are used.

SEE ALSO:

[Guidelines for Using Knowledge with Work Orders](#)

Operating Hours Fields

Operating hours and time slots have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Operating hours can be assigned to service territories, service territory members, and accounts to indicate when they are available for field service work. Create operating hours via the Operating Hours tab in Salesforce. Operating hours have the following fields.

Field Name	Description
Description	The description of the operating hours. Add any details that aren’t included in the name.
Name	The name of the operating hours. For example: <i>Summer Hours, Winter Hours, Peak Season Hours.</i>
Time Zone	The time zone that the operating hours fall within.

EDITIONS

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

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

Time slots represent a time period within a day when field service work can be completed. After you create operating hours, create time slots for each day via the Time Slots related list. Time slots have the following fields.

Field Name	Description
Day of Week	The day of the week when the time slot takes place.

Field Name	Description
End Time	The time when the time slot ends.
Name	The name of the time slot. The name is auto-populated to a day and time format—for example, Monday 9:00 AM – 10:00 PM—but you can manually update it if you wish.
Operating Hours	The operating hours that the time slot belongs to. An operating hours' time slots appear in the Operating Hours related list.
Start Time	The time when the time slot starts.
Type	The type of time slot. Possible values are <i>Normal</i> and <i>Extended</i> . You may choose to use <i>Extended</i> to represent overtime shifts.

 **Note:** You can't create custom fields on operating hours or time slots.

SEE ALSO:

[Create Operating Hours](#)

Skill Fields for Field Service

Skills represent certifications and areas of expertise in your field service workforce. Skills and their related objects have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Skills represent a certification or area of expertise. They are created in Setup, and have the following fields.

Field Name	Description
Name	The name of the skill.
Description	The description of the skill.
Developer Name	The unique name of the skill in the API.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

 **Note:** When you create a skill, leave the “Assign Users” and “Assign Profiles” sections blank. They are specific to Live Agent, which also uses skills.

Service resource skills are a skill that is assigned to a service resource. They appear in the Skills related list on service resource detail pages, and have the following fields.

Field Name	Description
End Date	The date when the skill expires. For example, if a resource must be re-certified after six months, the end date would be the date their certification expires.

Field Name	Description
Service Resource	The resource who possesses the skill.
Skill	The skill the resource possesses.
Skill Level	The resource's skill level. Skill level can range from zero to 99.99. For tips on how to define skill level, see Configure Skill Settings .
Start Date	The date when the resource gains the skill. For example, if the skill represents a certification, the start date would be the date of certification.

Skill requirements are skills that a resource needs to complete a task. They appear in the Skill Requirements related list on work type, work order, and work order line item detail pages, and have the following fields.

Field Name	Description
Related Record	The work order, work order line item, or work type that the skill is required on.
Skill	The required skill.
Skill Level	The required skill level. Skill level can range from zero to 99.99.

SEE ALSO:

[Set Up Skills for Field Service](#)

Adding a Knowledge Base

Adding Salesforce Knowledge

Welcome to Salesforce Knowledge

Build your knowledge base and give your website visitors, clients, partners, and service agents the ultimate in support. Salesforce Knowledge lets you create and manage your company information and securely share it when and where it is needed.

Your Salesforce Knowledge base is built from knowledge articles, which are documents of information. Articles can include information on process, like how to reset your product to its defaults, or frequently asked questions like, how much storage your product supports.

Experienced service agents and internal writers write the articles. The articles are then published to a range of channels: internal database, customer and partner communities, or public websites. Where and what information is published is based on the article layout profile and the field level security.

SEE ALSO:

[Salesforce Knowledge Documentation Overview](#)
[Complete Guide to Salesforce Knowledge](#)

Salesforce Knowledge Documentation Overview

Use these lists to find Salesforce Knowledge information in the Salesforce documentation set.

Overview of Salesforce Knowledge

- [Welcome to Salesforce Knowledge](#)
- [Plan Your Knowledge Base](#)
- [Salesforce Knowledge Limits](#)
- [Work with Articles and Translations](#)
- [Salesforce Knowledge Guide](#)

Set up Salesforce Knowledge

- [Build Your Knowledge Base](#)
- [Knowledge Article Types](#)
- [Import Existing Information into Salesforce Knowledge](#)
- [Knowledge Article Access](#)
- [Workflow and Approvals for Articles](#)

Use Your Salesforce Knowledge Base

- [Search Articles and External Sources on the Knowledge Tab](#)

EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

- Find Knowledge Articles in a Salesforce Console
- How Does Search Work?
- Articles or Knowledge Tab
- For searching and viewing Salesforce Knowledge Articles on your Android device, see [Access Salesforce Knowledge Articles with Salesforce1 for Android \(Beta\)](#) and [Salesforce1 Differences from the Full Salesforce Site](#)
- Create and Edit Articles
- Publish Articles and Translations
- Report on Salesforce Knowledge Articles

Define Data Categories for Your Salesforce Knowledge Articles

- [Data Categories in Salesforce.com](#)
- [Create and Modify Category Groups](#)
- [Add Data Categories to Category Groups](#)

Translate Salesforce Knowledge Articles

- [Support a Multilingual Knowledge Base](#)
- Translate Articles Within Salesforce Knowledge
- [Export Articles for Translation](#)
- [Import Translated Articles](#)

Share Your Salesforce Knowledge Base

- Salesforce Console and Salesforce Knowledge
- If you want visitors to your public website to view Salesforce Knowledge articles, install the *Public Knowledge Base* app from the AppExchange. To install, configure, and customize your public knowledge base with this package, see the Public Knowledge Base AppExchange App Guide available on the [AppExchange](#).

Develop with Salesforce Knowledge

- The [Salesforce Knowledge Developers Guide](#) has Salesforce Knowledge specific development information along with tutorials and examples.
- The [Force.com REST API Developer Guide](#) has information on supporting articles with the REST API.
- The [SOAP API Developer Guide](#) has information on the Salesforce Knowledge API:
 - Guidelines
 - Objects
 - Calls
- The [Metadata API Developers Guide](#) has information on Salesforce Knowledge Metadata API objects.
- The [Visualforce Developers Guide](#) has information on Salesforce Knowledge Visualforce components.
- The [Force.com Apex Code Developers Guide](#) has information on the Apex KnowledgeArticleVersionStandardController Class.

Plan Your Knowledge Base

It's important that you consider your individual company's needs while you develop a strategy for capturing and publishing your support team's expertise. With a robust knowledge base, customers receive service faster or even solve their own problems themselves.

Setting up Salesforce Knowledge is a "choose your own adventure" procedure. There are many features and options and it's up to you to decide which ones are right for your enterprise.

Consideration	Further Information
What information do you need to publish?	Article Types
Who can provide the information?	Knowledge User License, User Setup
Who can approve and manage the information?	Knowledge Management, Validation Rules
Do you need workflow or approval processes to manage article creation and publication?	Workflow and Approvals for Articles
Do you have an existing Knowledge base or documentation that you need to import?	Import Existing Information into Salesforce Knowledge
Who needs to read what information and where?	Knowledge Article Access, Create Public Groups for Knowledge, Assign Article Actions to Public Groups
Do you need to categorize your information?	Data Categories in Salesforce.com
Who has access to which categories?	Data Category Visibility
Are you supporting more than one language?	Support a Multilingual Knowledge Base
Do you need agents to search for articles while working on a case?	Attach PDF versions of articles to case emails. View a list of suggested articles based on case information., Set Up the Knowledge One Widget
Do you need agents to follow articles in Chatter?	Feed Tracking
Do you need to share your knowledge base externally?	Public Knowledge for Mobile, Web, and Facebook
Do you need to enhance searchability?	Improve the Article Search Experience
Do you need guidelines, resources, and current discussions on the evolving world of knowledge base orientated service?	Salesforce Knowledge is "KCS Verified" by the Consortium for Service Innovation, which recognizes best practices in customer support methodologies. By implementing Knowledge-Centered Support (KCS) features, you can create more efficient collaboration within your team and provide pertinent and accurate information to your customers.

EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

Consider the following tips when planning and using Salesforce Knowledge:

- Create [synonym groups](#) in Salesforce Knowledge. Synonyms are words or phrases that are treated as equivalent in article searches, letting you optimize search results.
- Before setting up data categories, carefully plan your category groups and their hierarchies. Also, consider how your category hierarchy maps to your role hierarchy. For more information, see [Data Category Visibility](#).
- Create custom reports on your Salesforce Knowledge data. You can also install the *Knowledge Base Dashboards and Reports* app from the AppExchange to receive over two dozen helpful reports.
- Multiple agents can edit the same article at the same time. If that occurs, your changes can be overwritten by a colleague without warning, even if you save your work frequently. To avoid accidental data loss, instruct all users who edit articles to edit only the articles they're assigned.
- Know the maximum [limits for articles](#), article types, and data categories.
- Review your usage regularly to avoid storage shortages: from Setup, enter *Storage Usage* in the **Quick Find** box, then select **Storage Usage**.
- Public knowledge base users cannot rate articles.
- The [File custom field type](#) allows agents to attach documents to articles.
- You will lose your data if you convert a custom field on an article type into any other field type. Do not convert custom fields unless no data exists for the field.
- When renaming Salesforce Knowledge labels note that standard field names, like title and type, are fixed. These fields do not change the labels on the article create and edit pages. If the organization is set to another language, these fields remain in the fixed label for that language.
- The Salesforce Knowledge search engine supports lemmatization, which is the process of reducing a word to its root form. With lemmatization, a search can match expanded forms of a search term. For example, a search for *running* matches items that contain *run*, *running*, and *ran*.
- Make sure that you have a clear understanding of the type of articles your organization needs, and how agents interact with these article types. This determines the article type permissions and article actions that you need to assign to Salesforce Knowledge users, which you can then use to create the set of profiles or permission sets required by your organization. For more information, see [Knowledge Article Access](#) on page 472.
- Determine if you need to create workflow rules for some of your article types. For example, you can create a rule that sends an email to an article manager when an agent creates an article upon closing a case.
- Determine if you need to create approval processes for some of your article types. For example, if you have a type of article that must have legal and management approval before it can be published externally, create an approval process for the article type.

SEE ALSO:

[Salesforce Knowledge Limits](#)
[Build Your Knowledge Base](#)
[Salesforce Knowledge Documentation Overview](#)
[Complete Guide to Salesforce Knowledge](#)

Salesforce Knowledge Limits

Limits for Salesforce Knowledge per edition.

Salesforce Knowledge is a knowledge base for creating and managing content. If Salesforce Knowledge is enabled in the Customer Portal or partner portal, customers and partners can access articles.

Salesforce Knowledge Limits	Details for Performance, Unlimited, Enterprise, and Developer Editions
Maximum number of articles	50,000 articles
Maximum number of article types	100 article types
Maximum number of custom fields per article type	Enterprise, Developer, and Unlimited editions: 500 custom fields per article type Performance editions: 800 custom fields per article type
Maximum file fields	5 file fields
Maximum file field size	File fields are counted as attachments and can be up to 25 MB.
Maximum rich text area size	131072 characters
Maximum size of all rich text area fields on an article	1638400 characters
Maximum unique article references (links) in a rich text area field	You can have up to 100 links to different Salesforce Knowledge articles in one rich text field.
Article history tracking	Article events are tracked for up to 18 months.
Maximum number of supported languages	16 supported languages
Article import	The import .zip file must meet the following requirements: • There can only be one .csv file and one .properties file. • The .csv file and the .properties file must be in the root directory. • The compression process must preserve the folder and subfolder structure. • The .zip file name can't contain special characters. • The .zip file can't exceed 20 MB and the individual, uncompressed, files within the zip file can't exceed 10 MB. • .csv files can't have more than 10,000 rows, including the header row. Therefore, you can have a maximum of 9,999 articles and translations. • .csv file rows can't exceed 400,000 characters. • .csv file cells can't exceed 32 KB. • Each article in the .csv file can't have more than 49 translations.
Maximum number of data category groups and active data category groups	5 category groups, with 3 groups active at a time
Maximum number of categories per data category group	100 categories in a data category group
Maximum number of levels in data category group hierarchy	5 levels in a data category group hierarchy
Maximum number of data categories from a data category group assigned to an article	8 data categories from a data category group assigned to an article

Salesforce Knowledge Limits

Details for Performance, Unlimited, Enterprise, and Developer Editions

Maximum number of promoted search terms	Your organization can create a maximum of 2,000 promoted terms.

SEE ALSO:

- [Welcome to Salesforce Knowledge](#)
- [Plan Your Knowledge Base](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

Build Your Knowledge Base

If your organization has Knowledge User licenses and one is assigned to you, you are ready to build your knowledge base.

To ensure that your organization has Knowledge User licenses, from Setup, enter *Company* in the Quick Find box, then select **Company Information**. Knowledge User licenses are listed near the bottom of the page, in the Feature Licenses related list.

To ensure that you are a Salesforce Knowledge user, from your personal settings, enter *Personal* in the Quick Find box, then select **Personal Information**. The Knowledge User checkbox is in the second column of the User Detail section.

To enable Salesforce Knowledge, from Setup, enter *Knowledge* in the Quick Find box, then select **Knowledge Settings**. Confirm that you want to enable Salesforce Knowledge and click **Enable Knowledge**. If your org doesn't have an article type, a default article type is created.

 **Note:** If you enabled Knowledge before Spring '16 you must create an article type first. After the Spring '16 release, you no longer need to create an article type first.

SEE ALSO:

- [Enable Salesforce Knowledge](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

USER PERMISSIONS

- To enable Salesforce Knowledge:
- "Customize Application"

Enable Salesforce Knowledge

From the Knowledge Settings page, you can create a Knowledge Base experience for your support agents, partners, and customers.

To set up or edit your knowledge Base, from Setup, enter *Knowledge Settings* in the **Quick Find** box, select **Knowledge Settings**, then click **Edit**.

Feature or Option	Description
General Settings	
Allow agents to create and edit articles from the Article or Knowledge tab	Enables agents to edit articles without going to the Article Management tab. Agents can click Edit to open the article edit page. If a published version of the article exists, they can view the published version or edit the current version. If a draft version exists, they can continue with editing the existing draft, but must carefully review the draft so that they don't overwrite unpublished changes.
Activate Validation Status field	Adds a Validation Status on page 483 field to all Salesforce Knowledge articles. Agents can select values to show whether the content of the article has been validated or not.
Allow agents to add external multimedia content to HTML in the standard editor	Allows <iframe> elements in the standard editor to embed multimedia content from the Dailymotion, Vimeo, and YouTube websites. Agents can simply cut and paste <iframe> HTML into the editor.
Article Summaries	
Show article summaries in article list views	For each channel, decide whether an article's summary details display beneath the article's title in search results.
Knowledge One	
Switch from the Articles tab to the Knowledge Tab	Enable Knowledge One with Profiles Enable Knowledge One with Permission Sets
Suggest related articles on cases	Search on the Knowledge tab suggests articles based on their content similarity and their links to similar cases. If no articles are linked to similar cases, suggested articles have similar titles as the case or have keywords in common with admin-selected case fields. Suggested articles are available in the Salesforce Console for Service and your portals when viewing existing cases and creating ones.

EDITIONS

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Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

Feature or Option	Description
	 Note: By default, the Subject field is selected. Choose up to five of the available short text fields that include a description of the issue, the affected product, or the case topic. We recommend choosing short text fields to return more relevant results. Only the first 100 characters of the content from all admin-selected fields are searched. The Description field is always taken into account when suggesting articles for cases and does not count toward the character limit.
Highlight relevant article text within search results	Search on the Knowledge tab generates a snippet of the relevant article text with the search terms bolded. See Search Highlights and Snippets .
Auto-complete keyword search	Search on the Knowledge tab suggests the three most popular keyword searches performed on the Knowledge tab. Suggestions are based on the channel (internal, customer, partner, or public) the reader is searching.  Note: Keyword search history is refreshed once a day.
Auto-complete title search	Search on the Knowledge tab suggests up to 3 articles with matching titles.
Language Settings	
Default Knowledge Base Language	The primary language used for writing articles. It defaults to your organization's language. We recommend that your Default Knowledge Base Language and your organization's language are the same.
Single or Multiple Language	If you support more than one language, select Multiple Languages and choose the translation settings. For instructions, see Support a Multilingual Knowledge Base .  Important: Setting up a Multilingual Knowledge Base. Important: If you enable Multiple Languages, you can't revert to a single language knowledge base.
Case Settings	
Allow agents to create an article from a case	If this checkbox is selected, agents can create a draft article that is attached to the case when the article is published using one of the following options. • Create articles using the simple editor only when closing cases. • Create articles using the standard editor any time an agent creates an article. Make sure that users have "Manage Articles," "Read," and "Create" permissions. Designate the following: — The default article type, from the drop-down list

Feature or Option	Description
	- For articles created when closing a case, assign the article to a user. - Help agents create articles fast by Selecting an Apex class that pre-populates any of the fields on the draft. By default, the Title field in all draft articles contains the case subject.  Note: If you enable this option, also click Layout Properties on each case-close page layout and select “Enable submissions during case close and Submit Articles.”
Use a profile to create article PDFs	By default, when a user creates an article PDF directly from a case, the PDF includes all the article fields visible to that user. If you want PDFs generated according to a different profile, for example, a profile that hides certain fields from customers, select Use a profile to create customer-ready article PDFs on cases and choose the profile that determines field visibility.
Enable list of cases linked to an article	Agents and Salesforce Knowledge managers can see a list of cases an article is attached to. This helps validate if the article is the right solution for a case and shows which articles are used most, without running a report. The Linked Cases related list: - Is visible on the detail or preview page of any article that has been published at least once. - Shows a maximum of 200 cases - Is sorted in descending order by the date the article was linked to the case. The sort order can’t be changed. - Doesn’t appear on archived articles or a translation’s edit and detail pages. - Doesn’t appear for external users such as portal or communities users or on Salesforce1.
Share Article via URL Settings	
Allow agents to share articles via public URLs	You can share an article that is available on a public knowledge base with a URL. In the Available Sites list, select the sites you want to allow your agents to send URLs from and add them to the Selected Sites list. Agents can then email customer service clients with a URL to link directly to the article in your public knowledge base.
Answers Settings	
Allow agents to create an article from a reply	If this checkbox is selected, members of an answers community or Chatter Answers community can convert helpful replies into articles. The article type you select determines which fields appear on the draft article. However, on all articles the Title contains the

Feature or Option	Description
	question and the Summary contains the reply. After a reply is promoted to an article, the original reply has a status message indicating its association with the draft article. When the article is published, the message on the reply includes a link to the article.
Chatter Questions Settings	
Display relevant articles as users ask questions in Chatter (also applies to communities with Chatter)	Shows similar questions and relevant Salesforce Knowledge articles when a user enters a question in the Search field.
Knowledge Statistics Settings	
Enable thumbs up or down voting for article	With this option, the article VoteStat report (which by default only contains totals for star ratings) includes totals for the thumbs up or down ratings.

SEE ALSO:

[Build Your Knowledge Base](#)[Knowledge Article Types](#)[Salesforce Knowledge Documentation Overview](#)[Complete Guide to Salesforce Knowledge](#)

Enable Knowledge One with Permission Sets

To switch users from the Articles tab to the Knowledge tab, add the **Knowledge One** permission to their permission sets.

To add the **Knowledge One** permission to a permission set:

1. From Setup, enter *Permission Sets* in the **Quick Find** box, then select **Permission Sets**.
2. Click the permission set you want to add the Knowledge One permission to.
3. In the  **Find Settings...** box, enter *Knowledge*.
4. Select **Knowledge One** from the list of suggestions.
5. Click **Edit**.
6. Under **Knowledge Management**, check the Enabled check box for **Knowledge One**.
7. Click **Save**.
8. Ensure each user has at least a Read permission on at least one article type.

Once Knowledge One is available for your users, define your external data sources. Your external data sources appear under your articles both in the search results and the left-side panel.

SEE ALSO:

[Enable Knowledge One with Profiles](#)

[Build Your Knowledge Base](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

USER PERMISSIONS

To create or edit permission sets:

- “Manage Profiles and Permission Sets”

To create and edit external data sources:

- “Customize Application”

Enable Knowledge One with Profiles

To switch users from the Articles tab to the Knowledge tab, add the **Knowledge One** permission to their profiles.

To add the **Knowledge One** permission to a profile:

1. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles**.
2. Click the profile you want to add the Knowledge One permission to.
3. In the  **Find Settings...** box, enter *Knowledge*.
4. Select **Knowledge One** from the list of suggestions.
5. Click **Edit**.
6. Under **Knowledge Management**, check **Knowledge One**.
7. Click **Save**.
8. Ensure each user has at least a Read permission on at least one article type.

Once Knowledge One is available for your users, define your external data sources. Your external data sources appear under your articles both in the search results and the left-side panel.

SEE ALSO:

[Enable Knowledge One with Permission Sets](#)
[Build Your Knowledge Base](#)
[Salesforce Knowledge Documentation Overview](#)
[Complete Guide to Salesforce Knowledge](#)

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USER PERMISSIONS

To create or edit profiles:

- “Manage Profiles and Permission Sets”

To create and edit external data sources:

- “Customize Application”

Example Apex for Submitting Articles from Cases

If your organization allows customer-support agents to create Salesforce Knowledge articles while closing a case, you can use Apex to pre-populate fields on draft articles. To do so, create an Apex class and assign it to the case article type using the example below as a guide.

For more information on the syntax and use of Apex, see the [Force.com Apex Code Developer's Guide](#).

Set up the example by creating the following article type, field, and data categories. Do not change the default `API Name` assigned to each new object.

1. Create an article type called `FAQ`.
2. Create a text custom field called `Details`.
3. Create a category group called `Geography` and assign it a category called `USA`.
4. Create a category group called `Topics` and assign it a category called `Maintenance`.

Now, create and assign the Apex class.

5. From Setup, enter `Apex Classes` in the Quick Find box, then select **Apex Classes** and click **New**.

6. To specify the version of Apex and the API used with this class, click **Version Settings**.

If your organization has installed managed packages from the AppExchange, you can also specify which version of each managed package to use with this class. Use the default values for all versions. This associates the class with the most recent version of Apex and the API, as well as each managed package. You can specify an older version of a managed package if you want to access components or functionality that differs from the most recent package version. You can specify an older version of Apex and the API to maintain specific behavior.

7. In the `Apex Class` text box enter the following script and click **Save**:

```
public class AgentContributionArticleController {
    // The constructor must take a ApexPages.KnowledgeArticleVersionStandardController
    as an argument
    public
    AgentContributionArticleController(ApexPages.KnowledgeArticleVersionStandardController
    ctl) {
        SObject article = ctl.getRecord(); //this is the SObject for the new article.

        //It can optionally be cast to the proper
        article type, e.g. FAQ__kav article = (FAQ__kav) ctl.getRecord();

        String sourceId = ctl.getSourceId(); //this returns the id of the case that was
        closed.
        Case c = [select subject, description from Case where id=:sourceId];

        article.put('title', 'From Case: '+c.subject); //this overrides the default
        behavior of pre-filling the title of the article with the subject of the closed case.
        article.put('Details__c',c.description);

        ctl.selectDataCategory('Geography','USA'); //Only one category per category
        group can be specified.
        ctl.selectDataCategory('Topics','Maintenance');
    }
}
```

8. From Setup, enter `Knowledge Settings` in the Quick Find box, then select **Knowledge Settings** and click **Edit**.

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USER PERMISSIONS

To edit Salesforce Knowledge settings:

- "Customize Application"

To create an Apex class:

- "Author Apex"

9. Verify the [case settings](#); using our example, the **Default article type** should be FAQ.
10. From the Use Apex Customization menu, select **AgentContributionArticleController** and click **Save**.

As a result of this example, when agents create an article from the case-close screen:

- The data from the `Description` field on the case appears in the `Details` field of the article.
- The title of the article contains *From Case:* and the case subject.
- The article is automatically assigned to the *USA* data category and the *Maintenance* data category.

SEE ALSO:

[Build Your Knowledge Base](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Use Videos from Any Provider with a Custom Visualforce Page

Using a custom Visualforce page and the HTML editor, you can insert videos from any provider into your Salesforce Knowledge articles.

For example, create a Visualforce page:

EDITIONS

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USER PERMISSIONS

To create a Visualforce page

- "Customize Application"

To create articles:

- "Manage Articles"

AND

"Read" and "Create" on the article type

To edit draft articles:

- "Manage Articles"

AND

"Read" and "Edit" on the article type

To edit published or archived articles:

- "Manage Articles"

AND

"Create," "Read," and "Edit" on the article type

```
<apex:page showHeader="false" showChat="false" sidebar="false">
  <iframe width="560" height="315"
    src="http://myvideo.provider.com/embed/{!$CurrentPage.parameters.VideoID}"
    frameborder="0" allowfullscreen="true">
  </iframe>
</apex:page>
```

Then, with the HTML editor, authors can reference videos using this code:

```
<iframe frameborder="0" height="315"
  src="https://<salesforce_instance>/apex/Video?videoID=12345"
  width="560">
</iframe>
```

SEE ALSO:

[Build Your Knowledge Base](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Knowledge Article Types

Article types, such as FAQs and Tutorials, provide the format and structure to control how an article displays for each audience, known as a channel. For each article type you can create custom fields, customize the layout by adding or removing sections and fields, and choose a template for each channel. You can also create workflow rules and approval processes to help your organization track and manage article creation and publication.

SEE ALSO:

[Create Article Types](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

EDITIONS

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Create Article Types

An article type controls how an article displays and what type of information of fields are included.

 **Note:** Before agents can access article types, you must set object permissions for article types.

1. From Setup, enter *Knowledge Article Types* in the Quick Find box, then select **Knowledge Article Types**.
2. Click **New Article Type** or edit an existing article type.
3. Enter the article types details

Field	Description
Label	A name used to refer to the article type in any user interface pages.
Plural Label	The plural name of the object. If you create a tab for this object, this name is used for the tab.
Gender	If it is appropriate for your organization's default language, specify the gender of the label. This field appears if the organization-wide default language expects gender. Your personal language preference setting does not affect whether the field appears. For example, if the organization's default language is English and your personal language is French, you are not prompted for gender when creating an article type.
Starts with a vowel sound	If it is appropriate for your organization's default language, check if your label should be preceded by "an" instead of "a".
Object Name	(Read only) A unique name used to refer to the article type when using the Force.com API. In managed packages, this unique name prevents naming conflicts on package installations. The Object 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.
Description	An optional description of the article type. A meaningful description helps you remember the differences between your article types when you are viewing them in a list.

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USER PERMISSIONS

To create, edit, or delete article types:

- "Customize Application"
- AND
- "Manage Salesforce Knowledge"

Field	Description
Track Field History	Select this option to track the full history of an article and its versions. The system records and displays field updates, publishing workflow events, and language versions for the master article and any translations.
Deployment Status	Indicates whether the article type is visible outside Setup. In Development means that article managers can't choose this article type when creating articles. Only select Deployed after you are done creating the article type.

4. Click **Save**.

On the article type detail page,

- In the Fields related list, [create or modify custom fields](#) as needed.
- In the Fields related list, [edit the article-type layout](#) as needed to rearrange fields and create sections.
- In the Channel Displays related list, [choose a template](#) for the Internal App, Partner, Customer, and Public Knowledge Base.

SEE ALSO:

[Add Custom Fields to Article Types](#)

[Article Type Page Layouts](#)

[Knowledge Article Types](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Add Custom Fields to Article Types

Create custom fields to store information that is important to your articles. The only standard fields provided on article types are: Article Number, Summary, Title, and URL Name. At minimum, you want to create a field where authors can write the body of the article.

Before you begin, determine the [type of custom field](#) you want to create.

 **Note:** Authors can view the URL Name when they create or edit an article. The URL Name does not appear to end users viewing published articles.

1. From Setup, enter *Knowledge Article Types* in the Quick Find box, then select **Knowledge Article Types**.
2. Select an article type.
3. Click **New** in the Fields related list.
4. Choose the type of field to create, and click **Next**.
5. 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 org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
6. Enter any field attributes, such as *Description*, and click **Next** to continue.
7. Set the [field-level security](#) to determine whether the field is visible and editable or read only for specific profiles, and click **Next**. Field-level security allows you to control which fields are visible in different channels.
8. If you do not want the field to be added automatically to the article-type layout, uncheck *Yes, add this custom field to the layout*.
9. Click **Save** to finish or **Save & New** to create more custom fields.
10. Optionally [rearrange your custom fields](#) on the article-type layout.

 **Note:** Creating fields can require changing many records at once. To process these changes efficiently, Salesforce might queue your request and send an email notification when the process has completed.

 **Warning:** You lose your data if you convert a custom field on an [article type](#) into any other field type. Do not convert a custom field on an article type unless no data exists for the field.

SEE ALSO:

[Custom Fields on Articles](#)

[Create Article Types](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

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USER PERMISSIONS

To create or change custom fields:

- "Customize Application"
- AND
- "Manage Salesforce Knowledge"

Custom Fields on Articles

The first step in creating a custom field for articles is choosing the field type. This table describes all available custom field types.

Field Type	Description
Article Currency	In a multiple currency organization, an article can have an article currency field to set the article's currency ISO code.
Currency	Allows agents to enter a currency amount. The system automatically formats the field as a currency amount. This can be useful if you export data to a spreadsheet application. You can make this field required so an agent must enter a value before saving an article.  Note: Salesforce uses the round-half-to-even tie-breaking rule for currency fields. For example, 23.5 becomes 24, 22.5 becomes 22, -22.5 becomes -22, and -23.5 becomes -24. Values lose precision after 15 decimal places.
Date	Allows agents to enter a date or pick a date from a popup calendar. In reports, you can limit the data by specific dates using any custom date field. You can make this field required so an agent must enter a value before saving an article.
Date/Time	Allows agents to enter a date or pick a date from a popup calendar, and enter a time of day. They can also add the current date and time by clicking the date and time link next to the field. The time of day includes AM or PM notation. In reports, you can limit the data by specific dates and times using any custom date field. You can make this field required so an agent must enter a value before saving an article.
Email	Allows agents to enter an email address, which is validated to ensure proper format. Character limit is 80. If this field is specified for contacts or leads, agents can choose the address when clicking Send an Email . You can't use custom email addresses for mass emails. You can make this field required so an agent must enter a value before saving an article.

EDITIONS

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Field Type	Description
File	Allows agents to upload and attach a file to an article. You can make this field required so an agent must enter a value before saving an article. Note the following caveats about File fields: • The maximum attachment size is 25 MB. • You can add up to 5 File fields to each article type; contact Salesforce to increase these limits. • If the <code>Disallow HTML documents and attachments</code> security setting is enabled, File fields do not support HTML files. • Text content in a File field attachment is searchable. You can search up to 25 MB of attached files on an article. For example, if an article has six 5-MB file attachments, the first 4.16 MB of each file is searchable. • You cannot attach Salesforce CRM Content files using the File field. • The File field type is not supported in Developer edition. • The filename cannot exceed 40 characters. • You cannot convert a File field type into any other data type.
Formula	Allows agents to automatically calculate values based on other values or fields such as merge fields.  Note: Salesforce uses the round half up tie-breaking rule for numbers in formula fields. For example, 12.345 becomes 12.35 and –12.345 becomes –12.34. In Database.com, the Formula editor does not provide a Check Syntax button. Syntax checking occurs when the agent attempts to save the formula.
Lookup Relationship	Creates a relationship between two records so you can associate them with each other. For example, opportunities have a lookup relationship with cases that lets you associate a particular case with an opportunity. A lookup relationship creates a field that allows agents to click a lookup icon and select another record from a popup window. On the associated record, you can then display a related list to show all the records that are linked to it. You can create lookup relationship fields that link to users, standard objects, or custom objects. If a lookup field references a record that has been deleted, Salesforce clears the value of the lookup field by default. Alternatively, you can choose to prevent records from being deleted if they're in a lookup relationship. You can make this field required so an agent must enter a value before saving an article. Lookup relationship fields are not available in Personal Edition.

Field Type	Description
	Lookup relationship fields to campaign members are not available; however, lookup relationship fields from campaign members to other objects are available.
Number	Allows agents to enter any number. This entry is treated as a real number and any leading zeros are removed. You can make this field required so an agent must enter a value before saving an article.  Note: Salesforce uses the round half up tie-breaking rule for number fields. For example, 12.345 becomes 12.35 and –12.345 becomes –12.34. Salesforce rounds numbers referenced in merge fields according to the user's locale, not the number of decimal spaces specified in the number field configuration.
Percent	Allows agents to enter a percentage number, for example, '10'. The system automatically adds the percent sign to the number. You can make this field required so an agent must enter a value before saving an article.  Note: If the decimal value is greater than 15, and you add a percent sign to the number, a runtime error occurs. Values lose precision after 15 decimal places.
Phone	Allows agents to enter any phone number. Character limit is 40. You can make this field required so an agent must enter a value before saving an article. Salesforce automatically formats it as a phone number.
Picklist	Allows agents to select a value from a list you define.
Picklist (Dependent)	Allows agents to select a value from a list dependent on the value of another field.
Picklist (Multi-select)	Allows agents to select more than one picklist value from a list you define. These fields display each value separated by a semicolon.
Text	Allows agents to enter any combination of letters, numbers, or symbols. You can set a maximum length, up to 255 characters. You can make this field required so an agent must enter a value before saving an article.
Text Area	Allows agents to enter up to 255 characters that display on separate lines similar to a <code>Description</code> field. You can make this field required so an agent must enter a value before saving an article.
Text Area (Long)	Allows agents to enter up to 131,072 characters that display on separate lines similar to a <code>Description</code> field. You can set the length of this field type to a lower limit, if desired. Any length from

Field Type	Description
Text Area (Rich)	256 to 131,072 characters is allowed. The default is 32,768 characters. Every time an agent presses <code>Enter</code> within a long text area field, a line break and a return character are added, both count toward the character limit. Also, smart links add more characters than what is displayed.  Note: If you lower the character limit and you have articles that surpass the new limit. Those articles can't be edited until the limit is reset higher than their character counts. Allows agents to enter up to 131,072 characters of HTML-supported text including code samples () and smart links between Salesforce Knowledge articles. There are two ways to create smart links: • Search for the article. • Enter the article URL.  Note: • You can have up to 100 links to different Salesforce Knowledge articles in one rich text field. • When you convert a text area (rich) field to a text area (long) field, links are displayed as link reference numbers, not URLs. • The upgraded editor doesn't support Internet Explorer version 7 or version 8 in compatibility mode. If you are using these browsers, you use the older editor.
URL	Allows agents to enter up to 255 characters of any valid website address. When agents click the field, the URL opens in a separate browser window. Only the first 50 characters are displayed on the record detail pages. You can make this field required so an agent must enter a value before saving an article.

SEE ALSO:

[Add Custom Fields to Article Types](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Field-Level Security on Articles

Field-level security lets administrators restrict readers' access to specific fields on detail and edit pages. For example, you can make a "Comment" field in an article visible for Internal App profiles but not for public Community profiles.

If using both [article-type layout](#) and field-level security to define field visibility, the most restrictive field access setting always applies. For example, if a field is hidden in the article-type layout, but visible in the field-level security settings, the layout overrides security settings and the field isn't visible. Some user permissions override both page layouts and field-level security settings. For example, users with the "Edit Read Only Fields" permission can always edit read-only fields regardless of any other settings.

 **Important:** Field-level security doesn't prevent searching on the values in a field. When search terms match on field values protected by field-level security, the associated records are returned in the search results without the protected fields and their values.

You can define security via a permission set, profile, or field.

Define field-level security via permission sets or profiles

1. For permission sets or profiles, from Setup, either:
 - Enter *Permission Sets* in the **Quick Find** box, then select **Permission Sets**, or
 - Enter *Profiles* in the **Quick Find** box, then select **Profiles**
2. Select a permission set or profile.
3. Depending on which interface you're using, do one of the following:
 - Permission sets or enhanced profile user interface—In the **Find Settings...** box, enter the name of the object you want and select it from the list. Click **Edit**, then scroll to the Field Permissions section.
 - Original profile user interface—In the Field-Level Security section, click **View** next to the object you want to modify, and then click **Edit**.
4. Specify the field's access level.

 **Note:** These field access settings override any less-restrictive field access settings on the article-type layouts.

5. Click **Save**.

Define field-level security via fields

1. For fields, from Setup, enter *Knowledge Article Types* in the **Quick Find** box, then select **Knowledge Article Types**.
2. Select the article type that contains the field to modify.
3. Select the field and click **Set Field-Level Security**.
4. Specify the field's access level.

 **Note:** These field access settings override any less-restrictive field access settings on the article-type layouts.

5. Click **Save**.

EDITIONS

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After setting field-level security, you can [modify the article-type layouts](#) to organize the fields on detail and edit pages.

SEE ALSO:

- [Add Custom Fields to Article Types](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

Article Type Page Layouts

Article-type layouts determine which fields agents can view and edit when entering data for an article. They also determine which sections appear when users view articles. The article-type template defines the format of the article, for example whether layout sections display as subtabs or as a single page with links. You can apply a layout per profile per article type. Therefore, you can display more sensitive fields of the same article to only those agents with the correct profile.

 **Tip:** You can also use [field-level security](#) to hide fields on article types. For example, if you publish the same article in the internal app and in a community, you can use field-level security to hide a custom field such as `Internal Comments` from external community users.

1. From Setup, enter *Knowledge Article Types* in the *Quick Find* box, then select **Knowledge Article Types**.
2. Click the article type.
3. Scroll down to the Page Layouts related list or click the Page Layouts link at the top of the page.
4. To create a page layout, click **New** and follow the prompts. To edit an existing layout, click **Edit** and make your changes.

Make your changes. The layout editor consists of two parts: a palette on the upper portion of the screen and the layout on the lower portion of the screen. The palette contains the available fields and a section element. The layout contains an Information section and space for you to add sections. By default, all custom fields are included in the Information section.

 **Important:** If you navigate away from your article-type layout before clicking save, your changes are lost.

 **Note:** The `Article Number`, `Summary`, `Title`, and `URL Name` standard fields do not display in the layout. `Article Number` and `Summary` appear in a read-only Properties section at the top of the published article. Also included in this header are the `First Published`, `Last Modified`, and `Last Published` fields.

Task	Description
Add a section	Drag and drop the section element into the palette.
Change the name of a section	Click its title. You cannot rename the Information section.
Remove a field from a section	Drag it to the right side of the palette or click the  icon next to the field.
Remove a section from the article-type layout	Click the  icon next to the section name.
Save your changes and continue editing the article type layout	Click Quick Save .

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USER PERMISSIONS

To customize the article-type layout:

- “Customize Application”

**Tip:**

- Use the undo and redo buttons to step backwards and forwards, respectively.
- Use the following keyboard shortcuts:
 - Undo = CTRL+Z
 - Redo = CTRL+Y
 - Quick Save = CTRL+S
- To select multiple elements individually, use CTRL+click. To select multiple elements as a group, use SHIFT+click.
- To quickly locate any item in the palette, use the Quick Find box. The Quick Find box is especially useful for article-type layouts that have large numbers of items available in the palette.

5. To assign various layouts to the article type based on a user profile, click **Page Layout Assignments**.

6. Click **Edit Assignment**.

7. Select the profile, or profiles (using SHIFT), you want to change and select the layout from the **Page Layout To Use** drop-down.

When creating multiple article type page layouts, consider the following limitations and functionality changes.

- When creating page layouts, some fields are hidden based on the agent's license. Out of Date, Translation Completed Date, and Translation Exported Date are hidden from users who do not have a Knowledge User license or who are customer portal or partner portal users. In addition, Archived By and Is Latest Version are hidden from customer portal and partner portal users.
- Before Spring '16, preview pages showed the Summary field in the API that contained text values, even if they were not in the page layout. To continue displaying summary fields on preview pages, manually update your page layouts to include them.
- If you want to attach articles as PDFs to emails when solving cases, add **File Attachments** to the **Selected Email Tools** in the Feed View for the article type layout.
- The article edit page only shows the standard fields (Article Number, Title, URL Name, and Summary) and all the custom fields added to the layout, including the side bar fields. Other standard fields added on the page layout are ignored because they are not editable, and the custom fields are displayed in the order specified in the page layout.
- If an article type page layout doesn't include a field with a [validation rule](#), you can't create or edit an article of that article type. Make sure all page layouts assigned to the article type by profile include all fields with validation rules.
- The Communication channel layout doesn't use the page layout to determine which Article fields are inserted into a case email. The fields that are inserted include the fields selected in the Communication Channel mapping.
- You can set up a specific profile to generate a PDF file. When sending articles as PDFs, the pdf is generated based on the sender's profile. Therefore, the receiver might get fields they are not meant to see. Use the `Use a profile to create customer-ready article PDFs on cases` setting on the Knowledge settings page so the fields in PDFs come from the page layout assigned to the configured profile. Also, Field Level Security of both the sender profile and the configured profile are applied.
- Salesforce Classic Mobile actions and related lists are not available on article page layouts in the desktop Salesforce user interface, with the exception of actions on the article feed.

SEE ALSO:

[Create Article Types](#)

[Knowledge Article Types](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Send Article Content in Email (Beta)

When using Knowledge One, agents can send an email with an article's contents embedded in the body of the email.

 **Note:** Sending article content via email is available through a beta program for articles published on external channels (public knowledge bases, portals, or communities) and is not supported on Internet Explorer 7. For new organizations, the user permission off on all standard profiles but on for the System Administrator profile. For existing organizations, contact your Salesforce representative to enable the permission on the standard System Administrator profile.

Agents can send article content within an email rather than just sending a URL. Your customers can access the information without going to a website. Your agents send articles that are not published publicly without rewriting or copy and pasting an internal article. Administrators can assign permission to only those agents with a good knowledge of what is acceptable for an external audience.

To enable and setup which article fields go into emails for each article type.

1. From the object management settings for cases, go to Page Layouts.
2. How you access the Case Feed Settings page depends on what kind of page layout you're working with.
 - For a layout in the Case Page Layouts section, click **Edit**, and then click **Feed View** in the page layout editor.
 - For a layout in the Page Layouts for Case Feed Users section, click  and choose **Edit feed view**. (This section appears only for organizations created before Spring '14.)

If you've already opted to use the advanced page layout editor to configure the publisher for a layout, choose **Edit detail view** to add, change, or remove actions.

3. Under **Articles Tool Settings**, check **Enable attaching articles inline**.
4. Click **Save**.
5. From Setup, enter *Knowledge Article Types* in the **Quick Find** box, then select **Knowledge Article Types**.
6. Click the label or name of the article type you'd like to share via email.
7. Under **Communication Channel Mappings**, click **New** or **Edit**.
8. Enter a Label and Name.
9. Select and add **Email** to the **Selected Channels** list.
10. Select and add the fields you'd like included in the body of an email.

-  **Note:** Smart links can't be included in the email and the following fields are not supported:
- ArticleType
 - isDeleted
 - Language
 - MultiPicklist
 - Picklist
 - Publish Status
 - Source

EDITIONS

Available in: Salesforce Classic

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USER PERMISSIONS

To administer Salesforce Knowledge and create, edit, and delete page layouts:

- "Customize Application"
- AND
- "Manage Salesforce Knowledge"

- Validation Status

11. Click **Save**.



Example: While solving customer cases, agents with the permission can insert article content into the body of an email. Anywhere agents can attach articles to cases, such as the Knowledge One sidebar in the Salesforce Console, the Articles list in the case feed, the Article widget, or the suggested articles in a Knowledge One search, they can email any article of that type within the body of an email by selecting **Email article with HTML** in the action drop-down. The article content is inserted at top of email thread or wherever the agent left their cursor. Once an article has been emailed, an envelope icon appears to the left of the title. When the article has files that exceed the 10-mb attachment limit, agents are asked to select which files to attach and retry sending the email.



Note: If rich text is not enabled on your case feed layout for the article type, only article text is embedded into the email and the action changes to **Email article text only**.

SEE ALSO:

[Article Type Page Layouts](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Post Site and Community Article URLs

In the Service Console, agents can insert Site or Community URLs for articles into the case feed via the email, community, or social publishers.

To post Site or Community URLs for articles into the case feed, you must have the Knowledge sidebar enabled in the Service Console and either a Force.com Site or Community setup.

1. From Setup, enter *Knowledge* in the *Quick Find* box, then select **Knowledge Settings**.
2. Click **Edit**.
3. In the *Share Article via URL Settings* section, enable **Allow users to share articles via public URLs**.
4. In the *Available Sites* list, select from which sites or communities you want agents to share article URLs and add them to the *Selected Sites* list.
5. Click **Save**.

Your agents can now select **Attach and share article** link from selected sites in the Knowledge sidebar of the console. Email is the default action but agents can change to the Social or Community action in the case feed before they insert the URL.



Important:

- Articles must be published. Draft articles don't show the insert URL option.
- Articles must be shared publicly, meaning their Channel must be Public Knowledge Base, Customer, or Partner.

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USER PERMISSIONS

To administer Salesforce Knowledge:

- "Customize Application"
- AND
- "Manage Salesforce Knowledge"

- All enabled URLs show **Attach and share article** link, even if the article is not visible in that site or community. The agent must confirm that the article is available in the site or community before sharing it with the customer.

SEE ALSO:

[Article Type Page Layouts](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Control Data Integrity with Validation Rules

Ensure that your article content is compliant with your company standards. Create validation rules for each article type to check whether required fields have the appropriate values based on the article's status.

1. From Setup, enter *Article Types* in the **Quick Find** box, then select **Knowledge Article Types**.
2. Click the article type.
3. Scroll down to the Validation Rules related list or click the **Validation Rules** link at the top of the page.
4. To create a validation rule, click **New**. To edit an existing rule, click **Edit**.
5. Name the rule.
6. Make the rule active.
7. Optionally, describe what you want to control on articles of this type.
8. Specify an error condition formula and a corresponding error message.

The error condition is written as a Boolean formula expression that returns true or false. When true, the article is not saved, and an error message displays. The author can correct the error and try again. For information on validation rules, see [Define Validation Rules](#).

 **Note:** Knowledge article errors always display at the top of the page, not next to the field. Write your errors descriptively so that authors know how to satisfy the validation rule. For example, identify which field is causing the error.

9. Click **Save**.

When creating validation rules on article types, consider the following limitations and functionality changes.

- If an article type page layout doesn't include a field with a validation rule, you can't create or edit an article of that article type. Make sure all [page layouts assigned to the article type by profile](#) include all fields with validation rules.
- The Article Currency field and the VLOOKUP function don't support validation rules.
- When importing articles, if the import data file has a valid article with an invalid translation, the translation is created, but its translated content isn't imported.
- Only the first validation rule error displays at the top of the page and in the import article log. If multiple errors exist but are not fixed, they are displayed on subsequent saves or imports.

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USER PERMISSIONS

To create or edit validation rules for article types:

- "Customize Application"
- AND
- "Manage Salesforce Knowledge"

- In the API, KA fields, such as Case Association Count and Archived Date, don't support validation rules. Only KAV (article version) fields are supported in validation rules.

SEE ALSO:

[Knowledge Article Types](#)[Salesforce Knowledge Documentation Overview](#)[Complete Guide to Salesforce Knowledge](#)

Article History Tracking

You can track the history of certain fields in articles. If you have history tracking enabled, open an article of that type and click **Version** to see a version history list. You can also set tracking for the article type and track the full history of an article and its versions. Article events are tracked for up to 18 months.

The system records and displays field updates, publishing workflow events, and language versions for the master article and any translations. When you track old and new values, the system records both values as well as the date, time, nature of the change, and the user who made the change. When you track only the changed values, the system marks the changed field as having been edited; it doesn't record the old and new field values. This information is available in the Version History list and the fields are available in the Article Version History report.

Article history respects field, entity, and record-level security. You must have at least "Read" permission on the article type or the field to access its history. For data category security, Salesforce determines access based on the categorization of the online version of an article. If there is no online version, then security is applied based on the archived version, followed by the security of the draft version.

1. From Setup, enter *Knowledge* in the **Quick Find** box, then select **Knowledge Article Types**.
2. Create an article type or edit one from the Article Types list.
3. Click **Set History Tracking**.
4. Choose the fields you want to track.
Salesforce begins tracking history from that date and time. Changes made before that date and time are not tracked.
5. Click **Save**.

SEE ALSO:

[Knowledge Article Types](#)[Salesforce Knowledge Documentation Overview](#)[Complete Guide to Salesforce Knowledge](#)

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USER PERMISSIONS

To create, edit, or delete article types:

- "Customize Application"
- AND
- "Manage Salesforce Knowledge"

Article Type Templates

Article types in Salesforce Knowledge require a template for each channel. The standard article-type templates—Tab and Table of Contents—specify how the sections in the article-type layout appear in the published article. For example, if you choose the Tab template, the sections defined in the layout appear as tabs when users view an article. With the Table of Contents template, sections appear on a single page with hyperlinks to each section. You can also create a custom template using Visualforce. Custom templates are not associated with the article-type layout.

1. From Setup, enter *Knowledge Article Types* in the **Quick Find** box, then select **Knowledge Article Types**.
2. Click an article type name.
 - If you are using a default template, continue with Step 12.
 - If you are creating a custom template, make note of the article type's **API Name**. You need this value when you create the Visualforce page.
3. From Setup, enter *Visualforce Pages* in the **Quick Find** box, then select **Visualforce Pages**.
4. Click **New**.
5. In the **Name** text box, enter the text that appears in the URL as the page name.
This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
6. In the **Label** text box, enter the text that users see when choosing this template from the Channel Displays related list on the article type detail page.
7. Add your Visualforce markup.

The only requirement for custom article-type templates is that the standard controller is equal to the **API Name** of the article type. For example, if the **API Name** of the article type is *Offer__kav*, your markup would be:

```
<apex:page standardController="Offer__kav">

    ... page content here ...

</apex:page>
```



Note: Click **Component Reference** for a list of the Visualforce components, such as *knowledge:articleRendererToolbar* and *knowledge:articleCaseToolbar*, available for use in custom article-type templates.

8. If your article type has a **File field**, you can allow users to download the field's content.

In the following example, the article type is *Offer*, the name of the File field is *my_file*, and the text that appears as a link is *Click me*:

```
<apex:outputLink value="{!URLFOR($Action.Offer__kav.FileFieldDownload,
Offer__kav.id, ['field'=$ObjectType.Offer__kav.fields.my_file__Body__s.name])}">Click
me</apex:outputLink>
```

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USER PERMISSIONS

To create, edit, or delete article-type templates:

- "Customize Application"
- AND
- "Manage Salesforce Knowledge"

 **Note:** If the File field is empty (meaning the author didn't upload a file), the link still appears on the published article but has no function. If you do not want the link to appear when the File field is empty, replace *Click me* in the example with the name of the file. For example, `{!Offer__kav.my_file__Name__s}`.

9. Click **Save**.

Your custom template can now be assigned to any channel on the article type.

10. From Setup, enter *Knowledge Article Types* in the **Quick Find** box, then select **Knowledge Article Types**

11. Click an article type name.

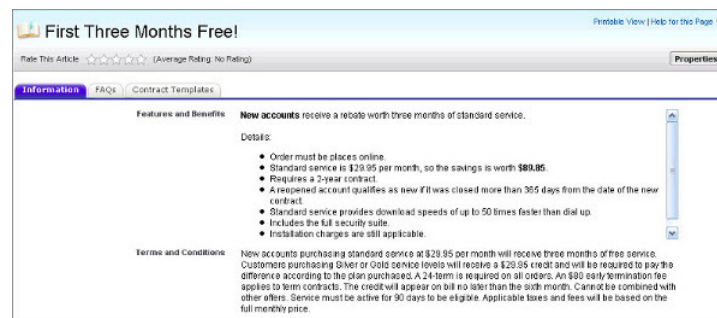
12. For each channel, specify the template.

- For Internal App, Customer and Partner, **Tab** is the default template.
- For Public Knowledge Base, **Table of Contents** is the default template.
- If you created a custom template for this article type, it also appears in the drop-down menu.

13. Click **Save**.

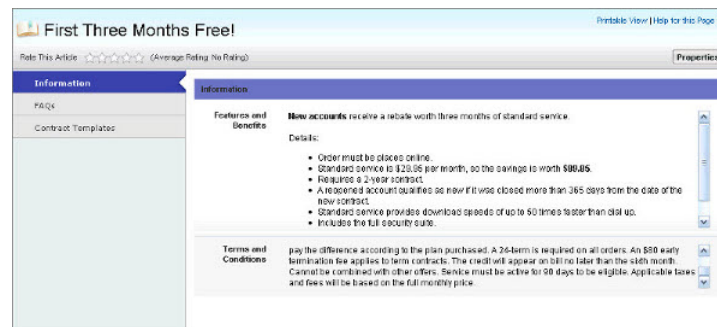
 **Example:** If you choose the Tab template, the sections you defined in the layout appear as tabs when users view an article.

Published Article Using the Tab Article-Type Template



If you choose the Table of Contents template, the sections you defined in the layout appear on one page with hyperlinks to each section title.

Published Article Using the Table of Contents Article-Type Template



SEE ALSO:

[Knowledge Article Types](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Example Apex for Submitting Articles from Cases

If your organization allows customer-support agents to create Salesforce Knowledge articles while closing a case, you can use Apex to pre-populate fields on draft articles. To do so, create an Apex class and assign it to the case article type using the example below as a guide.

For more information on the syntax and use of Apex, see the [Force.com Apex Code Developer's Guide](#).

Set up the example by creating the following article type, field, and data categories. Do not change the default `API Name` assigned to each new object.

1. [Create an article type](#) called `FAQ`.
2. [Create a text custom field](#) called `Details`.
3. [Create a category group](#) called `Geography` and [assign it a category](#) called `USA`.
4. [Create a category group](#) called `Topics` and [assign it a category](#) called `Maintenance`.

Now, create and assign the Apex class.

5. From Setup, enter `Apex Classes` in the `Quick Find` box, then select **Apex Classes** and click **New**.
6. To specify the version of Apex and the API used with this class, click **Version Settings**.

If your organization has installed managed packages from the AppExchange, you can also specify which version of each managed package to use with this class. Use the default values for all versions. This associates the class with the most recent version of Apex and the API, as well as each managed package. You can specify an older version of a managed package if you want to access components or functionality that differs from the most recent package version. You can specify an older version of Apex and the API to maintain specific behavior.

7. In the `Apex Class` text box enter the following script and click **Save**:

```
public class AgentContributionArticleController {
    // The constructor must take a ApexPages.KnowledgeArticleVersionStandardController
    as an argument
}
```

EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

USER PERMISSIONS

To edit Salesforce Knowledge settings:

- "Customize Application"

To create an Apex class:

- "Author Apex"

```

    public
    AgentContributionArticleController(ApexPages.KnowledgeArticleVersionStandardController
    ctl) {
        SObject article = ctl.getRecord();    //this is the SObject for the new article.

                                                //It can optionally be cast to the proper
        article type, e.g. FAQ__kav article = (FAQ__kav) ctl.getRecord();

        String sourceId = ctl.getSourceId(); //this returns the id of the case that was
        closed.
        Case c = [select subject, description from Case where id=:sourceId];

        article.put('title', 'From Case: '+c.subject); //this overrides the default
        behavior of pre-filling the title of the article with the subject of the closed case.
        article.put('Details__c',c.description);

        ctl.selectDataCategory('Geography','USA'); //Only one category per category
        group can be specified.
        ctl.selectDataCategory('Topics','Maintenance');
    }

```

8. From Setup, enter *Knowledge Settings* in the Quick Find box, then select **Knowledge Settings** and click **Edit**.
9. Verify the [case settings](#); using our example, the **Default article type** should be FAQ.
10. From the Use Apex Customization menu, select **AgentContributionArticleController** and click **Save**.

As a result of this example, when agents create an article from the case-close screen:

- The data from the *Description* field on the case appears in the *Details* field of the article.
- The title of the article contains *From Case:* and the case subject.
- The article is automatically assigned to the *USA* data category and the *Maintenance* data category.

SEE ALSO:

[Build Your Knowledge Base](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Delete an Article Type

Deleting article types can result in errors and lost data. Read this entire topic carefully before deleting article types.

1. From Setup, enter *Knowledge Article Types* in the **Quick Find** box, then select **Knowledge Article Types**.
2. Next to the article type, click **Del**.
3. Confirm that you want to delete the article type.

Notes on Deleting Article Types

- If your organization has only article type, you cannot delete it. Every Salesforce Knowledge org requires at least one deployed article type. Create an article type and then delete the old one.
- Any articles associated with a deleted article type are automatically removed from all channels, including draft, published, and archived articles.
- Salesforce does not display deleted article types in the Recycle Bin with other deleted records. Instead, deleted article types appear in the Deleted Article Types list on the article list view page for 15 days. During this time, you can restore the article type and its articles, or permanently erase the article type and its articles. After 15 days, the article type and its articles are permanently erased.
- If a reader clicks a bookmark to a deleted article's URL, an Insufficient Privileges message displays.

SEE ALSO:

[Knowledge Article Types](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Import Existing Information into Salesforce Knowledge

You can import your existing articles or information database into Salesforce Knowledge. This importer is for articles and translations you currently have outside Salesforce Knowledge

-  **Note:** If you are looking for instructions on importing translated articles that you've sent to a localization vendor, see [Import Translated Articles](#) on page 491.

IN THIS SECTION:

1. [Prepare Articles for Import to Salesforce Knowledge](#)
Each import file must have articles of the same type and columns corresponding to the fields in the article.
2. [Create a .csv File for Article Import](#)
Each .csv file imports articles into one article type and maps the imported articles' content with the article type's fields. For example, a .csv file might map articles' titles with the standard field `Title` in an article type, meaning that each article's title is imported into the `Title` field.

EDITIONS

Available in: Salesforce Classic

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Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

USER PERMISSIONS

To delete article types:

- "Customize Application"

EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

3. [Set Article Import Parameters](#)

Specify import parameters in a property file using key names and corresponding values. For example, use the key `DateFormat` to specify that a date custom field appears in the `DateFormat=dd/MM/YYYY` format or specify the character encoding to be used for the import.

4. [Create an Article .zip File for Import](#)

To complete your article import, create a .zip file with your `.parameters`, `.csv`, and `.html` files, and upload them into Salesforce Knowledge.

5. [Article and Translation Import and Export Status](#)

Find the status of your article imports and exports on the Article Imports page in Setup.

SEE ALSO:

[Prepare Articles for Import to Salesforce Knowledge](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Prepare Articles for Import to Salesforce Knowledge

Each import file must have articles of the same type and columns corresponding to the fields in the article.

 **Tip:** Test your import using a small set of articles.

1. Sort your existing articles by information type.
For example: FAQ, product information, or offer.
2. Ensure that each information type has a corresponding [Salesforce Knowledge article type](#) that matches its structure and content.

For example, if you are importing FAQs, ensure that Salesforce Knowledge has an FAQ article type with enough question and answer fields to accommodate the largest FAQ article.

If your articles contain .html files, use an article type that contains a rich text area field and ensure that the HTML is compliant with the tags and attributes supported in the rich text area field.

 **Note:** The article importer does not support subfields. If you have fields within fields, adjust your structure and content before importing into Salesforce Knowledge.

3. Verify that the article's [field-level security settings](#) allow you to edit the fields.

For each article type, [create a csv file](#) to import.

SEE ALSO:

[Create a .csv File for Article Import](#)

[Import Existing Information into Salesforce Knowledge](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

EDITIONS

Available in: Salesforce Classic

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Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

USER PERMISSIONS

To import articles:

- "Manage Salesforce Knowledge "
- AND
- "Manage Articles"
- AND
- "Manage Knowledge Article Import/Export"
- AND
- "Read," "Create," "Edit," and "Delete" on the article type

Create a .csv File for Article Import

Each .csv file imports articles into one article type and maps the imported articles' content with the article type's fields. For example, a .csv file might map articles' titles with the standard field `Title` in an article type, meaning that each article's title is imported into the `Title` field.

1. Create one .csv file per article type.
 - There can only be one .csv file and one .properties file.
 - The .csv file and the .properties file must be in the root directory.
 - The compression process must preserve the folder and subfolder structure.
 - The .zip file name can't contain special characters.
 - The .zip file can't exceed 20 MB and the individual, uncompressed, files within the zip file can't exceed 10 MB.
 - .csv files can't have more than 10,000 rows, including the header row. Therefore, you can have a maximum of 9,999 articles and translations.
 - .csv file rows can't exceed 400,000 characters.
 - .csv file cells can't exceed 32 KB.
 - Each article in the .csv file can't have more than 49 translations.
2. In the first row, specify the article type's fields and metadata, such as language [data categories](#) or channels.

Enter one item in each column. You can use the following fields and metadata to import content.

Field or data	Description
<code>isMasterLanguage</code>	Identifies the article as a master (1) or translation (0). Required to import articles with translations, however, it can't be in a .csv file to import articles without translations. Translations must follow their master articles so that they are associated with the master article preceding it
<code>Title</code>	The article or translation's title. Required for all imports.
Standard and custom fields	Refer to an article type's standard fields using field names and refer to custom fields using API names. Leaving a row cell empty may cause your articles to be skipped if the related article type field is mandatory.
Rich text area field	Use the rich text area custom fields to import .html files or images. Refer to an article type's rich text area field using its API name.
File field	Use the file custom fields to import any file type (.doc, .pdf, .txt, etc.). Refer to an article type's file field using its API name.

EDITIONS

Available in: Salesforce Classic

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Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

USER PERMISSIONS

To import articles:

- "Manage Salesforce Knowledge "
- AND
- "Manage Articles"
- AND
- "Manage Knowledge Article Import/Export"
- AND
- "Read," "Create," "Edit," and "Delete" on the article type

Field or data	Description
Data category groups	To categorize the imported articles, use category groups; refer to a category group using its unique name prefixed with <code>datacategorygroup.</code> For example, use <code>datacategorygroup.Products</code> to specify the category group <code>Products</code> .
Channel	To specify where the imported articles are available, use the keyword <code>Channels</code> .
Language	Specify the articles' language. Required to import articles with translations. Optional to import articles without translations. If you don't include this column, the articles automatically belong to the default knowledge base language and you can't import translations along with the master articles.

3. In subsequent rows, specify the articles you want to import.

Use one row per article and enter the appropriate information in each field or metadata column.

 **Important:** All file names are case sensitive and must match what is in the .csv file exactly.

Consideration	Notes
Standard or custom fields	Enter the articles' data for each field, except for rich text area fields where you must enter the relative path to the corresponding .html file in your .zip file.  Note: The article importer does not support subfields. If you have fields within fields, adjust your structure and content before importing into Salesforce Knowledge.
Rich text area field	Always enter the .html file path relative to the location of the .csv file. Never enter raw text. If the specified path doesn't exist, the related article isn't imported. Note the following information about importing HTML and images. • We recommend that you create separate folders for the .html files (for example, <code>/data</code>) and the images (for example, <code>data/images</code>). • To import images, include the images in an .html file using the <code></code> tag and <code>src</code> attribute. Ensure that the <code>src</code> value is a relative path from the .html file to the image folder. • Images must be <code>.png</code>, <code>.gif</code>, or <code>.jpeg</code> files. • Each image file can't exceed 1 MB. • .html files can't exceed the maximum size for their field. • If a date doesn't match the date format specified in the property file, the related article isn't imported.

Consideration	Notes
	• If an .html file references a file that isn't allowed, the related article isn't imported. • If an .html file references an image that's missing, the related article is imported without the image.
File field	Enter the path relative to the file's location. If the specified path doesn't exist, the related article isn't imported. Note the following information about importing files. • We recommend that you create a folder for your files (for example, <code>/files</code>). • Each file must not exceed 5 MB.
Category groups	Use category unique names to categorize articles. Use the plus symbol (+) to specify more than one category. For example, <code>Laptop+Desktop</code>. Note the following information about data category groups. • Leaving the cell row empty causes your article to be set to No Categories. • If you specify a category and its parent (for example, <code>Europe+France</code>) the import process skips the child category France and keeps the parent category Europe, because application of a parent category implicitly includes the category's children. • When importing articles with translations and associated data categories, only the master article retains the data categories. The article translations have no associated data category upon import.
Channels	Specify articles' channels using the keywords. • <code>application</code> for Internal App. If you don't specify a channel, <code>application</code> is the default. • <code>sites</code> for Public Knowledge Base. • <code>csp</code> for Customer. • <code>prm</code> for Partner. Use the plus (+) symbol to specify more than one channel (for example, <code>application+sites+csp</code> to make an article available in all channels).  Note: When importing articles with translations and associated channels, only the master article retains the channels. The article translations have no associated channels upon import.



Example: The following example .csv files import articles in a Product Offer article type. The first example is for imports of articles without translations. The second is for imports with translations. The .csv files contain titles, summaries, and descriptions. They also classify the articles in the category group Products and make them available for specific channels. The `description__c` field is a rich text area and only supports paths to .html files. The `summary__c` field is a text field and only supports raw text. The “Best Desktop Computer Deals” article has no summary; the cell is left blank because the `summary__c` field is not mandatory.

Title	summary__c	description__c	datacategorygroup .Products	Channels
Free Digital Camera Offer	Get the new Digital Camera.	data/freecam.html	Consumer_Electronics	application+csp
Best Desktop Computer Deals		data/bestdeals.html	Desktop	application+csp
Free Shipping on Laptop and Desktops		data/freeship.html	Laptop+Desktops	application+csp

Example `articlesimport.csv` file:

```
Title,summary__c,description__c,datacategorygroup.Products,Channels
Free Digital Camera Offer, Get the new Digital
Camera.,data/freecam.html,Consumer_Electronics,application+csp
Best Desktop Computer Deals,,data/bestdeals.html,Desktop,application+csp
Free Shipping on Laptop and Desktops,,data/freeship.html,Laptop+Desktops,application+csp
```

isMaster Language	Title	summary__c	description__c	datacategorygroup .Products	Channels	Language
1	Free Digital Camera Offer	Get the new Digital Camera.	data/freecam.html	Consumer_Electronics	application+csp	en_US
0	Libérer l'Offre d'Appareil photo digital	Obtenir le nouvel Appareil photo digital.	data/freecam/fr.html			fr
0	Liberte Oferta Digital de Cámara	Consiga la nueva Cámara Digital.	data/freecam/es.html			es
1	Best Desktop Computer Deals		data/bestdeals.html	Desktops	application+csp	en_US
0	Meilleures Affaires d'ordinateurs de bureau		data/bestdeals/fr.html			fr
0	Mejores Tratos de ordenadores		data/bestdeals/es.html			es
1	Free Shipping on Laptops and Desktops		data/freeship.html	Laptops+ Desktops	application+csp	en_US
0	Libérer Affranchissement sur Portables et Ordinateurs		data/freeship/fr.html			fr

isMaster Language	Title	summary__c	description__c	datacategorygroup .Products	Channels	Language
0	Liberte Franqueo en Laptops y Ordenadores		data/freeship/es.html			es

Example `articletranslationsimport.csv` file:

```
isMasterLanguage,Title,summary__c,description__c,datacategorygroup.Products,Channels,Language
1,Free Digital Camera Offer,Get the new Digital
Camera,data/freecam.html,Consumer_Electronics,application+csp,en
0,Libérer l'Offre d'Appareil photo digital,Obtenir le nouvel Appareil photo
digital.,data/freecam/fr.html,,,fr
0,Liberte Oferta Digital de Cámara,Consiga la nueva Cámara
Digital.,data/freecam/es.html,,,es
1,Best Desktop Computer Deals,,data/bestdeals.html,Desktops,application+csp,en
0,Meilleures Affaires d'ordinateurs de bureau,,data/bestdeals/fr.html,,,fr
0,Mejores Tratos de ordenadores,,data/bestdeals/es.html,,,es
1,Free Shipping on Laptop and
Desktops,,data/freeship.html,Laptops+Desktops,application+csp,en
0,Libérer Affranchissement sur Portables et Ordinateurs,,data/freeship/fr.html,,,fr
0,Liberte Franqueo en Laptops y Ordenadores,,data/freeship/es.html,,,es
```

Specify your [import parameters](#) in a property file using key names and corresponding values.

SEE ALSO:

- [Set Article Import Parameters](#)
- [Import Existing Information into Salesforce Knowledge](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

Set Article Import Parameters

Specify import parameters in a property file using key names and corresponding values. For example, use the key `DateFormat` to specify that a date custom field appears in the `DateFormat=dd/MM/YYYY` format or specify the character encoding to be used for the import.

1. Create a file with required parameters, as described in this table.

Key	Description	Default Value
<code>DateFormat</code>	Format of the date to read in the .csv file	<code>yyyy-MM-dd</code>
<code>DateTimeFormat</code>	Format of the date and time to read in the .csv file	<code>yyyy-MM-dd HH:mm:ss</code>
<code>CSVEncoding</code>	Character encoding used to read the .csv file	<code>ISO8859_15_FDIS</code>
<code>CSVSeparator</code>	.csv file separator	<code>,</code>
<code>RTAEncoding</code>	Default encoding used for the HTML files (if not specified in the <code>charset</code> attribute from the HTML <code>meta</code> tag).	<code>ISO8859_15_FDIS</code>

 **Note:** Salesforce does not support UTF-32 character encoding. We recommend using UTF-8. If you use specify UTF-16 character encoding, ensure that your HTML files specify the right byte-order mark.

 **Note:** Specify only Java date formats. Make sure the date format is not misleading. For example, if you choose the format `yyyy-M-d`, a date entered as `2011111` can be interpreted as `2011-01-11` or `2011-11-01`. Specify at least:

- Two digits for month and day format (MM, dd)
- Four digits for year format (yyyy)

If a date in the .csv file does not match the date format specified in the property file, the related article is not imported.

2. Save the file with the `.properties`.

 **Example:** Example `offerarticlesimport.properties` property file:

```
DateFormat=yyyy-MM-dd
DateTimeFormat=yyyy-MM-dd HH:mm:ss
CSVEncoding=ISO8859_15_FDIS
```

EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

USER PERMISSIONS

To import articles:

- "Manage Salesforce Knowledge"
- AND
- "Manage Articles"
- AND
- "Manage Knowledge Article Import/Export"
- AND
- "Read," "Create," "Edit," and "Delete" on the article type


```
CSVSeparator=,
RTAEncoding=UTF-8
```

Create a [.zip file](#) and import into Salesforce Knowledge.

SEE ALSO:

[Create an Article .zip File for Import](#)

[Import Existing Information into Salesforce Knowledge](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Create an Article .zip File for Import

To complete your article import, create a .zip file with your `.parameters`, `.csv`, and `.html` files, and upload them into Salesforce Knowledge.

1. Create a .zip file containing:

- The `.csv` file.
- The folder containing the `.html` files to import.
- The folder containing the image files referenced in the `.html` files.
- The `.properties` file.

 **Important:** The import .zip file must meet the following requirements:

- There can only be one `.csv` file and one `.properties` file.
- The `.csv` file and the `.properties` file must be in the root directory.
- The compression process must preserve the folder and subfolder structure.
- The .zip file name can't contain special characters.
- The .zip file can't exceed 20 MB and the individual, uncompressed, files within the zip file can't exceed 10 MB.
- `.csv` files can't have more than 10,000 rows, including the header row. Therefore, you can have a maximum of 9,999 articles and translations.
- `.csv` file rows can't exceed 400,000 characters.
- `.csv` file cells can't exceed 32 KB.
- Each article in the `.csv` file can't have more than 49 translations.

2. From Setup, enter *Import Articles* in the Quick Find box, then select **Import Articles**.

3. Select the appropriate **Article Type** for the imported articles.

4. To select the .zip file, click **Browse**, and then click **OK**.

5. If your import contains translations, select the `Contains translations?` checkbox.

 **Note:** If this checkbox is selected, your `.csv` file must contain the `isMasterLanguage`, `Title`, and `Language` columns. If this checkbox is not selected, your `.csv` file can't contain the

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USER PERMISSIONS

To import articles:

- "Manage Salesforce Knowledge"

AND

"Manage Articles"

AND

"Manage Knowledge Article Import/Export"

AND

"Read," "Create," "Edit," and "Delete" on the article type

isMasterLanguage column but must contain the Title column. The Language column is optional for imports of articles without translations.

6. Click **Import Now**.

When the import is complete, you receive an email with an attached log that provides details about the import.

Check on the [status of your import](#), on the Article Imports page.

SEE ALSO:

- [Article and Translation Import and Export Status](#)
- [Import Existing Information into Salesforce Knowledge](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

Article and Translation Import and Export Status

Find the status of your article imports and exports on the Article Imports page in Setup.

To check the status of your imports and exports, from Setup, enter *Article Imports* in the Quick Find box, then select **Article Imports**. If you've enabled multiple languages for Salesforce Knowledge, you see two tables: one for article and translation imports and another for exports for translation.

Import information includes:

- Possible actions
- .Zip file names
- Who submitted it and when
- Status
- Started and completed dates
- Article types

Export information includes:

- Possible actions
- Zip file names
- Who submitted it and when
- Status
- Started and completed dates

Status descriptions are as follows:

Status	Description	Possible Action
Pending	The import or export will start as soon as the previous pending import or export completes.	You can click Cancel to cancel the import or export.
Processing	The import or export is processing.	If you want to stop the process, or if the process has been stopped, call Salesforce Support. Salesforce may stop an import or

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Status	Description	Possible Action
		export if a maintenance task has to be performed or the import or export exceeds one hour.
Stopping/Stopped	Salesforce Support is stopping or has already stopped the import or export.	Contact Salesforce Support to restart the import or export, or click Cancel to cancel an entry.
Aborted	The import or export has been canceled. The articles that already imported or exported successfully are available in Salesforce.	You can restart an import or export, click Del to delete an entry, or click Email Log to receive the completion email and check the details of your import or export.
Completed	The import or export is complete. Successfully imported articles are visible on the Article Management tab on the Articles subtab. Successfully imported translations are visible on the Article Management tab on the Translations subtab.	This status doesn't mean the import or export is successful. Click Email Log to see the log file attached to the completion email and check the details of your import or export. Click the exported .zip file name to save or open the file on your system.

SEE ALSO:

[Import Translated Articles](#)[Import Existing Information into Salesforce Knowledge](#)[Salesforce Knowledge Documentation Overview](#)[Complete Guide to Salesforce Knowledge](#)

Knowledge Article Access

Give your knowledge agents access to articles. Specify which agents in your company are Salesforce Knowledge users, those who can create, edit, archive, and delete articles. Create user profiles with the appropriate user permissions, and then assign users to these profiles.

By default all internal users can read articles. However some licenses like the Knowledge Only User licenses, require the "AllowViewKnowledge" permission on the user's profile. To give a user the "AllowViewKnowledge" permission on their profile, activate the permission on a cloned profile and assign the cloned profile to the user.



Note: To do more than read articles, agents need the Knowledge User license.

1. From Setup, enter *Users* in the **Quick Find** box, then select **Users**.
2. Click **Edit** next to the user's name or click **New** to create a user.
3. If you are creating a user, complete all the required fields.
4. Select the **Knowledge User** checkbox.
5. Click **Save**.

See

User permissions control access to different tasks Salesforce Knowledge. We recommend using permission sets or custom profiles to grant users the permissions they need. For example, you can create a permission set called "Article Manager" that includes the permissions to create, edit, publish, and assign articles.

Refer to this table for details on permissions associated with Salesforce Knowledge tasks.

Salesforce Knowledge Task	User Permissions Needed
To create article types:	"Manage Salesforce Knowledge" (This permission is on by default in the System Administrator profile.)
To manage article actions:	"Manage Salesforce Knowledge" This permission is on by default in the System Administrator profile.
To create articles from cases using the simple editor:	"Read" and "Create" on the article type
To create articles from cases using the standard editor:	"Manage Articles" (This permission is on by default in the System Administrator profile.) AND "Read" and "Create" on the article type
To search articles from cases and attach articles to cases:	"Read" on the article type
To create articles from answers:	"Read" and "Create" on the article type

EDITIONS

Available in: Salesforce Classic

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Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

USER PERMISSIONS

To create or edit users:

- "Manage Internal Users"

To create article types and article actions:

- "Customize Application"

AND

"Manage Salesforce Knowledge"

Salesforce Knowledge Task	User Permissions Needed
To search for and read articles from the Article or Knowledge tab:	“Read” on the article type
To create or edit articles from the Article Management tab:	“Manage Articles” (This permission is on by default in the System Administrator profile.) AND “Read”, “Create”, and “Edit” on the article type
To edit draft articles from the Article Management tab:	“Manage Articles” (This permission is on by default in the System Administrator profile.) AND “Read” and “Edit” on the article type
To delete articles from the Article Management tab:	“Manage Articles” (This permission is on by default in the System Administrator profile.) AND “Read”, “Edit”, and “Delete” on the article type AND A delete article action, set on the Article Actions Setup page .
To publish articles from the Article Management tab:	“Manage Articles” (This permission is on by default in the System Administrator profile.) AND “Read”, “Create”, “Edit”, and “Delete” on the article type AND A publish article action, set on Article Actions Setup page
To assign articles for the Article Management tab:	“Manage Articles” (This permission is on by default in the System Administrator profile.) AND “Read” and “Edit” on the article type
To edit published or archived articles:	“Manage Articles” (This permission is on by default in the System Administrator profile.) AND “Read”, “Create”, and “Edit” on the article type AND A publish or archive article action, set on the Article Actions Setup page

Salesforce Knowledge Task	User Permissions Needed
To archive articles from the Article Management tab:	“Manage Articles” (This permission is on by default in the System Administrator profile.) AND “Read”, “Create”, “Edit”, and “Delete” on the article type AND An archive article action, set on the Article Actions Setup page
To submit articles for translation:	“Manage Articles” (This permission is on by default in the System Administrator profile.) AND “Read”, “Create”, and “Edit” on the article type AND A translate article action, set on the Article Actions Setup page
To delete translated articles:	“Manage Articles” (This permission is on by default in the System Administrator profile.) AND “Read”, “Edit”, and “Delete” on the article type AND A delete article action, set on the Article Actions Setup page
To publish translated articles:	“Manage Articles” (This permission is on by default in the System Administrator profile.) AND “Read”, “Create”, “Edit”, and “Delete” on the article type AND A publish article action, set on the Article Actions Setup page
To edit translated articles:	“Manage Articles” (This permission is on by default in the System Administrator profile.) AND “Read”, “Create”, and “Edit” on the article type AND A translate article action, set on the Article Actions Setup page
To import articles:	“Manage Salesforce Knowledge” (This permission is on by default in the System Administrator profile.) AND “Manage Articles” AND

Salesforce Knowledge Task	User Permissions Needed
	“Manage Knowledge Article Import/Export” AND “Read”, “Create”, “Edit”, and “Delete” on the article type
To import and export translated articles:	“Manage Salesforce Knowledge” (This permission is on by default in the System Administrator profile.) AND “Manage Articles” (This permission is on by default in the System Administrator profile.) AND “Manage Knowledge Article Import/Export” (This permission is on by default in the System Administrator profile.) AND “Read”, “Create”, “Edit”, and “Delete” on the article type
To create data categories	“Manage Data Categories” permission. This permission is on by default in the System Administrator profile.

To enable agents to perform their specific tasks, create [public groups](#) for each role and assign only the necessary [article actions](#) to those groups.



Example: Your Salesforce Knowledge agents are a mixture of different levels of job experience and expertise in the products and services your company offers. These examples outline four basic types of users and some of the permissions they need to perform their jobs.

Scott: The Reader

Scott Jackson is relatively new to the company, so he’s a basic agent of the knowledge base. Currently, he has read-only access to articles, so he can search and view articles. Readers don’t author or publish, so he won’t belong to a public group or need to submit articles for approval. He needs the following permissions to perform his job.

Scott	Permission	Article Type-Specific Permissions			
Salesforce Knowledge Functionality	Manage Articles	Read	Create	Edit	Delete
Search articles from and attach articles to cases		✓			
Search for and read articles from the Articles tab		✓			

Amber: The Candidate

Amber Delaney is a candidate-level agent and can create and publish articles with statuses of either **Work in Progress** or **Not Validated**. If Amber works on an article with a different validation status, she must send it to a queue for approval before it’s published.

Amber is part of the KCS Candidate public group and submits the articles she can't publish to the Publishing External queue. She needs the following permissions to perform her job duties.

Amber	Permission	Article Type-Specific Permissions			
		Read	Create	Edit	Delete
Search articles from and attach articles to cases		✓			
Search for and read articles from the Articles tab		✓			
Create or edit article from the Article Management tab	✓	✓	✓	✓	
Edit draft articles from the Article Management tab	✓	✓		✓	
Edit published or archived articles	✓	✓	✓	✓	

Anne: The Contributor

As a contributor, Anne Murphy is a more advanced Knowledge user. She understands the standards for articles in the organization and can create articles and publish articles with `Validated Internal` status. She can also work on articles authored by other users if they have either `Work in Progress` or `Not Validated` statuses, and can change them to `Validated Internal`. Since she doesn't have permission to publish articles to an external audience, she must submit those customer-facing articles to the Publishing External queue.

 **Note:** Article approvers require the "Manage Articles" permission and at least the "Read" permission on the article type associated with articles they review. These permissions let them access the article in a draft state. Without these permissions, approvers can reassign but not approve articles.

Anne is a member of the Contributor public group and she needs the following permissions to perform her job duties.

	Permission	Article Type-Specific Permissions			
		Read	Create	Edit	Delete
Create articles from cases using the simple editor		✓	✓		
Create articles from cases using the standard editor	✓	✓	✓		
Search articles from and attach articles to cases		✓			
Create articles from answers		✓	✓		
Search for and read articles from the Articles tab		✓			

Salesforce Knowledge Functionality	Permission	Article Type-Specific Permissions			
	Manage Articles	Read	Create	Edit	Delete
Create or edit article from the Article Management tab	✓	✓	✓	✓	
Edit draft articles from the Article Management tab	✓	✓		✓	
Delete articles (version or entire) from Article Management tab	✓	✓		✓	✓
Assign articles from Article Management tab	✓	✓		✓	
Edit published or archived articles	✓	✓	✓	✓	
Archive articles from the Article Management tab	✓	✓	✓	✓	✓

Pat: The Publisher

Pat Brown is Knowledge domain expert and is responsible for reviewing and publishing articles to an external audience. He is a member of the Publisher public group. Pat also belongs to the Publishing External queue. He needs the following permissions to perform his job duties.

Salesforce Knowledge Functionality	Permission	Article Type-Specific Permissions			
	Manage Articles	Read	Create	Edit	Delete
Create articles from cases using the simple editor		✓	✓		
Create articles from cases using the standard editor	✓	✓	✓		
Search articles from and attach articles to cases		✓			
Create articles from answers		✓	✓		
Search for and read articles from the Articles tab		✓			
Create or edit article from the Article Management tab	✓	✓	✓	✓	
Edit draft articles from the Article Management tab	✓	✓		✓	
Delete articles (version or entire) from Article Management tab	✓	✓		✓	✓
Publish article from Article Management tab	✓	✓	✓	✓	✓

Salesforce Knowledge Functionality	Permission	Article Type-Specific Permissions			
	Manage Articles	Read	Create	Edit	Delete
Assign articles from Article Management tab	✓	✓		✓	
Edit published or archived articles	✓	✓	✓	✓	
Archive articles from the Article Management tab	✓	✓	✓	✓	✓

How they all work together

Each user profile defines an agent's permission to perform different job duties and functions. To enable agents to perform these functions, you create [public groups](#) for each role and assign only the necessary [article actions](#) to that group. The criteria you create in the [approval process](#) defines which [validation status](#) can be automatically approved and published and which article must be approved and published by a domain expert.

For example, Anne, the Contributor, can create a Validated External article, but based on the article actions assigned to her public group, the approval process sends her article to Pat, the Publisher, to be published. Pat, as a Publisher, can publish his own articles without submitting them to a queue.

The following table lists the job functions that each role needs to perform on articles in the organization

Job Function	Reader	Candidate	Contributor	Publisher
Create and publish Work in Progress	No	Automatically approved and published	Automatically approved and published	Yes
Create and publish Not Validated	No	Automatically approved and published	Automatically approved and published	Yes
Create and publish Validated Internal	No	Needs approval	Automatically approved and published	Yes
Create and publish Validated External	No	Needs approval	Needs approval	Yes
Update and publish Work in Progress	No	No	Automatically approved and published	Yes
Update and publish Not Validated	No	No	Automatically approved and published	Yes
Update and publish Validated Internal	No	No	Automatically approved and published	Yes

Job Function	Reader	Candidate	Contributor	Publisher
Update and publish Validated External	No	No	Needs approval	Yes

SEE ALSO:

[Create Public Groups for Knowledge](#)

[Create Knowledge Actions](#)

[Assign Article Actions to Public Groups](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Create Public Groups for Knowledge

Salesforce Knowledge uses public groups as a way to assign users to specific tasks related to articles. When you assign article actions to a public group, you can grant users in that group the ability to do things like publish articles with a specified validation status. Public groups are also used in approval processes to manage the publishing workflow.

For example, when a member of the [Candidate](#) public group submits an article with the status *Work in Progress* for approval, it is automatically approved and published. If the same agent submits an article with *Validated Internal* status, it moves to the Publishing External queue to be reviewed before being published.

1. From Setup, enter *Public Groups* in the *Quick Find* box, then select **Public Groups**.
2. Click **New**, or click **Edit** next to the group you want to edit.
3. Enter the following information:

Field	Description
Label	The name used to refer to the group in any user interface pages.
Group Name (public groups only)	The unique name used by the API and managed packages.
Grant Access Using Hierarchies (public groups only)	Select Grant Access Using Hierarchies to allow automatic access to records using your role hierarchies. When selected, any records shared with users in this group are also shared with users higher in the hierarchy. Deselect Grant Access Using Hierarchies if you're creating a public group with All Internal Users as members, which optimizes performance for sharing records with groups.

EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

USER PERMISSIONS

To create or edit a public group:

- "Manage Users"

To create or edit another user's personal group:

- "Manage Users"



Note: If **Grant Access Using Hierarchies** is deselected, users that are higher in the role hierarchy don't receive automatic access. However, some users—such as those with the “View All” and “Modify All” object permissions and the “View All Data” and “Modify All Data” system permissions—can still access records they don't own.

Search

From the **Search** drop-down list, select the type of member to add. If you don't see the member you want to add, enter keywords in the search box and click **Find**.



Note: For account owners to see child records owned by high-volume portal users, they must be members of any portal share groups with access to the portal users' data.

Selected Members

Select members from the Available Members box, and click **Add** to add them to the group.

Selected Delegated Groups

In this list, specify any delegated administration groups whose members can add or remove members from this public group. Select groups from the Available Delegated Groups box, and then click **Add**. This list appears only in public groups.

4. Click **Save**.



Note: When you edit groups, sharing rules are automatically reevaluated to add or remove access as needed. If these changes affect too many records at once, a message appears warning that the sharing rules aren't automatically reevaluated, and you must manually recalculate them.

Now [assign only the necessary actions](#) to your groups so the selected members can perform their tasks while keeping the integrity of your knowledge base.

SEE ALSO:

[Create Knowledge Actions](#)

[Assign Article Actions to Public Groups](#)

[Knowledge Article Access](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Create Knowledge Actions

Knowledge actions are templates that link a workflow action to an article type. When knowledge actions are enabled, you can use them to link article types to specific workflow article actions, such as publishing. For example, if you want to have each FAQ published as a new version each time it completes the approval process, you can create a knowledge action that links the FAQ article type to the `Publish as New` action. Then, when you create an approval process for FAQs, select the new Knowledge Action.

 **Important:** When you create the approval process, make sure to change the final approval action to `Unlock the record for editing` to let users publish the article.

1. From Setup, enter *Knowledge Action* in the Quick Find box, then select **Knowledge Action**.
2. Click **New Knowledge Action**.
3. Select the article type for the action. The workflow rules and approval process that you associate with the action must belong to the same article type.
4. Enter a unique name for the knowledge action.
5. Select the type of action you want to apply to the article type. For example, `Publish as New` publishes the article as a new version.
6. Enter a description.
7. Click **Save**.

The Knowledge Action detail page appears showing you the rules and approval processes that use the knowledge action.

8. When you're ready to use the knowledge action in an approval or workflow process, click **Activate** on the Knowledge Action detail page.

SEE ALSO:

[Assign Article Actions to Public Groups](#)
[Create Public Groups for Knowledge](#)
[Knowledge Article Access](#)
[Salesforce Knowledge Documentation Overview](#)
[Complete Guide to Salesforce Knowledge](#)

EDITIONS

Available in: Salesforce Classic

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USER PERMISSIONS

To enable Salesforce Knowledge Actions:

- "Customize Application"

Assign Article Actions to Public Groups

Article actions allow agents to participate in the article publishing process. By default, all article actions are assigned to users with the “Manage Articles” user permission. Agents can complete an action as long as they have the correct article type permission. You can control article action access by assigning public groups to article actions and adding agents the relevant public groups. To further restrict actions like publishing, you can create approval processes that allow agents to publish only those articles that have specific validation statuses. For example, many contributors can write many articles but you can create an approval process so no articles are published until they are reviewed and validated by a qualified author.

 **Note:** Although you can add any user to a public group, only agents with the “Manage Articles” user permission and the appropriate object permissions can perform article actions.

This table summarizes the article type permissions that are required for each article action.

Article Action	Create	Read	Edit	Delete
Publish Articles	✓	✓	✓	✓
Archive Articles	✓	✓	✓	✓
Delete Articles		✓	✓	✓
Edit Published and Archived Articles		✓	✓	
Submit Articles for Translation	✓	✓	✓	
Publish Translation	✓	✓	✓	✓
Edit Translation	✓	✓	✓	

1. From Setup, enter *Knowledge Article Actions* in the Quick Find box, then select **Knowledge Article Actions**.
2. Click **Edit**.
3. For the action you want to assign, select the appropriate radio button and choose a public group.
If you don't modify an article action, all agents with the “Manage Articles” permission can perform that action.
4. Click **OK** and then click **Save**.

SEE ALSO:

[Create Public Groups for Knowledge](#)
[Create Knowledge Actions](#)
[Knowledge Article Access](#)
[Salesforce Knowledge Documentation Overview](#)
[Complete Guide to Salesforce Knowledge](#)

EDITIONS

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USER PERMISSIONS

To create public groups and assign them to article actions:

- “Customize Application”
AND
“Manage Users”
AND
“Manage Salesforce Knowledge”

Define Validation Status Picklist Values

When the `Validation Status` field is enabled on the Knowledge Settings page, you can create picklist values that show the state of the article. For example, values could be `Validated`, `Not Validated`, or `Needs Review`.

 **Note:** Validation status picklist values aren't retained when you export articles for translation. Articles with picklist values can be imported, however, and their values are retained as long as the values exist in your organization.

1. From Setup, enter *Validation Statuses* in the *Quick Find* box, then select **Validation Statuses**.
2. On the picklist edit page, click **New** to add new values to the validation status field. You can also edit, delete, reorder, and replace picklist values.
When you replace a picklist value, the system replaces it in all versions of the article, including any archived versions.
3. Add one or more picklist values (one per line) in the text area.
4. To set the value as the default for the picklist, be sure to select the `Default` checkbox.
5. Click **Save**.

SEE ALSO:

[Salesforce Knowledge Documentation Overview](#)
[Complete Guide to Salesforce Knowledge](#)

EDITIONS

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USER PERMISSIONS

To create or change validation status picklist values:

- “Customize Application”

Workflow and Approvals for Articles

Ensuring that the content in your articles is accurate and helpful is foundational to getting accurate information to those who need it most. Creating processes where Knowledge experts review, validate, and approve articles for publication is critical to creating a trustworthy knowledge base. Implementing approval processes with Salesforce Knowledge gives you additional control over the content and publication of your articles.

Creating workflow rules and approval processes lets your organization automate many of the tasks involved with managing its knowledge base. When implementing Salesforce Knowledge, you can create workflow rules and approval processes for some or all the article types used by your organization.

Workflow rules let you create email alerts, update fields, or send outbound API messages when an article meets certain criteria. For example, you could create a workflow rule that sends an email alert to the article owner when a new article is created from a case. Tasks are not supported by article type workflow.

Approval processes automate the approval of articles. When implemented with Salesforce Knowledge, approval processes give you additional control over the content of your articles and the process used to approve them. For example, you can create a process that requires legal and management teams to approve articles containing sensitive information.

 **Note:** Tasks aren't available for article type workflow rules. For more information about creating workflow rules, see [Set the Criteria for Your Workflow Rule](#). For more information about creating an approval process, see [Create an Approval Process with the Standard Wizard](#).

1. From Setup, enter *Workflow Rules* in the **Quick Find** box, then select **Workflow Rules** to access the workflow rules list page.
2. On the workflow rules list page, click **New Rule**.
3. Select the article type from the **Select object** drop-down list.
4. Click **Next**.
5. Enter a rule name. Optionally, enter a description for the rule.
6. Select the evaluation criteria and choose how criteria are met.
7. Enter criteria for the rule.
8. Click **Save & Next**.
9. Click **Add Workflow Action**, select the type of action for the rule, and enter the information required by the action.
10. Click **Save**.
11. Optionally, add a time-dependent workflow action by clicking **Add Time Trigger**. Provide time trigger information and then click **Save**.
12. Click **Done**.
13. From Setup, enter *Approval Processes* in the **Quick Find** box, then select **Approval Processes**.
14. Choose the Approval Process Wizard.
Two wizards are available to help you through the approval setup process. Choose the one that better meets your requirements. See [Choose the Right Wizard to Create an Approval Process](#).
15. Provide a name, unique name, and description for the process.
16. Specify criteria for entering the process.

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USER PERMISSIONS

To view workflow rules and approval processes:

- “View Setup and Configuration”

To create or change workflow rules and approval processes:

- “Customize Application”

For example, you could specify that if the article is published on a public site it requires approval: *Visible on public site equals True*.

17. Specify approvers for the process.

Let the submitter choose the approver manually. (default)

Prompts the user to select the next approver.

Automatically assign an approver using a standard or custom hierarchy field.

Assigns the approval request to the user in the field displayed next to this option. You select this field when you configure the approval process.

Automatically assign to a queue.

Available only for objects that support queues. Assigns approval requests to a queue.

Automatically assign to approver(s).

Assigns the approval request to one or more specific users, specific queues, or users related to the submitted record. You can add up to 25 per step.

18. Select the email template that the process uses to notify approvers.

When an approval process assigns an approval request to a user, Salesforce automatically sends the user an approval request email. The email contains a link to the approval page in Salesforce, where the agent can approve or reject the request and add comments.

19. Configure the approval request page layout.

The approver approves or rejects the article from this page. You can add as many fields to this page as you think your agents need to reasonably assess an article's content. For example, you might choose to include information such as a summary of the article's content, the product discussed, and the author's name.

20. Specify which users are allowed to submit articles for approval.

For example, for articles that require editing before approval, you could create a public group containing editors, and then specify that only members of that group can submit articles for approval.

21. Activate the approval process.



Example: When an approval process is associated with an article type, agents with the “Manage Articles” permission might see both the **Publish...** and **Submit for Approval** buttons from an article's detail page. Which buttons they see is determined by both permissions and article actions. These agents can publish an article without submitting it for approval. To limit this ability to certain users, assign the “Publish Articles” article action to a select group of users instead of giving it to all users with the “Manage Articles” permission. The ability to publish articles without prior approval is governed by an approval process that is specific to each user's public group.

Keep the following in mind when creating approval processes for article types.

- Adding an approval process to an article type lets your organization ensure that the required reviewers approve the article before it's published. When an approval process is enabled for an article's article type, the Approval History related list displays on the article details page.
- When creating an approval process, change the final approval action to “Unlock the record for editing” to allow agents to publish the article.
- Articles aren't published automatically at the end of an approval process. Agents must click **Publish...** to make the article available in the publishing channels.
- When an approval process is associated with an article type, agents with the “Manage Articles” permission might see both the **Publish...** and the **Submit for Approval** buttons on an article's detail page. (Which buttons they see is determined by both permissions and article actions). These agents can publish an article without submitting it for approval. To prevent this from affecting many users, assign the “Publish Articles” article action to a limited group of users instead of giving it to all users with the “Manage

Articles” permission. For more information, see [Assign Article Actions to Public Groups](#) on page 482. You still need to make sure that the users with direct publishing capability know which articles need approval before publication.

- Article approvers require the “Manage Articles” permission and at least the “Read” permission on the article type associated with articles they review. These permissions let them access the article in a draft state. Without these permissions, approvers can reassign but not approve articles.
- Workflow rules and approval processes apply to the “Draft to Publication” portion of the article publishing cycle. Workflow rules aren’t available for archiving. Approval processes aren’t available for translation or archiving.

 **Note:** When an article is published from the edit page, the article is first saved and then published. Workflow rules apply to the saved draft article but not the published article.

- A user who only has read access to an article type can publish a draft article of that type if there is an approval process associated to the article type and the approval process is complete (all the approvers have approved) but the article has not been published.

SEE ALSO:

[Salesforce Knowledge Documentation Overview](#)
[Complete Guide to Salesforce Knowledge](#)

Modify Default Category Group Assignments for Articles

Salesforce Knowledge uses data categories to classify articles. Data categories are organized in category group. After creating category groups, admins decide which groups to use for Salesforce Knowledge articles. For example, if your org uses both the Answers and Salesforce Knowledge, you might want one category group to be used by the answers community and two other category groups for articles. Answers and articles can use the same category group. Authors can assign up to eight data categories from one category group to an article so that users searching for articles can find and filter by category. By default, all the category groups you create are assigned to Salesforce Knowledge

1. From Setup, enter *Data Category Assignments* in the Quick Find box, then select **Data Category Assignments** under Knowledge.

A list of all category groups appears.

2. Click **Edit** and move any category groups that you don't want available for articles from the Selected Category Groups list to the Available Category Groups list.

Later, you can choose to make a hidden category group visible.

 **Note:** The order of category groups is not preserved from the edit page to the data category assignment page.

3. Click **Save**.

You receive an email after the save process completes. Authors can now assign categories in the selected groups to articles on the Article Management tab. Authors can only access categories if the category group is active and the author's [data category visibility settings](#) provide access to the category.

SEE ALSO:

[Salesforce Knowledge Documentation Overview](#)
[Complete Guide to Salesforce Knowledge](#)

EDITIONS

Available in: Salesforce Classic

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Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

USER PERMISSIONS

To modify category groups assignments in Salesforce Knowledge:

- “Customize Application”
AND
“Manage Salesforce Knowledge”

Filter Articles with Data Category Mapping

Make suggested articles more relevant when solving cases. Map case fields to data categories to filter for articles assigned to those data categories. For example, cases with a field for which product they are about can be mapped to the data category of that product. Articles assigned that category or product, are filtered to the top of the suggested article list.

Important:

- Filtering articles based on case information is only supported in text and picklist fields.
- Filters are applied to Knowledge results after the case has been saved.
- Filters are applied after a Knowledge search and only to the articles returned in the search.
- Using Filters does not return a list of all articles that match the filter criteria. Instead, the filters are applied to the initial pool of article results returned.
- Results may be filtered after a search.
- A category group can only be used once in a data category mapping.
- Suggested articles are returned if `Suggest articles for cases considering case content` is enabled. When suggested articles is disabled, search uses data category mappings. Case subject fields are used when there are no data category mappings.

To implement data category mapping, select which case fields map to which data categories and set a default data category for cases that have no value for the mapped fields.

For information on data categories, see [Data Categories in Salesforce.com](#) on page 515.

1. From Setup, enter *Data Category Mappings* in the `Quick Find` box, then select **Data Category Mappings**.
2. In the `Case Field` column, use the drop-down list to add a field.
3. In the `Data Category Group` column, use the drop-down list to map the information from the lookup field to a data category.
4. In the `Default Data Category` column, use the drop-down list to assign a data category when the field value does not match any categories from the category group.
5. Click **Add**.

SEE ALSO:

[Salesforce Knowledge Documentation Overview](#)
[Complete Guide to Salesforce Knowledge](#)

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USER PERMISSIONS

To map data category groups

- "Customize Application"
- AND
- "Manage Salesforce Knowledge"

Support Articles in Multiple Languages

With multiple languages for Salesforce Knowledge, you can lower support costs by translating articles into the languages your audience prefers. After selecting your language settings, two translation methods are available: translating articles in-house using the editing tool in the knowledge base, or sending articles to a localization vendor. Different languages can use different methods. For example, you may want to export articles to a vendor for French translations, but assign articles to an internal Knowledge user for Spanish translations.

- Before you add languages to your knowledge base, decide for each language whether you want to translate articles directly in Salesforce or export articles to a translation vendor. Communicate your decision to the people involved in the translation process (authors, reviewers, translation managers, publishers).
- When adding a language to your knowledge base, keep in mind that it can't be deleted; however, you can hide a language by making it inactive. Deactivating a language means it no longer appears as a choice in the New Article dialog or the Submit for Translation dialog. Also, if articles are already published in the language, those articles are no longer visible to readers when the language is deactivated.
- You can only add languages supported by Salesforce to your knowledge base.
- To hide translated articles for a specific language, deactivate the language by unchecking `Active` on the Settings page.

SEE ALSO:

[Support a Multilingual Knowledge Base](#)

[Export Articles for Translation](#)

[Import Translated Articles](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

EDITIONS

Available in: Salesforce Classic

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Support a Multilingual Knowledge Base

Reach a global audience by offering your knowledge base in multiple languages.

1. In Setup, enter *Knowledge Settings* in the *Quick Find* box, then select **Knowledge Settings**.
2. Click **Edit**.
3. Select *Multiple Languages* and add the languages you want to include in your knowledge base.

 **Important:** You can add the languages that your instance of Salesforce supports. But you can't remove any languages that have been added to your knowledge base.

4. Choose which settings you want to apply to language.

Setting	Description
Active	Active languages appear in the New Article and Submit for Translation dialog boxes. The active/inactive status determines whether a published article is visible. For example, if Spanish articles are published to your partner portal and then you make Spanish an inactive language, the articles no longer appear.
Default Assignee	The default assignee is automatically assigned articles submitted for translation. The default assignee can be either an individual person or a queue.
Default Reviewer	The default reviewer is automatically assigned finished translations that are ready to be reviewed or published. The default reviewer can be either an individual person or a queue.

5. Save your changes.
6. If you want, create queues to distribute and assign articles to groups of people who can either translate them or review the finished translations. When setting up queues, use the Knowledge Article Version object.

SEE ALSO:

[Create Queues](#)
[Export Articles for Translation](#)
[Import Translated Articles](#)
[Support Articles in Multiple Languages](#)
[Salesforce Knowledge Documentation Overview](#)
[Complete Guide to Salesforce Knowledge](#)

EDITIONS

Available in: Salesforce Classic

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USER PERMISSIONS

To set up multiple languages for Salesforce Knowledge:

- "Customize Application"
- AND
- "Manage Salesforce Knowledge"

Export Articles for Translation

If your organization sends Salesforce Knowledge articles to a vendor for translation, use the Export Articles for Translation feature in Setup.

Place the articles to be translated in a translation queue. To enable the article export feature, create one or more queues; authors and reviewers select the queue when they submit an article for translation. Make sure that they know which queue to choose for which language.

 **Note:** You can have up to 50 exports in 24 hours and a maximum of 15 pending exports (exports that have not entered a final state such as Completed, Failed, or Canceled).

1. Create a [translation queue](#) with articles for translation.
2. On the Article Management tab, select the articles you want to translate, and click **Submit for Translation**.
3. In the dialog box, indicate which languages to translate the articles into and assign the translations to their corresponding language translation queue.
4. From Setup, enter *Export Articles for Translation* in the Quick Find box, then select **Export Articles for Translation**.
5. Select the queue that contains the articles you're exporting.
6. Select either:
 - **All articles** to export every article in the queue.
 - **Updated articles** to only export articles that have been modified or added.
7. Click **Continue**.
8. Select the source and target language pairs you want to export.

 **Important:** Salesforce creates a separate .zip file for every article type in each language pair. You must retain the .zip file structure for a successful import. For more information, see [Import Translated Articles](#) on page 491.

9. To have the files reviewed or published after being translated, select a user or a queue.
10. Select the file character encoding.
 - ISO-8859-1 (General US & Western European, ISO-LATIN-1)
 - Unicode
 - Unicode (UTF-8) *default*
 - Japanese (Windows)
 - Japanese (Shift_JIS)
 - Chinese National Standard (GB18030)
 - Chinese Simplified (GB2312)
 - Chinese Traditional (Big5)
 - Korean
 - Unicode (UTF-16, Big Endian)
11. Select the delimiter for the .csv files.

The delimiter is the separator for columns when the file is converted to table form. Your options are tab (default) or comma.

12. Click **Export Now**.

EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

USER PERMISSIONS

To export articles:

- "Manage Salesforce Knowledge"
- AND
- "Manage Articles"
- AND
- "Manage Knowledge Article Import/Export"

To view articles:

- "Read" on the article type

To create articles:

- "Read" and "Create" on the article type

You're notified by email when your export is complete. You can also check the status of your export by viewing the Article Import and Export Queue. From Setup, enter *Article Imports and Exports* in the Quick Find box, then select **Article Imports and Exports**.

Unzip the exported files, but retain the file structure for a successful import.

SEE ALSO:

- [Import Translated Articles](#)
- [Support a Multilingual Knowledge Base](#)
- [Support Articles in Multiple Languages](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

Import Translated Articles

If your organization sends Salesforce Knowledge articles to a vendor for translation, use the Import Article Translations feature in Setup. You can only import articles that have been exported from the same Salesforce organization. For example, you can't export articles from your test or sandbox organization and import them into your production organization.

- From Setup, enter *Import Article Translations* in the Quick Find box, then select **Import Article Translations**.
- Choose how Salesforce handles translations after they're imported.

Option	Description
Review imported translations on the Article Management tab before publishing	Add imported translations to a queue from which agents can review them.
Publish translations immediately on import	Publish imported translations without reviews.

- Select the language of the articles you're importing.
- If you chose to have articles reviewed before publishing, select to send the files to a user or a queue.
- Click **Browse**, choose the translation .zip file to upload, and click **Open**.
You must place all the translation files (meaning, those exported from Salesforce and translated by your vendor) in a folder whose name is the same as the language code. For example, put French articles in an *fr* folder. Zip up this folder to create your import file.

EDITIONS

Available in: Salesforce Classic

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Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

USER PERMISSIONS

To export articles:

- "Manage Salesforce Knowledge"
- AND
- "Manage Articles"
- AND
- "Manage Knowledge Article Import/Export"

To view articles:

- "Read" on the article type

To create articles:

- "Read" and "Create" on the article type

Important: To import translated articles successfully, verify that the file structure and their extensions match the file structure and extensions of files exported from Salesforce Knowledge for translation. For example, if the target language is French, the file structure begins as follows:

```
import.properties
-fr
--articletypearticlename_kav
---articlename.csv
---[Article collateral, html, images, etc.]
```

6. Click **Import Now**.

If you have more translated articles to upload, repeat steps four through six.

7. Click **Finish**.

An email notification is sent to you when your import finishes. You can view the status of your import from Setup by entering *Article Imports and Exports* in the Quick Find box, then selecting **Article Imports and Exports**.

SEE ALSO:

[Article and Translation Import and Export Status](#)

[Export Articles for Translation](#)

[Support a Multilingual Knowledge Base](#)

[Support Articles in Multiple Languages](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Improve the Article Search Experience

Enable search highlights and snippets, synonyms, promoted terms, topics, and keywords from cases to improve your article search.

IN THIS SECTION:

[Search Highlights and Snippets](#)

Quickly identify the best article and see how articles match your search terms with relevant text and highlighted search terms in the search results.

[Search Synonyms for Articles](#)

Create synonyms so words or phrases are treated as equivalents in searches. When searching Salesforce Knowledge articles, users can enter search terms that don't match any terms in those items but are synonymous with the terms.

[Manage Promoted Search Terms](#)

View, edit, and delete—from a single page—all the promoted search terms that are associated with Salesforce Knowledge articles.

[Enable Topics for Articles](#)

With topics on articles, you can classify and search articles by assigning topics. Topics can be added from the article view and detail pages. Suggested topics, which are only supported in English, are terms extracted from the article, so that they are more concrete and precise than a data category assignment. When searching, topics can be used to index the article, so the matched articles are more relevant to keyword searches.

EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

[Use More Case Keywords to Find Articles](#)

When searching articles from a case, by default, only the case title is used in the search. Often, you want to use information from the case for more accurate search results, or create a custom search button.

SEE ALSO:

[Search Highlights and Snippets](#)[Search Synonyms for Articles](#)[Manage Promoted Search Terms](#)[Enable Topics for Articles](#)[Use More Case Keywords to Find Articles](#)[Salesforce Knowledge Documentation Overview](#)[Complete Guide to Salesforce Knowledge](#)

Search Highlights and Snippets

Quickly identify the best article and see how articles match your search terms with relevant text and highlighted search terms in the search results.

Search highlights and snippets give your agents and users context as to why the particular result matched their search query. The relevant text appears below the title with the search terms in bold. You can enable search highlights and snippets on the [Salesforce Knowledge Settings page](#) on page 433.



Note: Search highlights and snippets are not generated for searches with wildcards.

Search highlights and snippets are generated from the following fields:

- Email
- Long text area
- Rich text area
- Text area

Search highlights and snippets aren't generated from the following fields:

- Checkbox
- Currency
- Date
- Date Time
- File
- Formula
- Lookup
- Multi-picklist
- Number
- Percent
- Phone
- Picklist
- URL

EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

 **Note:** If a snippet is not generated, the article's summary field is shown instead.

SEE ALSO:

[Improve the Article Search Experience](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Search Synonyms for Articles

Create synonyms so words or phrases are treated as equivalents in searches. When searching Salesforce Knowledge articles, users can enter search terms that don't match any terms in those items but are synonymous with the terms.

To create synonyms and synonym groups, from Setup, enter *Synonyms* in the *Quick Find* box, then select **Synonyms** under **Customize > Search**. An org can create up to 10,000 synonym groups

A search for one term in synonym group returns results for all terms in the group. For example, if you define a synonym group with these synonyms:

CRM, customer relationship management, Salesforce

then a search for *customer relationship management* matches articles that contain *customer relationship management* and articles that contain *CRM* or *Salesforce*.

Synonyms affect search behavior in the following ways:

Priority

If a search term is part of a synonym group, the search results list items that contain the search term, followed by items that contain other terms in the synonym group.

For example, if this synonym group is defined:

fruit, oranges

Then a search for *oranges* matches a list of items containing *oranges*, followed by items containing *fruit*.

 **Note:** In the Article Management tab, if you sort the list by clicking a column header, the sort order, not priority, persists in the current and additional searches.

Wildcards

If a wildcard is used in a search, the wildcard expands the search term, but the search doesn't match any synonyms, even if the search phrase contains a defined synonym.

For example, if these synonym groups are defined:

fruit, oranges, apples

cabbage, lettuce

Then a search for *orang* lettuce* matches items that contain *orange* and *oranges*, but doesn't match items that contain *fruit*, *apples*, and *cabbage*.

Operators

If a search phrase contains an operator (AND/OR/AND NOT), synonym matches are returned only if the entire search phrase is a defined synonym.

For example, if these synonym groups are defined:

EDITIONS

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fruit, oranges and apples

vegetables, carrots

Then a search for *oranges and apples* returns matches for all items that contain the literal string *oranges and apples* and items that contain the term *fruit*.

However, if the search phrase is *fruit and vegetables*, which is not a defined synonym, the search matches only those items that contain both the terms, *fruit* and *vegetables*.

In this case, AND functions as an operator and synonym matches are not returned in the search results. In terms of this example, items that contain a synonym of either *fruit* or *vegetables* (items that contain the term *carrots* or the phrase *oranges and apples*) are not returned.

Exact phrase matches

If a defined synonym is only a part of a longer exact phrase search, the search doesn't treat it as a synonym.

For example, if this synonym group is defined:

oranges apples, fruit

Then an exact phrase search for "*raspberries oranges apples*" doesn't match items that contain the word *fruit*.

Lemmatization

Synonyms do not under go lemmatization in search results; rather, they are matched as an exact phrase. However, the search term does under go lemmatization.

For example, if this synonym group is defined:

quench, drink orange juice

Then a search for *quench* matches items that contain *quench*, *quenched*, *quenching*, and *drink orange juice*, but doesn't match items that contain *drinking orange juice*.

Ignored words

Words that are normally ignored in searches, such as *the*, *to*, and *for*, are matched if the word is part of a defined synonym.

For example, if this synonym group is defined:

peel the orange, cut the apple

Then a search for *peel the orange* matches items that contain the exact string *peel the orange*.

Overlapping synonyms

If a search term consists of overlapping synonyms from different groups, the search matches synonyms in all the overlapping synonym groups.

For example, if these synonym groups are defined:

- *orange marmalade, citrus*
- *marmalade recipe, sugar*

Then a search for *orange marmalade recipe* matches items that contain *orange marmalade*, *citrus*, *marmalade recipe*, and *sugar*.

Subsets

If one synonym group includes a synonym that is a subset of a synonym in another group, a search for the subset term doesn't match items that contain synonyms from the subset synonym group.

For example, if these synonym groups are defined:

- *orange, apple*
- *orange marmalade, citrus*
- *marmalade, jam*

Then a search for *orange marmalade* matches items that contain *orange marmalade* and *citrus*, but doesn't match items that contain *apple* or *jam*.

SEE ALSO:

[Improve the Article Search Experience](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Manage Promoted Search Terms

View, edit, and delete—from a single page—all the promoted search terms that are associated with Salesforce Knowledge articles.

You can add promoted search terms to articles on the article's detail page in the Promoted Search Terms related list.

1. From Setup, enter *Promoted Search Terms* in the *Quick Find* box, then select **Promoted Search Terms** under **Customize Search**.

2. To view which terms are assigned to an article, sort by the Article column.

3. To edit a term, click **Edit** in its row.

You can only change the term from this page, not the article it is assigned to.

4. To delete a term, click **Delete** in its row.

The term is only deleted from the article associated with this row, not from other articles.

5. Remember to save your changes.

SEE ALSO:

[Improve the Article Search Experience](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

USER PERMISSIONS

To create, edit, and delete promoted search terms:

- "Manage Promoted Search Terms"

Enable Topics for Articles

With topics on articles, you can classify and search articles by assigning topics. Topics can be added from the article view and detail pages. Suggested topics, which are only supported in English, are terms extracted from the article, so that they are more concrete and precise than a data category assignment. When searching, topics can be used to index the article, so the matched articles are more relevant to keyword searches.

 **Note:** Contrary to data categories, topics added to an article are not transferred to the same article in another language.

Topics for articles are enabled for each article type.

1. From Setup, enter *Topics for Objects* in the **Quick Find** box, then select **Topics for Objects**.
2. Click the article type name where you want to enable topics.
3. Check **Enable topics**.
4. Select which fields you want to use for suggestions.
5. Click **Save**.
6. Via profile or permission set, under System Permissions, define which agents can assign, create, delete, and edit topics.

SEE ALSO:

[Improve the Article Search Experience](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

USER PERMISSIONS

To enable topics:

- “Customize Application”

Use More Case Keywords to Find Articles

When searching articles from a case, by default, only the case title is used in the search. Often, you want to use information from the case for more accurate search results, or create a custom search button.

Luckily, Salesforce Knowledge search pages accept other parameters:

- **id=<case id>**: The ID of the current case.
- **search=<keywords>**: The keywords to be searched.
- **articleType_<article type dev name>=on**: multiple parameters possible, article types to select (if no article type is selected, then all article types are selected)
- **ct_<data category group internal name>=<data category internal name>**: multiple parameters possible, filter pre-selection

To take advantage of those parameters, add a custom button to the case detail page containing a few lines of javascript that extract keywords from the case and hide the default article search button.

 **Note:** You can also create a custom article widget with `support:caseArticle`.

1. From the object management settings for cases, go to Buttons, Links, and Actions.
2. Click **New Button or Link**.
3. Enter a unique Label, Name, and Description.
4. Select **Detail Page Button** for Display Type.
5. Select **Execute JavaScript** in the Behavior drop-down.
6. Select **OnClick JavaScript** in the Content Source drop-down.
7. Enter code for extracting case data and setting up parameters for the article search page.

For example:

```
// article search page URL
var url = '/knowledge/knowledgeHome.apexp';

// ID of the current case
url += '?id={!Case.Id}';

// use the case subject as the search keywords
url += '&search={!Case.Subject}';

// read case attributes
var caseType = '{!Case.Type}';
var caseProduct = '{!Case.Product__c}';

// if the case is of a certain type, select only 2 of the article types available
// in other cases, we keep the default behavior (all article types selected)

if (caseType=='Problem' || caseType=='Question') {
    url += '&articleType_FAQ_kav=on';
    url += '&articleType_How_To_kav=on';
}

// preselect a data category for search results based on the category
```

EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

USER PERMISSIONS

To create or change custom buttons or links and create a Visualforce page:

- "Customize Application"

```
var product = '';
if (caseProduct=='Home')
    product = 'Home';
if (caseProduct=='SMB')
    product = 'Small_and_Medium_Business';
if (caseProduct=='Large enterprise')
    product = 'Large_Enterprise';

if (product.length>0)
    url += '&ct_Products2=' + product;

// once the logic is executed, we go to the article search page
window.location = url;
```

8. Click **Save**.
9. From the object management settings for cases, go to Page Layouts.
10. Click **Edit** next to Case Layout.
11. Drag your custom button for article search into the case layout.
12. Click **Save**.
13. Create a Visualforce page named *CaseDetailsWithoutStandardKBSearchButton* with the following code:

```
<apex:page standardController="Case">
    <style type="text/css">
        div.knowledgeBlock input {display: none}
    </style>
    <apex:detail/>
</apex:page>
```

14. Back in the Buttons, Links, and Actions area for cases, click **Edit** next to View.
15. Select **Visualforce Page** in Override with.
16. Select **CaseDetailsWithoutStandardKBSearchButton** from the drop-down.
17. Click **Save**.

SEE ALSO:

[Improve the Article Search Experience](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Set Up the Knowledge One Widget

Knowledge One is available as a widget you can plug in to the Salesforce Console for Service or Salesforce Console for Sales. If you are using the Knowledge tab, you get the same easy-to-use interface for articles and external sources on cases and within the Salesforce Console for Service. You can search, send, and create articles, all without leaving the case.

Of [all the Salesforce Knowledge article widgets](#), the Knowledge One widget lets you:

- Attach a published Salesforce Knowledge article to the case in one click.
- Share an article as a URL, if it is shared on a public channel.
- Email an article as a PDF, if it is shared on a public channel.
- Create and manage articles.
- Make adjustments based on your window width. In the console, in windows smaller than 600 pixels, the searchable objects are displayed in a drop-down menu.

 **Note:** The article widget in a case feed search doesn't necessarily use the agent's language. If the agent's language isn't a Salesforce Knowledge supported language but their locale language is, the locale language is the search language. If neither the agent's language nor local language are supported, the search language is the default Salesforce Knowledge language, which you can find and set on the Knowledge Settings page.

1. From the object management settings for cases, go to Page Layouts and open your case page layout for edit.

2. Ensure the Email quick action is in the case page layout.

Without the Email quick action, you can't send articles via email.

a. Select **Quick Actions** in the left-hand menu.

b. Drag **Email** to the **Quick Actions** in the **Salesforce Classic Publisher** line.

3. Disable previous article sidebar components.

- To disable the Knowledge sidebar, click **Layout Properties** and ensure **Knowledge Sidebar** is unchecked.
- To disable the case feed article tool, click **Feed View** and ensure **Use Case Feed Article Tool in the Console** is unchecked.

4. In the page layout editor, click **Custom Console Components**.

5. In the sidebar where you want the Knowledge One widget, select **Knowledge One** in the Type drop down and set the sidebar parameters.

Email quick action to be added to the Case page layout in order to show up

 **Tip:** If you can't see the Knowledge One sidebar, increase its width to 250 (height to 150) in the page layout. These are the minimum measurements for the Knowledge One sidebar to display properly.

SEE ALSO:

[Compare Article Widgets for Cases at a Glance](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

USER PERMISSIONS

To administer Salesforce Knowledge and Salesforce Console for Service:

- "Customize Application"

AND

"Manage Salesforce Knowledge"

Compare Article Widgets for Cases at a Glance

Decide which Salesforce Knowledge article widget is best for your organization.

Does the widget...	Article Widget	Article Case Feed Widget	Knowledge One Widget
Filter on data category	Yes	No	Yes
Create an article	No	No	Yes
Search an external object	No	No	Yes
Access your draft articles	No	No	Yes
Attach an article to a case	Yes	Yes	Yes
Send an article as a PDF	No	Yes	Yes
Share an article's public URL	No	Yes	Yes
Adjust with the window size	No	No	Yes
Have more than one way to suggest articles	No	No	Yes

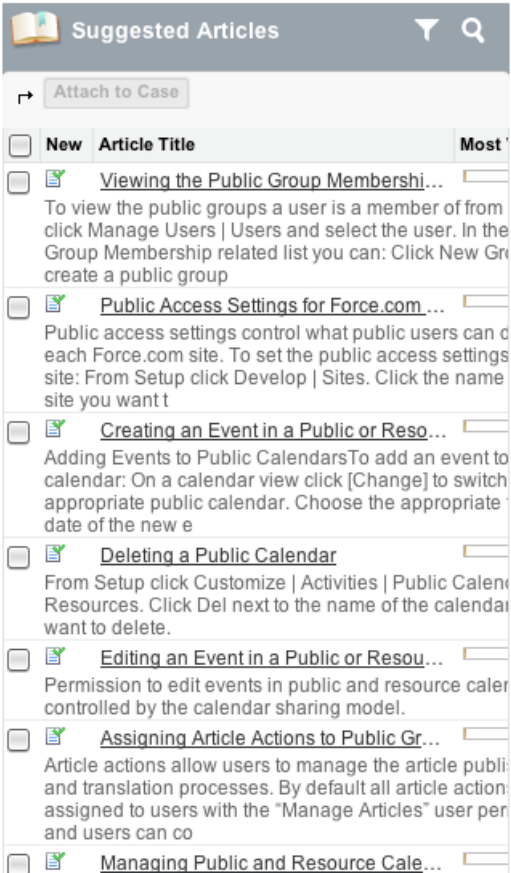
EDITIONS

Available in: Salesforce Classic

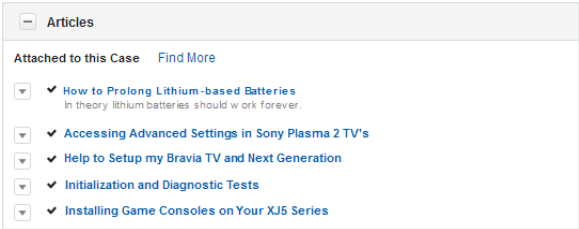
Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

Article Widget



Article Case Feed Widget



Knowledge One Widget


Knowledge


 Search Knowledge...

[< Back to Suggestions](#)
[Filters ▾](#)

Articles



How to Prolong Lithium-based Batteries
 In theory lithium batteries should work forever, but cycling, elevated temperature and aging decrease the performance o..
 How To • Validated External • Last Published 12/19/2...


Accessing Advanced Settings in Sony Plasma 2 TV's
 Instructions on how to access the advanced settings on all Sony Plasma TV's.
 FAQ • Not Validated • Last Published 12/19/2...



Help to setup my Bravia TV and next generation
 Troubleshooting • Not Validated



Initialization Diagnostic Test
 3T Philips Achieva MRI
 Troubleshooting • Not Validated


Installing game consoles on your XJ5 Series
 A guide to installing a gaming console on your XJ5 Series TV.
 Troubleshooting • Not Validated


20V Max Lithium String Trimmer LST220
 You already know the score: Gas lawn and garden equipment is a pain. Between clean up, pull cords, storage and mak..
 Video • Validated External • Last Published 11/8/2013

[Show more Articles](#)


SharePoint

[How To Use This Library.aspx](#)

[Branding Guidelines.pptx](#)
 Comment : **Brand Guidelines November, 2013**

SEE ALSO:

[Set Up the Knowledge One Widget](#)
[Salesforce Knowledge Documentation Overview](#)
[Complete Guide to Salesforce Knowledge](#)

Adding Solutions

HTML Solutions Overview

HTML solutions provide a more flexible way to create solutions, by allowing you to easily format paragraphs, and insert images and links. Using HTML solutions, you create solutions with an HTML editor and display those solutions to users in Salesforce, the Self-Service portal, the Customer Portal, and as public solutions.

Using the HTML editor, you can:

- Change fonts
- Increase or decrease font sizes
- Insert images from the Documents tab
- Set text color
- Set the background color of text
- Insert hyperlinks
- Change paragraph alignment
- Create bulleted and numbered lists

 **Note:** By default, solutions are created and displayed in text format. Your administrator must enable HTML solutions.

Before you begin creating HTML solutions for your organization, review the following implementation tips and best practices.

Implementation Tips

- Once you enable HTML solutions, you cannot disable it.
- If you open a text solution with the HTML editor and save it, the solution becomes an HTML solution.
- HTML solutions are presented as such to Self-Service portal, public solutions, Customer Portal, and Salesforce users.
- Any HTML tags entered into the HTML editor will display to users as text when the solution is saved.
- When the HTML solution detail is displayed in list views and search results, only the first 255 characters are displayed. This number includes HTML tags and images that are removed.
- Each HTML solution can contain up to 32000 characters, including HTML tags.
- HTML formatting is preserved in the printable view of a solution.
- Hyperlinks in HTML solutions open in a new browser window when users click on them.
- All images that you want to include in your HTML solutions must be uploaded to the Documents tab. Images in HTML solution details don't show up in list views and reports.
- HTML solutions can be created in any of the languages supported by Salesforce.

Best Practices

The following HTML tags are allowed in HTML solutions imported into Salesforce:

<a>	<dt>	<q>
<abbr>		<samp>
<acronym>		<small>

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create solutions:

- "Create" on solutions

<address>	<h1>	
	<h2>	<strike>
<bdo>	<h3>	
<big>	<h4>	<sub>
<blockquote>	<h5>	<sup>
 	<h6>	<table>
<caption>	<hr>	<tbody>
<cite>	<i>	<td>
<code>		<tfoot>
<col>	<ins>	<th>
<colgroup>	<kbd>	<thead>
<dd>		<tr>
<del>		<tt>
<dfn>	<p>	
<div>	<pre>	<var>
<dl>		

Within the above tags, you can include the following attributes:

alt	face	size
background	height	src
border	href	style
class	name	target
colspan	rowspan	width

The above attributes that can include a URL are limited to URLs that begin with the following:

- http:
- https:
- file:
- ftp:
- mailto:
- #
- / for relative links

Multilingual Solutions Overview

The multilingual solutions feature helps you translate solutions and solution categories into the languages supported by Salesforce so that customers and support reps can find answers to inquiries in the language with which they are most comfortable.

Multilingual solutions can lower support costs by:

- Improving customer satisfaction by answering inquiries in the languages preferred by customers
- Deflecting unnecessary incoming calls by providing solutions in languages that are the most useful for customers
- Managing inquiries in multiple languages from one location, anytime and anywhere

Review the following key terms for multilingual solutions:

Master Solution

A solution created in any language supported by Salesforce. A master solution can have zero or more translations associated with it; it cannot be linked to another master solution.

Translated Solution

A solution translated into another language supported by Salesforce and associated with exactly one master solution. A translated solution cannot have the same language as its master solution or any other translated solutions associated with that master solution. A translated solution cannot have other translated solutions associated with it. Translated solutions are represented by the  icon on solution detail pages, solution edit pages, solution list views, and solution search results.

You can work with multilingual solutions from the following:

Solutions Tab

When creating a new solution, users can choose a language in which to write the solution from the **Language** picklist field. Once the solution is saved, it becomes a master solution. Users can then create a translated solution by clicking **New** on the Translated Solutions related list of the master solution detail page. When a master solution is modified, users can adjust the statuses of its translated solutions to indicate that they may need translating.

Cases Tab

When users search for relevant solutions on a case by entering keywords in the Solutions related list and clicking **Find Solution**, search results include solutions in all languages that have matching keywords. Alternatively, if suggested solutions is enabled for cases, users can click **View Suggested Solutions** to find relevant solutions in multiple languages if they share common words with the case.

Self-Service Portal

If multilingual solution search is enabled for your Self-Service portal, customers automatically view solution search results in their preferred language as specified in their Self-Service user information settings. Customers can also choose to view solution search results in a specific language or all supported languages via a language drop-down list. By default, the Login Page of your Self-Service portal displays in your organization's language.

Public Solutions

If multilingual solution search is enabled for your public solutions, customers can choose to view solution search results in a specific language or all supported languages via a language drop-down list. By default, public solutions display in your organization's language.

Solution Categories

Users with the "Manage Translation" permission can use the translation workbench to translate solution categories so that they display in the language of each user on the Solutions tab and in the preferred language of each customer on the Self-Service portal as specified in the customer's user settings. Solution categories are not translated for public solutions.

EDITIONS

Available in: Salesforce Classic

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

Reports

You can track translated solutions marked **Out of Date** by choosing the Translated Solutions report. Running this report also lists the title and details of translated solutions. You can also create a custom report for multilingual solutions using the Master and Translated Solutions report type.

List Views

You can see which translated solutions are marked **Out of Date** and may need translating by creating a custom list view on the Solutions tab and entering the following search criteria: "Out of Date equals True".

Import

The Data Import Wizard includes options to import master and translated solutions and associate them with each other.

To learn more about enabling multilingual solutions, see [Enable Multilingual Solutions](#) on page 512.

SEE ALSO:

[Enable Multilingual Solutions](#)

Suggested Solutions Overview

The suggested solutions feature displays up to ten relevant solutions that may help users and customers solve a particular case from the case detail page, Salesforce Customer Portal, or the Self-Service portal.

Suggested solutions can lower support costs by:

- Reducing the time it takes for customer support reps to solve cases
- Improving customer support reps' productivity by offering them proactive access to all solutions for any case
- Enabling customers to solve and close their own cases

The solutions displayed are not simply found via a keyword search. Rather, the following variables are entered into a formula that automatically scores the relevancy of each solution to the particular case:

- Word frequency in all solutions
- Word frequency in similar cases with related solutions
- Proximity of the keywords within the solutions
- Word similarities to self-closed cases and solutions rated useful by Self-Service users
- The number of additional cases associated with a solution

You can enable suggested solutions for the following:

Cases tab

Users can click **View Suggested Solutions** from the case detail page to view a list of solutions relevant to their case. If multilingual solutions is enabled for your organization, search results return solutions in all languages that have matching keywords. However, search results across all languages might not be reliable because terms searched from one language to another are processed differently.

Customer Portal and Self-Service portal

Customers can view solutions relevant to their case when they submit a case or view cases online.

Customers can self-close their cases using suggested solutions.

When customers log new cases or click the **View Suggested Solutions** button on an existing case in the Customer Portal or Self-Service portal, a list of suggested solutions is displayed, including solutions in multiple languages for organizations with

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable suggested solutions:

- "Customize Application"

To modify Self-Service pages:

- "Manage Self-Service Portal"

AND

"Customize Application"

multilingual solutions enabled. When customers select a solution from the list, they can click **Yes** after **Does this Solution help you answer your question?** and then select a reason as to why they closed their case. The case will close with an indication on the `Closed by Self-Service User` case field. If the customer clicks **No**, they will be returned to the list of suggested solutions. If no suggested solutions are found, the Suggested Solutions Page is bypassed, and the customer is directed to their case.

Case auto-response rules and emails

Your support team can help customers solve their own cases without the assistance of customer support reps. Simply create email auto-responses for cases submitted via email, Web-to-Case, or the Self-Service portal. Within the auto-response email template, include the suggested solutions merge field, `{!Case_Suggested_Solutions}`, which provides outbound emails with direct links to the subject and description of each solution that may help customers answer their inquiries.



Note: Sending mass emails using templates with the suggested solutions merge field can take several minutes and isn't recommended.

The `Closed by Self-Service User` field, along with a `Closed When Created` field, can be added to case page layouts. These fields are automatically set by Salesforce and can't be modified. You can run reports on the `Closed by Self-Service User` and `Closed When Created` fields to see how cases have been closed.

- Report on the `Closed by Self-Service User` field to see how many cases have been closed by users via suggested solutions on the Self-Service portal
- Report on the `Closed When Created` field to see how many cases have been immediately saved and closed upon creation by support reps.



Note:

- Suggested solutions don't display [Salesforce Knowledge](#) articles.
- Suggested solutions isn't available for the public solutions because public solutions users don't have an authenticated login that allows them to create or access cases.

SEE ALSO:

[Customize Support Settings](#)

[Multilingual Solutions Overview](#)

Customizing Solution Settings

To customize solution settings:

1. From Setup, enter *Solution Settings* in the Quick Find box, then select **Solution Settings**.
2. Click **Edit**.
3. Select `Enable Solution Browsing` to turn on the ability to browse for and find solutions by category.

This setting enables solution browsing on the Solutions tab, Customer Portal, and when solving a case.
4. Select `Enable Multilingual Solutions` to turn on the ability for users to [translate solutions](#) into multiple languages.

You can deselect the `Enable Multilingual Solutions` checkbox at any time, but deselecting it removes all associations between master and translated solutions and automatically disables the `Enable Multilingual Solution Search in Self`

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To change solution settings:

- "Customize Application"

Service Portal and `Enable Multilingual Solution Search for Public Solutions` settings. If you select the `Enable Multilingual Solutions` checkbox again, the associations between master and translated solutions are restored.

5. Select `Enable Multilingual Solution Search in Self-Service Portal` to add a language drop-down list to the Self-Service portal that automatically restricts search results to solutions that match the Self-Service portal user's language. From the language drop-down list, Self-Service portal users can choose whether to search for solutions in a specific language or any language supported by Salesforce.

Deselecting this checkbox removes the language drop-down list from the Self-Service portal, and search results include solutions in all languages, regardless of the Self-Service portal user's language.

6. Select `Enable Multilingual Solution Search for Public Solutions` to add a language drop-down list to public solutions so that public solutions users can choose which language to search for solutions. From the language drop-down list, public solutions users can choose whether to search for solutions in a specific language or any language supported by Salesforce. Deselecting this checkbox removes the language drop-down list from public solutions, and search results include solutions in all languages.

7. Select `Enable HTML Solutions` to create and display solutions in HTML. When enabled, solutions appear in HTML in Salesforce, public solutions, Self-Service portal, and Salesforce Customer Portal. Using [HTML Solutions](#) allows users to easily format solution details by changing fonts and colors, and adding images and hyperlinks.



Warning: Once you select `Enable HTML Solutions`, you cannot disable it.

8. Select `Solution Summary` to display up to 150 characters of the solution details in the solution search results. Deselecting this checkbox removes the solution summary from the results.
9. Select `Inline Category Breadcrumbs` to display up to 150 characters of the breadcrumb trail of categories to which the solution belongs in the search results. Deselecting this checkbox removes the breadcrumbs from the results.
10. Click **Save**.
11. To enable solution browsing by customers in public solutions or your Self-Service portal, see [Enabling Public Solutions](#) on page 513 and [Enable Self-Service Features and Settings](#) on page 74.

In addition, you can customize the top-level category accessible by public solutions and Self-Service users. You do not need to modify this setting if you want customers to view all categories and all solutions that are visible in the Self-Service portal or visible in public solutions.



Note: Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

SEE ALSO:

[Managing Solution Categories](#)

[Enable Multilingual Solutions](#)

Getting Started with Categories

Follow these steps to ensure a successful rollout of solutions:

1. Plan which categories your support team needs.

Keep in mind that you can also allow customers to find solutions by category in public solutions and your Self-Service portal. You can specify that customers can view only solutions in a particular category and all of its subcategories.

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

2. Define your categories; see [Defining Solution Categories](#) on page 510.
3. Categorize your solutions; see [Categorizing Solutions](#). Administrators, and users with the "Manage Categories" permission, can categorize solutions prior to enabling solution categories for the entire organization.
4. Create a custom report of type Solution Categories to verify that all solutions are categorized appropriately. To find any uncategorized solutions, use the advanced report filters; choose the `Category Name` field and the "equals" operator, and leave the third field blank. Administrators, and users with the "Manage Categories" permission, can create solution category reports prior to enabling solution categories for the entire organization.
5. Enable solution category browsing for the Solutions tab; see [Customizing Solution Settings](#) on page 508.
6. Enable solution category browsing for customers using public solutions and your Self-Service portal. See [Enabling Public Solutions](#) on page 513 and [Enable Self-Service Features and Settings](#) on page 74.
7. Specify the top-level category accessible by customers using public solutions and your Self-Service portal. This is useful if you want to have certain categories available only to internal staff.

Leave this blank if you want customers to view all categories and all solutions that are visible in Self-Service portal or visible in public solutions.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create or change solution categories:

- "Manage Categories"

SEE ALSO:

[Managing Solution Categories](#)

Defining Solution Categories

Begin by creating your solution categories. The All Solutions category is automatically created for you as the top of your solution hierarchy. Users cannot add solutions to this category or translate it.

1. From Setup, enter *Solution Categories* in the Quick Find box, then select **Solution Categories**.
2. Click **Add Category** to create a subcategory below a specific category.
3. Enter the category name. Category names cannot include the backslash "\" character.
4. Select a different parent category, if desired. The parent category is the category directly above this category in the hierarchy.
5. Select a sort order for any subcategories you create under this category.
 - Choose Alphabetical Order to sort subcategories alphabetically.
 - Choose Custom Order to sort subcategories in the order you specify; see [Adding and Sorting Subcategories](#) on page 511.
6. Click **Save**.

7. After creating categories, categorize your solutions. See [Categorizing Solutions](#). Administrators, and users with the “Manage Categories” permission, can categorize solutions prior to enabling solution categories for the entire organization.
8. Then, after categorizing solutions, turn on solution category browsing on the Solutions tab. See [Customizing Solution Settings](#) on page 508.
9. To enable solution category browsing for the public knowledge base or your Self-Service portal, see [Enabling Public Solutions](#) on page 513.

Editing and Deleting Categories

From the list of solution categories, you can:

- Click **Edit** to modify the category name, parent category, or sort order.
- Click **Del** to delete the category. The solutions associated with the category are not deleted.



Note: You cannot delete a category in use by a Salesforce Customer Portal. For more information, see [Enable Customer Portal Login and Settings](#) on page 21.

- Click the category name to view the category details.

Adding and Sorting Subcategories

From a category detail page, you can:

- Click **New** to add a subcategory below the category.
- Enter a custom sort order for the subcategories.
 1. Edit the category to set the `Subcategory Sort Order` to Custom Order.
 2. Enter numbers in the Order column to specify the order of the subcategories.
 3. Click **Reorder**.

Managing Solution Categories

Create solution categories so that users can group similar solutions together. Once your solutions are categorized, users can browse for and find solutions by category from the Solutions tab or when solving a case. Customers can also browse solutions by category in public solutions, the Self-Service portal, and the Customer Portal.



Note: Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

SEE ALSO:

[Getting Started with Categories](#)
[Defining Solution Categories](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create or change solution categories:

- “Manage Categories”

Enable Multilingual Solutions

You can turn on multilingual solutions so users have the ability to translate solutions into multiple languages.

Preparing for Multilingual Solutions

Before you enable multilingual solutions:

- Run solution reports to locate any existing solutions that are already translated and will need to be converted to translated solutions after you enable multilingual solutions.

When multilingual solutions is enabled for the first time, all existing solutions automatically become master solutions. You can create translated solutions from master solutions by associating a master solution without any translated solutions with a master solution of a different language via the `Master Solution` lookup field.

- Translate any existing solution categories.

Translated solutions inherit the solution categories of their master solution. We recommend that you translate your solution categories before enabling multilingual solutions and then associate solutions with each other. This will help you associate solutions with the correct categories.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable multilingual solutions:

- “Customize Application”

Enabling Multilingual Solutions

To enable multilingual solutions:

1. From Setup, enter `Solution Settings` in the Quick Find box, then select **Solution Settings**.
2. Click **Edit**.
3. Select `Enable Multilingual Solutions`.

Optionally, select `Enable Multilingual Solution Search in Self-Service Portal` and `Enable Multilingual Solution Search for Public Knowledge Base` to allow customers to view solution search results in a specific language or all supported languages via a language drop-down list.

4. Click **Save**.
5. Customize solution page layouts to include the `Master Solution Title` field, `Master Solution Details` field, `Out-of-Date` field, and the Translated Solutions related list. The `Language` picklist and `Master Solution` lookup fields are automatically added to solution page layouts when you enable multilingual solutions.

 **Tip:** You can make solution edit pages easier for users to translate multilingual solutions by setting the Detail Information section to two columns and placing the `Master Solution Title` and `Master Solution Details` fields alongside each other. Underneath those fields, place the `Solution Title` and `Solution Details` fields alongside each other so that users can effortlessly compare the master and translated solutions. Note that the `Master Solution Title` and `Master Solution Details` fields display only on the translated solution edit page.

6. Set the field-level security settings of the `Master Solution` lookup field to editable for profiles or permission sets with the “Create” and “Edit” permissions on solutions.

When the `Master Solution` lookup field is editable, users can associate translated solutions with master solutions.

Field-level security is available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.

7. Set the field-level security settings of the `Out of Date` checkbox field to visible for all profiles or permission sets with the “Read” permission on solutions.

Field-level security is available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.

8. As a best practice, add a long text area custom field to solutions called `Translation Comments` and include it on solution page layouts so that users can add any comments regarding the translation of the solution. Users should include a date with their comments so that other users can see when each comment was added.

 **Note:** You can deselect the `Enable Multilingual Solutions` checkbox at any time, but deselecting it removes all associations between master and translated solutions and automatically disables the `Enable Multilingual Solution Search in Self Service Portal` and `Enable Multilingual Solution Search for Public Solutions` settings. If you select the `Enable Multilingual Solutions` checkbox again, the associations between master and translated solutions are restored.

Rolling Out Multilingual Solutions

After enabling multilingual solutions:

- Associate any existing translated solutions with the appropriate master solutions.

You can do this manually using the `Master Solution` lookup field, or you can export a report of existing translated solutions and then import those solutions to associate them with a master solution. For each translated solution you import, include the 15 to 18 character `Solution ID` field of its master solution in a master solution column on your import file. To view the `Solution ID` field for master solutions, run the Translated Solution report. If you import solutions by mistake, you can use mass delete to remove them from your organization.

SEE ALSO:

[Multilingual Solutions Overview](#)

[Support a Multilingual Knowledge Base](#)

Enabling Public Solutions

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

Using the Solutions tab, your customer support team can create solutions that people outside of your organization may find helpful. Using HTML code supplied by Salesforce, and with the help of your website administrator, you can add a search box and button to your website that allows your customers to search for solutions. This functionality is known as Public Solutions.

With public solutions, your customers can find answers to frequently asked questions without having to call your customer support center. All solutions with a `Status` of Reviewed and the `Visible in Public Knowledge Base` field checked will be available as public solutions, including any solution attachments.

Public solutions are different from the Self-Service portal and Salesforce Customer Portal because users are not required to log in, and they can only search for solutions, not submit cases. For more information about the Self-Service and Customer Portal, see [Setting Up Self-Service](#) on page 73 and [Setting Up Your Customer Portal](#) on page 14.

 **Note:**

- The search box and button are displayed in a frame; your website must support frames in order for the solution search feature to work.
- Suggested solutions don't display [Salesforce Knowledge](#) articles.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable web access to solutions:

- "Customize Application"

To enable Web access to solutions:

1. From Setup, enter *Public Solutions* in the *Quick Find* box, then select **Public Solutions**.
2. Click **Edit**.
3. Check *Public Solutions Enabled*.
4. If your organization uses solution categories, check *Enable Solution Browsing* to allow customers to browse solutions by category. Solution categories cannot be translated into other languages for public solutions.

If multilingual solutions is enabled for your organization, you can add a language drop-down list to public solutions so that customers can choose which language to search for solutions. For more information, see [Customizing Solution Settings](#) on page 508.
5. If solution category browsing is enabled, select the *Top-Level Category* accessible by customers in public solutions. Customers can view all solutions in this category and its subcategories if they are marked *Visible in Public Knowledge Base*.

Leave *Top-Level Category* blank if you want customers to view all solutions in all categories when they are visible as public solutions.
6. If desired, you can change the appearance of the frame on your website by specifying the *Maximum Page Width* and *Minimum Page Height*.
7. Provide the URL of your CSS page in *Style Sheet URL*. The CSS file does not have to exist yet; you can download a sample file as a starting point later, or use your own file.
8. You can change the word or phrase that is used to describe solutions in the frame in *Alternative Term*. Provide singular and plural versions of the term.
9. Click **Save**.
10. If desired, click **Download Sample CSS File** to get the Salesforce style sheet.
11. Click **Generate HTML**.
12. Copy the resulting HTML code and click **Finished**.
13. Send the HTML (and the CSS file, if you downloaded it) to your website administrator to be added to your site as follows:
 - Add the HTML to your Web page.
 - Customize the downloaded style sheet.
 - Host the style sheet in a publicly accessible location on your Web server.

Organizing Articles, Answers, and Ideas into Categories

Data Categories in Salesforce.com

Data categories are used in Salesforce Knowledge (articles and article translations), Ideas, Answers, and Chatter Answers to help classify and find articles, questions, or ideas. You can use data categories to control access to a particular set of articles, questions or ideas.

Salesforce Knowledge uses data categories to classify articles and make them easier to find. For example, to classify articles by sales regions and products, create two category groups: Sales Regions and Products. The Sales Regions category group could consist of a geographical hierarchy, such as All Sales Regions as the top level and North America, Europe, and Asia at the second level. The Products group could have All Products as the top level and Phones, Computers, and Printers at the second.

Data Category Limits	Details
Maximum number of data category groups and active data category groups	5 category groups, with 3 groups active at a time
Maximum number of categories per data category group	100 categories in a data category group
Maximum number of levels in data category group hierarchy	5 levels in a data category group hierarchy
Maximum number of data categories from a data category group assigned to an article	8 data categories from a data category group assigned to an article

EDITIONS

Available in: Salesforce Classic

Data categories and answers are available in **Enterprise, Performance, Unlimited, and Developer** Editions.

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional, Enterprise, and Unlimited** Editions.

In an answers zone, data categories help organize questions for easy browsing. Each answers zone supports one category group. For example, if you're a computer manufacturer you might create a Products category group that has four sibling categories: Performance Laptops, Portable Laptops, Gaming Desktops, and Enterprise Desktops. On the Answers tab, zone members can assign one of the four categories to each question and then browse these categories for answers to specific questions.



Example:

Logical Classification of Articles

As a knowledge base administrator, you can organize your knowledge base articles into a logical hierarchy and tag articles with the attributes that are significant to your business.

Easy Access to Questions

As an answers administrator, you can choose which data categories are visible on the Answers tab. Zone members can tag a question with a category, which makes finding questions and answers easier for other members.

Control of Article and Question Visibility

As a knowledge base or answers community administrator, you can centrally control the visibility articles or questions by mapping roles, permission sets, or profiles to categories in the category groups. When an article or question is categorized, users with visibility can automatically see it.

Article Filtering

As a support agent, when articles are classified into logical categories, you can quickly and easily locate the article you need by filtering your organization's knowledge base. To ensure you see all relevant articles, filtering by category has expansive

results that include a category's upward and downward relatives in the category hierarchy. For example, if your category hierarchy for products has the levels All Products > Computers > Laptops > Gaming Laptops and you are helping a customer with a laptop problem, filtering by Laptops returns articles classified with Laptops as well as articles classified with Computers, All Products, or Gaming Laptops. Effectively, you are made aware of useful related articles like a free shipping offer for all products or an upgrade offer for gaming laptops. (To prevent irrelevant results, category filtering doesn't return nonlinear relatives like siblings and cousins. Articles about Desktops, a sibling of Laptops, would not display.)

Article and Question Navigation

As an end user, you can navigate the categories on the Articles tab or Answers tab to find the information you need to solve your problem.

Managing Category Groups for Articles and Questions

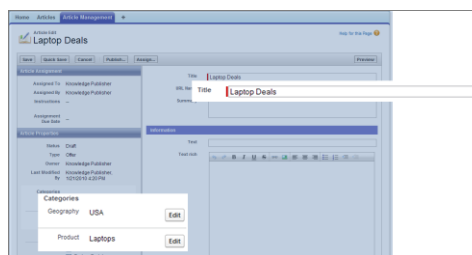
If your organization has Salesforce Knowledge and an answers community, you can create separate category groups or use the same category group for articles and questions.

Data Categories in Articles

A category group is the container for a set of categories. In Salesforce Knowledge it corresponds to the name of the category drop-down menus. For example, if you use the Data Categories page in Setup, (enter *Data Category* in the **Quick Find** box, then select **Data Category Setup**) to create and activate a category group called Products, a Products menu displays on the Article Management tab, the article edit page, the Articles tab in all channels, and the public knowledge base.

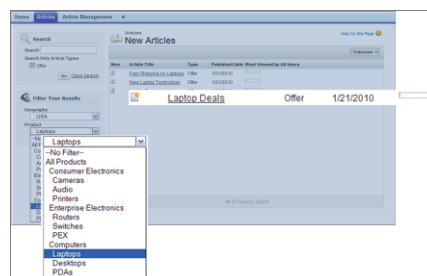
As an illustration, the figure below shows a knowledge base administrator's view of an article about laptop deals; using the article edit page, the administrator has classified the article with Laptops in the Products category group, and USA in the Geography category group.

An Article About Laptop Deals on the Article Management Tab



The next figure now illustrates an agent finding that same article published on the Articles tab; the agent has selected Laptops and USA respectively in the Products and Geography drop-down menus to retrieve an article that is classified with both Laptops and USA.

An Article About Laptop Deals on the Articles Tab



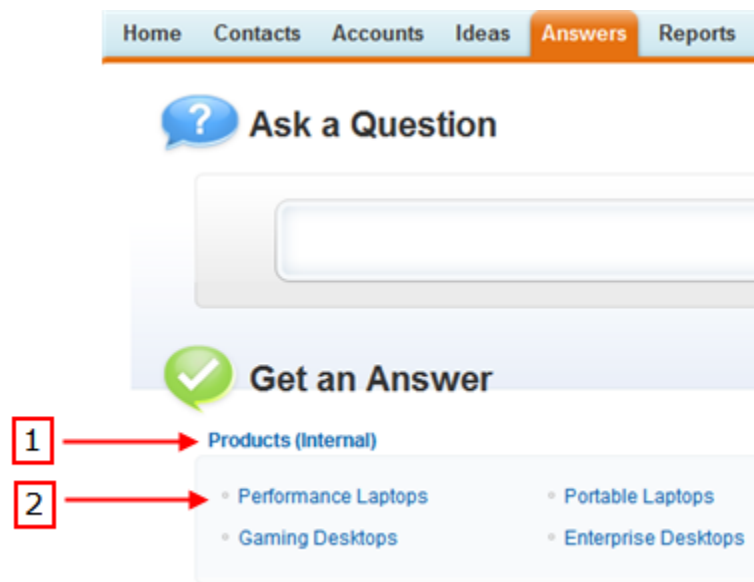
When you add categories to a category group, you build a hierarchy that can contain up to five levels of depth and up to 100 categories total. Each category can have one parent, many siblings, and many children. A robust and well-organized category hierarchy helps users find the articles that are relevant to them quickly and easily.

By default, all Salesforce Knowledge users have access to all categories; however, you can [restrict category visibility by role, permission set, or profile](#).

Data Categories in Answers Zones

An answers zone supports one category group, and members can assign one category to each question. Even though you can create up to five hierarchy levels of categories in a category group, only the first level of categories is supported in your answers community. Child categories below the first level are not displayed in the community, and community members can't assign these child categories to questions. The categories within the group display on the Answers tab below the zone name.

Answers tab displaying categories



By default, all zone members have access to all categories; however, you can [specify category visibility](#).

Data Category Implementation Tips

Consider the following information when planning and implementing data categories for your organization:

- You can create up to three category groups with a maximum of five hierarchy levels in each group. Each category group can contain a total of 100 categories.
- If you want to use data categories with Answers, after creating your category group you must assign it from Setup by entering *Data Category Assignments* in the Quick Find box, then selecting **Data Category Assignments** under Answers. You can only assign one category group to an answers community. Salesforce Knowledge supports multiple category groups.
- Even though you can create up to five hierarchy levels of categories in a category group, only the first level of categories is supported in your answers community. Child categories below the first level are not displayed in the community, and community members can't assign these child categories to questions. Salesforce Knowledge supports a hierarchy of data categories.
- Category groups are hidden from users until they are activated. Do not activate a category group until you have finished defining its categories and their access settings, including their visibility.

- When assigning categories to articles, you can choose up to eight categories in a category group.
- If an article has no categories, it displays only when you choose the `No Filter` option in the category drop-down menu.
- When searching for articles or article translations, selecting a category automatically includes the parent and children of that category and any grandparents, up to and including the top level. Sibling categories are not included. For example, if a category hierarchy has the levels All Products, Switches, Optical Networks, and Metro Core, selecting “Optical Networks” from the category drop-down menu returns articles assigned to any of the four categories. However, if the Switches category has a sibling category called Routers, selecting “Optical Networks” does not return articles classified within Routers. Category visibility settings may limit the specific articles you can find.
- Once [visibility settings](#) have been chosen for the categories:
 - Users who are not assigned visibility can only see uncategorized articles and questions unless [default category visibility](#) has been set up.
 - For role-based visibility, Customer Portal users and partner portal users inherit the category group visibility settings assigned to their account managers by default. You can [change the category group visibility settings](#) for each portal role.
 - If you only have access to one category in a category group, the category drop-down menu for that category group does not display on the Articles tab.
- Deleting a category:
 - Permanently removes it. It cannot be restored. It never appears in the Recycle Bin.
 - Permanently deletes its child categories.
 - As applicable, removes the category and its children from the Answers, Article Management, and Knowledge tabs in all channels, and your company's public knowledge base.
 - Removes associations between the category and articles or questions. You can reassign articles and questions to another category.
 - Removes its mapping to visibility. Readers lose their visibility to articles and answers associated with the deleted category.
- Deleting a category group:
 - Moves it to the Deleted Category Groups section, which is a recycle bin. You can view items in this section but not edit them. It holds category groups for 15 days before they are permanently erased and cannot be recovered. During the 15-day holding period, you can either restore a category group, or permanently erase it immediately.
 - Deletes all categories within that group.
 - Removes all associations between the group's categories and articles or questions.
 - Removes all associations between the group's categories and visibility.
 - As applicable, removes the category drop-down menu from the Articles tab in all channels, the Article Management tab, and your company's public knowledge base.
- You can translate the labels of categories and category groups using the Translation Workbench.

Best Practices for Data Categories

Consider the following tips when using data categories:

- To quickly manage data categories, use [keyboard shortcuts](#).
- After creating or updating categories, set up [category group visibility rules](#).
- Save your changes frequently. The more actions you perform before clicking Save, the longer it takes to save.

Data Category Shortcuts

Use keyboard shortcuts to work quickly with data categories.

Task	Action	Keyboard Shortcut
Adding a category	Add a sibling to the selected category	ENTER
	Add a child to the selected category	ENTER+TAB
	Close the Add Category field	ESC
	Save changes in the Add Category field	ENTER
Modifying a category	Open the Edit Category field for the selected category	SPACEBAR
	Close the Edit Category field	ESC
	Save changes in the Edit Category field	ENTER
Demoting or promoting a category	Demote a category down one level, as a child of the sibling currently above it	TAB
	Promote a category up one level, as a sibling to its current parent	SHIFT+TAB
Deleting a category	Delete the selected category and its children	DELETE
Navigating in the category hierarchy	Move the focus up in the category hierarchy	UP ARROW
	Move the focus down in the category hierarchy	DOWN ARROW
	Collapse children in a parent category	LEFT ARROW
	Expand children in a parent category	RIGHT ARROW
Canceling or repeating an action	Undo the last action	CTRL+Z
	Redo the last action	CTRL+Y
Saving the changes	Save the last changes in the category hierarchy	CTRL+S

EDITIONS

Available in: Salesforce Classic

Data categories and answers are available in **Enterprise, Performance, Unlimited, and Developer** Editions.

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional, Enterprise, and Unlimited** Editions.

Create and Modify Category Groups

Category groups are used by Salesforce Knowledge (articles), answers (questions), or ideas. In all cases, category groups are containers for individual data categories. For example, a Contracts category group might contain Fixed Price, Cost Reimbursement, and Indefinite Delivery categories.

1. From Setup, enter *Data Category* in the *Quick Find* box, then select **Data Category Setup**.
2. To create a category group, click **New** in the Category Groups section.
By default, you can create a maximum of five category groups and three active category groups. To edit an existing category group, hover your cursor over the category group name and then click the **Edit Category Group** icon ().
3. Specify the *Group Name* up to a maximum of 80 characters. This name appears as the title of the category drop-down menu on the Article Management and Articles tabs, and, if applicable, in the public knowledge base. The *Group Name* does not appear on the Answers tab.
4. Optionally, modify the *Group Unique Name* (the unique name used to identify the category group in the SOAP API).
5. Optionally, enter a description of the category group.
6. Click **Save**.
You receive an email after the save process completes.

Activating Category Groups

When you add a category group, it's deactivated by default and only displays on the administrative setup pages for Data Categories, Roles, Permission Sets, and Profiles. Keep your category groups deactivated to set up your category hierarchy and assign visibility. Until you manually activate a category group, it does not display in Salesforce Knowledge or your answers community. In addition to activating the category group, for answers communities you must assign the category group to a zone before the categories are visible on the Answers tab.

To activate a category group so it is available to users, move the mouse pointer over the name of the category group and click the *Activate Category Group* icon ().

You can now [add categories](#) to your category group. When you create a category group, Salesforce automatically creates a top-level category in the group named **A11**. Optionally, double-click **A11** to rename it.

EDITIONS

Available in: Salesforce Classic

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USER PERMISSIONS

To view the Data Categories page:

- "View Data Categories"

To create, edit, or delete data categories:

- "Manage Data Categories"

Delete and Undelete Category Groups

Deleting a category group deletes all of its categories and removes all associations between the categories and articles or questions. Read this entire topic carefully to understand the consequences of deleting category groups.

1. From Setup, enter *Data Category* in the Quick Find box, then select **Data Category Setup**.

2. Hover your cursor over the category group name.

3. Click the Delete Category Group icon ().

4. Select the checkbox in the confirmation dialog, then click **OK**.

The data category group is deleted. Continue to step 5 if you wish to restore the data category group.

5. In the Removed Category Groups section, hover your cursor over the category group name.

6. Click the Undelete Category Group icon ().

The category group moves to the Category Groups section as an inactive category group, and associations with articles, questions, and visibility are restored.



Example: Deleting a category group:

- Moves it to the Deleted Category Groups section, which is a recycle bin. You can view items in this section but not edit them. It holds category groups for 15 days before they are permanently erased and cannot be recovered. During the 15-day holding period, you can either restore a category group, or permanently erase it immediately.
- Deletes all categories within that group.
- Removes all associations between the group's categories and articles or questions.
- Removes all associations between the group's categories and visibility.
- As applicable, removes the category drop-down menu from the Articles tab in all channels, the Article Management tab, and your company's public knowledge base.

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USER PERMISSIONS

To view the Data Categories page:

- "View Data Categories"

To create, edit, or delete data categories:

- "Manage Data Categories"

Add Data Categories to Category Groups

Once you have category groups, you can add data categories to help agents classify and find articles, questions, or ideas.

Administrators can create data categories for Salesforce Knowledge articles, questions in a zone, or ideas to classify and find articles, questions, or ideas. You can also use data categories to control access to articles, questions, and ideas.

By default, you can create up to 100 categories in a data category group and have up to 5 levels in a data category group hierarchy. To request more categories or hierarchy levels, contact Salesforce.



Note: On the Answers tab, only first-level data categories display. Therefore, when creating data categories for a portal or community, ensure that the categories you want visible have a sibling relationship and not a parent-child relationship.

1. From Setup, enter *Data Category* in the *Quick Find* box, then select **Data Category Setup**.
2. Click the category group name.
3. Click a category that is directly above where you want to add a category (a parent), or at the same level (a sibling).
4. Click **Actions**, then select an action: **Add Child Category** or **Add Sibling Category**.
5. Enter a category name up to a maximum of 40 characters.

If possible, Salesforce automatically reuses the name you entered as the *Category Unique Name*, a system field which the SOAP API requires.

6. Click **Add**. Alternatively, press Enter.
7. Click Save.

Save your changes frequently. The more actions you perform before clicking Save, the longer it takes to save.



Tip: By default, all Salesforce Knowledge users and zone members can see all categories within an active category group. You can [restrict category visibility](#) after you have set up your data categories to ensure that users only access articles and questions that you want them to see.

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USER PERMISSIONS

To view the Data Categories page:

- “View Data Categories”

To create, edit, or delete data categories:

- “Manage Data Categories”

Modify and Arrange Data Categories

Modifying and arranging categories can result in long processing times, changes to the visibility and categorization of articles, and other significant consequences. Read this entire topic carefully before modifying categories.

 **Important:** Modify the category hierarchy when user activity is low. Because the save process involves potentially large and complex recalculations, it might take a long time to complete. During processing, agents might experience performance issues when searching for articles or questions or using category drop-down lists.

1. From Setup, enter *Data Category* in the **Quick Find** box, then select **Data Category Setup**.
2. Click a category group name.
3. Optionally, click **Expand All** to display the full category hierarchy, or **Collapse All** to display only the top-level categories.
4. To edit a category's name or its unique API name, double-click it.
5. Use drag-and-drop editing to reposition a category in the hierarchy. As you drag, a red icon indicates an invalid destination, while a green icon indicates a valid destination.
 - Drag a category on top of another category to reposition it as a child of the destination category. For example, drag USA on top of North America to make USA one level below North America. After dragging, the category displays below the other child categories at that level.
 - Drag a category to a line that borders another category to reposition it as a sibling of that category. For example, to position USA between Canada and Mexico, drag it to the line between Canada and Mexico.
6. To reorder a category's children in alphabetical order, hover your cursor over its name, then choose *Order Child Categories Alphabetically* from the Actions drop-down list. This reorder only affects the first-level children, not grandchildren or deeper levels.
7. As you modify the category hierarchy, click **Undo** to cancel your last actions. Similarly, click **Redo** to step forward through your flow of performed actions.
8. Click **Save**. You receive an email when the save process completes.

The save process recalculates the following:

- The contents of the category drop-down menu.
- The articles and questions visible to each user.
- The articles and questions associated with categories.

 **Note:** Save your changes frequently. The more actions you perform before clicking Save, the longer it takes to save.

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USER PERMISSIONS

To view the Data Categories page:

- "View Data Categories"

To create, edit, or delete data categories:

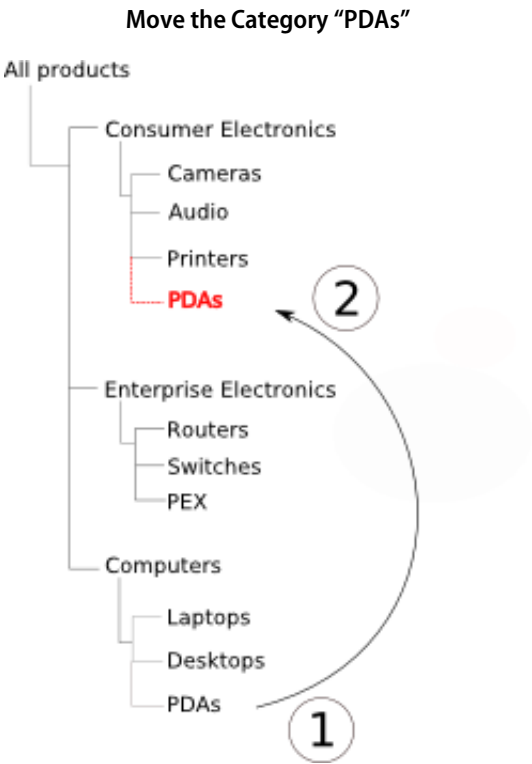
- "Manage Data Categories"

Example:

How Changing the Hierarchy Affects Article Visibility

Changing the category hierarchy potentially changes which articles readers can see. In the example shown in the following graphic, the category PDAs moves from the original parent category Computers to the new parent category Consumer Electronics.

Note: When a category moves to a new parent category, users that have no visibility on the new parent category lose their visibility to the repositioned category.



To understand how this change affects which readers can see articles classified with the PDAs category, see the following table.

When my role, permission set, or profile is mapped to:	Could I see PDA articles in their old location under Computers?	Can I see PDA articles in their new location under Consumer Electronics?	Why?
All products	Yes	Yes	When your role, permission set, or profile is mapped to the top-level "All products" category, you can see everything in the category hierarchy.
Computers	Yes	No	You don't have access to the branch of the category hierarchy where PDAs is now located.

When my role, permission set, or profile is mapped to:	Could I see PDA articles in their old location under Computers?	Can I see PDA articles in their new location under Consumer Electronics?	Why?
Consumer Electronics	No	Yes	PDA's has moved to the branch of the category hierarchy where you have been granted access.

How Changing the Hierarchy Affects Article Classification

Classifying an article with a parent category implicitly grants access to that category's children. You cannot explicitly apply both a parent category and one of its children to an article. From the article edit page, selecting a parent category grays out its child categories—you cannot select them in addition to the parent category. Salesforce respects this fact when you move a category to a new parent. It prevents explicitly adding a child category to an article when the new parent category is already present.

In the example depicted above, the category PDAs moves from the original parent category Computers to the new parent category Consumer Electronics. As a result, articles' classifications might or might not change:

- Articles formerly classified with both Consumer Electronics and PDAs lose PDAs, because having Consumer Electronics now implies having PDAs.
- Articles formerly classified with only Consumer Electronics but not PDAs do not change. Access to PDAs is now implied.
- Articles formerly classified with only PDAs, but not Consumer Electronics, retain PDAs.

Delete a Data Category

Deleting data categories can result in long processing times, changes to the visibility and categorization of articles and questions, and other significant consequences. Read this entire topic carefully before deleting categories.

 **Important:** Modify the category hierarchy when user activity is low. Because the save process involves potentially large and complex recalculations, it might take a long time to complete. During processing, agents might experience performance issues when searching for articles or questions or using category drop-down lists.

1. From Setup, enter *Data Category* in the **Quick Find** box, then select **Data Category Setup**.
2. Click a category group name.
3. Click a category name. If necessary, click **Expand All** to display all categories in the category group.
4. Press DELETE, or choose **Delete Category** from the Actions drop-down list.
5. Click **OK** in the confirmation dialog box.
6. Choose how you want to reclassify articles associated with the deleted category or the deleted category's children. In all cases, the articles retain their categories from other category groups.
 - Assign the deleted category's parent category.
 - Assign a different category. You can select any other category in this category group.

 **Note:** The category you select cannot be deleted itself before you save your work.

- Do not assign the articles a new category in this category group.

Deleting a category:

- Permanently removes it. It cannot be restored. It never appears in the Recycle Bin.
- Permanently deletes its child categories.
- As applicable, removes the category and its children from the Answers, Article Management, and Knowledge tabs in all channels, and your company's public knowledge base.
- Removes associations between the category and articles or questions. You can reassign articles and questions to another category.
- Removes its mapping to visibility. Readers lose their visibility to articles and answers associated with the deleted category.

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USER PERMISSIONS

To view the Data Categories page:

- "View Data Categories"

To create, edit, or delete data categories:

- "Manage Data Categories"

Data Category Visibility

Data category visibility can be set with roles, permission sets, or profiles. Data category visibility determines the individual data categories, categorized articles, and categorized questions that you can see.

There are three types of visibility:

- All Categories: All categories are visible
- None: No categories are visible
- Custom: Selected categories are visible

With custom data category visibility, you can only see the data categories permitted by their role, permission sets, or profile.

Visibility Setting Enforcement

To ensure a wide range of relevant information, category group visibility is broadly interpreted. Setting a category as visible makes that category and its entire directly related family line—ancestors, immediate parent, primary children, other descendants—visible to users. For example, consider a Geography category group with continents such as Asia and Europe at the top level, various countries at the second level, and cities at the third level. If France is the only visible category selected, then you can see articles classified with Europe, France, and all French cities. In other words, you can see categories that have a direct vertical relationship to France but you cannot see articles classified at or below Asia and the other continents.



Note: Only the first-level categories in the category group are visible on the Answers tab. In the Geography example, only the continent categories appear on the Answers tab; therefore, if France is the category selected as visible in category group visibility settings, zone members can see questions classified with Europe.

Category group visibility settings are enforced on the Answers tab, the Article Management tab, the Articles tab in all channels (internal app, partner portal, Salesforce.com Community, and Customer Portal), and the public knowledge base. In the following areas, users only see the categories that their visibility settings allow:

- On the Article Management tab, when creating or editing articles
- On the Article Management tab and the Articles tab, the category drop-down menu for finding articles
- On the Answers tab, the categories listed below the zone name

Initial Visibility Settings

If role, permission set, or profile data category visibility has not been set up, all users can see all data categories. However, if data category visibility is set up, users who are not assigned data category visibility by a role, permission set, or profile, only see uncategorized articles and questions unless you make the associated categories visible by default. Role, permission set, and profile visibility settings restrict default visibility settings. For example, if a data category is visible by default, it is not seen by a user whose role restricts access to that data category.



Note: If data category visibility is defined with roles, permission sets, and profiles, Salesforce uses a logical OR between the definitions to create a visibility rule for each user.

Role-Based Visibility Setting Inheritance

Child roles inherit their parent role's settings and are kept in sync with changes to the parent role. You can customize and reduce the child role's visibility, but you cannot increase it to be greater than that of the parent role. By default, Customer Portal users and partner portal users inherit the category group visibility settings assigned to their account managers. You can change the category

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group visibility settings for each portal role. Because high-volume portal users don't have roles, you must designate visibility settings by permission set or profile before these users can view categorized articles and questions.

Categorized Article Visibility

User's can see an article if they can see at least one category per category group on the article. For example, consider an article that is classified with *California* and *Ohio* in the Geography category group and *Desktop* in the Products category group:

- If you have visibility on Ohio and Desktop (but not California), you can see the article.
- If you don't have visibility on either California or Ohio but do have visibility on Desktop, you do not see the article.
- If you have visibility on California but not Desktop, you do not see the article.

Revoked Visibility

Data category visibility can be revoked (set to **None**) for a particular category group. Users in the target role, permission set, or profile can only see articles and questions that aren't classified with a category in that category group. For example, if a user's role has revoked visibility in the Geography category group but visibility to the Products category group, he or she can only see articles that have no categories in Geography and are classified with a category in Products. Because an answers zone can only be assigned to one category group, if the Geography category group was assigned to the zone and a member's role visibility was revoked for that group, the member could only see uncategorized questions.

For a detailed example, see [Category Group Article Visibility Settings Examples](#) on page 532

How Category Visibility Differs from Other Salesforce Models

These settings are unique to articles and questions and differ from other Salesforce models

These settings are unique to articles and questions and differ from other Salesforce models:

Exclusive to articles and questions

[Category group visibility settings](#) determine who can access articles and questions. Although they are standard objects, articles and questions do not have organization-wide defaults, sharing rules, or manual record sharing.

Access

Category group visibility settings are based on the user's role, permission set, or profile. Child roles cannot see more categories than their parent role. To change a user's visibility to categories and therefore categorized articles and questions, you must [change the visibility settings for the user's role, permission set, or profile](#), or, if custom data category visibility is not assigned, [make certain categories visible to all users](#).

Broad interpretation of visibility settings

To ensure a wide range of relevant information, category group visibility is broadly interpreted. Setting a category as visible makes that category and its entire directly related family line—ancestors, immediate parent, primary children, other descendants—visible to users. For example, consider a Geography category group with continents such as Asia and Europe at the top level, various countries at the second level, and cities at the third level. If France is the only visible category selected, then you can see articles classified with Europe, France, and all French cities. In other words, you can see categories that have a direct vertical relationship to France but you cannot see articles classified at or below Asia and the other continents.

 **Note:** Only the first-level categories in the category group are visible on the Answers tab. In the Geography example, only the continent categories appear on the Answers tab; therefore, if France is the category selected as visible in category group visibility settings, zone members can see questions classified with Europe.

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Category Group Visibility on Roles

USER PERMISSIONS

To view role details:	"View Setup and Configuration"
To edit and delete roles:	"Manage Roles"
To edit and delete permission sets and profiles:	"Manage Profiles and Permission Sets"
To view users:	"View Setup and Configuration"
To edit users:	"Manage Internal Users"
To view categories:	"View Data Categories"
To manage data categories:	"Manage Data Categories" AND "View Data Categories"

The Category Group Visibility Settings related list summarizes which categories users in the role can see, according to category group.

To view a role's category visibility setting, from Setup, enter *Roles* in the **Quick Find** box, then select **Roles**, and select a role. To view the category visibility settings for a Customer Portal or partner portal role, from Setup, enter *Users* in the **Quick Find** box, then select **Users** and click the name of the role.

The following table explains the possible values in the Visibility column of the related list:

Visibility	Description
All Categories	Users can see all categories in the category group. This option is only available for the topmost role in the role hierarchy. When you create a category group, its visibility is defaulted to All Categories .
None	Users cannot see any categories in the category group.
Custom	Users can view a selection of categories in the category group.

In the Category Group Visibility Settings, you can:

- To view a category group's setting details, click its name.
- To [modify a category group's visibility settings](#), click **Edit** next to it.

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Modify Default Data Category Visibility

You can edit the default data category visibility.

1. From Setup, enter *Default Data Category Visibility* in the Quick Find box, then select **Default Data Category Visibility**.
All active and inactive category groups are listed.
2. Pick a category group and click **Edit**.
3. To make all the categories in the category group visible by default, select **All Categories**. To make none of the categories visible by default, select **None**. To make some of the categories visible by default, select **Custom**.
4. If you chose Custom, move categories from the Available Categories area to the Selected Categories area as needed. Selecting a category implicitly includes its child and parent categories as well. Move categories from the Selected Categories area back to the Available Categories area to remove default visibility.

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USER PERMISSIONS

To view categories:

- "View Data Categories"

To manage data categories:

- "Manage Data Categories"

AND

"View Data Categories"

To assign default category groups:

- "Manage Data Categories"

Edit Category Group Visibility

You can edit your data category visibility.

- Go to the data category visibility settings page in Setup.
 - For roles: enter *Roles* in the *Quick Find* box, then select **Roles**.
 - For a role on the Customer Portal or partner portal: enter *Users* in the *Quick Find* box, then select **Users**.
 - For permission sets: enter *Permission Sets* in the *Quick Find* box, then select **Permission Sets**.
 - For profiles: enter *Profiles* in the *Quick Find* box, then select **Profiles**.
- Open a data category group for edit.
 - For roles, in the Category Group Visibility Settings related list, click **Edit** next to the category group you want to modify.
 - For permission sets and profiles:
 - Click a permission set or profile name.
 - Click **Data Category Visibility**.
 - Click **Edit** next to the data category group you want to assign.
- Select a visibility setting.

Visibility Setting	Description
All Categories	Users can see all categories in the category group. This option is only available for the topmost role in the role hierarchy. When you create a category group, its visibility is defaulted to <i>All Categories</i> .
None	Users cannot see any categories in the category group.
Custom	Users see your custom selection of categories. For roles, you can choose from the categories that are visible to the parent role. If the parent role's visibility changes to be less than its child's visibility, the child role's category visibility is reset to its parent's category visibility. To select categories, double-click the category in the <i>Available Categories</i> box. Alternatively, select a category and then click Add. Selecting a category implicitly includes its child and parent categories as well. Categories that are grayed out are not available for selection because their parent has already been selected.  Note: When you customize a role, permission set, or profile set to All Categories, first remove All from the <i>Selected Categories</i> box before you select specific categories.

- Click **Save**.

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USER PERMISSIONS

To view categories:

- "View Data Categories"

To manage data categories:

- "Manage Data Categories"

AND

"View Data Categories"

To assign default category groups:

- "Manage Data Categories"

Data Category Visibility Best Practices

- When you create a category group, its visibility is defaulted to **All Categories**.
- When you grant visibility to a category, you also grant visibility to its child and parent categories. If you want to give access to all categories in a branch of the category hierarchy, select the top-level category **All Categories**.
- Users who are not assigned to a category's visibility by role, permission set, or profile can only see uncategorized articles and questions unless:
 - The user has the "View all Data" permission.
 - A category group has been made visible to all users on the Default Data Category Visibility page in Setup.
- For role-based visibility, Customer Portal users and partner portal users inherit the role assigned to their account managers by default. You can change the category group visibility settings for each portal role.
- Keep your category groups deactivated to set up your category hierarchy and assign visibility. Until you manually activate a category group, it does not display in Salesforce Knowledge or your answers community
- For role-based visibility, always set up data category visibility in a top-down approach from the top of the role hierarchy down to the bottom. Give the highest roles the most visibility and give subordinate roles reduced visibility.

Category Group Article Visibility Settings Examples

Review examples of category group settings for article visibility permissions.

There are three types of visibility:

- All Categories: All categories are visible
- None: No categories are visible
- Custom: Selected categories are visible

With custom data category visibility, you can only see the data categories permitted by their role, permission sets, or profile.

These examples are based on two sample category groups, Products and Geography:

 **Note:** Although category group visibility settings are available with answers communities (questions) and Salesforce Knowledge (articles), the examples below apply to articles only. Answers communities support one category group and one data category per question.

Products Category Group

- All Products
 - Consumer Electronics
 - Cameras
 - Audio
 - Printers
 - Enterprise Electronics
 - Routers
 - Switches
 - PEX
 - Computers
 - Laptops

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- Desktops
- PDAs

Geography Category Group

- All Countries
 - Americas
 - USA
 - Canada
 - Brazil
 - Asia
 - China
 - Japan
 - India
 - Europe
 - France
 - United Kingdom
 - Poland

Example 1: A Role Hierarchy

In this example, the Acme Electronics organization manufactures hardware and provides customer support for both consumers and enterprises. The Engineering department is organized by products. The Support department is organized geographically. Europe and the Americas are managed by corporate teams, but Asia is outsourced. Within the corporate and outsourced teams, there are subteams dedicated either to consumer or enterprise support.

The table below shows the categories visible to each role in the Acme Electronics organization, and states whether the visibility settings are inherited from the parent role or if they are [custom visibility settings](#).

Acme Electronics Role Hierarchy	Visible Geographic Categories	Visible Product Categories
CEO	All Countries	All Products
VP of Engineering	All Countries <i>Inherit from CEO</i>	All Products <i>Inherit from CEO</i>
Consumer Engineering Team	All Countries <i>Inherit from VP of Engineering</i>	Consumer Electronics <i>Custom</i>
Enterprise Engineering Team	All Countries <i>Inherit from VP of Engineering</i>	Enterprise Electronics <i>Custom</i>
Computers Engineering Team	All Countries <i>Inherit from VP of Engineering</i>	Computers <i>Custom</i>

Acme Electronics Role Hierarchy	Visible Geographic Categories	Visible Product Categories
VP of Support	All Countries <i>Inherit from CEO</i>	All Products <i>Inherit from CEO</i>
VP of Corporate Support	Europe, America <i>Custom</i>	All Products <i>Inherit from VP of Support</i>
Director of Corporate Consumer Support	Europe, America <i>Inherit from VP of Corporate Support</i>	Consumer Electronics, Computers <i>Custom</i>
Director of Corporate Enterprise Support	Europe, America <i>Inherit from VP of Corporate Support</i>	Enterprise Electronics, Computers <i>Custom</i>
Outsourced Support	Asia <i>Custom</i>	All Products <i>Inherit from VP of Support</i>
Consumer Support Team	Asia <i>Inherit from Outsourced Support</i>	Consumer Electronics, Computers <i>Custom</i>
Enterprise Support Team	Asia <i>Inherit from Outsourced Support</i>	Enterprise Electronics, Computers <i>Custom</i>

Example 2: Article Visibility

The table below is an in-depth example of how [category visibility settings](#) restrict what users see. This example has three sample users whose category settings are noted in parentheses.

Table 2: Example: How Category Visibility Settings Restrict What Users See

Categories	When User 1's visibility is All countries/Computers, the category is:	When User 2's visibility is America/All products, the category is:	When User 3's visibility is France/None, the category is:
All countries/Laptop	VISIBLE	VISIBLE	NOT VISIBLE
Canada/Computers	VISIBLE	VISIBLE	NOT VISIBLE
USA/All products	VISIBLE	VISIBLE	NOT VISIBLE
Europe/Switches	NOT VISIBLE	NOT VISIBLE	NOT VISIBLE
Europe/No Categories	VISIBLE	NOT VISIBLE	VISIBLE

User 1: The user must be granted visibility in each category that classifies the article, or each category that classifies the article must be visible by default. [In this example, User 1](#) can see Europe, because Europe is the child of All Countries, but he cannot see Switches, because Switches does not belong to Computers. That's why [User 1](#) cannot see articles classified with Europe/Switches.

User 2: When a category is made visible to a user through custom settings or is made visible by default, its child and parent categories are implicitly included; therefore, [User 2](#) can see articles categorized with All Countries because it is the parent category of America. He can also see Articles classified with USA because it is the child of America.

User 3: If a user has no access to the whole category group, he can only see articles that are not categorized in that group. [User 3](#) cannot see the articles categorized with All countries/Laptop because he has no visibility in the category group that includes Laptop, but he can see articles categorized with Europe/No categories.

Case Teams and Queues

Create teams of people who work together to resolve cases faster, and create queues to share workloads among teams.

IN THIS SECTION:

[Case Teams](#)

Case teams help groups of people work together to solve a case, such as a support agent, support manager, and a product manager.

[Queues](#)

Prioritize, distribute, and assign records to teams who share workloads. Access queues from list views. Queue members can jump in to take ownership of any record in a queue. They're available for cases, leads, orders, custom objects, service contracts, and knowledge article versions.

[Create Queues](#)

Prioritize, distribute, and assign records to teams who share workloads. There's no limit to the number of queues you can create, and you can choose when queue members receive email notifications.

EDITIONS

Available in: Salesforce Classic

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

Case Teams

Case teams help groups of people work together to solve a case, such as a support agent, support manager, and a product manager.

If your admin has set up case teams, you can add people to the Case Team related list on cases. When adding a team member, choose one of the predefined roles that the person plays on the case. Roles determine the level of access to a case, such as read-only or read and write access.

You can add contacts to case teams, but they can only access cases when they're enabled as customer portal users assigned to case page layouts. Customer portal users can't update case teams or view case team roles. Case teams aren't available for the partner portal.



Note: Admins can predefine case teams so that you can quickly add people who you frequently work with. Admins can create assignment rules that add predefined teams to cases that match specific criteria. Admins can also create email alerts that notify team members when an action happens on a case.



Tip: To filter case lists when you're a team member, choose **My Case Teams**. To report on case teams that you belong to, run a case report, then choose **My team's cases** from the View filter.

EDITIONS

Available in: Salesforce Classic

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

IN THIS SECTION:

[Set Up Case Teams](#)

Create case teams to help groups of people work together to solve cases. Before you create case teams, define team roles.

[Create Case Team Roles](#)

Before you set up case teams or predefine case teams, create roles to determine team members level of access to cases.

SEE ALSO:

[Queues](#)

Set Up Case Teams

Create case teams to help groups of people work together to solve cases. Before you create case teams, define team roles.

To let people create and work on case teams, add the Case Team related list to case page layouts. Optionally, create email alerts that notify team members when actions happen on a case, such as when a comment is added. Also, if you've predefined case teams, create assignment rules that add teams to cases that match specific criteria, such as when cases originate from emails.



Note: Case teams count toward your org's overall storage limit. Each team member on a case counts as 2 KB of storage space.

SEE ALSO:

[Case Teams](#)[Set Up Assignment Rules](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up case teams:

- "Customize Application"
- AND
- "Manage Users"

To add team members:

- "Edit" on cases

Create Case Team Roles

Before you set up case teams or predefine case teams, create roles to determine team members level of access to cases.

You can create an unlimited number of case team roles, but we recommend no more than 20 so as not to overwhelm team members.

1. From Setup, enter *Case Team Roles* in the *Quick Find* box, then select **Case Team Roles**.
2. Click **New**, and enter the role's name.
3. From Case Access, choose the role's level of access to cases.

Read/Write

Members can view and edit cases and add related records, notes, and attachments to them.

Read Only

Members can view cases and add related records to them.

Private

Members can't access cases.

4. If you want members in the role visible to customer portal users viewing cases, choose **Visible in Customer Portal**. Even if *Visible in Customer Portal* isn't chosen, customer portal users added to case teams can view themselves on Case Team related lists.
5. Click **Save**.



Note: You can't delete roles, but you can click **Replace** next to a role you want to replace across all cases. If your org has one role, you can't replace it.



Tip: Roles don't change a case owner's access to cases, which is Read/Write by default.

IN THIS SECTION:

[Predefine Case Teams](#)

After you define case team roles, you can predefine case teams so that support agents can quickly add people who they frequently work with to cases.

[Set Up Email Alerts for Case Teams](#)

Create email alerts for case teams so that each time a case is created or updated, team members are notified.

SEE ALSO:

[Case Teams](#)

[Set Up Case Teams](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up case teams:

- "Customize Application"
- AND
- "Manage Users"

To add team members:

- "Edit" on cases

Predefine Case Teams

After you define case team roles, you can predefine case teams so that support agents can quickly add people who they frequently work with to cases.

1. From Setup, enter *Predefined Case Teams* in the **Quick Find** box, then select **Predefined Case Teams**.
2. Click **New**, and enter the team's name.
3. Add team members.
 - a. Choose a team member type: User, Contact, or Customer Portal User. Contacts can access cases only when they're enabled as customer portal users and assigned to case page layouts.
 - b. Click **Lookup** (🔍) and select a member.
 - c. Choose a role for the member.
4. Click **Save**.

 **Note:** To delete a predefined case team, remove it from assignment rules first. If you delete a predefined case team, it's removed from all cases it's on, and you can't retrieve it from the Recycle Bin. When you remove members from a predefined case team, they're removed from all cases in which they were members of the team.

SEE ALSO:

[Case Teams](#)

[Set Up Case Teams](#)

Set Up Email Alerts for Case Teams

Create email alerts for case teams so that each time a case is created or updated, team members are notified.

1. Create email templates for notifications.
2. Set up workflow rules that specify which actions on a case send email alerts to team members.
 - a. From Setup, enter *Workflow Rules* in the **Quick Find** box, then select **Workflow Rules**.
 - b. Click **New Rule**.
 - c. From Select object, choose **Case** and click **Next**.
 - d. Enter a rule name.
 - e. Choose the evaluation criteria. To ensure that every case is evaluated for an email alert, we recommend that you set the evaluation criteria to **Evaluate the rule when a record is: created, and every time it's edited**.
 - f. Enter your rule criteria. We recommend that you choose **criteria are met** and select the criteria that a case must match to send email alerts. For example, if you want team members to receive an email alert each time a case's status is set to New, set the criteria to *Case : Status equals New*.
 - g. Click **Save & Next**.
3. Add email alerts to your workflow rule's criteria.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up case teams:

- "Customize Application"
- AND
- "Manage Users"

To add team members:

- "Edit" on cases

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up case teams:

- "Customize Application"
- AND
- "Manage Users"

To create or change workflow rules:

- "Customize Application"

To create or change email alerts:

- "Customize Application"

- a. Click **Add Workflow Action** and choose **New Email Alert**.
 - b. Enter a description and unique name for the email alert. Because you chose Case as the object for the workflow rule, object appears as read only.
 - c. Choose an email template.
 - d. Select who receives email alerts from the workflow rule. To select all members of a case team, choose **Case Team** from Recipient Type, and add the team as selected recipients. You can enter up to five more email addresses.
 - e. Click **Save**.
4. Activate the workflow rule and its email alert.
- a. From Setup, enter *Workflow Rules* in the Quick Find box, then select **Workflow Rules**
 - b. Click **Activate** next to the name of the rule.
-  **Note:** To prevent the rule from sending email alerts, click **Deactivate** at any time. If you deactivate a rule with pending actions, the actions finish as long as the case that triggered the rule isn't updated.

SEE ALSO:

[Case Teams](#)
[Set Up Case Teams](#)

Queues

Prioritize, distribute, and assign records to teams who share workloads. Access queues from list views. Queue members can jump in to take ownership of any record in a queue. They're available for cases, leads, orders, custom objects, service contracts, and knowledge article versions.

You can manually add a record to a queue by changing the record's owner to the queue. Or, an assignment rule can add cases or leads to a queue based on specific record criteria. Records remain in a queue until they're assigned an owner. Any queue members or users higher in a role hierarchy can take ownership of records in a queue.

**Example:**

- Create a lead queue with members who are salespeople assigned to a specific sales territory.
- Create a case queue with members who are support agents assigned to different service levels.
- Create a knowledge article version queue members who are users that can translate new versions of articles into a specific language.

SEE ALSO:

[Create Queues](#)
[Case Teams](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Service contract queues available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud

Lead queues and case queues are not available in **Database.com**

Create Queues

Prioritize, distribute, and assign records to teams who share workloads. There's no limit to the number of queues you can create, and you can choose when queue members receive email notifications.

1. From Setup, enter *Queues* in the *Quick Find* box, then select **Queues**.
2. Click **New**.
3. Enter a label and queue name. The label is the name of the list view that users work from.
4. Choose whom to notify when new records are added to the queue.
5. If your org uses divisions, select the queue's default division. Cases inherit the division of the contact they're related to, but when a case doesn't have a contact, it's assigned to the default global division.
6. Add which objects to include in the queue.
7. Add queue members. Members can be individuals, roles, public groups, territories, connections, or partner users.

Depending on your sharing settings, only queue members and users above them in the role hierarchy can take ownership of records in the queue.
8. Save the queue.
9. If you want, set up assignment rules for your lead or case queues so that records that meet certain criteria are automatically added to a queue.

SEE ALSO:

[Queues](#)

[Case Teams](#)

[Set Up Assignment Rules](#)

[Knowledge Article: How to stop email notification to Queue members?](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Service contract queues available in: **Professional, Enterprise, Performance, Unlimited**, and **Developer** Editions with the Service Cloud

Lead queues and case queues are not available in **Database.com**

USER PERMISSIONS

To create or change queues:

- "Customize Application"
- AND
- "Manage Public List Views"

To change queues created by other users:

- "Customize Application"
- AND
- "Manage Public List Views" and "Manage Users"

Adding Social Customer Service

Welcome to Social Customer Service

Social Customer Service lets you create cases or leads out of social media posts and send personalized responses on the same social media channels.

 **Note:** The Social Customer Service setup pages, the moderation and authorization pages, and the Reply action in the case feed are only available in Salesforce Classic.

 **Important:** If you have two or fewer social accounts to track, you can use the free starter pack. Otherwise, you must have sufficient Social Studio accounts.

Watch the following video for a brief overview on getting started with Social Customer Service:  [Support Your Customers on Their Social Networks](#) (2:58).

Social Customer Service integrates with Radian6 and Social Studio so service agents and sales representatives can engage customers by responding to cases and leads created from Facebook, Twitter, Instagram, and other social networks.

Social Network	Release State
Facebook	Generally Available
Twitter	Generally Available
Instagram	Generally Available
Google+	Pilot Program
Sina Weibo	Pilot Program

The social publisher action on the case or lead feed is the primary interface for replying to consumers or prospects. Inbound and outbound social posts appear as items in the feed, making it easy to follow the thread of the conversation. Permission sets allow you to grant access to your managed social accounts to different sets of users. Out of the box, default settings control how inbound social posts are processed. Optionally, you can modify an Apex class to apply your own custom business logic.

 **Note:** When a lead is converted to an account or contact, the social items in the feed are removed.

In Salesforce1, agents can see and reply to social content from mobile devices.

For Twitter accounts, agents can use case and lead feeds to see the content that they are responding to, retweet, mark as Like and follow tweets, send replies to tweets and direct messages, and delete tweets managed by your social accounts.

For Facebook accounts, cases and leads are created from your managed Facebook page and agents can use the feeds to see the content that they are replying to, like posts and comments, send posts, comments, replies, and private messages, and delete posts managed by your social accounts.

For both Facebook and Twitter, you can click the View Source link to open an item in its native social media Web site. This allows you to gain context so you can provide a more informed response.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Social Customer Service is available in **Enterprise**, **Performance**, and **Unlimited** editions.

USER PERMISSIONS

To administer Social Customer Service:

- "Manage Users"
- AND
- "Customize Application"

To create case feed items:

- Feed Tracking for All Related Objects on the Case object

To send and receive social media posts or messages:

- Case Feed enabled
- AND
- Access to a social account

You can sync your Instagram #hashtag to Social Customer Service to receive Social posts when your brand’s #hashtag is mentioned on Instagram. To activate Instagram #hashtag listening, [create a rule](#) in your Social Hub account to receive posts when your brand’s #hashtag is mentioned.

Social Customer Service Limits	Enterprise, Performance, and Unlimited editions.
Maximum number of active managed social accounts	2000 accounts. Social Customer Service Settings shows up to 500 managed social accounts per page.
Maximum number of post tags	200 post tags
Maximum number of errors before inbound posts are paused	100 errors. When errors reach 100, inbound posts are stopped until the errors are cleared. This allows administrators to ensure that posts are processed correctly.

SEE ALSO:

- [Implementing Social Customer Service](#)
- [Complete Guide to Social Customer Service](#)

Implementing Social Customer Service

Enable social customer service in your organization and customize your support agents’ experience.

- [Set Up Social Customer Service](#)
- [Create the Social Action Interface](#)
- [Enable Moderation for Social Customer Service](#)
- [Modify the Default Apex Class](#)

SEE ALSO:

- [Set Up Social Customer Service](#)
- [Enable Social Post Approvals](#)
- [Enable Moderation for Social Customer Service](#)
- [Create the Social Action Interface](#)
- [Modify the Default Apex Class](#)
- [Complete Guide to Social Customer Service](#)

EDITIONS

Available in: Salesforce Classic

Social Customer Service is available in **Enterprise**, **Performance**, and **Unlimited** editions.

USER PERMISSIONS

- To administer Social Customer Service:
- “Manage Users”
- AND
- “Customize Application”
- To create case feed items:
- Feed Tracking for All Related Objects on the Case object

Set Up Social Customer Service

Enable Social Customer Service, install the SocialCustomerService package, sync your social accounts, and assign social handles.

 **Important:** If you have two or fewer social accounts to track, you can use the free starter pack. Otherwise, you must have sufficient Social Studio accounts.

Radian6, part of Marketing Cloud's Social Studio, provides social media monitoring. With the free starter pack, you don't need an explicit Radian6 login. Simply connect up to two social accounts and Salesforce handles the rest of the details. If you are a Social Studio customer, set up data sources in Social Studio that can be synced with Service Cloud.

 **Important:** Case Feed Tracking for All Related Objects must be enabled for case feed items to be created. See [Set Up Cases for Salesforce Classic](#) on page 261. For Leads, from Setup, enter *Feed Tracking* in the Quick Find box, then select **Feed Tracking** and ensure **Enable Feed Tracking** and **All Related Objects** are checked. When a lead is converted to an account or contact, the social items in the feed are removed.

1. From Setup, enter *Social Media* in the Quick Find box, then select **Social Customer Service**.

 **Tip:** Enter *med* as a shortcut to bring up the Social Media section more quickly.

2. On the Settings tab, check **Enable Social Customer Service**.
3. If you want posts approved before they send, check **Enable approvals for social posts**.

As part of a job training or quality review process, you may require some agents to have their posts approved rather than allowing them to post freely. With approval processes and user permissions, selected agents can submit social posts for approval, recall the posts, and retry or resubmit them. Approvers can approve and reject posts for publication. See [Enable Social Post Approvals](#) on page 547.

4. If you want to map new posts to parent posts, which are the first posts that generated a case, select **Enable retrieval of parent posts for added context**.
5. Under **Radian6 Credentials**, either create a Social Studio account with the starter pack by clicking **Create Account**, or click **Login** and enter your Social Studio credentials.

 **Note:** With the Social Customer Service Starter Pack, you can enable Social Customer Service and up to two social accounts from any social network. For example, if you add one Twitter account, you can only add one Facebook account. You can't downgrade from a Social Studio account to the starter pack. The starter pack doesn't support the moderation feature (all posts become cases) and the default Apex code can't be customized.

6. On the Social Accounts tab, click **Add Account** and select your social network, for example Twitter or Facebook.

The social network opens and asks you to authenticate the account. Once your account is authenticated, Salesforce returns you to the Social Accounts tab.

 **Note:** If you receive an error "We're sorry, but we currently do not support Facebook business accounts registration." or "Your Facebook account can't be added due to unsupported features.", you might need to set a user name on your Facebook page.

7. Click the refresh icon next to **Add Account**.

 **Warning:** Deleting a Social Account deletes it everywhere, including in Social Studio. This action cannot be undone.

EDITIONS

Available in: Salesforce Classic

Social Customer Service is available in **Enterprise**, **Performance**, and **Unlimited** editions.

USER PERMISSIONS

To administer Social Customer Service:

- "Manage Users"

AND

"Customize Application"

To create case feed items:

- Feed Tracking for All Related Objects on the Case object

8. If you are using the Starter Pack, check the **Case Creation** box to indicate that you want cases created automatically when posts come from the social account.
For example, if you have two Twitter handles, one for support and one for marketing or brand-focused information, you can have cases created automatically only from the support handle. The tweets from the marketing handle go in a social post queue for review. See [Manage Social Posts](#).
-  **Note:** If you are using the full Social Customer Service version, you can set up case moderation through Social Studio. See [Enable Moderation for Social Customer Service](#) on page 548.
9. If you have a portfolio of managed social accounts, set the **Default Responses From** for each Twitter, Instagram (pilot), and Sina Weibo (pilot) account. This lets you standardize and raise awareness of your brand's support by setting a dedicated support handle, for example @acmehelp or @acmesupport. Also, agents have fewer clicks when they send outbound posts because the chosen account appears as the default value in the account drop-down in the social publisher. The default response handle doesn't apply for Twitter direct messages and doesn't affect Facebook, Google Plus, or LinkedIn, as they are restricted to the page handle itself.
10. On the **Inbound Settings** tab, you can see which Apex class controls how the inbound content is processed in your organization and which user it's set to run under. If you are using the default Apex class, you can select inbound business rules to determine how incoming social data is handled.

Enable Case Reopen

If a new post, from the same social persona, is associated to a closed case, the case is reopened within the designated number of days. The number must be greater than or equal to 1 and less than or equal to 3000.

Use Person Accounts

Assign a person account of the selected type for the social persona parent record.

Create Case for Post Tags

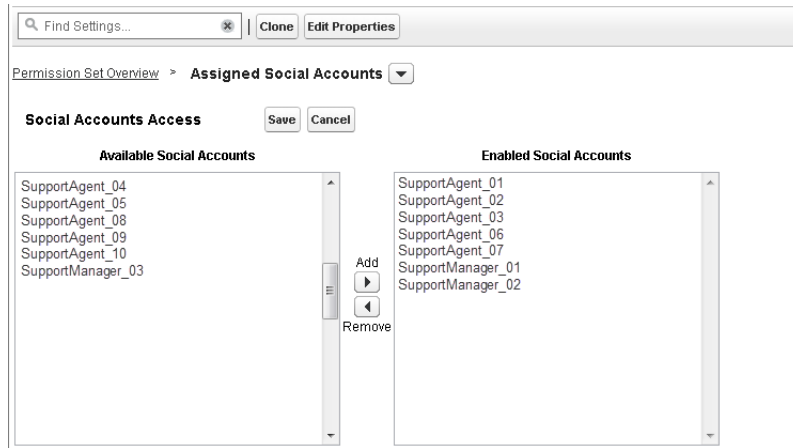
Override the social hub's case creation rules and create a case when selected post tags are present on a social post. Post Tags are used to answer the question "What is the topic of this one post?". Post tags, set in Social Hub, help to provide further context to what the individual post is about.

 **Note:** Social Customer Service only shows 200 post tags. If you have more post tags in Social Studio, you can view them in that program.

The default Apex class creates a social post, social persona, case, contact, and supports common use cases. For information on modifying the default Apex class, see [Modify the Default Apex Class](#).

 **Note:** If you are using the starter pack, the Apex class can't be changed but you can change the user it is run under.

11. To assign social handles to a profile or permission set, still within Setup:
 - Enter *Profiles* in the **Quick Find** box, then select **Profiles**.
 - Enter *Permission Sets* in the **Quick Find** box, then select **Permission Sets**.
12. Click an existing profile or permission set or create a new one.
13. In the Apps section, click **Assigned Social Accounts**.
14. Click **Edit**.



15. Assign the social accounts you need to make available to your users with this profile or permission set.

 **Important:** All users must have the profile or permission set you chose or created in step 8.

16. Save your changes.

17. Ensure that the profile or permission set has the correct field visibility.

- For profiles, from Setup, enter *Profiles* in the Quick Find box, select **Profiles**, then select the profile you chose or created earlier. Next, in the Field Level Security section, select **Social Post**.
- For permission sets, from Setup, enter *Permission Sets* in the Quick Find box, select **Permission Sets**, then select the permission set you chose or created earlier. Next, click **Object Settings**, and then select **Social Post**.

18. Click **Edit**. Under Field Permissions, ensure all fields available are set to Visible (not Read-Only) for profiles or Edit for permission sets. Click **Save**.

19. Optionally, set up Quick Text so agents can create ready-to-send responses to social networks. See [Enable Quick Text](#).

20. Optionally, give social post read access to external community and portal users.

There are three requirements to make social posts available in communities and portals.

- Ensure that the user has access to cases in the community.
- Give users read permission to social posts on their profiles.
- On your organization's Social Post object, enable visibility to individual fields through the field level security settings.

 **Note:** Once these requirements are met, external users can see all social posts exposed to them. For example, if a case or lead feed is exposed externally, all social posts in the feed are visible. There is no way to limit visibility at the social post object level.

Turning on history tracking on for the Social Persona and Social Post objects is recommended for the first few months of using Social Customer Service. History tracking helps identify who made what changes when and for differentiating between automatic and manual changes.

You can synchronize up to 2,000 managed social accounts from Social Studio. However, the Social Customer Service Settings page in Setup only shows up to 500 managed social accounts. Agents can respond from all synced accounts from the social publisher on the case feed. If you are syncing more than 500 social accounts, allow at least a minute for the settings page to load.

SEE ALSO:

- [How to Reconnect a Social Account](#)
- [Implementing Social Customer Service](#)
- [Complete Guide to Social Customer Service](#)

How to Reconnect a Social Account

Reconnect your social account for Social Customer Service.

Your social account can be disconnected from Social Customer Service if your social media network provider's connect, or token, has expired. Many providers have expiration policies of 60 to 90 days.

1. From Setup, enter *Social Media* in the **Quick Find** box, then select **Settings**.

2. On the **Social Accounts** tab, click **Reauthorize** in the **Action** column.

The social network opens and asks you to authenticate the account. Once your account is reauthenticated, you are returned to the Social Accounts tab.

SEE ALSO:

- [Set Up Social Customer Service](#)
- [Welcome to Social Customer Service](#)
- [Complete Guide to Social Customer Service](#)

EDITIONS

Available in: Salesforce Classic

Social Customer Service is available in **Enterprise**, **Performance**, and **Unlimited** editions.

USER PERMISSIONS

To administer Social Customer Service:

- "Manage Users"

AND

"Customize Application"

To create case feed items:

- Feed Tracking for All Related Objects on the Case object

To send and receive social media posts or messages:

- Case Feed enabled

AND

Access to a social account

Enable Social Post Approvals

Social care agents are both problem solvers for your consumers and the voice of your brand on social networks like Facebook and Twitter. You can have guidelines so your agents write with a consistent tone and syntax that's in line with your organization's social media strategy. For example, you require social agents to sign their tweets in a standard manner, such as “~John.”

Salesforce Admins can create approval processes and assign agents and approvers permissions accordingly.

1. From Setup, enter *Social Media* in the Quick Find box, then select **Settings**.
2. Select **Enable approvals for social posts**.
3. Build and activate approval processes for social posts using either the Jump Start Wizard or the Standard Setup Wizard.

 **Important:** The Jump Start Wizard is a streamlined way to create approval processes in Salesforce. However, the **Let the submitter choose the approver manually** option is not supported in the Jump Start Wizard. Choosing that option results in an error later when an agent submits a post for approval.

4. From Setup, go to **Administer > Manage Users > Permission sets**.
5. Enable the new **Require Social Post Approvals** user permission.
6. Assign the **Require Social Post Approvals** user permission with a permission set to agents that need their posts reviewed before they are sent.

When assigning user permissions, remember these two points.

- Because approving a post automatically submits it for publishing, approvers must have the same access to social accounts as the agents whose work they're reviewing. Otherwise, the posts they approve result in an error.
- If your user permissions include **Require Social Post Approvals**, then the submit button on the social publisher always reads **Submit for Approval** rather than "Comment," "Tweet," or other words. This is true even if no active approval process applies to the user. In that situation, clicking **Submit for Approval** publishes the social post normally since there is no active approval process in effect.

For more information, see [Create an Approval Process with the Standard Wizard](#), [Prepare to Create an Approval Process](#), and [Sample Approval Processes](#).

 **Tip:** If your agents work with social post record detail pages, rather than in the case feed, we recommend removing the approvals related list from the page layout. The same page layout is shared between inbound and outbound social posts. Removing the approvals related list avoids confusion when viewing an inbound post that is an invalid candidate for an approval process. Approvers can still approve or reject posts through all other normal means such as email, Chatter, and list views.

SEE ALSO:

[Implementing Social Customer Service](#)
[Complete Guide to Social Customer Service](#)

EDITIONS

Available in: Salesforce Classic

Social Customer Service is available in **Enterprise**, **Performance**, and **Unlimited** editions.

USER PERMISSIONS

To administer Social Customer Service:

- “Manage Users”

AND

“Customize Application”

To create case feed items:

- Feed Tracking for All Related Objects on the Case object

Enable Moderation for Social Customer Service

Use moderation to triage incoming posts and only create cases for posts that are actionable requests for help. Moderation helps your organization focus on real customer issues and avoid opening unnecessary cases.

Not all posts require a case, for example, a complimentary tweet or post does not need agent assistance. However, when the default social customer service is configured, cases are automatically created from each social post. Using moderation, agents can manage which posts get cases and which are ignored. Moderation is enabled with a Social Hub rule in your Social Studio account to turn off automatic case creation.

 **Note:** With the Starter Pack, you can decide if you want cases created automatically when posts come from a particular social account on the Social Accounts tab. See [Set Up Social Customer Service](#) on page 544.

1. From your Social Hub account, click the **Rules** tab.
2. Create a rule, or use an existing one, to indicate that no case is created in Salesforce.
For example, the rule should have the following setup.
 - a. Action: send to Salesforce.
 - b. **Create Case** checkbox unchecked.
3. Save and enable your rule.

 **Note:** You can enable your rule for all social posts or only those coming from certain managed accounts.

Case creation can also be customized by implementing a custom Apex case logic. To do so, from setup, enter *Social Media* in the **Quick Find** box, then select **Settings**. See [Modify the Default Apex Class](#).

 **Note:** If you started using Social Customer Service before Spring '16 and have a custom Apex class, you may need update your Apex class to benefit from the latest moderation features. If your custom Apex is extended from the default Apex class, you get the update for the default apex functions you call. If your custom Apex isn't extended from the default Apex class (you copied the default and changed it), you must update manually.

To manually update your custom Apex class, add the following code and update your moderation social post list view.

1. Call this method directly before inserting the post, after all the relationships have been set on the post.

```
private void setModeration(SocialPost post){
    //if we don't automatically create a case, we should flag the post as requiring
    moderator review.
    if(post.parentId == null)
        post.reviewedStatus = 'Needed';
}
```

In the default Apex, see lines 50 and 61-65.

2. Update your moderation social post list filter from:

```
Parent EQUAL TO "" AND ReviewStatus NOT EQUAL TO "ignore"
```

To:

```
Parent EQUAL TO "" AND ReviewStatus EQUAL TO "Needed"
```

EDITIONS

Available in: Salesforce Classic

Social Customer Service is available in **Enterprise**, **Performance**, and **Unlimited** editions.

USER PERMISSIONS

To administer Social Customer Service:

- "Manage Users"
- AND
- "Customize Application"

To ensure that you don't lose track of social posts currently in your moderation queue, make a list view with the new filter, and switch to it once the new and old filters show the same results.

SEE ALSO:

[Implementing Social Customer Service](#)

[Complete Guide to Social Customer Service](#)

Create the Social Action Interface

The social action is created when you install Social Customer Service. You can add, remove, and organize fields to suit your organization.

The social action is created when Social Customer Service is enabled.

1. From the object management settings for cases, go to Button, Links, and Actions.
2. Click **Layout** next to the social action.
3. Edit the desired fields.



Note: Changing field values could invalidate incoming posts against the Social Customer Service [Apex class](#).

To send social content, the social action must have the following fields:

- In Reply To:
- Managed Social Account
- Message Type
- Content

Headline and Name are required fields. To remove them, create a predefined value for each field and remove them from the action. See [Set Predefined Field Values for Quick Action Fields](#).

4. Click **Save**.
5. From the object management settings for cases, go to Page Layouts.
6. In Case Page Layouts, click **Edit** next to Feed-Based Layout.
7. In the palette, click **Quick Actions**.
8. Ensure that the social action is in the Quick Actions in the Salesforce Classic Publisher section of the layout.
9. Optionally, repeat steps 5 through 8 for the Leads object to enable the social action on leads (from the object management settings for leads, go to Page Layouts).

SEE ALSO:

[Implementing Social Customer Service](#)

[Complete Guide to Social Customer Service](#)

EDITIONS

Available in: Salesforce Classic

Social Customer Service is available in **Enterprise**, **Performance**, and **Unlimited** editions.

USER PERMISSIONS

To administer Social Customer Service:

- "Manage Users"

AND

"Customize Application"

To create case feed items:

- Feed Tracking for All Related Objects on the Case object

Modify the Default Apex Class

If you aren't using the Starter Pack, you can customize the default Apex class to specify how inbound social content is processed.

 **Note:** You can't modify the default Apex class if you are using the Starter Pack. The free Starter Pack lets you simply connect up to two social accounts and Salesforce handles the rest of the details, like a Social Studio account.

The [default Apex class](#) for Social Customer Service creates a social post, social persona, case, contact, and supports common use cases. To customize how information is processed, by create a new Apex class.

 **Important:** If your agents use the Social Customer Service feature to send private messages to Facebook users, prevent or resolve errors by upgrading your Apex classes to the latest available version of the Salesforce API. In particular, the Apex class that inserts the post must be version 32 or higher.

If you alter the default Apex class, be sure to select your new Apex class on the setup page, where you can also see Apex processing errors. From Setup, enter *Social Media* in the **Quick Find** box, then select **Settings**. An email is sent to the administrator when there are errors and, in most circumstances, the data is saved and can be reprocessed. If too many errors are waiting for reprocessing, the Salesforce Social Hub rules are automatically paused to ensure social content is not missed.

We have provided [tests for the default Apex class](#). If you alter your Apex class, you must alter the tests accordingly.

 **Note:** Social personas created after the Summer '15 release have a field indicating which social network created the persona: `Source App`. This field is set on creation and is not updateable. If your organization uses custom Apex, update it to use this field. Keep in mind that personas created before the Summer 15 release do not have the field. Also, every time new fields are added to the social action you must update your Apex version or the new fields aren't saved.

To create an Apex class, in Setup, enter *Apex Classes* in the **Quick Find** box, then select **Apex Classes**. You can use the following code to:

- Support person accounts
- Designate a default account ID
- Change the number of days before closed cases are reopened

```
global class MyInboundSocialPostHandlerImpl extends
Social.InboundSocialPostHandlerImpl implements Social.InboundSocialPostHandler {
    global override SObject createPersonaParent(SocialPersona persona) {
        String name = persona.Name;
        if (persona.RealName != null && String.isNotBlank(persona.RealName))
            name = persona.RealName;

        String firstName = '';
        String lastName = 'unknown';
        if (name != null && String.isNotBlank(name)) {
            firstName = name.substringBeforeLast(' ');
            lastName = name.substringAfterLast(' ');
            if (lastName == null || String.isBlank(lastName))
                lastName = firstName;
        }

        //You must have a default Person Account record type
        Account acct = new Account (LastName = lastName, FirstName = firstName);
```

EDITIONS

Available in: Salesforce Classic

Social Customer Service is available in **Enterprise**, **Performance**, and **Unlimited** editions.

```

        insert acct;
        return acct;
    }

    global override String getDefaultAccountId() {
        return '<account ID>';
    }

    global override Integer getMaxNumberOfDaysClosedToReopenCase() {
        return 5;
    }
}

```

You can use the following code to implement your own social customer service process.

```

global class MyInboundSocialPostHandlerImpl implements Social.InboundSocialPostHandler {
    global Social.InboundSocialPostResult handleInboundSocialPost(SocialPost post,
        SocialPersona persona, Map<String, Object> data) {
        Social.InboundSocialPostResult result = new Social.InboundSocialPostResult();

        // Custom process

        return result;
    }
}

```

The [default Apex class](#) sets the contact as the persona parent. To set the persona parent as an account, person account, or lead, create a method to override the persona parent.

If you want a post to go to the error queue, so errors are not lost, your custom apex must do one of two things.

1. Bubble up an exception (recommended).

```

global Social.InboundSocialPostResult handleInboundSocialPost(SocialPost post,
    SocialPersona persona, Map<String, Object> rawData) {
    Social.InboundSocialPostResult result = new Social.InboundSocialPostResult();
    result.setSuccess(true);

    try{
        //handle the post here
    } catch(Exception e){
        //log exception, etc
        throw e;
    }
    return result;
}

```

OR

2. Set the success flag on the response object to false.

```

global Social.InboundSocialPostResult handleInboundSocialPost(SocialPost post,
    SocialPersona persona, Map<String, Object> rawData) {
    Social.InboundSocialPostResult result = new Social.InboundSocialPostResult();
    result.setSuccess(true);

    try{

```

```
//handle the post here
} catch(Exception e){
//log exception, etc
result.setSuccess(false);
}
return result;
}
```

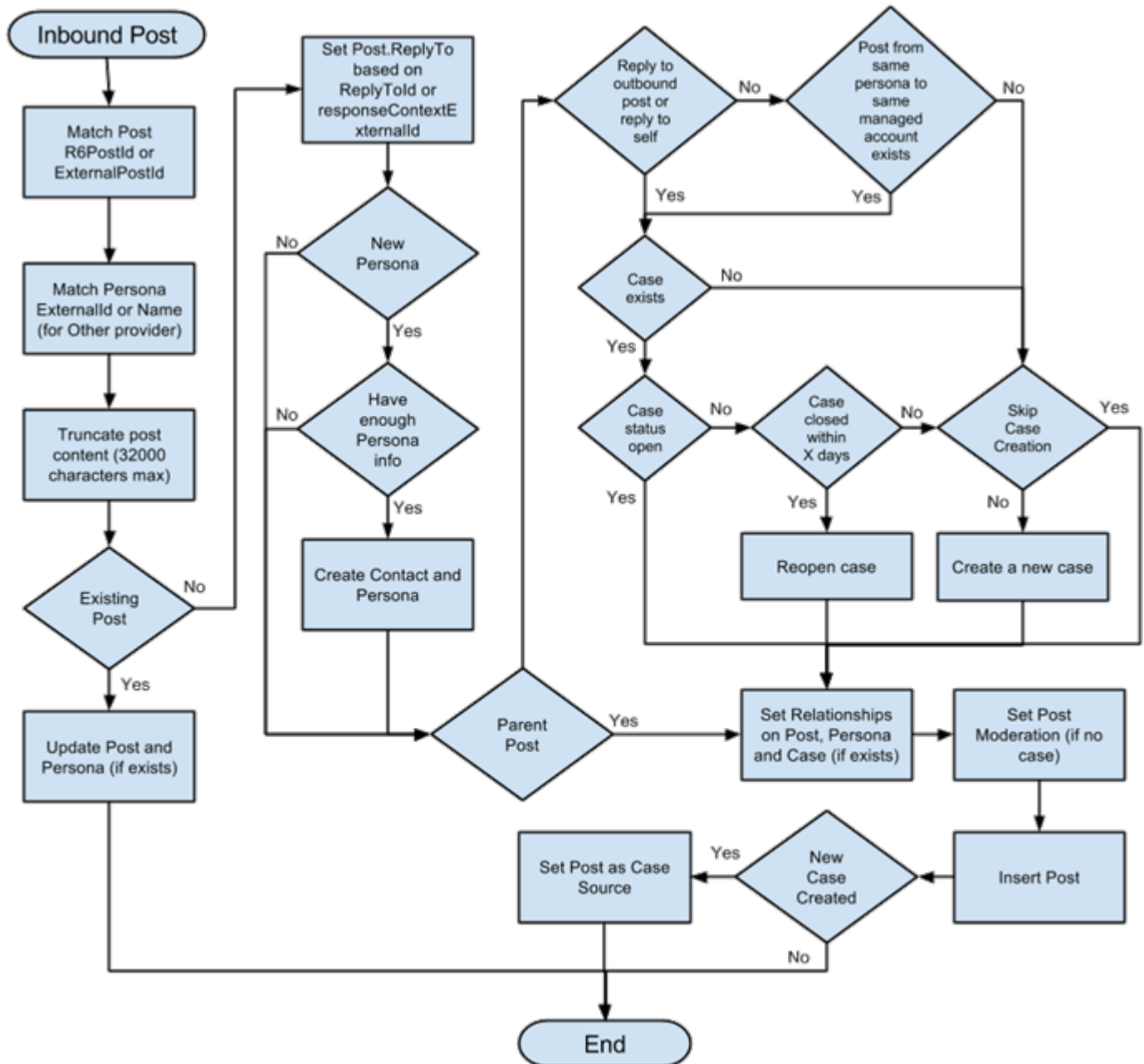
Default Apex Class Process

A visual diagram of an inbound post's path through the default apex class.

EDITIONS

Available in: Salesforce
Classic

Social Customer Service is
available in **Enterprise**,
Performance, and
Unlimited editions.



Default Apex Class Reference

Social Customer Service's full default Apex class code. The following Apex class is current as of the Summer '16 release.

For previous versions, see [Default Apex Class History](#) on page 570

EDITIONS

Available in: Salesforce Classic

Social Customer Service is available in **Enterprise**, **Performance**, and **Unlimited** editions.

```
global virtual class InboundSocialPostHandlerImpl implements Social.InboundSocialPostHandler
{

    final static Integer CONTENT_MAX_LENGTH = 32000;
    Boolean isNewCaseCreated = false;

    // Reopen case if it has not been closed for more than this number
    global virtual Integer getMaxNumberOfDaysClosedToReopenCase() {
        return 5;
    }

    // Create a case if one of these post tags are on the SocialPost, regardless of the
    skipCreateCase indicator.
    global virtual Set<String> getPostTagsThatCreateCase(){
        return new Set<String>();
    }

    global virtual String getDefaultAccountId() {
        return null;
    }

    global Social.InboundSocialPostResult handleInboundSocialPost(SocialPost post,
    SocialPersona persona, Map<String, Object> rawData) {
        Social.InboundSocialPostResult result = new Social.InboundSocialPostResult();
        result.setSuccess(true);
        matchPost(post);
        matchPersona(persona);

        if ((post.Content != null) && (post.Content.length() > CONTENT_MAX_LENGTH)) {
            post.Content = post.Content.abbreviate(CONTENT_MAX_LENGTH);
        }

        if (post.Id != null) {
            handleExistingPost(post, persona);
            return result;
        }

        setReplyTo(post, persona);
        buildPersona(persona);
        Case parentCase = buildParentCase(post, persona, rawData);
        setRelationshipsOnPost(post, persona, parentCase);
    }
}
```

```

        setModeration(post, rawData);

        upsert post;

        if(isNewCaseCreated){
            updateCaseSource(post, parentCase);
        }

        return result;
    }

    private void setModeration(SocialPost post, Map<String, Object> rawData){
        //if we don't automatically create a case, we should flag the post as requiring
moderator review.
        if(post.parentId == null && !isUnsentParent(rawData))
            post.reviewedStatus = 'Needed';
    }

    private void updateCaseSource(SocialPost post, Case parentCase){
        if(parentCase != null) {
            parentCase.SourceId = post.Id;
            //update as a new subject to prevent undoing any changes done by insert triggers

            update new Case(Id = parentCase.Id, SourceId = parentCase.SourceId);
        }
    }

    private void handleExistingPost(SocialPost post, SocialPersona persona) {
        update post;
        if (persona.id != null)
            updatePersona(persona);
    }

    private void setReplyTo(SocialPost post, SocialPersona persona) {
        SocialPost replyTo = findReplyTo(post, persona);
        if(replyTo.id != null) {
            post.replyToId = replyTo.id;
            post.replyTo = replyTo;
        }
    }

    private SocialPersona buildPersona(SocialPersona persona) {
        if (persona.Id == null)
            createPersona(persona);
        else
            updatePersona(persona);

        return persona;
    }

    private void updatePersona(SocialPersona persona) {
        try{
            update persona;

```

```

        }catch(Exception e) {
            System.debug('Error updating social persona: ' + e.getMessage());
        }
    }

    private Case buildParentCase(SocialPost post, SocialPersona persona, Map<String, Object>
rawData){
        if(!isUnsentParent(rawData)) {
            Case parentCase = findParentCase(post, persona);
            if (parentCase != null) {
                if (!parentCase.IsClosed) {
                    return parentCase;
                }
                else if (caseShouldBeReopened(parentCase)) {
                    reopenCase(parentCase);
                    return parentCase;
                }
            }
            if(shouldCreateCase(post, rawData)){
                isNewCaseCreated = true;
                return createCase(post, persona);
            }
        }

        return null;
    }

    private boolean caseShouldBeReopened(Case c){
        return c.id != null && c.isClosed && System.now() <
c.closedDate.addDays(getMaxNumberOfDaysClosedToReopenCase());
    }

    private void setRelationshipsOnPost(SocialPost postToUpdate, SocialPersona persona,
Case parentCase) {
        if (persona.Id != null) {
            postToUpdate.PersonaId = persona.Id;

            if(persona.ParentId.getSObjectType() != SocialPost.sObjectType) {
                postToUpdate.WhoId = persona.ParentId;
            }
        }
        if(parentCase != null) {
            postToUpdate.ParentId = parentCase.Id;
        }
    }

    private Case createCase(SocialPost post, SocialPersona persona) {
        Case newCase = new Case(subject = post.Name);
        if (persona != null && persona.ParentId != null) {
            if (persona.ParentId.getSObjectType() == Contact.sObjectType) {
                newCase.ContactId = persona.ParentId;
            } else if (persona.ParentId.getSObjectType() == Account.sObjectType) {
                newCase.AccountId = persona.ParentId;
            }
        }
    }

```



```

    }
    if (post != null && post.Provider != null) {
        newCase.Origin = post.Provider;
    }
    insert newCase;
    return newCase;
}

private Case findParentCase(SocialPost post, SocialPersona persona) {
    Case parentCase = null;
    if (post.ReplyTo != null && !isReplyingToAnotherCustomer(post, persona) &&
!isChat(post)) {
        parentCase = findParentCaseFromPostReply(post);
    }
    if (parentCase == null) {
        parentCase = findParentCaseFromPersona(post, persona);
    }
    return parentCase;
}

private boolean isReplyingToAnotherCustomer(SocialPost post, SocialPersona persona){
    return !post.ReplyTo.IsOutbound && post.ReplyTo.PersonaId != persona.Id;
}

private boolean isChat(SocialPost post){
    return post.messageType == 'Private' || post.messageType == 'Direct';
}

private Case findParentCaseFromPostReply(SocialPost post) {
    if (post.ReplyTo != null && String.isNotBlank(post.ReplyTo.ParentId)) {
        List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE
Id = :post.ReplyTo.ParentId LIMIT 1];
        if(!cases.isEmpty()) {
            return cases[0];
        }
    }
    return null;
}

private Case findParentCaseFromPersona(SocialPost post, SocialPersona persona) {
    SocialPost latestInboundPostWithSamePersonaAndRecipient =
findLatestInboundPostBasedOnPersonaAndRecipient(post, persona);
    if (latestInboundPostWithSamePersonaAndRecipient != null) {
        List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE
id = :latestInboundPostWithSamePersonaAndRecipient.parentId LIMIT 1];
        if(!cases.isEmpty()) {
            return cases[0];
        }
    }
    return null;
}

private void reopenCase(Case parentCase) {
    SObject[] status = [SELECT MasterLabel FROM CaseStatus WHERE IsClosed = false AND

```

```

IsDefault = true];
    parentCase.Status = ((CaseStatus)status[0]).MasterLabel;
    update parentCase;
}

private void matchPost(SocialPost post) {
    if (post.Id != null) return;

    performR6PostIdCheck(post);

    if (post.Id == null){
        performExternalPostIdCheck(post);
    }
}

private void performR6PostIdCheck(SocialPost post){
    if(post.R6PostId == null) return;
    List<SocialPost> postList = [SELECT Id FROM SocialPost WHERE R6PostId =
:post.R6PostId LIMIT 1];
    if (!postList.isEmpty()) {
        post.Id = postList[0].Id;
    }
}

private void performExternalPostIdCheck(SocialPost post) {
    if (post.provider == 'Facebook' && post.messageType == 'Private') return;
    if (post.provider == null || post.externalPostId == null) return;
    List<SocialPost> postList = [SELECT Id FROM SocialPost WHERE ExternalPostId =
:post.ExternalPostId AND Provider = :post.provider LIMIT 1];
    if (!postList.isEmpty()) {
        post.Id = postList[0].Id;
    }
}

private SocialPost findReplyTo(SocialPost post, SocialPersona persona) {
    if(post.replyToId != null && post.replyTo == null)
        return findReplyToBasedOnReplyToId(post);
    if(post.responseContextExternalId != null){
        if((post.provider == 'Facebook' && post.messageType == 'Private') ||
(post.provider == 'Twitter' && post.messageType == 'Direct')){
            SocialPost replyTo =
findReplyToBasedOnResponseContextExternalPostIdAndProvider(post);
            if(replyTo.id != null)
                return replyTo;
        }
        return findReplyToBasedOnExternalPostIdAndProvider(post);
    }
    return new SocialPost();
}

private SocialPost findReplyToBasedOnReplyToId(SocialPost post){

```

```

        List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE id = :post.replyToId LIMIT 1];
        if(posts.isEmpty())
            return new SocialPost();
        return posts[0];
    }

    private SocialPost findReplyToBasedOnExternalPostIdAndProvider(SocialPost post){
        List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE Provider = :post.provider AND ExternalPostId = :post.responseContextExternalId LIMIT
1];
        if(posts.isEmpty())
            return new SocialPost();
        return posts[0];
    }

    private SocialPost findReplyToBasedOnResponseContextExternalPostIdAndProvider(SocialPost
post){
        List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE Provider = :post.provider AND responseContextExternalId =
:post.responseContextExternalId ORDER BY posted DESC NULLS LAST LIMIT 1];
        if(posts.isEmpty())
            return new SocialPost();
        return posts[0];
    }

    private SocialPost findLatestInboundPostBasedOnPersonaAndRecipient(SocialPost post,
SocialPersona persona) {
        if (persona != null && String.isNotBlank(persona.Id) && post != null &&
String.isNotBlank(post.Recipient)) {
            List<SocialPost> posts = [SELECT Id, ParentId FROM SocialPost WHERE Provider
= :post.provider AND Recipient = :post.Recipient AND PersonaId = :persona.id AND IsOutbound
= false ORDER BY CreatedDate DESC LIMIT 1];
            if (!posts.isEmpty()) {
                return posts[0];
            }
        }
        return null;
    }

    private void matchPersona(SocialPersona persona) {
        if (persona != null) {
            List<SocialPersona> personaList = new List<SocialPersona>();
            if(persona.Provider != 'Other' && String.isNotBlank(persona.ExternalId)) {
                personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
Provider = :persona.Provider AND
ExternalId = :persona.ExternalId LIMIT 1];
            } else if(persona.Provider == 'Other' && String.isNotBlank(persona.ExternalId)
&& String.isNotBlank(persona.MediaProvider)) {
                personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
MediaProvider = :persona.MediaProvider AND
ExternalId = :persona.ExternalId LIMIT 1];
            } else if(persona.Provider == 'Other' && String.isNotBlank(persona.Name) &&
String.isNotBlank(persona.MediaProvider)) {

```

```

        personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
                        MediaProvider = :persona.MediaProvider AND
                        Name = :persona.Name LIMIT 1];
    }

    if (!personaList.isEmpty()) {
        persona.Id = personaList[0].Id;
        persona.ParentId = personaList[0].ParentId;
    }
}

private void createPersona(SocialPersona persona) {
    if (persona == null || String.isNotBlank(persona.Id) ||
!isThereEnoughInformationToCreatePersona(persona))
        return;

    SObject parent = createPersonaParent(persona);
    persona.ParentId = parent.Id;
    insert persona;
}

private boolean isThereEnoughInformationToCreatePersona(SocialPersona persona) {
    return String.isNotBlank(persona.Name) &&
        String.isNotBlank(persona.Provider) &&
        String.isNotBlank(persona.MediaProvider);
}

private boolean shouldCreateCase(SocialPost post, Map<String, Object> rawData) {
    return !isUnsentParent(rawData) && (!hasSkipCreateCaseIndicator(rawData) ||
hasPostTagsThatCreateCase(post));
}

private boolean isUnsentParent(Map<String, Object> rawData) {
    Object unsentParent = rawData.get('unsentParent');
    return unsentParent != null && 'true'.equalsIgnoreCase(String.valueOf(unsentParent));
}

private boolean hasSkipCreateCaseIndicator(Map<String, Object> rawData) {
    Object skipCreateCase = rawData.get('skipCreateCase');
    return skipCreateCase != null &&
'true'.equalsIgnoreCase(String.valueOf(skipCreateCase));
}

private boolean hasPostTagsThatCreateCase(SocialPost post){
    Set<String> postTags = getPostTags(post);
    postTags.retainAll(getPostTagsThatCreateCase());
    return !postTags.isEmpty();
}

private Set<String> getPostTags(SocialPost post){
    Set<String> postTags = new Set<String>();
    if(post.postTags != null)

```

```

        postTags.addAll(post.postTags.split(',', 0));
        return postTags;
    }

    global String getPersonaFirstName(SocialPersona persona) {
        String name = getPersonaName(persona);
        String firstName = '';
        if (name.contains(' ')) {
            firstName = name.substringBeforeLast(' ');
        }
        firstName = firstName.abbreviate(40);
        return firstName;
    }

    global String getPersonaLastName(SocialPersona persona) {
        String name = getPersonaName(persona);
        String lastName = name;
        if (name.contains(' ')) {
            lastName = name.substringAfterLast(' ');
        }
        lastName = lastName.abbreviate(80);
        return lastName;
    }

    private String getPersonaName(SocialPersona persona) {
        String name = persona.Name.trim();
        if (String.isNotBlank(persona.RealName)) {
            name = persona.RealName.trim();
        }
        return name;
    }

    global virtual SObject createPersonaParent(SocialPersona persona) {

        String firstName = getPersonaFirstName(persona);
        String lastName = getPersonaLastName(persona);

        Contact contact = new Contact(LastName = lastName, FirstName = firstName);
        String defaultAccountId = getDefaultAccountId();
        if (defaultAccountId != null)
            contact.AccountId = defaultAccountId;
        insert contact;
        return contact;
    }
}

```

Apex Tests for the Default Apex Class

Social Customer Service's tests for the default Apex class code.

EDITIONS

Available in: Salesforce Classic

Social Customer Service is available in **Enterprise**, **Performance**, and **Unlimited** editions.

```
@isTest
public class InboundSocialPostHandlerImplTest {

    static Map<String, Object> sampleSocialData;
    static Social.InboundSocialPostHandlerImpl handler;

    static {
        handler = new Social.InboundSocialPostHandlerImpl();
        sampleSocialData = getSampleSocialData('1');
    }

    static testMethod void verifyNewRecordCreation() {
        SocialPost post = getSocialPost(sampleSocialData);
        SocialPersona persona = getSocialPersona(sampleSocialData);

        test.startTest();
        handler.handleInboundSocialPost(post, persona, sampleSocialData);
        test.stopTest();

        SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost];

        SocialPersona createdPersona = [SELECT Id, ParentId FROM SocialPersona];
        Contact createdContact = [SELECT Id FROM Contact];
        Case createdCase = [SELECT Id, ContactId FROM Case];

        System.assertEquals(createdPost.PersonaId, createdPersona.Id, 'Post is not linked
to the Persona.');
```

```
        System.assertEquals(createdPost.WhoId, createdPersona.ParentId, 'Post is not linked
to the Contact');
```

```
        System.assertEquals(createdPost.ParentId, createdCase.Id, 'Post is not linked to
the Case.');
```

```
        System.assertEquals(createdCase.ContactId, createdContact.Id, 'Contact is not
linked to the Case.');
```

```
    }

    static testMethod void matchSocialPostRecord() {
        SocialPost existingPost = getSocialPost(getSampleSocialData('2'));
        insert existingPost;

        SocialPost post = getSocialPost(sampleSocialData);
        post.R6PostId = existingPost.R6PostId;
```

```

        SocialPersona persona = getSocialPersona(sampleSocialData);

        test.startTest();
        handler.handleInboundSocialPost(post, persona, sampleSocialData);
        test.stopTest();

        System.assertEquals(1, [SELECT Id FROM SocialPost].size(), 'There should be only
1 post');
    }

    static testMethod void matchSocialPersonaRecord() {
        Contact existingContact = new Contact(LastName = 'LastName');
        insert existingContact;
        SocialPersona existingPersona = getSocialPersona(getSampleSocialData('2'));
        existingPersona.ParentId = existingContact.Id;
        insert existingPersona;

        SocialPost post = getSocialPost(sampleSocialData);
        SocialPersona persona = getSocialPersona(sampleSocialData);
        persona.ExternalId = existingPersona.ExternalId;

        test.startTest();
        handler.handleInboundSocialPost(post, persona, sampleSocialData);
        test.stopTest();

        SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost];

        SocialPersona createdPersona = [SELECT Id, ParentId FROM SocialPersona];
        Contact createdContact = [SELECT Id FROM Contact];
        Case createdCase = [SELECT Id, ContactId FROM Case];

        System.assertEquals(createdPost.PersonaId, createdPersona.Id, 'Post is not linked
to the Persona.');
```

```

        System.assertEquals(createdPost.WhoId, createdPersona.ParentId, 'Post is not linked
to the Contact');
        System.assertEquals(createdPost.ParentId, createdCase.Id, 'Post is not linked to
the Case.');
```

```

        System.assertEquals(createdCase.ContactId, createdContact.Id, 'Contact is not
linked to the Case.');
```

```

    }

    static testMethod void matchCaseRecord() {
        Contact existingContact = new Contact(LastName = 'LastName');
        insert existingContact;
        SocialPersona existingPersona = getSocialPersona(getSampleSocialData('2'));
        existingPersona.ParentId = existingContact.Id;
        insert existingPersona;
        Case existingCase = new Case(ContactId = existingContact.Id, Subject = 'Test Case');

        insert existingCase;
        SocialPost existingPost = getSocialPost(getSampleSocialData('2'));
        existingPost.ParentId = existingCase.Id;
        existingPost.WhoId = existingContact.Id;
        existingPost.PersonaId = existingPersona.Id;
    }

```

```

insert existingPost;

SocialPost post = getSocialPost(sampleSocialData);
post.responseContextExternalId = existingPost.ExternalPostId;

test.startTest();
handler.handleInboundSocialPost(post, existingPersona, sampleSocialData);
test.stopTest();

SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost
WHERE R6PostId = :post.R6PostId];
System.assertEquals(existingPersona.Id, createdPost.PersonaId, 'Post is not linked
to the Persona.');
```

```

    System.assertEquals(existingContact.Id, createdPost.WhoId, 'Post is not linked to
the Contact');
    System.assertEquals(existingCase.Id, createdPost.ParentId, 'Post is not linked to
the Case.');
```

```

    System.assertEquals(1, [SELECT Id FROM Case].size(), 'There should only be 1
Case.');
```

```

}

static testMethod void reopenClosedCase() {
    Contact existingContact = new Contact(LastName = 'LastName');
    insert existingContact;
    SocialPersona existingPersona = getSocialPersona(getSampleSocialData('2'));
    existingPersona.ParentId = existingContact.Id;
    insert existingPersona;
    Case existingCase = new Case(ContactId = existingContact.Id, Subject = 'Test Case',
Status = 'Closed');
    insert existingCase;
    SocialPost existingPost = getSocialPost(getSampleSocialData('2'));
    existingPost.ParentId = existingCase.Id;
    existingPost.WhoId = existingContact.Id;
    existingPost.PersonaId = existingPersona.Id;
    insert existingPost;

    SocialPost post = getSocialPost(sampleSocialData);
    post.responseContextExternalId = existingPost.ExternalPostId;

    test.startTest();
    handler.handleInboundSocialPost(post, existingPersona, sampleSocialData);
    test.stopTest();

    SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost
WHERE R6PostId = :post.R6PostId];
    System.assertEquals(existingPersona.Id, createdPost.PersonaId, 'Post is not linked
to the Persona.');
```

```

    System.assertEquals(existingContact.Id, createdPost.WhoId, 'Post is not linked to
the Contact');
    System.assertEquals(existingCase.Id, createdPost.ParentId, 'Post is not linked to
the Case.');
```

```

    System.assertEquals(1, [SELECT Id FROM Case].size(), 'There should only be 1
Case.');
```

```

    System.assertEquals(false, [SELECT Id, IsClosed FROM Case WHERE Id =
```



```

:existingCase.Id].IsClosed, 'Case should be open.');
```

```

    }

    static SocialPost getSocialPost(Map<String, Object> socialData) {
        SocialPost post = new SocialPost();
        post.Name = String.valueOf(socialData.get('source'));
        post.Content = String.valueOf(socialData.get('content'));
        post.Posted = Date.valueOf(String.valueOf(socialData.get('postDate')));
        post.PostUrl = String.valueOf(socialData.get('postUrl'));
        post.Provider = String.valueOf(socialData.get('mediaProvider'));
        post.MessageType = String.valueOf(socialData.get('messageType'));
        post.ExternalPostId = String.valueOf(socialData.get('externalPostId'));
        post.R6PostId = String.valueOf(socialData.get('r6PostId'));
        return post;
    }

    static SocialPersona getSocialPersona(Map<String, Object> socialData) {
        SocialPersona persona = new SocialPersona();
        persona.Name = String.valueOf(socialData.get('author'));
        persona.RealName = String.valueOf(socialData.get('realName'));
        persona.Provider = String.valueOf(socialData.get('mediaProvider'));
        persona.MediaProvider = String.valueOf(socialData.get('mediaProvider'));
        persona.ExternalId = String.valueOf(socialData.get('externalUserId'));
        return persona;
    }

    static Map<String, Object> getSampleSocialData(String suffix) {
        Map<String, Object> socialData = new Map<String, Object>();
        socialData.put('r6PostId', 'R6PostId' + suffix);
        socialData.put('r6SourceId', 'R6SourceId' + suffix);
        socialData.put('postTags', null);
        socialData.put('externalPostId', 'ExternalPostId' + suffix);
        socialData.put('content', 'Content' + suffix);
        socialData.put('postDate', '2015-01-12T12:12:12Z');
        socialData.put('mediaType', 'Twitter');
        socialData.put('author', 'Author');
        socialData.put('skipCreateCase', false);
        socialData.put('mediaProvider', 'TWITTER');
        socialData.put('externalUserId', 'ExternalUserId');
        socialData.put('postUrl', 'PostUrl' + suffix);
        socialData.put('messageType', 'Tweet');
        socialData.put('source', 'Source' + suffix);
        socialData.put('replyToExternalPostId', null);
        socialData.put('realName', 'Real Name');
        return socialData;
    }
}

```

Data Populated into Social Objects

Details on which fields exist in the standard objects, Social Post and Social Persona, and which fields are currently populated by data from Social Studio.

When Social Studio is configured to work with Social Customer Service (SCS), Social Studio sends data to Salesforce in raw format, which is then decoded by the SCS data intake system and appended to two standard Salesforce objects: Social Post and Social Persona. Social Post contains information that is post specific (posts in this context encompass tweets, Twitter direct messages, Facebook posts, comments, comment replies, etc.). Social Persona stores social identity information gleaned from the author information on posts received by SCS.



Note: If you've modified the default Apex class, you may experience alternate mappings.

EDITIONS

Available in: Salesforce Classic

Social Customer Service is available in **Enterprise**, **Performance**, and **Unlimited** editions.

Social Post

The following fields exist on the Social Post object.

Table 3: Social Post Fields

Salesforce Field	Data Value from Social Studio	Sample Data	Notes
AssignedTo	assignedTo	"Joe Smith" (user in Social Studio, not Salesforce)	Not updated
Analyzer Score	analyzerScore	5	Score set on a post in the R6 platform
Attachment Type	mediaUrls array	Image, Video	Populated by SCS when new data arrives in Salesforce - only the first attachment is mapped
Attachment URL	mediaUrls array	http://some.domain/image.jpg	Populated by SCS when new data arrives in Salesforce - only the first attachment is mapped.
Classification	classification	[Custom value]	Populated as admin defines
CommentCount	commentCount	N/A	Not updated
Content	content	Apple teases the new Mac Pro, what do you think	The actual content of the Social post
ExternalPostId	externalPostId	1111222233334444	Native Social Network Id
Handle	author	thehotclothes	N/A
HarvestDate	harvestDate	2013-06-11T13:07:00Z	Date post collected by Social Studio
Headline	source	N/A	Not updated
Id	salesforcePostId	12345678912345	Populated within Salesforce
InboundLinkCount	inboundLinkCount	N/A	Not updated

Salesforce Field	Data Value from Social Studio	Sample Data	Notes
IsOutbound	N/A	Yes/No	Populated within Salesforce
KeywordGroupName	keywordGroupName	N/A	Not updated
Language	language	English	Populated in SCS
LikesAndVotes	likesAndVotes	N/A	Not updated
MediaProvider	mediaProvider	TWITTER	Social network
MediaType	mediaType	Twitter	Social network
MessageType	messageType	Tweet	Possible values: - Twitter: Tweet, Reply, Direct - Facebook: Post, Comment, Reply, Private
Name	source	TWEET FROM: mysamplehandle	System generated by Social Studio.
OutboundSocialAccount	N/A	Northern Trails Outfitters	Populated with Social Account used to publish - only for outbound posts
Parent	N/A	00001728 (linked)	Populated with parent case number if Post associated with case
Persona	N/A	Sample Persona	Populated with author Social Persona if one exists
Posted	postDate	2013-06-11T13:07:00Z	Date-time published on social network.
PostPriority	postPriority	High	Priority set within Social Studio.
PostTags	postTags	post tag 1, post tag 2	Tags are comma-separated.
PostUrl	postUrl	https://twitter.com/MySampleHandle/status/11122233444	Link to source post
Provider	mediaProvider	Twitter	Set to social network.
R6PostId	r6PostId	12345678	Native Social Studio post ID.
R6SourceId	r6SourceId	1234	Native Social Studio ID for author.
R6TopicId	r6TopicId	1234567890	Native Social Studio ID for either topic profile or managed account
Recipient	recipientId	12345678912345	Native ID of recipient on social network

Salesforce Field	Data Value from Social Studio	Sample Data	Notes
RecipientType	recipientType	Person	N/A
ReplyTo	N/A	Another Social Post (linked)	Dynamically filled by Salesforce logic based on replyToExternalPostId from Social Studio
Sentiment	sentiment	Neutral	N/A
Shares	shares	N/A	Not updated
SourceTags	sourceTags	source tag 1, source tag 2	Source tags used to track types of authors
SpamRating	spamRating	NotSpam	N/A
Status	status	N/A	Not updated
StatusMessage	statusMessage	N/A	Not updated
ThreadSize	threadSize	N/A	Not updated
TopicProfileName	topicProfileName	@my_handle	Name of TP in Social Studio.sd
TopicType	topicType	Keyword Managed	Whether a topic profile or managed account.
UniqueCommentors	uniqueCommentors	N/A	Not updated
ViewCount	viewCount	N/A	Not updated
Who	N/A	Polymorphic relationship	Can be several other types of records, including Lead. Linked.

Social Persona

The following fields exist on the Social Persona object.



Note: The Social Persona object is only updated when you get a post from someone with an existing persona record. Social Persona is not updated via a parallel process.

Table 4: Social Persona Fields

Salesforce Field	Data Value from Social Studio	Sample Data	Notes
AreWeFollowing	areWeFollowing	N/A	Not updated
Bio	bio	Sample Twitter biography	N/A
ExternalId	externalUserId	1234567890	N/A
ExternalPictureURL	profileIconUrl	http://some.domain/image.jpg	N/A
Followers	followers	290	N/A

Salesforce Field	Data Value from Social Studio	Sample Data	Notes
Following	following	116	N/A
IsBlacklisted	isBlacklisted	N/A	Not updated
IsDefault	N/A	true/false	This value specifies if this record is used to get the avatar image that is displayed on the contact/account. Its used by Social Contacts.N/A
IsFollowingUs	isFollowingUs	N/A	Not updated
Klout	kloutScore	N/A	Not updated
ListedCount	listed	4	N/A
MediaProvider	mediaProvider	Twitter, Facebook etc.	Social network of profile
MediaType	mediaType	Twitter	N/A
Name	author	Joe Smith	N/A
NumberOfFriends	friends	N/A	Not updated
NumberOfTweets	tweets	59546	N/A
Parent	N/A	Contact Name (linked)	Social Persona by default parents to a contact.
ProfileType	authorType	Person	N/A
ProfileUrl	profileUrl	http://twitter.com/mysamplehandle	N/A
Provider	mediaProvider	other	Similar to mediaType but allows fewer values.
R6SourceId	r6SourceId	123456789	Native ID for author
RealName	realName	Joe Smith	N/A
TopicType	topicType	Keyword or Managed	N/A

Additional Data From Social Studio

In addition to the data noted above, certain fields come in the raw data from Social Studio but are not automatically mapped to fields within the Social Post and Social Persona objects. You can access these fields through Visualforce or Apex.

Table 5: Additional Data Fields from Social Studio

Raw Data Field	Notes
authorTags	String
classifiers	Classifier[]

Raw Data Field	Notes
createLead	Boolean
firstName	String
jobId	String
lastName	String
mediaUrls	Raw data comes through as an array of all attachments. SCS matches the first attachment with a known type (image video) to SocialPost.AttachmentType and SocialPost.AttachmentURL
originalAvatar	String
originalFullName	String
originalScreenName	String
origins	String
privacy	String
r6ParentPostId	Long
recipientId	String
replyToExternalPostId	Raw data used to look up 'In Reply To' Social Post but field not directly written into Social Post
skipCreateCase	Used for the moderation feature introduced in the Summer '14 release; if Yes, SCS skips case creation in the default logic. This field can also be used in customer-specific logic

Default Apex Class History

Social Customer Service's full default Apex class for prior releases.

For the current release, see [Default Apex Class Reference](#) on page 554

Default Apex Class and Test for Spring '16

EDITIONS

Available in: Salesforce Classic

Social Customer Service is available in **Enterprise**, **Performance**, and **Unlimited** editions.

```
global virtual class InboundSocialPostHandlerImpl implements Social.InboundSocialPostHandler
{

    final static Integer CONTENT_MAX_LENGTH = 32000;
    Boolean isNewCaseCreated = false;

    // Reopen case if it has not been closed for more than this number
```

```

    global virtual Integer getMaxNumberOfDaysClosedToReopenCase() {
        return 5;
    }

    // Create a case if one of these post tags are on the SocialPost, regardless of the
    skipCreateCase indicator.
    global virtual Set<String> getPostTagsThatCreateCase(){
        return new Set<String>();
    }

    global virtual String getDefaultAccountId() {
        return null;
    }

    global Social.InboundSocialPostResult handleInboundSocialPost(SocialPost post,
    SocialPersona persona, Map<String, Object> rawData) {
        Social.InboundSocialPostResult result = new Social.InboundSocialPostResult();
        result.setSuccess(true);
        matchPost(post);
        matchPersona(persona);

        if ((post.Content != null) && (post.Content.length() > CONTENT_MAX_LENGTH)) {
            post.Content = post.Content.abbreviate(CONTENT_MAX_LENGTH);
        }

        if (post.Id != null) {
            handleExistingPost(post, persona);
            return result;
        }

        setReplyTo(post, persona);
        buildPersona(persona);
        Case parentCase = buildParentCase(post, persona, rawData);
        setRelationshipsOnPost(post, persona, parentCase);
        setModeration(post);

        upsert post;

        if(isNewCaseCreated){
            updateCaseSource(post, parentCase);
        }

        return result;
    }

    private void setModeration(SocialPost post){
        //if we don't automatically create a case, we should flag the post as requiring
        moderator review.
        if(post.parentId == null)
            post.reviewedStatus = 'Needed';
    }

    private void updateCaseSource(SocialPost post, Case parentCase){
        if(parentCase != null) {

```

```

        parentCase.SourceId = post.Id;
        update parentCase;
    }

}

private void handleExistingPost(SocialPost post, SocialPersona persona) {
    update post;
    if (persona.id != null)
        updatePersona(persona);
}

private void setReplyTo(SocialPost post, SocialPersona persona) {
    SocialPost replyTo = findReplyTo(post, persona);
    if(replyTo.id != null) {
        post.replyToId = replyTo.id;
        post.replyTo = replyTo;
    }
}

private SocialPersona buildPersona(SocialPersona persona) {
    if (persona.Id == null)
        createPersona(persona);
    else
        updatePersona(persona);

    return persona;
}

private void updatePersona(SocialPersona persona) {
    try{
        update persona;
    }catch(Exception e) {
        System.debug('Error updating social persona: ' + e.getMessage());
    }
}

private Case buildParentCase(SocialPost post, SocialPersona persona, Map<String, Object>
rawData){
    Case parentCase = findParentCase(post, persona);
    if (parentCase != null) {
        if (!parentCase.IsClosed) {
            return parentCase;
        }
        else if (caseShouldBeReopened(parentCase)) {
            reopenCase(parentCase);
            return parentCase;
        }
    }
    if(shouldCreateCase(post, rawData)){
        isNewCaseCreated = true;
        return createCase(post, persona);
    }
}

```



```

        return null;
    }

    private boolean caseShouldBeReopened(Case c){
        return c.id != null && c.isClosed && System.now() <
c.closedDate.addDays(getMaxNumberOfDaysClosedToReopenCase());
    }

    private void setRelationshipsOnPost(SocialPost postToUpdate, SocialPersona persona,
Case parentCase) {
        if (persona.Id != null) {
            postToUpdate.PersonaId = persona.Id;

            if(persona.ParentId.getSObjectType() != SocialPost.sObjectType) {
                postToUpdate.WhoId = persona.ParentId;
            }
        }
        if(parentCase != null) {
            postToUpdate.ParentId = parentCase.Id;
        }
    }

    private Case createCase(SocialPost post, SocialPersona persona) {
        Case newCase = new Case(subject = post.Name);
        if (persona != null && persona.ParentId != null) {
            if (persona.ParentId.getSObjectType() == Contact.sObjectType) {
                newCase.ContactId = persona.ParentId;
            } else if (persona.ParentId.getSObjectType() == Account.sObjectType) {
                newCase.AccountId = persona.ParentId;
            }
        }
        if (post != null && post.Provider != null) {
            newCase.Origin = post.Provider;
        }
        insert newCase;
        return newCase;
    }

    private Case findParentCase(SocialPost post, SocialPersona persona) {
        Case parentCase = null;
        if (post.ReplyTo != null && !isReplyingToAnotherCustomer(post, persona) &&
!isChat(post)) {
            parentCase = findParentCaseFromPostReply(post);
        }
        if (parentCase == null) {
            parentCase = findParentCaseFromPersona(post, persona);
        }
        return parentCase;
    }

    private boolean isReplyingToAnotherCustomer(SocialPost post, SocialPersona persona){
        return !post.ReplyTo.IsOutbound && post.ReplyTo.PersonaId != persona.Id;
    }

```

```

private boolean isChat(SocialPost post){
    return post.messageType == 'Private' || post.messageType == 'Direct';
}

private Case findParentCaseFromPostReply(SocialPost post) {
    if (post.ReplyTo != null && String.isNotBlank(post.ReplyTo.ParentId)) {
        List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE
Id = :post.ReplyTo.ParentId LIMIT 1];
        if(!cases.isEmpty()) {
            return cases[0];
        }
    }
    return null;
}

private Case findParentCaseFromPersona(SocialPost post, SocialPersona persona) {
    SocialPost latestInboundPostWithSamePersonaAndRecipient =
findLatestInboundPostBasedOnPersonaAndRecipient(post, persona);
    if (latestInboundPostWithSamePersonaAndRecipient != null) {
        List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE
id = :latestInboundPostWithSamePersonaAndRecipient.parentId LIMIT 1];
        if(!cases.isEmpty()) {
            return cases[0];
        }
    }
    return null;
}

private void reopenCase(Case parentCase) {
    SObject[] status = [SELECT MasterLabel FROM CaseStatus WHERE IsClosed = false AND
IsDefault = true];
    parentCase.Status = ((CaseStatus)status[0]).MasterLabel;
    update parentCase;
}

private void matchPost(SocialPost post) {
    if (post.Id != null) return;

    performR6PostIdCheck(post);

    if (post.Id == null){
        performExternalPostIdCheck(post);
    }
}

private void performR6PostIdCheck(SocialPost post){
    if(post.R6PostId == null) return;
    List<SocialPost> postList = [SELECT Id FROM SocialPost WHERE R6PostId =
:post.R6PostId LIMIT 1];
    if (!postList.isEmpty()) {
        post.Id = postList[0].Id;
    }
}

```

```

private void performExternalPostIdCheck(SocialPost post) {
    if (post.provider == 'Facebook' && post.messageType == 'Private') return;
    if (post.provider == null || post.externalPostId == null) return;
    List<SocialPost> postList = [SELECT Id FROM SocialPost WHERE ExternalPostId =
:post.ExternalPostId AND Provider = :post.provider LIMIT 1];
    if (!postList.isEmpty()) {
        post.Id = postList[0].Id;
    }
}

private SocialPost findReplyTo(SocialPost post, SocialPersona persona) {
    if(post.replyToId != null && post.replyTo == null)
        return findReplyToBasedOnReplyToId(post);
    if(post.responseContextExternalId != null){
        if((post.provider == 'Facebook' && post.messageType == 'Private') ||
(post.provider == 'Twitter' && post.messageType == 'Direct')){
            SocialPost replyTo =
findReplyToBasedOnResponseContextExternalPostIdAndProvider(post);
            if(replyTo.id != null)
                return replyTo;
        }
        return findReplyToBasedOnExternalPostIdAndProvider(post);
    }
    return new SocialPost();
}

private SocialPost findReplyToBasedOnReplyToId(SocialPost post){
    List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE id = :post.replyToId LIMIT 1];
    if(posts.isEmpty())
        return new SocialPost();
    return posts[0];
}

private SocialPost findReplyToBasedOnExternalPostIdAndProvider(SocialPost post){
    List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE Provider = :post.provider AND ExternalPostId = :post.responseContextExternalId LIMIT
1];
    if(posts.isEmpty())
        return new SocialPost();
    return posts[0];
}

private SocialPost findReplyToBasedOnResponseContextExternalPostIdAndProvider(SocialPost
post){
    List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE Provider = :post.provider AND responseContextExternalId =
:post.responseContextExternalId ORDER BY posted DESC NULLS LAST LIMIT 1];
    if(posts.isEmpty())
        return new SocialPost();
    return posts[0];
}

```

```

    }

    private SocialPost findLatestInboundPostBasedOnPersonaAndRecipient(SocialPost post,
SocialPersona persona) {
        if (persona != null && String.isNotBlank(persona.Id) && post != null &&
String.isNotBlank(post.Recipient)) {
            List<SocialPost> posts = [SELECT Id, ParentId FROM SocialPost WHERE Provider
= :post.provider AND Recipient = :post.Recipient AND PersonaId = :persona.id AND IsOutbound
= false ORDER BY CreatedDate DESC LIMIT 1];
            if (!posts.isEmpty()) {
                return posts[0];
            }
        }
        return null;
    }

    private void matchPersona(SocialPersona persona) {
        if (persona != null) {
            List<SocialPersona> personaList = new List<SocialPersona>();
            if(persona.Provider != 'Other' && String.isNotBlank(persona.ExternalId)) {
                personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
Provider = :persona.Provider AND
ExternalId = :persona.ExternalId LIMIT 1];
            } else if(persona.Provider == 'Other' && String.isNotBlank(persona.ExternalId)
&& String.isNotBlank(persona.MediaProvider)) {
                personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
MediaProvider = :persona.MediaProvider AND
ExternalId = :persona.ExternalId LIMIT 1];
            } else if(persona.Provider == 'Other' && String.isNotBlank(persona.Name) &&
String.isNotBlank(persona.MediaProvider)) {
                personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
MediaProvider = :persona.MediaProvider AND
Name = :persona.Name LIMIT 1];
            }

            if (!personaList.isEmpty()) {
                persona.Id = personaList[0].Id;
                persona.ParentId = personaList[0].ParentId;
            }
        }
    }

    private void createPersona(SocialPersona persona) {
        if (persona == null || String.isNotBlank(persona.Id) ||
!isThereEnoughInformationToCreatePersona(persona))
            return;

        SObject parent = createPersonaParent(persona);
        persona.ParentId = parent.Id;
        insert persona;
    }

    private boolean isThereEnoughInformationToCreatePersona(SocialPersona persona) {
        return String.isNotBlank(persona.Name) &&

```

```

        String.isNotBlank(persona.Provider) &&
        String.isNotBlank(persona.MediaProvider);
    }

    private boolean shouldCreateCase(SocialPost post, Map<String, Object> rawData){
        return !hasSkipCreateCaseIndicator(rawData) || hasPostTagsThatCreateCase(post);
    }

    private boolean hasSkipCreateCaseIndicator(Map<String, Object> rawData) {
        Object skipCreateCase = rawData.get('skipCreateCase');
        return skipCreateCase != null &&
'true'.equalsIgnoreCase(String.valueOf(skipCreateCase));
    }

    private boolean hasPostTagsThatCreateCase(SocialPost post){
        Set<String> postTags = getPostTags(post);
        postTags.retainAll(getPostTagsThatCreateCase());
        return !postTags.isEmpty();
    }

    private Set<String> getPostTags(SocialPost post){
        Set<String> postTags = new Set<String>();
        if(post.postTags != null)
            postTags.addAll(post.postTags.split(',', 0));
        return postTags;
    }

    global String getPersonaFirstName(SocialPersona persona) {
        String name = getPersonaName(persona);
        String firstName = '';
        if (name.contains(' ')) {
            firstName = name.substringBeforeLast(' ');
        }
        firstName = firstName.abbreviate(40);
        return firstName;
    }

    global String getPersonaLastName(SocialPersona persona) {
        String name = getPersonaName(persona);
        String lastName = name;
        if (name.contains(' ')) {
            lastName = name.substringAfterLast(' ');
        }
        lastName = lastName.abbreviate(80);
        return lastName;
    }

    private String getPersonaName(SocialPersona persona) {
        String name = persona.Name.trim();
        if (String.isNotBlank(persona.RealName)) {
            name = persona.RealName.trim();
        }
        return name;
    }

```

```

global virtual SObject createPersonaParent(SocialPersona persona) {

    String firstName = getPersonaFirstName(persona);
    String lastName = getPersonaLastName(persona);

    Contact contact = new Contact(LastName = lastName, FirstName = firstName);
    String defaultAccountId = getDefaultAccountId();
    if (defaultAccountId != null)
        contact.AccountId = defaultAccountId;
    insert contact;
    return contact;
}
}

```

Test

```

@isTest
public class InboundSocialPostHandlerImplTest {

    static Map<String, Object> sampleSocialData;
    static Social.InboundSocialPostHandlerImpl handler;

    static {
        handler = new Social.InboundSocialPostHandlerImpl();
        sampleSocialData = getSampleSocialData('1');
    }

    static testMethod void verifyNewRecordCreation() {
        SocialPost post = getSocialPost(sampleSocialData);
        SocialPersona persona = getSocialPersona(sampleSocialData);

        test.startTest();
        handler.handleInboundSocialPost(post, persona, sampleSocialData);
        test.stopTest();

        SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost];

        SocialPersona createdPersona = [SELECT Id, ParentId FROM SocialPersona];
        Contact createdContact = [SELECT Id FROM Contact];
        Case createdCase = [SELECT Id, ContactId FROM Case];

        System.assertEquals(createdPost.PersonaId, createdPersona.Id, 'Post is not linked
to the Persona.');
```

```

        System.assertEquals(createdPost.WhoId, createdPersona.ParentId, 'Post is not linked
to the Contact');
```

```

        System.assertEquals(createdPost.ParentId, createdCase.Id, 'Post is not linked to
the Case.');
```

```

        System.assertEquals(createdCase.ContactId, createdContact.Id, 'Contact is not
linked to the Case.');
```

```

    }

    static testMethod void matchSocialPostRecord() {

```

```

        SocialPost existingPost = getSocialPost(getSampleSocialData('2'));
        insert existingPost;

        SocialPost post = getSocialPost(sampleSocialData);
        post.R6PostId = existingPost.R6PostId;
        SocialPersona persona = getSocialPersona(sampleSocialData);

        test.startTest();
        handler.handleInboundSocialPost(post, persona, sampleSocialData);
        test.stopTest();

        System.assertEquals(1, [SELECT Id FROM SocialPost].size(), 'There should be only
1 post');
    }

    static testMethod void matchSocialPersonaRecord() {
        Contact existingContact = new Contact(LastName = 'LastName');
        insert existingContact;
        SocialPersona existingPersona = getSocialPersona(getSampleSocialData('2'));
        existingPersona.ParentId = existingContact.Id;
        insert existingPersona;

        SocialPost post = getSocialPost(sampleSocialData);
        SocialPersona persona = getSocialPersona(sampleSocialData);
        persona.ExternalId = existingPersona.ExternalId;

        test.startTest();
        handler.handleInboundSocialPost(post, persona, sampleSocialData);
        test.stopTest();

        SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost];

        SocialPersona createdPersona = [SELECT Id, ParentId FROM SocialPersona];
        Contact createdContact = [SELECT Id FROM Contact];
        Case createdCase = [SELECT Id, ContactId FROM Case];

        System.assertEquals(createdPost.PersonaId, createdPersona.Id, 'Post is not linked
to the Persona.');
```

```

        System.assertEquals(createdPost.WhoId, createdPersona.ParentId, 'Post is not linked
to the Contact');
        System.assertEquals(createdPost.ParentId, createdCase.Id, 'Post is not linked to
the Case.');
```

```

        System.assertEquals(createdCase.ContactId, createdContact.Id, 'Contact is not
linked to the Case.');
```

```

    }

    static testMethod void matchCaseRecord() {
        Contact existingContact = new Contact(LastName = 'LastName');
        insert existingContact;
        SocialPersona existingPersona = getSocialPersona(getSampleSocialData('2'));
        existingPersona.ParentId = existingContact.Id;
        insert existingPersona;
        Case existingCase = new Case(ContactId = existingContact.Id, Subject = 'Test Case');
```

```

insert existingCase;
SocialPost existingPost = getSocialPost(getSampleSocialData('2'));
existingPost.ParentId = existingCase.Id;
existingPost.WhoId = existingContact.Id;
existingPost.PersonaId = existingPersona.Id;
insert existingPost;

SocialPost post = getSocialPost(sampleSocialData);
post.responseContextExternalId = existingPost.ExternalPostId;

test.startTest();
handler.handleInboundSocialPost(post, existingPersona, sampleSocialData);
test.stopTest();

SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost
WHERE R6PostId = :post.R6PostId];
System.assertEquals(existingPersona.Id, createdPost.PersonaId, 'Post is not linked
to the Persona.');
```

```

System.assertEquals(existingContact.Id, createdPost.WhoId, 'Post is not linked to
the Contact');
```

```

System.assertEquals(existingCase.Id, createdPost.ParentId, 'Post is not linked to
the Case.');
```

```

System.assertEquals(1, [SELECT Id FROM Case].size(), 'There should only be 1
Case.');
```

```

}

static testMethod void reopenClosedCase() {
Contact existingContact = new Contact(LastName = 'LastName');
insert existingContact;
SocialPersona existingPersona = getSocialPersona(getSampleSocialData('2'));
existingPersona.ParentId = existingContact.Id;
insert existingPersona;
Case existingCase = new Case(ContactId = existingContact.Id, Subject = 'Test Case',
Status = 'Closed');
insert existingCase;
SocialPost existingPost = getSocialPost(getSampleSocialData('2'));
existingPost.ParentId = existingCase.Id;
existingPost.WhoId = existingContact.Id;
existingPost.PersonaId = existingPersona.Id;
insert existingPost;

SocialPost post = getSocialPost(sampleSocialData);
post.responseContextExternalId = existingPost.ExternalPostId;

test.startTest();
handler.handleInboundSocialPost(post, existingPersona, sampleSocialData);
test.stopTest();

SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost
WHERE R6PostId = :post.R6PostId];
System.assertEquals(existingPersona.Id, createdPost.PersonaId, 'Post is not linked
to the Persona.');
```

```

System.assertEquals(existingContact.Id, createdPost.WhoId, 'Post is not linked to
the Contact');
```



```

        System.assertEquals(existingCase.Id, createdPost.ParentId, 'Post is not linked to
the Case.');
```

```

        System.assertEquals(1, [SELECT Id FROM Case].size(), 'There should only be 1
Case.');
```

```

        System.assertEquals(false, [SELECT Id, IsClosed FROM Case WHERE Id =
:existingCase.Id].IsClosed, 'Case should be open.');
```

```

    }

    static SocialPost getSocialPost(Map<String, Object> socialData) {
        SocialPost post = new SocialPost();
        post.Name = String.valueOf(socialData.get('source'));
        post.Content = String.valueOf(socialData.get('content'));
        post.Posted = Date.valueOf(String.valueOf(socialData.get('postDate')));
        post.PostUrl = String.valueOf(socialData.get('postUrl'));
        post.Provider = String.valueOf(socialData.get('mediaProvider'));
        post.MessageType = String.valueOf(socialData.get('messageType'));
        post.ExternalPostId = String.valueOf(socialData.get('externalPostId'));
        post.R6PostId = String.valueOf(socialData.get('r6PostId'));
        return post;
    }

    static SocialPersona getSocialPersona(Map<String, Object> socialData) {
        SocialPersona persona = new SocialPersona();
        persona.Name = String.valueOf(socialData.get('author'));
        persona.RealName = String.valueOf(socialData.get('realName'));
        persona.Provider = String.valueOf(socialData.get('mediaProvider'));
        persona.MediaProvider = String.valueOf(socialData.get('mediaProvider'));
        persona.ExternalId = String.valueOf(socialData.get('externalUserId'));
        return persona;
    }

    static Map<String, Object> getSampleSocialData(String suffix) {
        Map<String, Object> socialData = new Map<String, Object>();
        socialData.put('r6PostId', 'R6PostId' + suffix);
        socialData.put('r6SourceId', 'R6SourceId' + suffix);
        socialData.put('postTags', null);
        socialData.put('externalPostId', 'ExternalPostId' + suffix);
        socialData.put('content', 'Content' + suffix);
        socialData.put('postDate', '2015-01-12T12:12Z');
        socialData.put('mediaType', 'Twitter');
        socialData.put('author', 'Author');
        socialData.put('skipCreateCase', false);
        socialData.put('mediaProvider', 'TWITTER');
        socialData.put('externalUserId', 'ExternalUserId');
        socialData.put('postUrl', 'PostUrl' + suffix);
        socialData.put('messageType', 'Tweet');
        socialData.put('source', 'Source' + suffix);
        socialData.put('replyToExternalPostId', null);
        socialData.put('realName', 'Real Name');
        return socialData;
    }
}

```

Default Apex Class and Test for Winter '15

```

global virtual class InboundSocialPostHandlerImpl implements Social.InboundSocialPostHandler
{
    final static Integer CONTENT_MAX_LENGTH = 32000;
    Boolean isNewCaseCreated = false;

    // Reopen case if it has not been closed for more than this number
    global virtual Integer getMaxNumberOfDaysClosedToReopenCase() {
        return 5;
    }

    // Create a case if one of these post tags are on the SocialPost, regardless of the
    skipCreateCase indicator.
    global virtual Set<String> getPostTagsThatCreateCase(){
        return new Set<String>();
    }

    global virtual String getDefaultAccountId() {
        return null;
    }

    global Social.InboundSocialPostResult handleInboundSocialPost(SocialPost post,
    SocialPersona persona, Map<String, Object> rawData) {
        Social.InboundSocialPostResult result = new Social.InboundSocialPostResult();
        result.setSuccess(true);
        matchPost(post);
        matchPersona(persona);

        if ((post.Content != null) && (post.Content.length() > CONTENT_MAX_LENGTH)) {
            post.Content = post.Content.abbreviate(CONTENT_MAX_LENGTH);
        }

        if (post.Id != null) {
            handleExistingPost(post, persona);
            return result;
        }

        setReplyTo(post, persona);
        buildPersona(persona);
        Case parentCase = buildParentCase(post, persona, rawData);
        setRelationshipsOnPost(post, persona, parentCase);

        upsert post;

        if(isNewCaseCreated){
            updateCaseSource(post, parentCase);
        }

        return result;
    }

    private void updateCaseSource(SocialPost post, Case parentCase){

```

```

        if(parentCase != null) {
            parentCase.SourceId = post.Id;
            update parentCase;
        }
    }

    private void handleExistingPost(SocialPost post, SocialPersona persona) {
        update post;
        if (persona.id != null)
            updatePersona(persona);
    }

    private void setReplyTo(SocialPost post, SocialPersona persona) {
        SocialPost replyTo = findReplyTo(post, persona);
        if(replyTo.id != null) {
            post.replyToId = replyTo.id;
            post.replyTo = replyTo;
        }
    }

    private SocialPersona buildPersona(SocialPersona persona) {
        if (persona.Id == null)
            createPersona(persona);
        else
            updatePersona(persona);

        return persona;
    }

    private void updatePersona(SocialPersona persona) {
        try{
            update persona;
        }catch(Exception e) {
            System.debug('Error updating social persona: ' + e.getMessage());
        }
    }

    private Case buildParentCase(SocialPost post, SocialPersona persona, Map<String, Object>
rawData){
        Case parentCase = findParentCase(post, persona);
        if (parentCase != null) {
            if (!parentCase.IsClosed) {
                return parentCase;
            }
            else if (caseShouldBeReopened(parentCase)) {
                reopenCase(parentCase);
                return parentCase;
            }
        }
        if(shouldCreateCase(post, rawData)){
            isNewCaseCreated = true;
            return createCase(post, persona);
        }
    }

```

```

        return null;
    }

    private boolean caseShouldBeReopened(Case c){
        return c.id != null && c.isClosed && System.now() <
c.closedDate.addDays(getMaxNumberOfDaysClosedToReopenCase());
    }

    private void setRelationshipsOnPost(SocialPost postToUpdate, SocialPersona persona,
Case parentCase) {
        if (persona.Id != null) {
            postToUpdate.PersonaId = persona.Id;

            if(persona.ParentId.getSObjectType() != SocialPost.sObjectType) {
                postToUpdate.WhoId = persona.ParentId;
            }
        }
        if(parentCase != null) {
            postToUpdate.ParentId = parentCase.Id;
        }
    }

    private Case createCase(SocialPost post, SocialPersona persona) {
        Case newCase = new Case(subject = post.Name);
        if (persona != null && persona.ParentId != null) {
            if (persona.ParentId.getSObjectType() == Contact.sObjectType) {
                newCase.ContactId = persona.ParentId;
            } else if (persona.ParentId.getSObjectType() == Account.sObjectType) {
                newCase.AccountId = persona.ParentId;
            }
        }
        if (post != null && post.Provider != null) {
            newCase.Origin = post.Provider;
        }
        insert newCase;
        return newCase;
    }

    private Case findParentCase(SocialPost post, SocialPersona persona) {
        Case parentCase = null;
        if (post.ReplyTo != null && !isReplyingToAnotherCustomer(post, persona) &&
!isChat(post)) {
            parentCase = findParentCaseFromPostReply(post);
        }
        if (parentCase == null) {
            parentCase = findParentCaseFromPersona(post, persona);
        }
        return parentCase;
    }

    private boolean isReplyingToAnotherCustomer(SocialPost post, SocialPersona persona){
        return !post.ReplyTo.IsOutbound && post.ReplyTo.PersonaId != persona.Id;
    }

```

```

private boolean isChat(SocialPost post){
    return post.messageType == 'Private' || post.messageType == 'Direct';
}

private Case findParentCaseFromPostReply(SocialPost post) {
    if (post.ReplyTo != null && String.isNotBlank(post.ReplyTo.ParentId)) {
        List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE
Id = :post.ReplyTo.ParentId LIMIT 1];
        if(!cases.isEmpty()) {
            return cases[0];
        }
    }
    return null;
}

private Case findParentCaseFromPersona(SocialPost post, SocialPersona persona) {
    SocialPost latestInboundPostWithSamePersonaAndRecipient =
findLatestInboundPostBasedOnPersonaAndRecipient(post, persona);
    if (latestInboundPostWithSamePersonaAndRecipient != null) {
        List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE
id = :latestInboundPostWithSamePersonaAndRecipient.parentId LIMIT 1];
        if(!cases.isEmpty()) {
            return cases[0];
        }
    }
    return null;
}

private void reopenCase(Case parentCase) {
    SObject[] status = [SELECT MasterLabel FROM CaseStatus WHERE IsClosed = false AND
IsDefault = true];
    parentCase.Status = ((CaseStatus)status[0]).MasterLabel;
    update parentCase;
}

private void matchPost(SocialPost post) {
    if (post.Id != null) return;

    performR6PostIdCheck(post);

    if (post.Id == null){
        performExternalPostIdCheck(post);
    }
}

private void performR6PostIdCheck(SocialPost post){
    if(post.R6PostId == null) return;
    List<SocialPost> postList = [SELECT Id FROM SocialPost WHERE R6PostId =
:post.R6PostId LIMIT 1];
    if (!postList.isEmpty()) {
        post.Id = postList[0].Id;
    }
}

```

```

    }

    private void performExternalPostIdCheck(SocialPost post) {
        if (post.provider == 'Facebook' && post.messageType == 'Private') return;
        if (post.provider == null || post.externalPostId == null) return;
        List<SocialPost> postList = [SELECT Id FROM SocialPost WHERE ExternalPostId =
:post.ExternalPostId AND Provider = :post.provider LIMIT 1];
        if (!postList.isEmpty()) {
            post.Id = postList[0].Id;
        }
    }

    private SocialPost findReplyTo(SocialPost post, SocialPersona persona) {
        if(post.replyToId != null && post.replyTo == null)
            return findReplyToBasedOnReplyToId(post);
        if(post.responseContextExternalId != null){
            if((post.provider == 'Facebook' && post.messageType == 'Private') ||
(post.provider == 'Twitter' && post.messageType == 'Direct')){
                SocialPost replyTo =
findReplyToBasedOnResponseContextExternalPostIdAndProvider(post);
                if(replyTo.id != null)
                    return replyTo;
            }
            return findReplyToBasedOnExternalPostIdAndProvider(post);
        }
        return new SocialPost();
    }

    private SocialPost findReplyToBasedOnReplyToId(SocialPost post){
        List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE id = :post.replyToId LIMIT 1];
        if(posts.isEmpty())
            return new SocialPost();
        return posts[0];
    }

    private SocialPost findReplyToBasedOnExternalPostIdAndProvider(SocialPost post){
        List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE Provider = :post.provider AND ExternalPostId = :post.responseContextExternalId LIMIT
1];
        if(posts.isEmpty())
            return new SocialPost();
        return posts[0];
    }

    private SocialPost findReplyToBasedOnResponseContextExternalPostIdAndProvider(SocialPost
post){
        List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE Provider = :post.provider AND responseContextExternalId =
:post.responseContextExternalId ORDER BY posted DESC NULLS LAST LIMIT 1];
        if(posts.isEmpty())
            return new SocialPost();
    }

```

```

        return posts[0];
    }

    private SocialPost findLatestInboundPostBasedOnPersonaAndRecipient(SocialPost post,
SocialPersona persona) {
        if (persona != null && String.isNotBlank(persona.Id) && post != null &&
String.isNotBlank(post.Recipient)) {
            List<SocialPost> posts = [SELECT Id, ParentId FROM SocialPost WHERE Provider
= :post.provider AND Recipient = :post.Recipient AND PersonaId = :persona.id AND IsOutbound
= false ORDER BY CreatedDate DESC LIMIT 1];
            if (!posts.isEmpty()) {
                return posts[0];
            }
        }
        return null;
    }

    private void matchPersona(SocialPersona persona) {
        if (persona != null) {
            List<SocialPersona> personaList = new List<SocialPersona>();
            if(persona.Provider != 'Other' && String.isNotBlank(persona.ExternalId)) {
                personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
                    Provider = :persona.Provider AND
                    ExternalId = :persona.ExternalId LIMIT 1];
            } else if(persona.Provider == 'Other' && String.isNotBlank(persona.ExternalId)
&& String.isNotBlank(persona.MediaProvider)) {
                personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
                    MediaProvider = :persona.MediaProvider AND
                    ExternalId = :persona.ExternalId LIMIT 1];
            } else if(persona.Provider == 'Other' && String.isNotBlank(persona.Name) &&
String.isNotBlank(persona.MediaProvider)) {
                personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
                    MediaProvider = :persona.MediaProvider AND
                    Name = :persona.Name LIMIT 1];
            }

            if (!personaList.isEmpty()) {
                persona.Id = personaList[0].Id;
                persona.ParentId = personaList[0].ParentId;
            }
        }
    }

    private void createPersona(SocialPersona persona) {
        if (persona == null || String.isNotBlank(persona.Id) ||
!isThereEnoughInformationToCreatePersona(persona))
            return;

        SObject parent = createPersonaParent(persona);
        persona.ParentId = parent.Id;
        insert persona;
    }

    private boolean isThereEnoughInformationToCreatePersona(SocialPersona persona) {

```

```

        return String.isNotBlank(persona.Name) &&
               String.isNotBlank(persona.Provider) &&
               String.isNotBlank(persona.MediaProvider);
    }

    private boolean shouldCreateCase(SocialPost post, Map<String, Object> rawData){
        return !hasSkipCreateCaseIndicator(rawData) || hasPostTagsThatCreateCase(post);
    }

    private boolean hasSkipCreateCaseIndicator(Map<String, Object> rawData) {
        Object skipCreateCase = rawData.get('skipCreateCase');
        return skipCreateCase != null &&
            'true'.equalsIgnoreCase(String.valueOf(skipCreateCase));
    }

    private boolean hasPostTagsThatCreateCase(SocialPost post){
        Set<String> postTags = getPostTags(post);
        postTags.retainAll(getPostTagsThatCreateCase());
        return !postTags.isEmpty();
    }

    private Set<String> getPostTags(SocialPost post){
        Set<String> postTags = new Set<String>();
        if(post.postTags != null)
            postTags.addAll(post.postTags.split(',', 0));
        return postTags;
    }

    global String getPersonaFirstName(SocialPersona persona) {
        String name = getPersonaName(persona);
        String firstName = '';
        if (name.contains(' ')) {
            firstName = name.substringBeforeLast(' ');
        }
        firstName = firstName.abbreviate(40);
        return firstName;
    }

    global String getPersonaLastName(SocialPersona persona) {
        String name = getPersonaName(persona);
        String lastName = name;
        if (name.contains(' ')) {
            lastName = name.substringAfterLast(' ');
        }
        lastName = lastName.abbreviate(80);
        return lastName;
    }

    private String getPersonaName(SocialPersona persona) {
        String name = persona.Name.trim();
        if (String.isNotBlank(persona.RealName)) {
            name = persona.RealName.trim();
        }
        return name;
    }

```



```

    }

    global virtual SObject createPersonaParent(SocialPersona persona) {

        String firstName = getPersonaFirstName(persona);
        String lastName = getPersonaLastName(persona);

        Contact contact = new Contact(LastName = lastName, FirstName = firstName);
        String defaultAccountId = getDefaultAccountId();
        if (defaultAccountId != null)
            contact.AccountId = defaultAccountId;
        insert contact;
        return contact;
    }
}

```

Test

```

@isTest
public class InboundSocialPostHandlerImplTest {

    static Map<String, Object> sampleSocialData;
    static Social.InboundSocialPostHandlerImpl handler;

    static {
        handler = new Social.InboundSocialPostHandlerImpl();
        sampleSocialData = getSampleSocialData('1');
    }

    static testMethod void verifyNewRecordCreation() {
        SocialPost post = getSocialPost(sampleSocialData);
        SocialPersona persona = getSocialPersona(sampleSocialData);

        test.startTest();
        handler.handleInboundSocialPost(post, persona, sampleSocialData);
        test.stopTest();

        SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost];

        SocialPersona createdPersona = [SELECT Id, ParentId FROM SocialPersona];
        Contact createdContact = [SELECT Id FROM Contact];
        Case createdCase = [SELECT Id, ContactId FROM Case];

        System.assertEquals(createdPost.PersonaId, createdPersona.Id, 'Post is not linked
to the Persona. ');
        System.assertEquals(createdPost.WhoId, createdPersona.ParentId, 'Post is not linked
to the Contact ');
        System.assertEquals(createdPost.ParentId, createdCase.Id, 'Post is not linked to
the Case. ');
        System.assertEquals(createdCase.ContactId, createdContact.Id, 'Contact is not
linked to the Case. ');
    }
}

```

```

static testMethod void matchSocialPostRecord() {
    SocialPost existingPost = getSocialPost(getSampleSocialData('2'));
    insert existingPost;

    SocialPost post = getSocialPost(sampleSocialData);
    post.R6PostId = existingPost.R6PostId;
    SocialPersona persona = getSocialPersona(sampleSocialData);

    test.startTest();
    handler.handleInboundSocialPost(post, persona, sampleSocialData);
    test.stopTest();

    System.assertEquals(1, [SELECT Id FROM SocialPost].size(), 'There should be only
1 post');
}

static testMethod void matchSocialPersonaRecord() {
    Contact existingContact = new Contact(LastName = 'LastName');
    insert existingContact;
    SocialPersona existingPersona = getSocialPersona(getSampleSocialData('2'));
    existingPersona.ParentId = existingContact.Id;
    insert existingPersona;

    SocialPost post = getSocialPost(sampleSocialData);
    SocialPersona persona = getSocialPersona(sampleSocialData);
    persona.ExternalId = existingPersona.ExternalId;

    test.startTest();
    handler.handleInboundSocialPost(post, persona, sampleSocialData);
    test.stopTest();

    SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost];

    SocialPersona createdPersona = [SELECT Id, ParentId FROM SocialPersona];
    Contact createdContact = [SELECT Id FROM Contact];
    Case createdCase = [SELECT Id, ContactId FROM Case];

    System.assertEquals(createdPost.PersonaId, createdPersona.Id, 'Post is not linked
to the Persona.');
```

```

    System.assertEquals(createdPost.WhoId, createdPersona.ParentId, 'Post is not linked
to the Contact');
    System.assertEquals(createdPost.ParentId, createdCase.Id, 'Post is not linked to
the Case.');
```

```

    System.assertEquals(createdCase.ContactId, createdContact.Id, 'Contact is not
linked to the Case.');
```

```

}

static testMethod void matchCaseRecord() {
    Contact existingContact = new Contact(LastName = 'LastName');
    insert existingContact;
    SocialPersona existingPersona = getSocialPersona(getSampleSocialData('2'));
    existingPersona.ParentId = existingContact.Id;
    insert existingPersona;
    Case existingCase = new Case(ContactId = existingContact.Id, Subject = 'Test Case');
```

```

insert existingCase;
SocialPost existingPost = getSocialPost(getSampleSocialData('2'));
existingPost.ParentId = existingCase.Id;
existingPost.WhoId = existingContact.Id;
existingPost.PersonaId = existingPersona.Id;
insert existingPost;

SocialPost post = getSocialPost(sampleSocialData);
post.responseContextExternalId = existingPost.ExternalPostId;

test.startTest();
handler.handleInboundSocialPost(post, existingPersona, sampleSocialData);
test.stopTest();

SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost
WHERE R6PostId = :post.R6PostId];
System.assertEquals(existingPersona.Id, createdPost.PersonaId, 'Post is not linked
to the Persona.');
```

```

System.assertEquals(existingContact.Id, createdPost.WhoId, 'Post is not linked to
the Contact');
```

```

System.assertEquals(existingCase.Id, createdPost.ParentId, 'Post is not linked to
the Case.');
```

```

System.assertEquals(1, [SELECT Id FROM Case].size(), 'There should only be 1
Case.');
```

```

}

static testMethod void reopenClosedCase() {
Contact existingContact = new Contact(LastName = 'LastName');
insert existingContact;
SocialPersona existingPersona = getSocialPersona(getSampleSocialData('2'));
existingPersona.ParentId = existingContact.Id;
insert existingPersona;
Case existingCase = new Case(ContactId = existingContact.Id, Subject = 'Test Case',
Status = 'Closed');
insert existingCase;
SocialPost existingPost = getSocialPost(getSampleSocialData('2'));
existingPost.ParentId = existingCase.Id;
existingPost.WhoId = existingContact.Id;
existingPost.PersonaId = existingPersona.Id;
insert existingPost;

SocialPost post = getSocialPost(sampleSocialData);
post.responseContextExternalId = existingPost.ExternalPostId;

test.startTest();
handler.handleInboundSocialPost(post, existingPersona, sampleSocialData);
test.stopTest();

SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost
WHERE R6PostId = :post.R6PostId];
System.assertEquals(existingPersona.Id, createdPost.PersonaId, 'Post is not linked
to the Persona.');
```

```

System.assertEquals(existingContact.Id, createdPost.WhoId, 'Post is not linked to
```

```

the Contact');
    System.assertEquals(existingCase.Id, createdPost.ParentId, 'Post is not linked to
the Case.');
```

```

    System.assertEquals(1, [SELECT Id FROM Case].size(), 'There should only be 1
Case.');
```

```

    System.assertEquals(false, [SELECT Id, IsClosed FROM Case WHERE Id =
:existingCase.Id].IsClosed, 'Case should be open.');
```

```

    }

    static SocialPost getSocialPost(Map<String, Object> socialData) {
        SocialPost post = new SocialPost();
        post.Name = String.valueOf(socialData.get('source'));
        post.Content = String.valueOf(socialData.get('content'));
        post.Posted = Date.valueOf(String.valueOf(socialData.get('postDate')));
        post.PostUrl = String.valueOf(socialData.get('postUrl'));
        post.Provider = String.valueOf(socialData.get('mediaProvider'));
        post.MessageType = String.valueOf(socialData.get('messageType'));
        post.ExternalPostId = String.valueOf(socialData.get('externalPostId'));
        post.R6PostId = String.valueOf(socialData.get('r6PostId'));
        return post;
    }

    static SocialPersona getSocialPersona(Map<String, Object> socialData) {
        SocialPersona persona = new SocialPersona();
        persona.Name = String.valueOf(socialData.get('author'));
        persona.RealName = String.valueOf(socialData.get('realName'));
        persona.Provider = String.valueOf(socialData.get('mediaProvider'));
        persona.MediaProvider = String.valueOf(socialData.get('mediaProvider'));
        persona.ExternalId = String.valueOf(socialData.get('externalUserId'));
        return persona;
    }

    static Map<String, Object> getSampleSocialData(String suffix) {
        Map<String, Object> socialData = new Map<String, Object>();
        socialData.put('r6PostId', 'R6PostId' + suffix);
        socialData.put('r6SourceId', 'R6SourceId' + suffix);
        socialData.put('postTags', null);
        socialData.put('externalPostId', 'ExternalPostId' + suffix);
        socialData.put('content', 'Content' + suffix);
        socialData.put('postDate', '2015-01-12T12:12:12Z');
        socialData.put('mediaType', 'Twitter');
        socialData.put('author', 'Author');
        socialData.put('skipCreateCase', false);
        socialData.put('mediaProvider', 'TWITTER');
        socialData.put('externalUserId', 'ExternalUserId');
        socialData.put('postUrl', 'PostUrl' + suffix);
        socialData.put('messageType', 'Tweet');
        socialData.put('source', 'Source' + suffix);
        socialData.put('replyToExternalPostId', null);
        socialData.put('realName', 'Real Name');
        return socialData;
    }
}

```

Default Apex Class for Spring '15 and Summer '15

```
global virtual class InboundSocialPostHandlerImpl implements Social.InboundSocialPostHandler
{
    final static Integer CONTENT_MAX_LENGTH = 32000;

    // Reopen case if it has not been closed for more than this number
    global virtual Integer getMaxNumberOfDaysClosedToReopenCase() {
        return 5;
    }

    global virtual String getDefaultAccountId() {
        return null;
    }

    global Social.InboundSocialPostResult handleInboundSocialPost(SocialPost post,
SocialPersona persona, Map<String, Object> rawData) {
        Social.InboundSocialPostResult result = new Social.InboundSocialPostResult();
        result.setSuccess(true);
        matchPost(post);
        matchPersona(persona);

        if ((post.Content != null) && (post.Content.length() > CONTENT_MAX_LENGTH)) {
            post.Content = post.Content.abbreviate(CONTENT_MAX_LENGTH);
        }

        if (post.Id != null) {
            handleExistingPost(post, persona);
            return result;
        }

        setReplyTo(post, persona);
        buildPersona(persona);
        Case parentCase = buildParentCase(post, persona, rawData);
        setRelationshipsOnPost(post, persona, parentCase);

        upsert post;

        return result;
    }

    private void handleExistingPost(SocialPost post, SocialPersona persona) {
        update post;
        if (persona.id != null)
            updatePersona(persona);
    }

    private void setReplyTo(SocialPost post, SocialPersona persona) {
        SocialPost replyTo = findReplyTo(post, persona);
        if(replyTo.id != null) {
            post.replyToId = replyTo.id;
            post.replyTo = replyTo;
        }
    }
}
```

```

    }

    private SocialPersona buildPersona(SocialPersona persona) {
        if (persona.Id == null)
            createPersona(persona);
        else
            updatePersona(persona);
        return persona;
    }

    private void updatePersona(SocialPersona persona) {
        try {
            update persona;
        } catch (Exception e) {
            System.debug('Error updating social persona: ' + e.getMessage());
        }
    }

    private Case buildParentCase(SocialPost post, SocialPersona persona,
        Map<String, Object> rawData){
        Case parentCase = findParentCase(post, persona);
        if (caseShouldBeReopened(parentCase))
            reopenCase(parentCase);
        else if (!hasSkipCreateCaseIndicator(rawData) && (parentCase.id == null ||
parentCase.isClosed))
            parentCase = createCase(post, persona);
        return parentCase;
    }

    private boolean caseShouldBeReopened(Case c){
        return c.id != null && c.isClosed && System.now() <
c.closedDate.addDays(getMaxNumberOfDaysClosedToReopenCase());
    }

    private void setRelationshipsOnPost(SocialPost postToUpdate, SocialPersona persona,
Case parentCase) {
        if (persona.Id != null)
            postToUpdate.PersonaId = persona.Id;
        if (parentCase.id != null)
            postToUpdate.ParentId = parentCase.Id;
    }

    private Case createCase(SocialPost post, SocialPersona persona) {
        Case newCase = new Case(subject = post.Name);
        if (persona != null && persona.ParentId != null) {
            if (persona.ParentId.getSObjectType() == Contact.sObjectType)
                newCase.ContactId = persona.ParentId;
        }
        if (post != null && post.Provider != null) {
            newCase.Origin = post.Provider;
        }
        insert newCase;
        return newCase;
    }

```

```

    }

    private Case findParentCase(SocialPost post, SocialPersona persona) {
        Case parentCase = new Case();
        if (post.ReplyTo != null && (post.ReplyTo.IsOutbound || post.ReplyTo.PersonaId ==
persona.Id))
            parentCase = findParentCaseFromPostReply(post);
        else if((post.messageType == 'Direct' || post.messageType == 'Private') &&
String.isNotBlank(post.Recipient))
            parentCase = findParentCaseFromRecipient(post, persona);
        return parentCase;
    }

    private Case findParentCaseFromPostReply(SocialPost post){
        List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE Id =
:post.ReplyTo.ParentId LIMIT 1];
        if(!cases.isEmpty())
            return cases[0];
        return new Case();
    }

    private Case findParentCaseFromRecipient(SocialPost post, SocialPersona persona){
        List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE id =
:findReplyToBasedOnRecipientsLastPostToSender(post, persona).parentId LIMIT 1];
        if(!cases.isEmpty())
            return cases[0];
        return new Case();
    }

    private void reopenCase(Case parentCase) {
        SObject[] status = [SELECT MasterLabel FROM CaseStatus WHERE IsClosed = false AND
IsDefault = true];
        parentCase.Status = ((CaseStatus)status[0]).MasterLabel;
        update parentCase;
    }

    private void matchPost(SocialPost post) {
        if (post.Id != null) return;

        performR6PostIdCheck(post);

        if (post.Id == null){
            performExternalPostIdCheck(post);
        }
    }

    private void performR6PostIdCheck(SocialPost post){
        if(post.R6PostId == null) return;
        List<SocialPost> postList = [SELECT Id FROM SocialPost WHERE R6PostId = :post.R6PostId
LIMIT 1];
        if (!postList.isEmpty()) {
            post.Id = postList[0].Id;
        }
    }

```

```

    }

    private void performExternalPostIdCheck(SocialPost post) {
        if (post.provider == 'Facebook' && post.messageType == 'Private') return;
        if (post.provider == null || post.externalPostId == null) return;
        List<SocialPost> postList = [SELECT Id FROM SocialPost WHERE ExternalPostId =
:post.ExternalPostId AND Provider = :post.provider LIMIT 1];
        if (!postList.isEmpty()) {
            post.Id = postList[0].Id;
        }
    }

    private SocialPost findReplyTo(SocialPost post, SocialPersona persona) {
        if(post.replyToId != null && post.replyTo == null)
            return findReplyToBasedOnReplyToId(post);
        if(post.responseContextExternalId != null)
            return findReplyToBasedOnExternalPostIdAndProvider(post,
post.responseContextExternalId);
        return new SocialPost();
    }

    private SocialPost findReplyToBasedOnReplyToId(SocialPost post){
        List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE id = :post.replyToId LIMIT 1];
        if(posts.isEmpty())
            return new SocialPost();
        return posts[0];
    }

    private SocialPost findReplyToBasedOnExternalPostIdAndProvider(SocialPost post, String
externalPostId){
        List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE Provider = :post.provider AND ExternalPostId = :externalPostId LIMIT 1];
        if(posts.isEmpty())
            return new SocialPost();
        return posts[0];
    }

    private SocialPost findReplyToBasedOnRecipientsLastPostToSender(SocialPost post,
SocialPersona persona){
        List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE provider = :post.provider AND OutboundSocialAccount.ProviderUserId = :post.Recipient
AND ReplyTo.Persona.id = :persona.id ORDER BY CreatedDate DESC LIMIT 1];
        if(posts.isEmpty())
            return new SocialPost();
        return posts[0];
    }

    private void matchPersona(SocialPersona persona) {
        if (persona != null) {
            List<SocialPersona> personaList = new List<SocialPersona>();
            if(persona.Provider != 'Other' && String.isNotBlank(persona.ExternalId)) {

```



```

        personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
            Provider = :persona.Provider AND
            ExternalId = :persona.ExternalId LIMIT 1];
    } else if(persona.Provider == 'Other' && String.isNotBlank(persona.ExternalId)
&& String.isNotBlank(persona.MediaProvider)) {
        personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
            MediaProvider = :persona.MediaProvider AND
            ExternalId = :persona.ExternalId LIMIT 1];
    } else if(persona.Provider == 'Other' && String.isNotBlank(persona.Name) &&
String.isNotBlank(persona.MediaProvider)) {
        personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
            MediaProvider = :persona.MediaProvider AND
            Name = :persona.Name LIMIT 1];
    }

    if (!personaList.isEmpty()) {
        persona.Id = personaList[0].Id;
        persona.ParentId = personaList[0].ParentId;
    }
}

private void createPersona(SocialPersona persona) {
    if (persona == null || String.isNotBlank(persona.Id) ||
!isThereEnoughInformationToCreatePersona(persona))
        return;

    SObject parent = createPersonaParent(persona);
    persona.ParentId = parent.Id;
    insert persona;
}

private boolean isThereEnoughInformationToCreatePersona(SocialPersona persona) {
    return String.isNotBlank(persona.Name) &&
        String.isNotBlank(persona.Provider) &&
        String.isNotBlank(persona.MediaProvider);
}

private boolean hasSkipCreateCaseIndicator(Map<String, Object> rawData) {
    Object skipCreateCase = rawData.get('skipCreateCase');
    return skipCreateCase != null &&
'true'.equalsIgnoreCase(String.valueOf(skipCreateCase));
}

global virtual SObject createPersonaParent(SocialPersona persona) {
    String name = persona.Name.trim();
    if (String.isNotBlank(persona.RealName))
        name = persona.RealName.trim();

    String firstName = '';
    String lastName = name;
    if (name.contains(' ')) {
        firstName = name.substringBeforeLast(' ');
        lastName = name.substringAfterLast(' ');
    }
}

```

```

    }

    firstName = firstName.abbreviate(40);
    lastName = lastName.abbreviate(80);

    Contact contact = new Contact(LastName = lastName, FirstName = firstName);
    String defaultAccountId = getDefaultAccountId();
    if (defaultAccountId != null)
        contact.AccountId = defaultAccountId;
    insert contact;
    return contact;
}
}

```

Default Apex Class for Summer '14 and Winter '14

```

global virtual class InboundSocialPostHandlerImpl implements Social.InboundSocialPostHandler
{
    // Reopen case if it has not been closed for more than this number
    global virtual Integer getMaxNumberOfDaysClosedToReopenCase() {
        return 5;
    }

    global virtual String getDefaultAccountId() {
        return null;
    }

    global Social.InboundSocialPostResult handleInboundSocialPost(SocialPost post,
        SocialPersona persona, Map<String, Object> rawData) {
        Social.InboundSocialPostResult result = new Social.InboundSocialPostResult();
        result.setSuccess(true);
        matchPost(post);
        matchPersona(persona);

        if (post.Id != null) {
            handleExistingPost(post, persona);
            return result;
        }

        setReplyTo(post, persona, rawData);
        buildPersona(persona);
        Case parentCase = buildParentCase(post, persona, rawData);
        setRelationshipsOnPost(post, persona, parentCase);
        upsert post;

        return result;
    }

    private void handleExistingPost(SocialPost post, SocialPersona persona) {
        update post;
        if (persona.id != null)

```

```

        update persona;
    }

    private void setReplyTo(SocialPost post, SocialPersona persona, Map<String, Object>
rawData) {
        SocialPost replyTo = findReplyTo(post, persona, rawData);
        if(replyTo.id != null) {
            post.replyToId = replyTo.id;
            post.replyTo = replyTo;
        }
    }

    private SocialPersona buildPersona(SocialPersona persona) {
        if (persona.Id == null)
            createPersona(persona);
        else
            update persona;
        return persona;
    }

    private Case buildParentCase(SocialPost post, SocialPersona persona, Map<String, Object>
rawData){
        Case parentCase = findParentCase(post, persona);
        if (caseShouldBeReopened(parentCase))
            reopenCase(parentCase);
        else if(! hasSkipCreateCaseIndicator(rawData) && (parentCase.id == null ||
parentCase.isClosed))
            parentCase = createCase(post, persona);
        return parentCase;
    }

    private boolean caseShouldBeReopened(Case c){
        return c.id != null && c.isClosed && System.now() <
c.closedDate.addDays(getMaxNumberOfDaysClosedToReopenCase());
    }

    private void setRelationshipsOnPost(SocialPost postToUpdate, SocialPersona persona,
Case parentCase) {
        if (persona.Id != null)
            postToUpdate.PersonaId = persona.Id;
        if(parentCase.id != null)
            postToUpdate.ParentId = parentCase.Id;
    }

    private Case createCase(SocialPost post, SocialPersona persona) {
        Case newCase = new Case(subject = post.Name);
        if (persona != null && persona.ParentId != null) {
            if (persona.ParentId.getSObjectType() == Contact.sObjectType)
                newCase.ContactId = persona.ParentId;
        }
        insert newCase;
        return newCase;
    }

```

```

    private Case findParentCase(SocialPost post, SocialPersona persona) {
        Case parentCase = new Case();
        if (post.ReplyTo != null && (post.ReplyTo.IsOutbound || post.ReplyTo.PersonaId ==
persona.Id))
            parentCase = findParentCaseFromPostReply(post);
        else if((post.messageType == 'Direct' || post.messageType == 'Private') &&
post.Recipient != null && String.isNotBlank(post.Recipient))
            parentCase = findParentCaseFromRecipient(post, persona);
        return parentCase;
    }

    private Case findParentCaseFromPostReply(SocialPost post){
        List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE Id =
:post.ReplyTo.ParentId LIMIT 1];
        if(!cases.isEmpty())
            return cases[0];
        return new Case();
    }

    private Case findParentCaseFromRecipient(SocialPost post, SocialPersona persona){
        List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE id =
:findReplyToBasedOnRecipientsLastPostToSender(post, persona).parentId LIMIT 1];
        if(!cases.isEmpty())
            return cases[0];
        return new Case();
    }

    private void reopenCase(Case parentCase) {
        SObject[] status = [SELECT MasterLabel FROM CaseStatus WHERE IsClosed = false AND
IsDefault = true];
        parentCase.Status = ((CaseStatus)status[0]).MasterLabel;
        update parentCase;
    }

    private void matchPost(SocialPost post) {
        if (post.Id != null || post.R6PostId == null) return;
        List<SocialPost> postList = [SELECT Id FROM SocialPost WHERE R6PostId =
:post.R6PostId LIMIT 1];
        if (!postList.isEmpty())
            post.Id = postList[0].Id;
    }

    private SocialPost findReplyTo(SocialPost post, SocialPersona persona, Map<String,
Object> rawData) {
        if(post.replyToId != null && post.replyTo == null)
            return findReplyToBasedOnReplyToId(post);
        if(rawData.get('replyToExternalPostId') != null &&
String.isNotBlank(String.valueOf(rawData.get('replyToExternalPostId'))))
            return findReplyToBasedOnExternalPostIdAndProvider(post,
String.valueOf(rawData.get('replyToExternalPostId')));
        return new SocialPost();
    }

    private SocialPost findReplyToBasedOnReplyToId(SocialPost post){

```

```

        List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE id = :post.replyToId LIMIT 1];
        if(posts.isEmpty())
            return new SocialPost();
        return posts[0];
    }

    private SocialPost findReplyToBasedOnExternalPostIdAndProvider(SocialPost post, String
externalPostId){
        List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE Provider = :post.provider AND ExternalPostId = :externalPostId LIMIT 1];
        if(posts.isEmpty())
            return new SocialPost();
        return posts[0];
    }

    private SocialPost findReplyToBasedOnRecipientsLastPostToSender(SocialPost post,
SocialPersona persona){
        List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE provider = :post.provider AND OutboundSocialAccount.ProviderUserId = :post.Recipient
AND ReplyTo.Persona.id = :persona.id ORDER BY CreatedDate DESC LIMIT 1];
        if(posts.isEmpty())
            return new SocialPost();
        return posts[0];
    }

    private void matchPersona(SocialPersona persona) {
        if (persona != null && persona.ExternalId != null &&
String.isNotBlank(persona.ExternalId)) {
            List<SocialPersona> personaList = [SELECT Id, ParentId FROM SocialPersona WHERE

                Provider = :persona.Provider AND
                ExternalId = :persona.ExternalId LIMIT 1];
            if ( !personaList.isEmpty()) {
                persona.Id = personaList[0].Id;
                persona.ParentId = personaList[0].ParentId;
            }
        }
    }

    private void createPersona(SocialPersona persona) {
        if (persona == null || (persona.Id != null && String.isNotBlank(persona.Id)) ||
!isThereEnoughInformationToCreatePersona(persona))
            return;

        SObject parent = createPersonaParent(persona);
        persona.ParentId = parent.Id;
        insert persona;
    }

    private boolean isThereEnoughInformationToCreatePersona(SocialPersona persona){
        return persona.ExternalId != null && String.isNotBlank(persona.ExternalId) &&
        persona.Name != null && String.isNotBlank(persona.Name) &&
        persona.Provider != null && String.isNotBlank(persona.Provider) &&

```

```

        persona.provider != 'Other';
    }

    private boolean hasSkipCreateCaseIndicator(Map<String, Object> rawData) {
        Object skipCreateCase = rawData.get('skipCreateCase');
        return skipCreateCase != null &&
'true'.equalsIgnoreCase(String.valueOf(skipCreateCase));
    }

    global virtual SObject createPersonaParent(SocialPersona persona) {
        String name = persona.Name;
        if (persona.RealName != null && String.isNotBlank(persona.RealName))
            name = persona.RealName;

        String firstName = '';
        String lastName = 'unknown';
        if (name != null && String.isNotBlank(name)) {
            firstName = name.substringBeforeLast(' ');
            lastName = name.substringAfterLast(' ');
            if (lastName == null || String.isBlank(lastName))
                lastName = firstName;
        }

        Contact contact = new Contact(LastName = lastName, FirstName = firstName);
        String defaultAccountId = getDefaultAccountId();
        if (defaultAccountId != null)
            contact.AccountId = defaultAccountId;
        insert contact;
        return contact;
    }
}

```

Default Apex Class for Winter '13 and Spring '14

```

global virtual class InboundSocialPostHandlerImpl implements Social.InboundSocialPostHandler
{

    // Reopen case if it has not been closed for more than this number
    global virtual Integer getMaxNumberOfDaysClosedToReopenCase() {
        return 5;
    }

    global virtual Boolean usePersonAccount() {
        return false;
    }

    global virtual String getDefaultAccountId() {
        return null;
    }

    global Social.InboundSocialPostResult handleInboundSocialPost(SocialPost post,
        SocialPersona persona, Map<String, Object> rawData) {
        Social.InboundSocialPostResult result = new Social.InboundSocialPostResult();
    }
}

```

```

        result.setSuccess(true);
        matchPost(post);
        matchPersona(persona);

        if (post.Id != null) {
            update post;
            if (persona.id != null) {
                update persona;
            }
            return result;
        }

        findReplyTo(post, rawData);

        Case parentCase = null;
        if (persona.Id == null) {
            createPersona(persona);
            post.PersonaId = persona.Id;
        }
        else {
            update persona;
            post.PersonaId = persona.Id;
            parentCase = findParentCase(post, persona, rawData);
        }

        if (parentCase == null) {
            parentCase = createCase(post, persona);
        }

        post.ParentId = parentCase.Id;

        insert post;

        return result;
    }

    private Case createCase(SocialPost post, SocialPersona persona) {
        Case newCase = new Case(
            subject = post.Name
        );
        if (persona != null && persona.ParentId != null) {
            if (persona.ParentId.getSObjectType() == Contact.sObjectType) {
                newCase.ContactId = persona.ParentId;
            }
            else if (persona.ParentId.getSObjectType() == Account.sObjectType) {
                newCase.AccountId = persona.ParentId;
            }
        }
        insert newCase;
        return newCase;
    }

    private Case findParentCase(SocialPost post, SocialPersona persona, Map<String, Object>
rawData) {

```

```

        SocialPost replyToPost = null;
        if (post.ReplyTo != null && (post.ReplyTo.IsOutbound || post.ReplyTo.PersonaId ==
persona.Id)) {
            replyToPost = post.ReplyTo;
        }
        else if (post.MessageType == 'Direct' && String.isNotBlank(post.Recipient)) {
            // find the latest outbound post that the DM is responding to
            List<SocialPost> posts = [SELECT Id, ParentId FROM SocialPost WHERE
OutboundSocialAccount.ProviderUserId = :post.Recipient AND ReplyTo.Persona.Id = :persona.Id
ORDER BY CreatedDate DESC LIMIT 1];
            if (!posts.isEmpty()) {
                replyToPost = posts[0];
            }
        }

        if (replyToPost != null) {
            List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE
Id = :replyToPost.ParentId];
            if (!cases.isEmpty()) {
                if (!cases[0].IsClosed) return cases[0];
                if (cases[0].ClosedDate >
System.now().addDays(-getMaxNumberOfDaysClosedToReopenCase())) {
                    reopenCase(cases[0]);
                    return cases[0];
                }
            }
        }

        return null;
    }

    private void reopenCase(Case parentCase) {
        SObject[] status = [SELECT MasterLabel FROM CaseStatus WHERE IsClosed = false AND
IsDefault = true];
        parentCase.Status = ((CaseStatus)status[0]).MasterLabel;
        update parentCase;
    }

    private void matchPost(SocialPost post) {
        if (post.Id != null || post.R6PostId == null) return;
        List<SocialPost> postList = [SELECT Id FROM SocialPost WHERE R6PostId =
:post.R6PostId LIMIT 1];
        if (!postList.isEmpty()) {
            post.Id = postList[0].Id;
        }
    }

    private void findReplyTo(SocialPost post, Map<String, Object> rawData) {
        String replyToId = (String)rawData.get('replyToExternalPostId');
        if (String.isBlank(replyToId)) return;
        List<SocialPost> postList = [SELECT Id, ParentId, IsOutbound, PersonaId FROM
SocialPost WHERE ExternalPostId = :replyToId LIMIT 1];
        if (!postList.isEmpty()) {
            post.ReplyToId = postList[0].id;
        }
    }

```



```

        post.ReplyTo = postList[0];
    }
}

private void matchPersona(SocialPersona persona) {
    if (persona != null && String.isNotBlank(persona.ExternalId)) {
        List<SocialPersona> personaList = [SELECT Id, ParentId FROM SocialPersona WHERE

            ((Provider != 'Other' AND Provider = :persona.Provider) OR
             (Provider = 'Other' AND MediaProvider != null AND MediaProvider =
:persona.MediaProvider)) AND
            ((ExternalId != null AND ExternalId = :persona.ExternalId) OR
             (ExternalId = null AND Name = :persona.Name)) LIMIT 1];
        if ( !personaList.isEmpty()) {
            persona.Id = personaList[0].Id;
            persona.ParentId = personaList[0].ParentId;
        }
    }
}

private void createPersona(SocialPersona persona) {
    if (persona == null || persona.Id != null || String.isBlank(persona.ExternalId)
|| String.isBlank(persona.Name) ||
        String.isBlank(persona.Provider)) return;

    if (isPersonaAccountEnabled()){
        Account account = createPersonAccount(persona);
        persona.ParentId = account.Id;
    }
    else {
        Contact contact = createContact(persona);
        persona.ParentId = contact.Id;
    }
    insert persona;
}

private Boolean isPersonaAccountEnabled() {
    if (!usePersonAccount()) return false;
    Map<String, Object> accountFields = Schema.SObjectType.Account.fields.getMap();
    return accountFields.containsKey('IsPersonAccount');
}

private Account createPersonAccount(SocialPersona persona) {
    Account account = new Account(
        Name = persona.Name
    );
    insert account;
    return account;
}

private Contact createContact(SocialPersona persona) {
    String name = persona.RealName;
    if (String.isBlank(name)) {

```

```

        name = persona.Name;
    }

    String firstName = '';
    String lastName = 'unknown';
    if (!String.isBlank(name)) {
        firstName = name.substringBeforeLast(' ');
        lastName = name.substringAfterLast(' ');
        if (String.isBlank(lastName)) {
            lastName = firstName;
        }
    }

    Contact contact = new Contact(
        LastName = lastName,
        FirstName = firstName
    );
    String defaultAccountId = getDefaultAccountId();
    if (defaultAccountId != null) {
        contact.AccountId = defaultAccountId;
    }
    insert contact;
    return contact;
}

```

Reporting on Support Activity

Use support reports to track the number of cases created, case comments, case emails, case owners, case contact roles, cases with solutions, the length of time since the case last changed status or owner, and the history of cases.

You can also report on the solutions for your organization, including solution history, the languages in which solutions have been written, and whether translated solutions are out of date. If you have enabled the Self-Service portal, you can run reports to track usage of your Self-Service portal.

IN THIS SECTION:

[Using Custom Report Types to Report on Support Activity](#)

Cases and Solutions come with a number of custom report types that you can use to track your team's work with cases and solutions.

[Tips for Effective Support Reporting](#)

You can get a lot of useful information out of your cases and solutions data if you keep a few tips and best practices in mind.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions except **Database.com** (The edition determines which reports you see.)

Using Custom Report Types to Report on Support Activity

Cases and Solutions come with a number of custom report types that you can use to track your team's work with cases and solutions.

Use the built-in custom report types to create reports on the number of cases created, case comments, case emails, case owners, case contact roles, cases with solutions, the length of time since the case last changed status or owner, and the history of case fields.

You can also report on your organization's solutions, including solution history, the languages in which solutions have been written, and whether translated solutions are out of date.

Some custom report types become available only when you enable their related features. For example, when you enable historical trend reporting for Cases, you automatically get a Cases with Historical Trending custom report type.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions** except **Database.com** (The edition determines which reports you see.)

Cases with Historical Trending

Use the Cases with Historical Trending custom report type to analyze changes in case data over time. Available when Historical Trend Reporting is enabled.

Cases and Emails

Create a custom report to view a list of both inbound and outbound emails by case by choosing the Cases and Emails report type. This type of report is available when Email-to-Case or On-Demand Email-to-Case is enabled.

Translated Solutions

Choose the Translated Solutions report to summarize the translated solutions associated with each master solution.

Contact Role

Choose the Contact Role report to show all cases with their associated contact roles.

Cases with Articles

Choose the Cases with Articles report to see the articles attached to cases. This report is available if Salesforce Knowledge is enabled.

The report displays articles even if they're not marked as available for the internal app channel.

Case Lifecycle

Run case lifecycle reports to view the results of the `Range` field, which indicates the length of time since the case last changed status or owner. Each time the status or owner changes, the counter begins again at zero.

Service Contracts with Entitlements

Use the Service Contracts with Entitlements report type to report on the services your customers are entitled to. Available when Service Contracts with Entitlements is enabled.

Accounts with Entitlements with Contacts

Lists accounts with entitlements that include contacts (named callers). Available when Service Contracts with Entitlements is enabled.

Service Contracts with Contract Line Items

Lists service contracts with contract line items (products). Available when Service Contracts with Contract Line Items and Entitlements is enabled

Cases with Milestones

You can create a custom report to view a list of cases with milestones by choosing the Cases with Milestones report type. This report type is available if entitlements is enabled.



Note: Milestone status in list views and reports is based on the related entitlement process' end time. If a user's profile doesn't include access to the `Entitlement Process End Time` case field, reports and list views that they view may show an incorrect milestone status on cases. The case record and Case Milestones related list will still display the correct milestone status values.

Case History/Solution History

Use the Case History and Solution History report types to track the history of standard and custom fields on cases and solutions where field histories are set up for tracking. Use these reports to see tracked fields' old and new values. You can't use filter conditions to search the results of the `Old Value` and `New Value` fields.

Entitlements and Contracts

Use custom report types to define report criteria from which users can run and create reports on entitlements, service contracts, and contract line items. After entitlement management is enabled, Salesforce automatically includes the following custom report types:

Custom Report Type	Description	Report Type Location
Accounts with entitlements with contacts	Lists accounts with entitlements that include contacts (named callers).	Accounts & Contacts
Service contracts with contract line items	Lists service contracts with contract line items (products).	Customer Support Reports
Service contracts with entitlements	Lists service contracts with entitlements.	Customer Support Reports

Tips for Effective Support Reporting

You can get a lot of useful information out of your cases and solutions data if you keep a few tips and best practices in mind.

- When reporting on cases, add the `Parent Case Number` field to your report. This field indicates if a case is associated with a parent case.
- When reporting on first-call resolution of cases, add the `Closed When Created` field to your report. This field indicates cases that were closed by support reps via the **Save & Close** button during the creation of the case.
- You can create a case report containing contact email addresses, export that data to Excel, and then do a mass mail merge using Microsoft Word.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions except **Database.com** (The edition determines which reports you see.)

Standard Report Types

- Choose the Translated Solutions report to summarize the translated solutions associated with each master solution.
- Choose the Contact Role report to show all cases with their associated contact roles.
- Choose the Cases with Articles report to see the articles attached to cases. This report is only available if Salesforce Knowledge is enabled.

The report displays articles even if they're not marked as available for the internal app channel.

Custom Report Types

- You can create a custom report to view a list of cases with milestones by choosing the Cases with Milestones report type. This report type is only available if entitlements is enabled.
- Choose the Case History and Solution History report types to track the history of standard and custom fields on cases and solutions where field histories are set up for tracking. Use these reports to see tracked fields' old and new values. You can't use filter conditions to search the results of the `Old Value` and `New Value` fields.

- You can create a custom report to view a list of both inbound and outbound emails by case by choosing the Cases and Emails report type. This type of report is only available to organizations with Email-to-Case or On-Demand Email-to-Case enabled.
- You can run case lifecycle reports to view the results of the `Range` field, which indicates the length of time since the case last changed status or owner. Each time the status or owner changes, the counter begins again at zero.

Cases in Portals

If you have enabled the Self-Service portal, you can run reports to track usage of your Self-Service portal.

- When reporting on case comments, use the `Public Case Commented` field to indicate if the comment is private or public. Public comments are indicated with a check mark. To limit report results to public comments, customize the report and add a field filter where `Public Case Commented equals True`. Likewise, the filter `Public Case Commented equals 0` yields only private case comments.
- Choose the `Closed by Self-Service User` field to report on how many cases have been closed by users via suggested solutions on the Self-Service portal.

Solution Categories

Create a custom report that sorts solutions by category. Select the `Category Name` field to display the solution's category and the `Parent Category Name` field to display the category directly above the solution's category.

- If you restrict your report to solutions in a particular category, the report includes only solutions that are directly associated with that category. It does not include solutions in subcategories of the specified category.
- To report on uncategorized solutions, use the advanced report filters. Choose the `Category Name` field and the "equals" operator, and leave the third field blank.

Team Members

- You can report on case teams in which you are a member. After you run a case report, select `My case team's cases` from the `Show` drop-down.
- `Owner Role` for case reports is defined differently than for other objects. For most objects, `Owner Role` is defined in the `Role Name as displayed on reports` field on the user's role. Cases uses the `Label` field instead.
- You can limit any case report to cases owned by users or cases in queues. Choose `User Owned Cases` or `Queue Owned Cases` from the `View` drop-down at the top of a case report.

INDEX

A

- Accounts
 - customer accounts [63](#)
- administering entitlements [323](#), [361–363](#), [366](#)
- Age
 - cases [606–608](#)
- Agent console
 - assigning layouts [261](#)
 - choosing related objects [259](#)
 - creating layouts [257](#)
 - customizing layouts [257](#)
 - defining mini page layouts [260](#)
 - deleting layouts [258](#)
 - managing layouts [258](#)
 - setting up [256](#)
- Answers
 - Customer Portal [38](#)
 - data category [101](#)
 - disabling [100](#)
 - enabling [100](#)
 - See also Data categories [522](#)
 - setting up [99](#)
 - settings [100](#)
- Apex [398](#)
- Approval processes
 - Draft emails
 - [281](#)
 - approval processes [281](#)
 - with draft emails [281](#)
- Article Translations
 - import [491](#)
- Article types
 - adding sections to layout [450](#)
 - assigning templates to channels [456](#)
 - creating [442](#)
 - creating fields [444](#)
 - custom templates [438](#), [458](#)
 - delete [460](#)
 - field-level security [449](#)
 - managing [441](#)
 - rearranging fields on layout [450](#)
- Articles
 - access model [528](#)
 - categorizing [515](#)
 - CSV file for importing to Salesforce Knowledge [463](#)

- Articles (*continued*)
 - export status [470](#)
 - history [455](#)
 - import status [470](#)
 - importing [460](#)
 - importing parameters for Salesforce Knowledge [468](#)
 - monitor [315](#)
 - preparing articles for import to Salesforce Knowledge [462](#)
 - See also Article types [428](#), [431](#), [484](#)
 - See also Salesforce Knowledge [428](#), [431](#), [484](#)
 - topics [492](#), [497](#)
 - track changes [455](#)
 - validation status [454](#), [483](#)
 - zip file for importing [469](#)
- attachment [276](#)
- attachment component [276](#)
- Auto-response rules
 - differences from workflow alerts [305](#)
 - setup [304](#)
- Automated chat invitations
 - create [183](#)
- automated invitation
 - settings [184](#)

B

- Business hours
 - about [296–297](#)
 - holidays [298–299](#)
 - multiple [296–297](#)
- Buttons
 - Live Agent [175](#)

C

- Call Center
 - about [139](#)
 - adding a user to a call center [157](#)
 - call center definition files [141](#)
 - call center directories [151](#)
 - call center fields [150](#)
 - cloning a call center [149](#)
 - creating call centers [148](#)
 - CTI adapters [140](#)
 - CTI adaptors [140](#)
 - CTI toolkit [137](#)
 - editing call centers [149](#)
 - enabling HTTPS in a call center [156](#)

- Call Center *(continued)*
 - importing call centers [144](#)
 - managing call center users [157](#)
 - managing call centers [150](#)
 - Open CTI [136](#)
 - removing a user from a call center [158](#)
 - setting up [139](#)
 - SoftPhone layouts [153](#)
- Capturing
 - web cases [9](#)
- case
 - fields [325](#)
- Case [135](#)
- Case assignment rules [303](#)
- Case escalation rule
 - queue [315](#)
- case experts [277](#)
- case feed
 - custom feed filters [269](#)
 - highlight externally visible feed items [266](#)
- Case Feed
 - adding custom actions [268](#)
 - assigning users [264](#)
 - configuring the publisher [277](#)
 - creating permission sets [263](#)
 - custom components [268](#)
 - customer notifications for portal replies [265](#)
 - customizing [271](#), [282](#)
 - default email templates [280](#)
 - enabling [262](#)
 - enabling email drafts [267](#)
 - enabling in custom profiles [264](#)
 - feed layouts [271](#)
 - highlights panel [271](#)
 - page layouts
 - [270–271](#), [279](#)
 - editing page layouts
 - [270](#)
 - assigning page layouts [270](#)
 - Portal publisher [265](#)
 - pre-loaded email templates [280](#)
 - renaming actions [282](#)
 - renaming feed filters [282](#)
 - setting up [261](#), [268](#), [277](#)
 - settings [272](#)
 - upgrading cases [264](#)
- case milestone [351](#)
- case milestones [339](#), [350](#), [355–356](#), [358](#)
- Case milestones [332–333](#)
- case page layout
 - add actions to case page layout [290](#)
- Case Queues [535](#)
- Case teams
 - default [538](#)
 - email alerts [538](#)
 - overview [535](#)
 - predefine [538](#)
 - roles [537](#)
 - setting up [536](#)
- Case Teams [535](#)
- Cases
 - capturing web cases [9](#)
 - case teams [535](#)
 - configuring for Chatter Answers [123](#)
 - Email-to-Case attachment limits [9](#)
 - Lightning Experience [282](#), [288](#)
 - limiting spam [13](#)
 - limits [12](#)
 - reports [606–608](#)
 - search Salesforce Knowledge articles [492](#), [498](#)
 - set up [282](#), [288](#)
 - setting assignment rules [303](#)
 - teams [536](#)
 - upgrading to Case Feed interface [264](#)
 - Web-generated cases [13](#)
- Categories
 - See Data categories [515](#), [522](#)
 - See Solutions [515](#)
- Category groups
 - data categories [521](#)
 - delete [521](#)
 - restore [521](#)
 - See Data categories [515](#)
 - undelete [521](#)
- chat button
 - settings [176](#)
- Chatter Answers
 - adding to a Customer Portal [126](#)
 - adding to a partner portal [126](#)
 - adding to a Partner Portal [128](#)
 - adding to portal tabs [126](#)
 - assigning data categories [124](#)
 - best practices [135](#)
 - configuring a Customer Portal [119](#)
 - configuring a Force.com site [121](#)
 - configuring cases [123](#)
 - configuring data categories [125](#)
 - configuring promote-to-article [125](#)

- Chatter Answers (*continued*)
 - configuring Salesforce Knowledge 125
 - configuring self-registration 120
 - configuring users 120
 - creating zones 97
 - customizing appearance 111
 - editing zones 97
 - email notification settings 118
 - enabling 113
 - enabling without a Force.com site 126
 - implementation tips 133
 - language 130
 - managing users 130
 - Questions tab 123
 - setting Questions tab visibility 123
 - setting up 112
 - setup overview 111
 - site snapshot 130
 - troubleshooting setup 130
 - users 130
 - Visualforce pages 113, 115
- Communities
 - Ideas 102
- Community
 - assigning to answers 100
- Community app 107
- configuring 168
- Contacts
 - enable customer portal 59
- contract line item
 - limitations 322
- contract line items
 - setting up 365
- Convert portal user access wizard
 - about 18
 - using 19
- CORS whitelist 208
- create an entitlement process 355
- creating KCS groups 479
- CTI
 - See Call Center 136–137, 139
- CTI adapters
 - deploying 140
- CTI adaptors
 - deploying 140
- CTI Toolkit
 - CTI adapters 137
 - CTI adaptors 137
 - overview 137
- Custom fields
 - File field 445
 - Salesforce Knowledge 445
- custom Visualforce pages 116, 129
- Customer portal
 - enable access for contacts 59
 - enable access for person accounts 59
- Customer Portal
 - about 14
 - Answers 38
 - assigning user profiles 57
 - creating multiple portals 20
 - deactivating access for contacts 60
 - deactivating access for person accounts 60
 - delegated administration 65
 - disabling access for contacts 60
 - disabling access for person accounts 60
 - disabling customer accounts 63
 - Documents tab 31
 - enabling 17
 - granting access to user records 54
 - IdeaExchange 35
 - Ideas 35
 - Ideas tab 31
 - language configuration 40
 - limits 45
 - managing high-volume portal users 53
 - managing users 65
 - page layouts 39
 - portal super user 65
 - portal user access 18
 - preparation for setup 79
 - Reports tab 31
 - role 59
 - Salesforce CRM Content 31, 33
 - setting up 14
 - Sharing high-volume portal user records 56
 - sharing user records 54
 - tab order 31
 - tabs 31
 - tips and best practices 41
 - user management 46
 - user setup 57
 - viewing articles 37
 - viewing entitlements 35
 - viewing service contracts 35
 - Web tabs 31
- Customer support
 - settings 292

Customer support (*continued*)

templates [292](#)

D

Data categories

arrange [523](#)

category groups [521](#)

compared to other models [528](#)

creating [522](#)

creating category groups [520](#)

default visibility [530](#)

delete [526](#)

description [515](#)

edit [523](#)

editing visibility settings [531](#)

examples of category group visibility settings [532](#)

keyboard shortcuts [519](#)

modify [523](#)

position [523](#)

viewing visibility settings by role [529](#)

visibility [527](#)

deployment

settings [173](#), [255](#)

deployments

Live Agent [173](#)

SOS [255](#)

Directory numbers

adding additional [152](#)

managing additional [151](#)

Documentation

Salesforce Knowledge [426](#)

E

email

Email-to-Case [2–3](#), [7](#)

On-Demand Email-to-Case [4–5](#), [7](#)

routing address [7](#)

Email

email-to-case [3](#)

Email-to-Case [7](#)

On-Demand Email-to-Case [5](#), [7](#)

response rules [304](#)

Email-to-Case

email response rules [304](#)

enabling and configuring [3](#)

On-Demand Email-to-Case [5](#)

routing addresses [7](#)

setting up [2](#)

settings [3](#)

Email-to-Case (*continued*)

setup [7](#)

Enabling

Live Agent [161](#)

entitlement

business hours [360](#)

communities [330](#)

Email-to-Case [330](#)

entitlement process versions [363](#)

entitlement processes [362–363](#)

limitations [322](#)

report types [359](#)

triggers [330](#)

updating [361–362](#)

versioning [361–362](#)

Web-to-Case [330](#)

entitlement management

limitations [322](#)

milestones [343](#)

Entitlement management

about [317](#)

setting up [320](#)

entitlement process

adding milestones [355](#)

creating [351–352](#)

fields [354](#)

milestone actions [356](#)

setting up [351](#)

updating [361](#)

Entitlement process

queue [316](#)

entitlement processes [333–334](#), [339](#), [341](#), [344](#), [350](#)

Entitlement processes [332](#)

entitlements

communities [366](#)

enabling [324](#)

entitlement process [351](#)

entitlement processes [350](#)

fields [324](#)

lookups [325](#)

milestones on [331](#)

page layouts [324](#)

setting up [323](#)

templates [329](#)

user permissions [326](#)

Entitlements

about [317](#)

determining set up [318](#)

enabling in the Customer Portal [35](#)

Entitlements (*continued*)

getting started [318](#)

models [318](#)

Escalate question [135](#)

experts [277](#)

Export

articles [490](#)

Exporting

Salesforce Knowledge status [470](#)

F

FAQ

cases [12](#)

Email-to-Case [8](#)

Email-to-Case attachment limits [9](#)

limiting spam [13](#)

Web-generated cases [13](#)

field service [394](#), [396](#), [415](#), [419](#)

Field-level security

in Article Types [449](#)

Fields

audit [455](#)

call center [150](#)

history [455](#)

track changes [455](#)

Files [276](#)

Folders

excluding portal users [18](#)

H

High-volume portal users

about [50](#)

Authenticated Website licenses [50](#)

granting access to records [53](#)

granting access to user records [54](#)

High Volume Customer Portal licenses [50](#)

sharing records [56](#)

sharing records or users [52](#)

sharing sets [53–54](#), [57](#)

Holidays

setting [298–299](#)

HTML solutions [504](#)

HTTPS

enabling in a call center [156](#)

I

Idea Comments

triggers [107](#)

Idea Themes

enabling [111](#)

Ideas

adding categories [108](#)

administration [103](#)

categories [104](#), [109–110](#)

category [108](#)

Communities [102](#)

community expert [97](#)

community experts [106](#)

creating zones [97](#)

custom field layouts [106](#)

custom fields [108](#)

Customer Portal [35](#)

disabling [104](#)

editing zones [97](#)

enabling [104](#)

enabling the Community app [107](#)

expert [97](#)

fields [108](#)

half-life [104](#)

Idea Themes [111](#)

page layouts [106](#)

picklist default value [108](#)

removing categories [108](#)

reputation [105](#)

Reputation

[105](#)

Ideas [105](#)

settings [104](#)

standard fields [108](#)

status [103](#), [108–109](#)

zones [96](#)

Import

article translations into Salesforce Knowledge [491](#)

Importing

articles into Salesforce Knowledge [460](#)

call center definition files [144](#)

CSV file for importing articles to Salesforce Knowledge [463](#)

importing parameters for Salesforce Knowledge [468](#)

preparing articles for import to Salesforce Knowledge [462](#)

Salesforce Knowledge status [470](#)

zip file for importing articles into Salesforce Knowledge [469](#)

independent recurrence [334](#)

Introduction [1](#)

K

Knowledge [479](#), [493](#)

Knowledge actions

activating [481](#)

creating [481](#)

Knowledge One widget

setting up [197](#)

Knowledge user

creating [472](#)

L

Languages

See also Multilingual solutions [506](#)

Layouts

See also Article types [450](#)

See also SoftPhone layouts [153](#)

Lead assignment rules

Cases [303](#)

Leads

setting assignment rules [303](#)

limitations [214](#)

Limits

Salesforce Knowledge [429](#)

Linked articles [422](#)

Live Agent

add to Salesforce console [195](#)

add to the Salesforce console [196](#), [198](#)

agent permissions [162](#), [164](#)

audio notifications [172](#)

automated chat invitations [183](#)

automated invitation [184](#)

basic implementation [160](#)

block [192](#)

chat button [176](#)

chat buttons [178–179](#)

configuring [168](#)

creating buttons [175](#)

creating users [162](#)

customize chat windows [181](#)

customize implementation [182](#)

deployment [173](#)

deployments [173](#), [175](#), [181](#)

enabling [161](#)

enabling with Omni-Channel [201–202](#), [230–231](#)

Force.com sites [181](#)

incoming chat notifications [172](#)

Live Agent

[198](#)

Salesforce console [198](#)

Live Agent console [214–215](#)

permitted domains [175](#)

Live Agent (*continued*)

post-chat page [187](#)

pre-chat form [187](#)

queueing options [179](#)

Quick Text [188](#), [314](#)

routing options [178](#)

sensitive data [192](#)

sessions [190–191](#)

Sessions tab [190–191](#)

set up [160](#), [182](#), [195](#)

set up Quick Text [312](#)

setting Supervisor tab visibility through profiles [189](#)

setting up [197](#)

settings [168](#)

skills [167](#)

status notifications [172](#)

supervisor panel [189](#), [198](#)

supervisor tab [189](#)

transfer chats [193–194](#)

Live Agent configurations

settings [168](#)

Live Agent console

limitations [215](#)

Live Agent deployment

settings [173](#)

Live Agent limitations [214](#)

Live Agent Sessions tab

permission sets [190](#)

profiles [191](#)

Live Agent user

creating [162](#)

Log files

CTI adapter [140](#)

CTI adaptor [140](#)

M

milestone

limitations [322](#)

milestone tracker [341](#)

milestones

case [341](#)

creating [344](#)

feed items [341](#)

page layouts [339](#)

setting up [338](#)

triggers [345](#)

validation rules [343](#)

Milestones

case [337](#)

Milestones (*continued*)

work order [337](#)

Multilingual solutions

enabling [512](#)

O

Omni-Channel

compact layouts [228](#)

enable [217](#)

enabling with Live Agent [201–202](#), [230–231](#)

Omni-Channel widget [228](#)

presence configuration [223](#)

presence status [225](#)

presence statuses [227](#)

routing [232](#)

routing configuration [221](#)

routing configurations
[219](#)

create [219](#)

routing model options [221](#)

service channels

[218](#)

create [218](#)

supported objects [219](#), [234](#)

testing [229](#)

Omni-Channel Agent Work

fields [234](#)

Omni-Channel User Service Presence

fields [236](#)

Omni-Channel widget

add to Salesforce console [228](#)

add widget to console [254](#)

On-Demand Email-to-Case

setting up [4](#)

settings [5](#)

Open CTI

overview [136](#)

Overview

Call Center [139](#)

CTI toolkit [137](#)

Open CTI [136](#)

P

Partner Portal

deactivating access for contacts [60](#)

disabling access for contacts [60](#)

portal user access [18](#)

permission set

SOS [251](#)

Person accounts

enable customer portal [59](#)

Picklists

validation status [454](#), [483](#)

Portals

health check [67](#)

security [67](#)

single sign-on [46](#)

tab [93](#)

presence configuration

create [223](#)

Presence configuration

settings [223](#)

presence status

create [225](#), [252](#)

Presence status

settings [225](#)

presence statuses

access through permission sets [227](#), [252](#)

access through profiles [227](#), [253](#)

Promoted Search Terms

administer [492](#), [496](#)

Public knowledge base

prerequisites [431](#)

Public Solutions

enabling [513](#)

Q

Questions

categorizing [515](#)

zones [96](#)

Queues

about [539](#)

adding users [540](#)

case escalation rule [315](#)

cases [539](#)

creating [540](#)

custom objects [539](#)

deleting [540](#)

email settings [540](#)

examples [539](#)

knowledge article versions [539](#)

leads [539](#)

service contracts [539](#)

quick actions

Service Console [280](#)

Quick Text

enabling [313](#)

giving support agents access [313](#)

Quick Text (*continued*)

- set up [312](#)
- user permissions [313](#)

Quick Text>

- create messages [188, 314](#)

R

reputations [131](#)

Reputations

- Chatter Answers [131](#)

Roles

- editing category group visibility settings [531](#)
- examples of category group visibility settings [532](#)
- viewing category group visibility [529](#)

routing configuration

- settings [220](#)

S

Salesforce console

- configuring [168](#)
- Live Agent configurations [168](#)
- supervisor panel [198](#)

Salesforce Console for Service

- article widget [500](#)
- article widgets [501](#)

Salesforce CRM Content

- Customer Portal [33](#)

Salesforce Customer Portal

- See Customer Portal [14](#)

Salesforce Customer Portal users

- Managing Customer Portal Users [46](#)

Salesforce Knowledge

- about multiple languages [488](#)
- administration documentation [426](#)
- Apex documentation [426](#)
- API documentation [426](#)
- article widget [500](#)
- article widgets [501](#)
- available field types [445](#)
- cases documentation [426](#)
- choosing the channel display [456](#)
- create approval processes [484](#)
- create users [431](#)
- create workflow rules [484](#)
- creating article types [442](#)
- creating fields for article types [444](#)
- CSV file for importing [463](#)
- Customer Portal documentation [426](#)
- data categories documentation [426](#)

Salesforce Knowledge (*continued*)

- default language [432](#)
 - define access to articles [530](#)
 - description [426](#)
 - development documentation [426](#)
 - enabling in the Customer Portal [37](#)
 - export articles for translation [490](#)
 - get started [431](#)
 - getting started [428](#)
 - hiding data category groups [486](#)
 - import article translations [491](#)
 - importing articles [460](#)
 - importing parameters [468](#)
 - Knowledge One [436–437](#)
 - Knowledge tab [436–437](#)
 - limits [429](#)
 - limits documentation [426](#)
 - manage documentation [426](#)
 - metadata api documentation [426](#)
 - modifying the article type layout [450](#)
 - multiple languages [489](#)
 - partner portal documentation [426](#)
 - permissions [472](#)
 - preparing articles for import [462](#)
 - public article URLs [453](#)
 - public knowledge base documentation [426](#)
 - restrict article manager access [482](#)
 - search articles from cases [492, 498](#)
 - search documentation [426](#)
 - See also Article types [442](#)
 - See also Articles [426](#)
 - See also Data categories [426](#)
 - See also Public knowledge base [428, 431, 484](#)
 - send article content in email [452](#)
 - service console documentation [426](#)
 - set up [431, 484](#)
 - setting up [428, 472](#)
 - setup documentation [426](#)
 - tab visibility [428, 431](#)
 - tips and tricks [440, 498](#)
 - translation documentation [426](#)
 - video links [440](#)
 - view export status [470](#)
 - view import status [470](#)
 - zip file for importing articles [469](#)
- search highlights [493](#)
- Security
- portals [67](#)
 - portals single sign-on [46](#)

- Self-Service
 - fonts and colors [78](#)
 - jump start [72](#)
 - point-and-click editor [78](#)
 - portals [93](#)
 - preparation for setup [79](#)
 - user management [94](#)
- Self-Service Portal
 - supported HTML [86](#)
- Send actions
 - creating [281](#)
- send email quick action
 - fields [286](#)
- Send Email quick action
 - default email template [285](#)
- sequential recurrence [334](#)
- Service channel
 - settings [218](#)
- Service Console
 - global quick actions [280](#)
 - quick actions [280](#)
- service contract
 - report types [359](#)
- service contracts
 - business hours [360](#)
 - communities [366](#)
 - setting up [364](#)
 - user permissions [326](#)
- Service contracts
 - enabling in the Customer Portal [35](#)
- service level agreement [364–365](#)
- Service Presence [216–217, 226, 237–239, 241, 244–248](#)
- Set up
 - Quick Text [312](#)
- Setup
 - Call Center [139](#)
 - support [291](#)
- Share groups [56](#)
- Sharing
 - compared to category group visibility [528](#)
 - high-volume portal user records [56](#)
- Sharing rules
 - updating for portal users [18](#)
- Sharing sets
 - creating [53](#)
 - editing [53](#)
 - for user object [54](#)
 - overview [52](#)
 - viewing [57](#)
- Single sign-on
 - portals [46](#)
- skills
 - Live Agent user [167](#)
- sla
 - products [365](#)
- snap-in chat [203, 207–211](#)
- Social Action
 - customize [549](#)
- Social Customer Service
 - administration [542–543, 549–550](#)
 - Apex class [550, 552, 554, 570](#)
 - Apex tests [562](#)
 - approvals [547](#)
 - moderation [548](#)
 - permission sets [542](#)
 - profiles [542](#)
 - reconnect [546](#)
 - set up [542–543](#)
 - social action [549](#)
 - Social Objects [566](#)
 - Social Persona [566](#)
 - Social Posts [566](#)
 - triage [548](#)
- SoftPhone layouts
 - assigning to user profiles [156](#)
 - customizing [153](#)
 - defining [153](#)
- Solutions
 - defining categories [510](#)
 - defining solution categories [511](#)
 - enabling multilingual solutions [512](#)
 - HTML [504](#)
 - multilingual [506](#)
 - public [513](#)
 - reports [606–608](#)
 - settings [508](#)
 - suggested [507](#)
 - translating [506](#)
- SOS
 - deployment [255](#)
 - deployments [255](#)
 - license [251](#)
 - permission set [251](#)
 - presence status [252](#)
 - presence statuses [252–253](#)
 - routing configurations [253](#)
 - create [253](#)

- SOS deployment
 - settings [255](#)
- SOS widget
 - add widget to console [254](#)
- supervisor panel [198](#)
- Support
 - Customer Portal user management [46](#)
 - holidays [298–299](#)
 - Self-Service fonts and colors [78](#)
 - Self-Service jump start [72](#)
 - Self-Service user management [94](#)
 - setting business hours [296–297](#)
 - setting hours [296–297](#)
 - settings [292](#)
 - setup [291](#)
 - templates [292](#)
- Support Teams [535](#)
- Synonyms
 - search behavior [492, 494](#)

T

- test the embedded chat setup [213](#)
- Topics
 - articles [492, 497](#)
- Triggers
 - Idea Comments [107](#)

U

- update quick action
 - update case owner field [289](#)

- Users
 - Chatter Answers [130](#)
 - managing call centers [157](#)

V

- video links
 - Salesforce Knowledge [440](#)

W

- Web-to-Case
 - email response rules [304](#)
 - limitations [11](#)
 - limits [12](#)
 - notes [11](#)
 - setup [9](#)
- Web-to-Lead
 - email response rules [304](#)
- work order [394, 396, 415, 419](#)
- work order line item [419](#)
- work order line items
 - fields [419](#)
- work orders
 - fields [415](#)
 - pricing [396](#)
- Work orders
 - test class [398](#)
 - trigger [398](#)
- Workflow
 - differences from auto-response rules [305](#)
 - Knowledge [481](#)