salesforce

Support Your Customers

Salesforce, Summer '17

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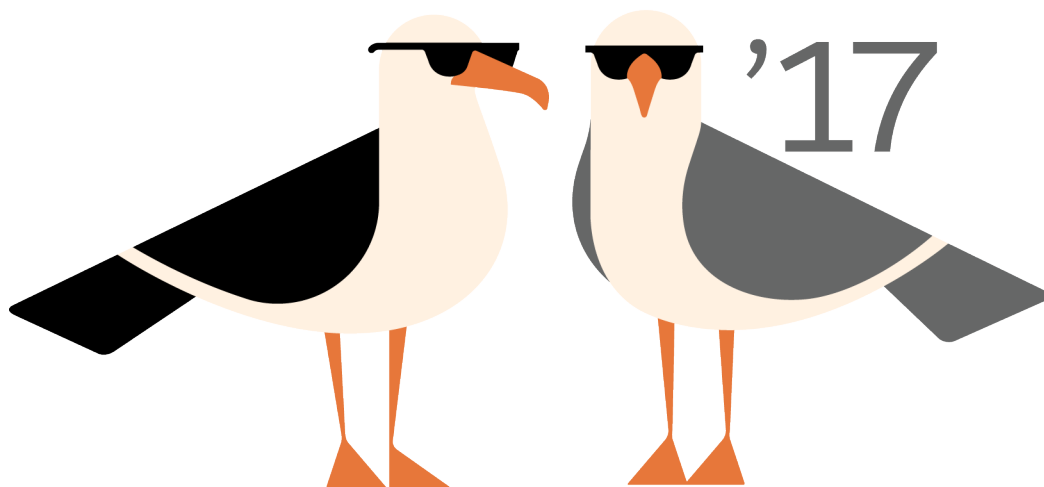
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SUPPORT YOUR CUSTOMERS

Use Service Cloud to wow your customers with awesome service and boost your support team's productivity.

Track Customer Inquiries

Track customer questions and feedback with cases.

Work with Cases

A case is a customer's question or feedback. Support agents can review cases to see how they can deliver better service. Sales reps can use cases to see how they affect the sales process. Responding to cases keeps your customers happy and enhances your brand.

Your administrator can set up communication channels to gather cases from customers' preferred forms of contact. Channels include Communities for online forums, Email-to-Case for emails, Web-to-Case for websites, Salesforce Call Center for phone calls, and more. Some channels aren't available for Lightning Experience.

From the Cases home page, you can create, locate, and edit cases and also sort and filter cases and queues using standard and custom list views.

> **Tip:** If a Salesforce console is set up, you can use its dashboard-like interface to respond to multiple cases faster. If entitlements are set up, you can check whether customers are eligible for support or if cases are close to violating a milestone. If Salesforce to Salesforce is set up and cases are shared with external contacts, choose one of the list views to see cases that your business partners have shared with you. These features are available only in Salesforce Classic.

IN THIS SECTION:

Cases Home
From the Cases home page, you can create, locate, and edit cases.

Create Cases

Guidelines for Working with Cases
A case is a customer question or feedback. The fields and related lists you see on a case are determined by your customizations or features set up by your administrator. Learn how you can get the most out of working with cases.

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Case Management Implementation Guide

Cases Home

From the Cases home page, you can create, locate, and edit cases.

In addition, case home lets you jump to case reports and mass delete cases or mass email contacts on cases.

IN THIS SECTION:

Viewing Case Lists

Changing Multiple Cases

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Guidelines for Working with Cases

Create Cases

Cloning Cases

Close Cases

Deleting Cases

Viewing Case Lists

The cases list page displays a list of cases in your current view. To show a filtered list of items, select a predefined list from the `View` drop-down list, or click **Create New View** to define your own custom views.To edit or delete any view you created, select it from the `View` drop-down list and click **Edit**.

If the Salesforce console is set up, view case lists by selecting Cases from the navigator tab (if Cases is available).

- Click **Edit** or **Del** to edit or delete a case.
- If Chatter is enabled, click ⊕ or ✕ to follow or stop following a case in your Chatter feed.
- Click **New Case** or select **Case** from the Create New drop-down list in the sidebar to create a case.
- Select the box next to one or more cases and then use the buttons at the top of the view to close the cases, take ownership of them, or change the case status or owner.

> 📝 Note: Cases with a red arrow have been automatically escalated via your organization's escalation rules.

Taking Ownership of Cases

To take ownership of cases in a queue, view the queue list view, check the box next to one or more cases, and then click **Accept**. Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations can grant additional access to cases beyond what the sharing model allows.

> 📝 Note: The org-wide sharing model for an object determines the access users have to that object's records in queues:
>
> **Public Read/Write/Transfer**
>
> Users can view and take ownership of records from any queue.

Public Read/Write or Public Read Only

Users can view any queue but only take ownership of records from queues of which they are a member or, depending on sharing settings, if they are higher in the role or territory hierarchy than a queue member.

Private

Users can only view and accept records from queues of which they are a member or, depending on sharing settings, if they are higher in the role or territory hierarchy than a queue member.

Regardless of the sharing model, users must have the "Edit" permission to take ownership of records in queues of which they are a member. Salesforce admins, users with the "Modify All" object-level permission for Cases or Leads, and users with the "Modify All Data" permission, can view and take records from any Case or Lead queue regardless of their membership in the queue.

SEE ALSO:

[Work with Cases](#)

[Guidelines for Working with Cases](#)

Changing Multiple Cases

From any case list page, administrators can "mass update" multiple cases at once. From any queue list view, users can take ownership of one or more cases if they are a member of that queue, if they are higher in the role or territory hierarchy than a queue member, or if the organization's default sharing for cases is Public Read/Write/Transfer. Simply check the boxes next to the desired cases and click the appropriate button. The following actions are possible:

- **Accept**—Assigns you as the owner of the selected cases in a queue list view. Any attached open activities are transferred to you as well. In organizations that do not have the Public Read/Write/Transfer sharing model for cases, you can take cases only from queues of which you are a member or if you are higher in the role hierarchy than a queue member.

- **Change Owner**—Assigns the cases to the one user or queue you specify. Any attached open activities are transferred to the new owner as well. When putting cases in a queue, the open activities are not transferred.

    In addition to the required user permissions for this feature, you must have read sharing access to the cases you are updating.

    > **Note:** When you change case ownership, any associated open activities that are owned by the current case owner are transferred to the new owner.

- **Close**—[Closes the selected cases](#) using the values you specify. You can set a common `Status` and `Reason` and add any comments.

    You must have the "Manage Cases" permission and read/write sharing access to the cases to use this feature.

- **Change Status**—Changes the `Status` of the cases to the value you set.

    You must have the "Manage Cases" permission and read/write sharing access to the cases to use this feature.

SEE ALSO:

[Guidelines for Working with Cases](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To change case owner:
- Transfer Cases OR Transfer Record

    AND

    Edit on cases

To close and change the status of cases:
- Manage Cases

Create Cases

You can create cases in various ways:

- Your admin can set up Web-to-Case and either Email-to-Case or On-Demand Email-to-Case to automatically capture cases from your website and customer emails.

- Your customers can log their own cases from a community, Customer Portal, Self-Service portal, or Chatter Answers.

  📝 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 create cases manually from the Cases tab, the Cases related list, or, depending on your org's settings, in the feed on record detail pages.

- If you have an answers community, you can escalate an unanswered or problematic question into a new case.

You can create or update cases only for contacts that are eligible to receive customer support. For how to find out if a contact is eligible, or if a service contract includes an entitlement, see Verify Entitlements on page 128.

To create a case for a support email or phone call:

1. Use Search to find the individual's account and then locate the contact in the Contacts related list.

   If the contact doesn't exist, create a contact for that account.

2. Click **New** in the Cases related list of the contact.

   If your org uses record types, you might be prompted to choose a `Record Type` when creating a case. Different record types can have different fields and different picklist values.

3. Enter information for the case.

   When you enter or select a contact for the `Contact Name` field, the `Account Name` field defaults to the account associated with the contact when you save the case. However, you can change the account in the `Account Name` field during subsequent updates.

4. To associate the case with an asset:

   a. Click the **Asset** lookup icon. Initially, the asset lookup lists all assets for the selected contact. Enter search criteria and click **Go!** to refine this list.

   b. Select an asset from the assets listed to associate it with the case.

   c. If you do not find a matching asset, click **New** to create a asset from the lookup dialog and associate it with the new case. The **New** button displays if your org has enabled Quick Create and you have the "Create" permission on assets.

   d. To associate the new asset with a product, enter your product search criteria and click **Go!** or select a product from the list of matches. Click **Skip** if you do not want to associate the asset with a product.

   e. Enter the asset details and click **Save**.

5. If your org settings allow it, you can associate the case with another case. Simply type the case number of the parent in the `Parent Case` field. Alternatively, you can click the lookup icon to search for a case's case number.

   When a case is associated with a parent case it signifies a relationship between cases. The relationship can be a grouping of similar cases for easy tracking, or a division of one case into multiple cases for various users to resolve.

EDITIONS

Available in: Salesforce Classic

Case assignment rules, Web-to-Case, Email-to-Case, and the Self-Service portal are available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

USER PERMISSIONS

To view cases:
- Read on cases

To create cases:
- Create on cases

6. Optionally set who sees the case and how, depending on how your org is set up.

   - To prevent the case from appearing in the Self-Service portal, deselect `Visible in Self-Service Portal`.

   - To automatically assign the case using your org's active assignment rule, select `Assign using active assignment rules`. If `Assign using active assignment rules` is selected and no assignment rule criterion is met, the case is assigned to the Default Case Owner. If this setting isn't active, you are assigned as the owner.

     If `Assign using active assignment rules` is selected by default and you deselect it, you override your org's default assignment rules and you're assigned as the owner.

   - To automatically send an email to the contact indicating that the case was create, select `Send notification email to contact`.

7. Click **Save**, or click **Save & New** to save the case and create another. Alternatively, click **Save & Close** to save and close the case immediately. This action sets the `Closed When Created` field on the case, which indicates that the case was closed during creation.

   📝 Note: When you save a newly-created case with an active assignment rule, the record type of the case can change, depending on how your admin configured assignment rules.

If your org uses divisions, the division of a new case is automatically set to the division of the related contact.

SEE ALSO:
   Cloning Cases
   Case Fields
   Cases Home
   Solving Cases

Guidelines for Working with Cases

A case is a customer question or feedback. The fields and related lists you see on a case are determined by your customizations or features set up by your administrator. Learn how you can get the most out of working with cases.

Updating Cases

When you change a contact, the account doesn't update to the contact's account, but you can edit the account yourself.

Contacts who are portal users can only view cases associated with the account on their contact record.

When you change an account, manual shares on a case are deleted for users who don't have read access on the new account.

If set up, select **Send notification email to contact** to let the contact know that you've updated the case. An email is sent only if you have access to the contact.

If set up, select **Assign using active assignment rules** to reassign a case using an assignment rule. If the case doesn't match rule criteria, it's reassigned to your organization's default case owner.

If set up, click **Sharing** to share a case with other users, groups, or roles.

If set up, close a case by selecting Closed under `Status`. Otherwise, click **Close Case** and change any fields as needed. If knowledge article submissions are set up, click **Save and Create**

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Case assignment rules, case escalation rules, web-to-case, and customer portals are available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

USER PERMISSIONS

To view cases:
- Read on cases

To update cases:
- Edit on cases

Article to store information that would help others close similar cases. When the draft article you submit is published, it's attached to the case and available in the knowledge base for easy reference.

If set up, a Web-to-Case Information section lists information entered by the customer who created the case from a website form.

Using Case Related Lists

To reply and work with cases created from Email-to-Case, use the Emails related list.

To view the required steps in a support process or to add the date of a completed milestone, use the Case Milestones related list.

To add files to a case, drag them onto the Files or Attachments related list. You can only drag files in Lightning Experience.

To find articles from your organization's knowledge base to help solve a case, use the Articles related list. To initiate a search, type keywords. Attach relevant articles to the case to track solutions and help others solve similar cases. Attached articles appear on the related list. If you create a draft article while closing a case, the article appears on the related list after the draft article is published.

To find solutions (version 1.0 of articles) to help solve a case, use the Solutions related list. If solution categories are set up, choose them to refine your search, along with keywords. If suggested solutions are set up, click **View Suggested Solutions** to see relevant solutions. The solutions are suggested based on relevancy and case similarity.

Replying to Cases from Chatter Answers (Not Available in Lightning Experience)

To reply to a case converted from a question on a web community, type your response in the Chatter-like feed, and click **Answer Customer**. Your response is tracked on the Case Comments related list.

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.

IN THIS SECTION:

Creating and Editing Case Comments

SEE ALSO:

Creating and Editing Case Comments

You can create or edit a case comment from:

- The `Internal Comments` field on a case edit page
- The Case Comments related list on a case detail page

IN THIS SECTION:

Creating and Editing Case Comments on Case Detail Pages

Creating and Editing Case Comments on Case Edit Pages

SEE ALSO:

Work with Cases

Creating and Editing Case Comments on Case Detail Pages

1. Click **New** or **Edit** on the Case Comments related list.

2. Optionally, select `Public` to enable comment notifications to the contact on the case, and to let the contact view the comment on the Customer Portal or Self-Service.

3. Type comments in `Comment`.

4. Click **Save**.

📝 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.

📝 Note: If you publish cases and case comments to external contacts via Salesforce to Salesforce, all public case comments are automatically shared with a connection when you share a case. To stop sharing a comment, select **Make Private**.

💡 Tip: On the Case Comments related list:

- Click **Del** to delete an existing comment.

- Click **Make Public** or **Make Private** to change the public status of a comment on the Customer Portal or Self-Service portal. 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.

SEE ALSO:

Creating and Editing Case Comments

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view case comments:
- Read on cases

To add case comments and make case comments public:
- Edit or Create on cases

To edit or delete case comments added by other users:
- Modify All on cases

To edit, delete, or make public your existing case comments:
- Edit Case Comments

Creating and Editing Case Comments on Case Edit Pages

1. Click **New** on the Cases tab to create a case, or select an existing case and click **Edit**.

2. Type your comments in `Internal Comments`.

3. Optionally, select `Send Customer Notification` to email the contact on the case of your new public comment.

4. Click **Save**.

An email is sent to the case owner whenever a case comment is created or updated.

Note: `Send Customer Notification` displays on case edit pages when:

- An administrator has enabled case comment notification to contacts on Support Settings or Self-Service Portal settings pages.
- The comment is marked `Public`.
- There's a contact on the case.
- The contact on the case has a valid email address.

SEE ALSO:

[Creating and Editing Case Comments](#)

Case History

The Case History related list of a case detail page tracks the changes to the case. Any time a user modifies any of the standard or custom fields whose history is set to be tracked on the case, a new entry is added to the Case History related list. All entries include the date, time, nature of the change, and who made the change. Modifications to the related lists on the case are not tracked in the case history.

Note: Changes to the `Closed When Created` field are only tracked when the field is updated via the Force.com API.

In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, for automated case changes that result from Web-to-Case or case assignment or escalation rules, the user listed in the history is the `Automated Case User` chosen in the Support Settings.

SEE ALSO:

[Work with Cases](#)

Case Fields

Depending on your page layout and field-level security settings, some fields may not be visible or editable.

Field	Description
⬆	Indicates that an escalation rule escalated a case. The escalation icon disappears when a case is closed or no longer meets escalation rule criteria.
💬	Indicates that a customer added a comment to a case from a web portal. The icon appears until the case owner views the case.
Account Name	Name of the account associated with a case's contact. The name is added when you link the case to a contact and save the case. When updating a case, you can add a different account.
Asset	The customer's product model. On edit pages, this field shows only assets associated with a case's contact, but you can use inline editing to see a list of all assets on a case.
Business Hours	Indicates the hours at which escalation actions or entitlement processes run on a case.
Case Currency	The currency for all currency amounts on a case. Amounts display in the case currency and are also converted to your personal currency. Only available for organizations that use multiple currencies.
Case Division	The division to which a case belongs. Division is inherited from a case's contact. If it has no contact, it's set to the default global division. Only available in organizations that use divisions to segment data.
Case Number	Unique number assigned to the case. Numbers start at 1000 and are read only, but administrators can change the format. Case numbers often increase sequentially, but sometimes they skip numbers in a sequence.
Case Owner	User assigned to own a case.
Case Record Type	Field name that determines the picklist values available on a case. Record types are often related to a support process.

Field	Description
Closed by Self-Service User	Indicates if a case's contact closed the case from a web portal. This field is read only.
Closed When Created	Indicates if a case was closed during creation using the **Save and Close** button. This field is read only.
Contact Email	Email address of a case's contact. The address is added when you add a contact to a case. This field is read only.
Contact Fax	Fax number of a case's contact. This number is added when you add a contact to a case. This field is read only.
Contact Mobile	Mobile phone number of a case's contact. The number is added when you add a contact to a case. This field is read only.
Contact Name	Name of a case's contact.
Contact Phone	Phone number of a case's contact. The number is added when you add a contact to a case. This field is read only.
Created By	User who created a case, including creation date and time. This field is read only.
Custom Links	Lists of custom links for cases created by an administrator.
Date/Time Closed	Date and time that a case was closed. This field is read only.
Date/Time Opened	Date and time that a case was opened. This field is read only.
Description	Description of a case,- usually a customer question or feedback. This field can store up to 32 KB of data, but only the first 255 characters display in reports.
Entitlement Name	Name of an entitlement added to a case. Only available if entitlements are set up.
Entitlement Process Start Time	The time the case entered an entitlement process. If you have "Edit" permission on cases, you can update or reset the time. When you reset the time: • Closed or completed milestones aren't affected • Incomplete milestones are recalculated based on the new start time If an entitlement process applies to a case, this field appears.
Entitlement Process End Time	The time a case exited an entitlement process. If an entitlement process applies to a case, this field appears.
Internal Comments	Internal notes related to a case. Each comment can store up to 4 KB of data and appears on the Case Comments related list. Comments marked "public" can appear on web portals.
Milestone Status	A milestone is a step in an entitlement process. If an entitlement process applies to a case, this field appears.

Field	Description
Milestone Status Icon	Indicates a milestone's status on a case by displaying one of the following icons: • ✔ Compliant • 🛑 Open Violation • ⚠ Closed Violation If an entitlement process applies to a case, this field appears.
Modified By	User who last changed a case, excluding any changes made to a case's related list items. This field also includes the date and time of the change. This field is read only.
Origin	Source of a case, for example, phone, email, or web. Administrators set field values, and each value can have up to 40 characters. When editing a case created from a community with quick actions, add an origin because it isn't set by default.
Parent Case	A case above one or more related cases in a case hierarchy. A case number identifies a parent case, and a parent case must exist before you can add it to another case.
Priority	Urgency of a case. Administrators set field values, and each value can have up to 20 characters.
Product	Name of a case's product. This field is only available if entitlements are set up to include products.
Question	A question on the Q&A tab that is related to a case. This field is populated when you create a case from a question or a question is escalated to a case.
Reason	The reason a case was created. Administrators set field values.
Status	Status of a case, for example, open or closed. Administrators set field values.
Stopped	Lets you stop an entitlement process on a case, which might be necessary if you're waiting for a customer's response. You can stop an entitlement process up to 300 times. If an entitlement process applies to a case, this field appears.
Stopped Since	Shows the date and time an entitlement process was stopped on a case. If an entitlement process applies to a case, this field appears.
Subject	Brief description of the customer's question or feedback, for example, `Printing Gives Error on Internet Explorer`.

Field	Description
Timeline	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.
Type	Type of case, for example, question or problem. Administrators set field values.
Visible in Self-Service Portal	Indicates if a case is visible to users in a web portal. If you want web-generated cases visible in a portal, include this field in Web-to-Case setup.
Web Company	Company name provided by a customer who created a case from Web-to-Case or Email-to-Case.
Web Email	Email address provided by a customer who created a case from Web-to-Case or Email-to-Case.
Web Name	Customer's name as provided by a customer who created a case from Web-to-Case or Email-to-Case.
Web Phone	Phone number provided by the customer who created a case from Web-to-Case or Email-to-Case.

IN THIS SECTION:

How is the "Age" calculated in case reports?

SEE ALSO:

Guidelines for Working with Cases

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:

    Case Fields

Using the Case Milestones Related List

The Case Milestones related list on a case detail page displays a list of milestones that automatically apply to the case due to an entitlement process. Milestones are required steps in your support process. They're metrics that represent service levels to provide to each of your customers. Examples of milestones include First Response and Resolution Times on cases.

> **Note:**
> - `No records to display` appears in the related list if no milestones apply to the case.
> - The related list contains fields that your company has chosen to display, based on its business processes. Depending on your company's requirements, you may see some or all of the following fields.

Action

Lists the actions you can perform on the milestone. For example, if you have the "Edit" permission on cases, you can click **Edit** to select the milestone completion date.

> **Note:** Customer Portal users can't edit case milestones.

Milestone

The name of a set of steps in an entitlement process that applies to the case. Users with the "Manage Entitlements" permission can click a milestone's name to view the entitlement process, case criteria, time triggers, and actions associated with it.

The following table lists the types of actions associated with 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.

Administrators can set up milestones to automate the following 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.
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.

Start Date

The date and time that the milestone tracking started.

Target Date

The date and time to complete the milestone.

Completion Date

The date and time the milestone was completed.

Target Response

Shows the time to complete the milestone. Automatically calculated to include any business hours on the case. Depending on your company's business requirements, the time can appear in minutes, hours, or days.

Time Remaining

Shows the time that remains before a milestone violation. Automatically calculated to include any business hours on the case. Depending on your company's business requirements, the time can appear in minutes, hours, or days.

Elapsed Time

Shows the time it took to complete a milestone. Automatically calculated to include any business hours on the case. Elapsed Time is calculated only after the Completion Date field is populated. Depending on your company's business requirements, the time can appear in minutes, hours, or days.

Violation

Icon (🔴) that indicates a milestone violation.

Time Since Target

Shows the time that has elapsed since a milestone violation. Automatically calculated to include any business hours on the case. You can choose to display the time in days, hours and minutes, or minutes and seconds.

Completed

Icon (✅) that indicates a milestone completion.

Because they're part of a case's history, completed milestones remain on a case even if they're no longer applicable.

SEE ALSO:

Case Fields

Searching for Cases

1. Enter your search terms in the sidebar or header search box.

2. Click **Search**.

3. From the search results, click an item to open it or click **Edit**, if available.

You can also create a case list view to find cases that match specific criteria.

SEE ALSO:

Work with Cases

Cloning Cases

The **Clone** button on a case quickly creates a new case using information from the existing case, for example, when you need to log multiple issues for a customer on a support call.

1. Click **Clone** on an existing case.

2. Enter or change any information for the new case.

3. Check the box to assign the case automatically using your active assignment rule.

4. Click **Save**.

📝 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:

Case Fields

Deleting Cases

To delete a case, click **Del** next to the case on the cases list page, or click **Delete** on the case detail page. The **Del** link and **Delete** button do not display for users who do not have the "Delete" permission on cases.

When you delete a case, all related events and tasks, case comments, and attachments are also deleted. Associated contacts, accounts, and solutions are not deleted with the case. The deleted case is moved to the Recycle Bin. If you undelete the case, any related items are also restored.

📝 Note: If you delete an event, task, case comment, or attachment from a case—and then delete the case— the event, task, case comment, or attachment cannot be restored via undelete.

SEE ALSO:

Work with Cases

Assigning Cases

You can assign cases to users or queues in a variety of ways.

• **Using an Assignment Rule for Web-to-Case, Email-to-Case, or On-Demand Email-to-Case**

  In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, web- and email-generated cases are automatically assigned to users or queues based on criteria in your active case assignment rule.

  Cases that do not match the assignment rule criteria are automatically assigned to the `Default Case Owner` specified in the Support Settings.

• **Using an Assignment Rule when Creating or Editing a Case**

  In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, when creating or editing a case, you can check a box to assign the case automatically using your active case assignment rule. An email is automatically sent to the new owner if your administrator specified an email template in the matching rule entry. If you want this checkbox to be selected by default, your administrator can modify the appropriate page layout. If required, your administrator can edit the page layout to hide the assignment checkbox but still force case assignment rules.

• **Changing Ownership of Multiple Cases (administrators only)**

  From any case list page, an administrator, or a user with the "Manage Cases" permission, can manually assign one or more cases to a single user or queue.

• **Taking Cases from a Queue**

  To take ownership of cases in a queue, go to the queue list view, check the box next to one or more cases, and click **Accept**.

  📝 Note: The org-wide sharing model for an object determines the access users have to that object's records in queues:

  Public Read/Write/Transfer

  Users can view and take ownership of records from any queue.

Public Read/Write or Public Read Only

> Users can view any queue but only take ownership of records from queues of which they are a member or, depending on sharing settings, if they are higher in the role or territory hierarchy than a queue member.

Private

> Users can only view and accept records from queues of which they are a member or, depending on sharing settings, if they are higher in the role or territory hierarchy than a queue member.

Regardless of the sharing model, users must have the "Edit" permission to take ownership of records in queues of which they are a member. Salesforce admins, users with the "Modify All" object-level permission for Cases or Leads, and users with the "Modify All Data" permission, can view and take records from any Case or Lead queue regardless of their membership in the queue.

- **Changing Ownership of One Case**

  To transfer a single case you own or have read/write privileges to, click **Change** next to the `Case Owner` field on the case detail page, and specify a user, partner user, or queue. Make sure that the new owner has the "Read" permission on cases. The **Change** link displays only on the detail page, not the edit page.

  In Group, Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, check the `Send Notification Email` box to automatically send an email to the new case owner.

- **Creating a Case Manually (default assignment)**

  When you create a case from the Cases tab, you are automatically listed as the case owner, unless the assignment rule checkbox is displayed and you select it to enable the assignment rule. If it's selected by default, you can override the assignment rule and assign yourself as the owner by deselecting the checkbox.

  📝 **Note:** You can use case assignment rules in Lightning communities if your cases are created using the **New** button on top of the Record List component (when mapped to cases). Case assignment rules aren't supported in Lightning community cases made using the Create Case Form, Create Record Button, or Contact Support & Ask Button components.

SEE ALSO:

Sharing Cases

Your administrator defines the default sharing model for your entire organization. You can change this model to extend sharing to more users than the default set by your administrator. However, you cannot change the sharing model to make it more restrictive than the default.

To view and manage sharing details, click **Sharing** on the case detail page. The Sharing Detail page lists the users, groups, roles, and territories that have sharing access to the case. On this page, you can do any of the following:

- To show a filtered list of items, select a predefined list from the `View` drop-down list, or click **Create New View** to define your own custom views. To edit or delete any view you created, select it from the `View` drop-down list and click **Edit**.

- To grant access to the record for other users, groups, roles, or territories, click **Add**.

  📝 **Note:** To share a case with another user, that user must have access to the account associated with the case and the "Read" permission on cases.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view cases:
- Read on cases

- Click **Expand List** to view all users that have access to the record.

- For manual sharing rules that you created, click **Edit** or **Del** next to an item in the list to edit or delete the access level.

Viewing Case Hierarchies

A case hierarchy shows you cases that are associated with one another via the `Parent Case` field. When a case is associated with a parent case it signifies a relationship between cases. The relationship can be a grouping of similar cases for easy tracking, or a division of one case into multiple cases for various users to resolve. In the case hierarchy, cases are indented to show that they are related to the parent case above them.

- To view the hierarchy for a case, click **View Hierarchy** next to the `Case Number` field on the case detail page.

- To specify that a case is associated with another case, edit the case and type the case number of the parent in the `Parent Case` field. Alternatively, you can click the lookup icon to search for a case's case number.

  > Note: A parent case must exist before it can be entered and saved in the `Parent Case` field.

- To create a new case that is automatically associated with a case whose detail page you are viewing, click the **New** button on the Related Cases related list. From the **New** drop-down button, you can choose to create either a blank case or a case with information from the parent case.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view cases:
- Read on cases

To view parent cases:
- Read on cases

Related Cases

If set up by your administrator, case detail pages include a Related Cases related list, which displays all of the cases directly below a parent case in a case hierarchy. Cases can be associated with each other via the `Parent Case` lookup field on a case edit page. When a case is associated with a parent case it signifies a relationship between cases. The relationship can be a grouping of similar cases for easy tracking, or a division of one case into multiple cases for various users to resolve.

From the Related Cases related list, click:

- **New** and choose from the drop-down button to create either a blank case or a case with information from the parent case.
- **Edit** to modify an existing case.
- **Cls** to close an existing case.

To perform mass actions from the Related Cases related list, select the checkboxes next to the cases you wish to update, and click:

- **Close** to close the selected cases using the values you specify.
- **Change Owner** to assign the cases to the one user or queue you specify.
- **Change Status** to change the `Status` of the cases to the value you specify.

SEE ALSO:

 Viewing Case Hierarchies

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view cases:
- Read on cases

To create cases:
- Create on cases

Use the Case Feed

Case feed is a combination of a Chatter feed and actions. Agents can use the actions to create and log calls, and communicate with customers.

IN THIS SECTION:

Case Feed Overview

Case Feed gives support agents a more streamlined way of creating, managing, and viewing cases. It includes actions and a Chatter feed. The actions let agents create case notes, log calls, change the status of cases, and communicate with customers. The feed displays important case events in chronological order, so it's easy to see the progress of each case.

Using Feed Filters in Case Feed

Feed filters make it easy for support agents to see all updates of one type, such as all call logs or all email messages, when working with cases in Case Feed. By using filters, agents can find the information they need more quickly, without having to browse through each case event.

Case Feed and Related Lists

In the traditional case interface, support agents complete tasks such as logging calls and sending emails primarily by working with related lists. In Case Feed, agents can do several of these tasks directly in the feed.

Printable View in Case Feed

Use the printable view option to view and print a comprehensive list of the information related to a case.

View and Edit Cases from the Case Detail Page in Case Feed

Use the Case Detail page to see and update detailed information about a case and work with related lists.

EDITIONS

Available in: Salesforce Classic

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

Case Feed Overview

Case Feed gives support agents a more streamlined way of creating, managing, and viewing cases. It includes actions and a Chatter feed. The actions let agents create case notes, log calls, change the status of cases, and communicate with customers. The feed displays important case events in chronological order, so it's easy to see the progress of each case.
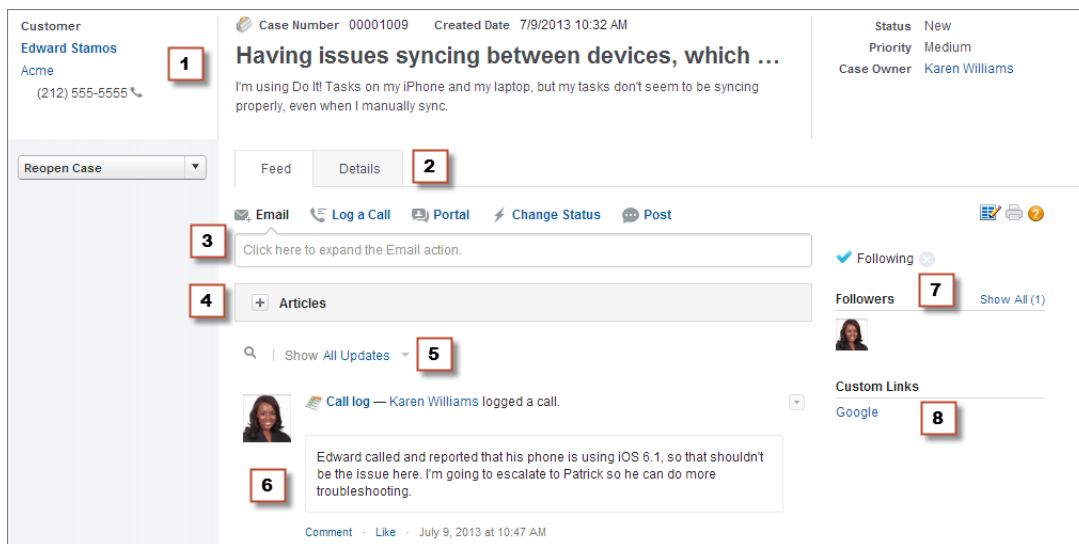
Agents assigned to a Case Feed page layout see a page that typically looks like the page shown in the screenshot when they view a case.

📝 **Note:** Administrators can customize case page layouts, so your org's page layout may look different from the screenshot.

- **Highlights Panel (1)**—Provides an overview of the most important information about a case, such as the contact information, case name, case description, status, priority, and case owner. Agents can use the column dividers to resize sections of the highlights panel so they can see more of the info that's most relevant.

- **Feed and Detail Views (2)**—From the feed view, which includes the publisher and feed, agents can easily switch to the case detail view to see more in-depth information and work with related lists.

- **Publisher (3)**—Contains the actions agents use to work with cases, such as the Email, Case Note, and Change Status actions.

- **Articles Tool (4)**—Lets agents find Knowledge articles that can help them resolve cases, and then attach them to a case or email them to customers.

- **Feed Filters (5)**—Help agents quickly find specific information in the feed by limiting the feed items that appear.

- **Feed (6)**—Offers a chronological view of the case's history. Feed items are created for:
  - Incoming and outgoing email related to the case
  - Comments related to the case on a customer portal or Chatter Answers
  - Calls logged about the case
  - Changes to the case status
  - Comments made on the case
  - Links or files added to the case
  - Milestone activity related to the case
  - Case actions that result from workflow events

- New tasks and events related to the cases

- **Follow Button and Followers List (7)**—Let agents follow the case so they're notified in Chatter of updates to it, and let them see other followers.

- **Custom Buttons and Links (8)**—Give agents access to more tools and functionality.

Administrators can customize most aspects of Case Feed, including:

- Fields in the highlight panel

- Actions that appear and the fields they include

- Feed filters that are available and where on the page the list appears

- Width of the feed

- Availability of tools, custom buttons, and custom links, and where they appear on the page

SEE ALSO:

    Case Feed and Related Lists

    View and Edit Cases from the Case Detail Page in Case Feed

Using Feed Filters in Case Feed

Feed filters make it easy for support agents to see all updates of one type, such as all call logs or all email messages, when working with cases in Case Feed. By using filters, agents can find the information they need more quickly, without having to browse through each case event.

When creating or editing feed layouts, administrators can specify which filters are available:

- Choosing only `All Updates` automatically shows all events on a case and hides the list of individual feed filters. Use this option if you want support agents to see the complete history of a case.

- Choosing only one type of feed filter automatically shows only case events of that type and hides the list of individual feed filters. For example, if you select only `All Emails`, the feed for each case shows the email messages related to the case but not case notes, portal replies, or other activities. This option is useful for agents who provide support primarily by one channel—phone, email, or portal—and who need to see case events only for that channel.

- Choosing more than one type of feed filter shows a list of available filters in the left sidebar of the Case Feed page or above the feed in the center of the page, with the first filter selected by default. For example, if you make the `All Emails`, `Status Changes`, and `Portal Answers` filters available, the feed for each case shows, by default, the email messages related to the case; users can click the other filters to see other types of case events. Use this option if your agents tend to provide support in one channel but also need to be able to see other types of case updates.

In addition, administrators can specify how and where the list of feed filters appears:

- As a fixed list in the left column.

- As a floating list in the left column. With this option, the feed filters list remains 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.

- As a drop-down list in the center column.

- As in-line links in the compact feed view. This option is available only for compact feed view.

SEE ALSO:

    Case Feed Overview

EDITIONS

Available in: Salesforce Classic

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

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Case Feed and Related Lists

In the traditional case interface, support agents complete tasks such as logging calls and sending emails primarily by working with related lists. In Case Feed, agents can do several of these tasks directly in the feed.

Here's an overview of the most common related lists included in the traditional case interface, the tasks agents do from them, and where agents can complete those tasks in Case Feed.

Activity History

Task	Case Feed Feature Agents Use for this Task
Logging a call	Log a Call action in the publisher
Viewing call logs	Call log feed items
Creating and replying to customer emails	• Email action in the publisher • Emails related list
Viewing emails	• Email feed items • Activity History related list • Emails related list

Approval History

Task	Case Feed Feature Agents Use for this Task
Submitting a case for approval	Approval History related list
Viewing approval history	Approval History related list

Attachments

Task	Case Feed Feature Agents Use for this Task
Attaching files to a case	• Articles tool (to attach Salesforce Knowledge articles) • Attachments related list
Attaching files to an email	• Email action in the publisher • Emails related list
Viewing files attached to a case	• Attachment feed items • Attachments related list

> **Note:** Attachments to case notes aren't included in the Attachments related list.

Case Comments

Task	Case Feed Feature Agents Use for this Task
Creating an internal case note	Post action in the publisher In Case Feed private comments have been replaced by case notes, which are Chatter posts and aren't available from the Case Comments related lists.
Viewing case notes	Post feed items
Creating a public customer comment	Portal action in the publisher
Viewing a public customer comment	Portal feed items

Case History

Task	Case Feed Feature Agents Use for this Task
Viewing case history	Feed items for activity on the case

Case Team

Task	Case Feed Feature Agents Use for this Task
Creating a case team	Case Team related list
Viewing a case team	Case Team related list

Contact Roles

Task	Case Feed Feature Agents Use for this Task
Creating contact roles	Contact Roles related list
Viewing contact roles	Contact Roles related list
Creating and replying to customer emails	Email action in the publisher

Content Deliveries

Task	Case Feed Feature Agents Use for this Task
Viewing or previewing content	Content Deliveries related list
Creating and delivering content	Content Deliveries related list

Emails

Task	Case Feed Feature Agents Use for this Task
Creating customer emails	• Email action in the publisher • Emails related list
Viewing emails	• Email feed items • Activity History related list • Emails related list

Open Activities

Task	Case Feed Feature Agents Use for this Task
Creating and editing tasks	• Create Task action in the publisher • Open Activities related list
Viewing tasks	• Task feed items (for tasks created with Create Task action) • Open Activities related list
Creating and editing events	• Create Event action in the publisher • Open Activities related list
Viewing events	• Task feed items (for events created with Create Event action) • Open Activities related list

Related Cases

Task	Case Feed Feature Agents Use for this Task
Creating and editing related cases	• Create Child Case action in the publisher • Related Cases related list
Viewing related cases	• Related case feed items (for cases created with Create Child Case action) • Related cases related list

Solutions

Task	Case Feed Feature Agents Use for this Task
Viewing suggested solutions	Solutions related list

Task	Case Feed Feature Agents Use for this Task
Finding solutions	Solutions related list

Printable View in Case Feed

Use the printable view option to view and print a comprehensive list of the information related to a case.

Printable view, which you access by clicking 🖶 on any Case Feed page, displays information in the following order:

1. Case details

2. Contents of related lists that are included on the Case Detail page

3. Internal notes

Notes and Tips

- Depending on the related lists that are included on the Case Detail page, certain case events, such as email messages and logged calls, may not appear in the printable view. To ensure that emails and call logs are included, customize your Case Detail page layouts for Case Feed users to add the `Activity History` related list. To include public portal posts, add the `Case Comments` related list.

- Internal notes are listed under the heading **Chatter** on the printable view page.

- Related lists that don't have data in them aren't displayed in the printable view, even if they're included in the Case Detail page layout.

- If your Case Detail page layout includes custom links and buttons, they appear in the case details section in the printable view.

- Printable view shows 500 each of the most recent internal note posts, links, and documents, and 100 of the most recent comments on each of these posts.

View and Edit Cases from the Case Detail Page in Case Feed

Use the Case Detail page to see and update detailed information about a case and work with related lists.

On the Case Detail page, you can:

- View and edit case information, including changing contact and account information, status, origin, priority, type, and case reason.
- Change or update the case subject and description.
- View related lists and use them to complete additional tasks (for example, viewing the approval history on a case or adding members to a case team).
- Close a case.
- Delete a case.
- Clone a case.

> **Note:** If your organization has inline editing enabled, you can use it on the Case Detail page.

To switch between the feed view and the case details page when viewing a case, use the
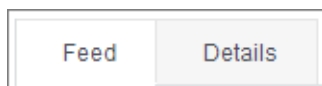
| Feed | Details | buttons or, if you're working in the Salesforce console, the

| | | buttons

To open a printable display of the case details, click **Printable View** on any page in Case Feed.

SEE ALSO:

Case Feed Overview

Solve Customer Inquiries

Suggest articles to solve customer inquiries and close cases.

IN THIS SECTION:

Solving Cases

Find an article or solution that answers the customer's question.

Enable Suggested Articles to Solve Cases

Articles are a great way to solve cases and keep service agents efficient. When customers have the same questions, you can create one article with the answer and attach it each time the question is asked.

Use Actions to Work with Cases in Case Feed

Case Feed actions make it easy for support agents to do tasks like send email, post to portals and communities, log calls, change case status, and write case notes, all on the same page.

Find, Attach, and Email Articles with the Case Feed Articles Tool

Knowledge articles can help you solve cases more quickly by providing in-depth troubleshooting steps and other detailed information. Use the articles tool in Case Feed to search for articles relevant to the case you're working with, attach articles to the case, and email them to customers.

Close Cases

After you solve a customer's case, you can close it from a few locations and create a solution or article to help solve similar cases.

Sending Articles from Cases

Service agents can send articles as PDFs to customers with cases.

Solving Cases

Find an article or solution that answers the customer's question.

To solve a case:

1. View the case.

2. Find an article or find a solution that answers the case's question.

3. Attach the article or solution to the case by clicking **Select** next to a reviewed solution in the list of solutions. Or, click the title of an unreviewed solution and choose **Select** on the solution detail page.

4. Email the solution or article to the contact by clicking **Send Email** in the Activity History related list.

   a. Click **Select Template** and choose a template.

   You or your administrator can create email templates that automatically include the case description, solution detail, solution attachments, and other fields.

   b. Fill in the email fields.

   c. Click **Send**.

   The emailed solution or article is logged as an activity in the Activity History related list.

5. Close the case.

Enable Suggested Articles to Solve Cases

Articles are a great way to solve cases and keep service agents efficient. When customers have the same questions, you can create one article with the answer and attach it each time the question is asked.

Suggested articles help knowledge base users solve cases quickly. When a new case is saved, the search engine automatically looks for articles that have keywords in common with the admin-selected case fields. The user working the case can scan the articles and attach them to the case if needed, or initiate another search with different keywords. Articles attached to the case appear on the Articles related list, which also provides a **Find Articles** button to search the knowledge base at any time.

To enable suggested articles:

1. From Setup, enter `Support Settings` in the `Quick Find` box, then select **Support Settings**.

2. Click **Edit** and choose **Enable suggested articles**. Suggested articles and suggested solutions cannot be enabled at the same time.

3. Choose each audience (channel) that receives suggested articles when submitting a case. Suggested articles are available for the internal app and the portals.

4. When you're done with the Support Settings page click **Save**.

Use Actions to Work with Cases in Case Feed

Case Feed actions make it easy for support agents to do tasks like send email, post to portals and communities, log calls, change case status, and write case notes, all on the same page.
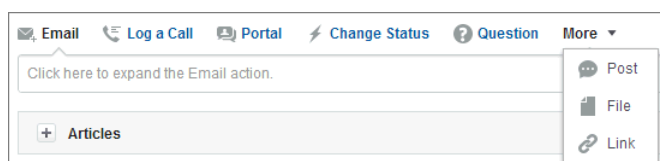
Actions appear in the publisher at the top of the feed.

Here are some common Case Feed actions. Depending on how your administrator has set up your organization, you might not see all of these actions.

- Use the Email action to respond to customers by email. In some organizations, the Email and Portal actions are combined in an Answer Customer action.

- The Log a Call action lets you create a record of the details of a phone call. Call logs are visible only to other users in your organization, not to customers.

  > **Note:** If you're using a SoftPhone, completed calls and call notes are logged automatically in the case's feed, as are interaction log entries whose `Status` is Completed.

- With the Portal action, you can post replies to a customer portal or a Chatter Answers community.

- Use the Change Status action to escalate, close, or make other changes to the status of a case.

- The Question action lets you search for and create questions.

- The Post, File, and Link actions are the same ones you're used to seeing in Chatter.

  - Use the Post action to create case notes to share information about the case or get help from others in your organization. (Notes created with the Post action aren't included in the Case Comments related list on the case detail page.)

  - Add a PDF, photo, or other document to the case with the File action. (Documents you add with File aren't included in the Attachments related list on the case detail page.)

  - Use the Link action to share a link that's relevant to the case.

SEE ALSO:

Case Feed Overview

Find, Attach, and Email Articles with the Case Feed Articles Tool

Knowledge articles can help you solve cases more quickly by providing in-depth troubleshooting steps and other detailed information. Use the articles tool in Case Feed to search for articles relevant to the case you're working with, attach articles to the case, and email them to customers.

> **Note:** Before you can use the articles tool, your administrator needs to set up and configure Salesforce Knowledge.

EDITIONS

Available in: Salesforce Classic

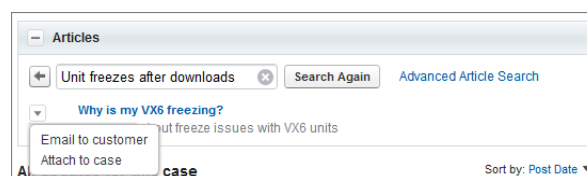Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To use articles in Case Feed:
- Manage Cases

  AND

  Read on at least one article type

- Click ✚ to open the articles tool.

- By default, the tool shows articles with keywords or phrases similar to the subject and description of the case you're working with. If you don't see the article you want, type new terms in the search box and click **Search Again**, or click **Advanced Article Search** for more options.

- Click the title of an article to open it in a new window if you want to see more information about it than just the title and the summary.

- When you find the article you want, choose what you want to do with it:

    - Select `Email to customer` to attach the article to a message as a PDF.

    - Select `Attach to case` to include the article as a case attachment.

Close Cases

After you solve a customer's case, you can close it from a few locations and create a solution or article to help solve similar cases.

1. Click **Close Case** on a case's detail page, **Cls** on the Cases related list, or **Save & Close** while editing a case. If enabled by your administrator, you can select Closed from `Status` on a case's edit page and click **Save** without completing any more steps.

2. Update `Status`, `Case Reason`, or any other fields as necessary.

3. If solutions are enabled, you can fill in the `Solution Details` for the case. If you don't want to save the solution or submit it for review to a solution manager, uncheck `Submit to public solutions`. When this field is checked, the new solution is automatically linked to the case.

4. If there's a contact on the case, select `Notify contact on case close` to send an email to the contact based on a predefined case close template.

5. Click **Save** or **Save and Create Article**. The article option is available if both Salesforce Knowledge and article submission during case close is enabled.

> 💡 Tip: If you have the "Manage Cases" permission, you can close multiple cases at once using the **Close** button on case lists.

SEE ALSO:

Deleting Cases

Tips on Writing Solutions

<div style="float:right">

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To close cases:
- Edit on cases

</div>

Sending Articles from Cases

USER PERMISSIONS		EDITIONS
To set up Email-to-Case or On-Demand Email-to-Case:	Customize Application	Available in: Salesforce Classic, Lightning Experience
To enable Email-to-Case or On-Demand Email-to-Case:	Modify all Data AND Customize Application	Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.
To customize page layouts:	Customize Application	Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.
To create or change HTML email templates:	Edit HTML Templates	
To create or change public email template folders:	Manage Public Templates	
To create or change Visualforce email templates:	Customize Application	

Service agents can send articles as PDFs to customers with cases.

If articles are associated with a case, users working on the case can attach PDF versions of the articles to an email simply by choosing a template you create. This capability is available if Email-to-Case or On-Demand-Email-to-Case is set up and the Email related list is visible on case page layouts.

Creating an Email Template that Converts Articles to PDF Files

To allow users working on a case to automatically attach article PDFs to an email message:

1. From Setup, enter `Email Templates` in the `Quick Find` box, then select **Email Templates**.

2. Click **New Template** to create a template from scratch or click **Edit** next to an existing template. The new or edited template must include the `Articles as PDFs` case field.

3. For example, If you want to edit the *SUPPORT: Case Response with Solution (SAMPLE)* template to include articles instead of solutions, complete these steps:

   a. Click **Edit** next to the *SUPPORT: Case Response with Solution (SAMPLE)* template.

   b. Change the `Email Template Name` to *SUPPORT: Case Response with Article (SAMPLE)*.

   c. Modify the `Template Unique Name` as needed.

   d. Choose **Case Fields** from the Select Field Type drop-down menu.

   e. Choose **Articles as PDFs** from the Select Field drop-down menu.

   f. Copy the value from the `Copy Merge Field Value` field and paste it in the email body.

4. Click **Save**.

   On the case detail page in the Emails related list, users can now click **Send an Email** and choose the new template. Articles associated with the case are automatically converted to PDF attachments, and the attachments can be previewed or deleted if needed before the email is sent.

> 📝 **Note:** Both the article and the knowledge base must be in the same language. For example, if your knowledge base language is English but you want a Japanese article converted into a PDF, change your knowledge base language to Japanese (in Setup, enter `Knowledge` in the `Quick Find` box, select **Knowledge Settings**, then click **Edit**) before converting the article.

Notes on Field Visibility in Article PDFs

Consider the following information when using email templates that include the **Articles as PDFs** function:

- The fields that appear in article PDFs are determined by your profile if the `Use a profile to create customer-ready article PDFs on cases` checkbox (from Setup, enter `Knowledge Settings` in the `Quick Find` box, then select **Knowledge Settings**) is not selected. If you can see all fields in the original article, all fields also appear in the automatically generated PDF. If field-level security restricts you from seeing a field on an article, that field and its data do not appear in the article's PDF.

- If the `Use a profile to create customer-ready article PDFs on cases` checkbox is selected and a profile is chosen from the **Profile** menu (from Setup, enter `Knowledge Settings` in the `Quick Find` box, then select **Knowledge Settings**), the chosen profile determines which fields appear in automatically generated PDFs. For example, if you are sending article PDFs to customers, you might choose the Customer Portal User profile to ensure that internal-only fields do not appear in article PDFs.

- Fields in the Properties section of an article, including `First Published`, `Last Modified`, `Last Published`, and `Summary`, are not included in any PDF version regardless of setting or profile.

Respond to Customers

Respond to your customers via email, chat, calls, and engage customers in portals and web communities.

IN THIS SECTION:

Email Customers

Respond to your customers using email. Use email templates, reply from the case feed, and use quick text to stay efficient.

Chat with Customers in Live Agent

Live Agent is a chat solution that's fully integrated with the rest of Salesforce, making it easy for you to access all the information you need about your customers in a single workspace.

Call Customers on the Phone

Phone calls are one of the easiest ways to reach your customers.

Reply to Portals and Web Communities

Respond to your customers in a portal or web community. You can view community activity and answer community questions.

Email Customers

Respond to your customers using email. Use email templates, reply from the case feed, and use quick text to stay efficient.

IN THIS SECTION:

Working with Case Emails

Cases generated via Email-to-Case or On-Demand Email-to-Case display in an Emails related list. The Emails related list includes all emails sent by your customer regarding a particular case, as well the email threads between you and your customer. The first 77 characters of an email message appear in the related list so that you can see what the message is about without having to click on it.

Send and Reply to Email from Case Feed

Use the features of the Case Feed email action to save time when writing messages and customize the emails you send to customers.

Add Images and Files to Email Messages in Case Feed

Give customers comprehensive information to help resolve their issues more quickly by attaching files to email messages, and add inline images to include pictures that enhance your text.

Use Email Templates in Case Feed

Templates help you ensure consistency, save time, and include basic information, such as a customer's name and their case number, all with one click. If your administrator has created text, HTML, or Visualforce email templates, or if you've created your own templates, you can use them when emailing customers in Case Feed.

Work with Draft Emails in Case Feed

With draft emails, support agents can save messages they write to customers without having to send them immediately, and administrators can create approval processes for email messages.

Review and Approve Email Drafts

Depending on how your administrator has set up draft emails and approval processes for your organization, you may need to review and approve messages written by the agents you oversee before those messages are sent to customers.

Customize Emails with the Rich Text Editor in Case Feed

The rich text editor lets you customize the emails you send to customers. Use it to format text, add bulleted or numbered lists, and add images and links.

Use Quick Text in Case Feed

Quick Text helps you respond to customers and update cases more quickly. Insert pre-written messages, such as greetings and common troubleshooting steps, into customer communications like emails and portal posts. You also can insert pre-written notes into case status changes and call logs. In Case Feed, you can use Quick Text with the Email, Portal, Change Status, and Log a Call actions.

Working with Case Emails

Cases generated via Email-to-Case or On-Demand Email-to-Case display in an Emails related list. The Emails related list includes all emails sent by your customer regarding a particular case, as well the email threads between you and your customer. The first 77 characters of an email message appear in the related list so that you can see what the message is about without having to click on it.

To work with Email-to-Case or On-Demand Email-to-Case emails:

- Click **Send An Email** to send an email to a contact, another user, or any other email address.

- Click **Reply** to respond to an email. The email response automatically includes the email body as received from the customer. Enter your response and click **Send**.

  When you reply to email messages in the Email related list on cases, the `From:` field on your email may display to recipients as `no-reply@salesforce.com` or `support@company.com`. This is due to how the recipients' email applications receive `Sender` and `From` headers on inbound email. By default, an `Enable Sender ID compliance` setting is selected for your organization, which enables email messages sent from Salesforce to comply with email applications that require `Sender` headers for delivery.

- Click **To All** to respond to all participants on an email thread.

- Click the subject of the email to view the email. From the email, you can reply to the sender, reply to everyone, forward the email, or delete it.

- While viewing an email, you can display a list of all the emails associated with the case by clicking **Email Message List**, and you can navigate to the case's other emails by clicking **Next** or **Previous**.

  > 📝 Note: The **Email Message List**, **Next**, and **Previous** links are not available in the Customer Portal and partner portal.

- While viewing an email, click **Forward** to forward it. The email automatically includes the email body as received from the customer. Optionally, enter text and click **Send**.

- If the original email was an HTML email, you can click the **Click here to view HTML version** link to see the HTML version. If you want to see the entire email header, click the **Click here to view original email headers** link.

- To view any attachments contained in incoming emails, go to the Attachments related list of the email. To view attachments sent with outbound emails, view the Attachments related list of outbound emails.

  The size limit for an attachment is 5 MB. The user who configured the email agent can view its log file to see if any attachments exceeded the size limit.

- Click **Del** to delete an email. Note that a deleted email can be retrieved from the Recycle Bin. However, if you delete an email from a case, then delete the case, you will not be able to retrieve the deleted email from the Recycle Bin.

In the Email related list, emails are listed in the order received according to the most recent. Emails in the related list display one of the following statuses:

Email Status	Description
New 📩	An inbound email that has not been read.
	The contents of the `Subject` field display in bold for emails with a `New Status`.
Read 📩	An inbound email that has been read but not replied to.

Email Status	Description
Sent 📤	An outbound email.
Replied 📩	An inbound email that has been replied to. Replying to a sent email gives it a replied status.

When a case contains a new (unread) email, an "Email" task associated with that case is automatically created in the case owner's task list with the email subject displayed. The owner can easily see the new task on the Home tab or from the Open Activities related list of the case. From the task, the owner can click a link to view the email associated with the case. When the user responds to the email, the task is removed from the owner's task list and added to the case's Activity History related list. The user can also move an email task to which they have not responded to the Activity History related list by changing its status to "Completed."

📝 Note: When inbound emails create a new case and your assignment rules route that case to a queue, the "Email" task is assigned to the user configured in the email agent.

If an inbound email does not contain the email address of an existing contact, then the `Web Name` field on the case is automatically updated with the name in the `From` field of the email, and the `Web Email` field on the case is automatically updated with the address provided in the inbound email.

💡 Tip: When running the Cases with Emails report, add the `Is Incoming` field to the report to see the cases received via Email-to-Case.

SEE ALSO:

Sending Articles from Cases

Send and Reply to Email from Case Feed

Use the features of the Case Feed email action to save time when writing messages and customize the emails you send to customers.

The email action in Case Feed is available only if your organization uses Email-to-Case and if the `Enable Case Feed Actions and Feed Items` setting is enabled.

📝 Note: Depending on how your administrator has set up Case Feed, some of the options described in the screenshot might not be available to you or might look different.

Here's how to use the email action:

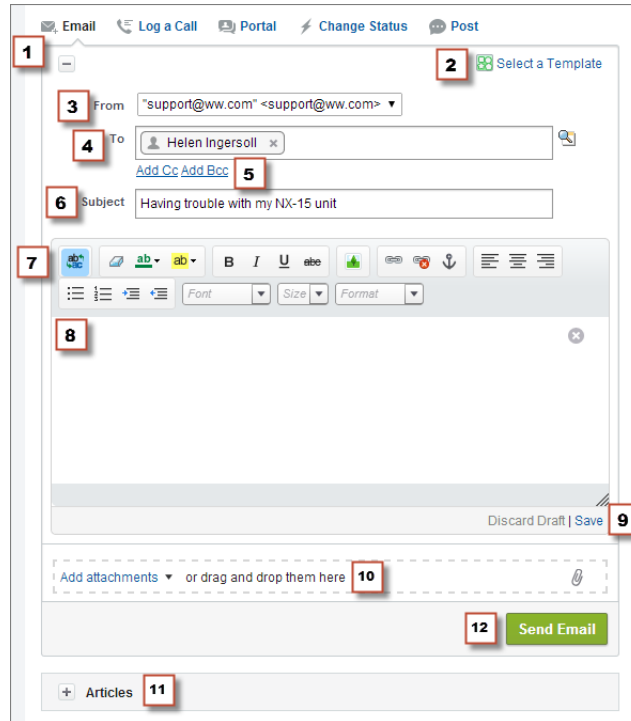1. In the feed for the case, click **Email**. Depending on how your administrator has set up Case Feed, some of the options described in the screenshot might not be available to you or might look different. To write a reply to a message, click **Reply** or **Reply All** below an email message in the feed.

2. If your department uses email templates, choose one for your message.

3. Select a **From** address.
   If this field doesn't appear as a picklist, your administrator has already defined a From address.

4. The email address of the contact who created the case automatically appears in the To field, as long as the creator is an existing contact. To add more recipients, click 🔍 to look up an address, or type or paste email addresses or names in the To field.

   - When you enter an email address or name that matches one contact or user, the address appears as a button with the person's name.

   - To add several addresses at once, copy and paste them separated by spaces or commas. These email addresses appear as buttons, and, if they're associated with a contact or user, show the contact's name.

   - When you enter an email address that matches multiple contacts or users, the address appears as a button. Click the button to see a list of people associated with the email address. Choose the contact or user that you want to associate with the message.

5. If you want to copy other people on the message, click **Add Cc** or **Add Bcc**.

6. By default, the email subject is the name of the case it's related to. If you apply an email template that includes a subject, then the template subject is shown. You can edit the subject if you want to.

7. Use the rich text editor to add formatting to your message.

8. Create your message. If your department uses Quick Text messages, you can add them in the body of your email.

9. If your administrator has enabled email drafts, you can click **Save** to save a copy of your message without sending it. When you save a message as a draft, any agent with access to the case can edit it.

10. Click **Attach File** or drag and drop files in the attachments pane to add files to the message.

11. Optionally, attach an article to the message.

12. Click **Send Email**.

Note: Depending on how your administrator has set up Case Feed, this button might have a different name.

> **Tip:** Click and drag ⧄ in the bottom right corner to change the height of the message pane. Make it larger so you can see more of what you're writing. Make it smaller so you can see more of the case history in the feed without scrolling. Once you resize the message pane, it appears in the new size each time you write an email, until you resize it again.

SEE ALSO:

Post on Cases and Community Questions with the Community Action in the Case Feed

Case Feed Overview

Use Quick Text in Case Feed

Add Images and Files to Email Messages in Case Feed

Give customers comprehensive information to help resolve their issues more quickly by attaching files to email messages, and add inline images to include pictures that enhance your text.

For example, if you're working on a case that requires a customer to try a few different solutions to resolve an issue, you might attach a how-to video or a document with multiple sets of detailed troubleshooting steps. If the customer has to follow a particular set of troubleshooting steps very carefully, you could use inline images after each step in the body of a message.

<table>
<tr><td>

EDITIONS

Available in: Salesforce Classic

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

</td></tr>
</table>

- To add an inline image, click 🖼 in the toolbar of the Case Feed email publisher and upload or link to the image you want. Each image you embed must be no larger than 1 MB, and in .png, .jpg, .jpeg, .jpe, .jfif, .pjpeg, .bmp, or .gif format. The total size of your email message, including images and text, can be no more than 12 MB.

  > **Note:** You need to use the rich text editor in the email publisher to embed images. You can't embed images in plain text messages.

<table>
<tr><td>

USER PERMISSIONS

To send emails with attachments or inline images:
- Send Email

</td></tr>
</table>

- To attach files to an email, click **Upload files** to choose a file from your computer or Salesforce, or to use a file that's already attached to the case, or drag and drop files to the attachments area at the bottom of the email publisher. You can attach up to a total of 10 MB to each email message. Salesforce supports all file types.

  > **Note:** Drag-and-drop functionality is available only on browsers that support HTML5.

- Click **Files:** to see a list of the attachments you've added.

- Click ✖ next to an attachment to remove it.

When the recipient of your email views the message, any images you've embedded appear in the body of the email.. If the total size of everything you've attached to the message is greater than 3 MB, all of the attachments appear as links, which the recipient can use to download the files. If the total attachment size is less than 3 MB, each file appears as an attachment.

> **Example:** For example, let's say you're a support agent for an appliance company, and you're working on a case for a customer who's having trouble with the ice maker on her fridge. You could email the customer step-by-step instructions for troubleshooting the ice maker and include an image after each step, and could attach two documents: a PDF of the user manual for the fridge (a 2 MB file) and a list of maintenance tips to keep the fridge working well (a 10 KB file). When the customer receives the email, she'll see:

- The images embedded in the body of the email message so she can refer to them one at a time as she works through the troubleshooting steps

- The user manual and list of maintenance tips as attachments to the message, as their total size is less than 3 MB

If you also attached a troubleshooting video (a 2.5 MB file), all three of the attachments would appear to the customer as links, as the total size of all attachments would be greater than 3MB.

SEE ALSO:

Send and Reply to Email from Case Feed

Find, Attach, and Email Articles with the Case Feed Articles Tool

Customize Emails with the Rich Text Editor in Case Feed

Use Email Templates in Case Feed

Templates help you ensure consistency, save time, and include basic information, such as a customer's name and their case number, all with one click. If your administrator has created text, HTML, or Visualforce email templates, or if you've created your own templates, you can use them when emailing customers in Case Feed.

For best results, we recommend using the rich text editor when working with email templates.

> **Note:** Depending on how your administrator has set up Case Feed, you may see a pre-loaded template when you use the Email action. Use the steps below to choose a different template if needed.

To use a template:

1. Depending on which action appears, click **Answer Customer** and select `Email`, or just click `Email`.

2. Click `Select a Template`.

3. Choose the folder that has the template you want.

4. Click the name of the template to add it to the email.

   > **Tip:**
   > - If you choose more than one text or HTML template, each template is added in the order you choose it. If you choose a Visualforce template after choosing another template, it replaces the earlier template.
   > - If the template you choose has attachments, they're included with the message.
   > - If the template you choose has merge fields, only the case-related fields are merged.
   > - To remove a template, click ⊗ . This also deletes any text you've entered and removes all template attachments.

5. Finish writing and sending your message.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To send emails
- Send Email

Work with Draft Emails in Case Feed

With draft emails, support agents can save messages they write to customers without having to send them immediately, and administrators can create approval processes for email messages.

Drafts are only supported if your administrator has enabled them.

As a support agent, you might want to save a message as a draft while you gather additional information about the issue you're solving, confirm troubleshooting steps with a colleague, or take a break and log out of Salesforce. To save an email as a draft, click **Save** under the text box when you're writing an email.

📝 **Note:** Drafts aren't auto-saved.

Each case can have only one draft email associated with it, so if you're working on a case with a draft you or someone else has saved, you won't be able to write another email until that draft is sent or discarded. When you view a case with a draft associated with it, you see a notification with the name of the user who wrote the draft and a link to view it. Any agent or supervisor with access to a case can edit the draft email, unless it's awaiting approval.

If your company uses approval processes for email messages, when you submit a message, it's sent to a supervisor for review. (Depending on how your administrator has set up approval processes, you may have the option of submitting the message for review or sending it without review.) When a supervisor approves the message, it's sent to the customer. If your email isn't approved, a message with an explanation appears at the top of the publisher when you click **Email** while viewing the case. You can edit the message and resubmit it.

SEE ALSO:

Review and Approve Email Drafts

Review and Approve Email Drafts

Depending on how your administrator has set up draft emails and approval processes for your organization, you may need to review and approve messages written by the agents you oversee before those messages are sent to customers.

When an agent submits a message for approval, you receive an email notification with a link to the case that includes the message. A notice appears at the top of the publisher when you click **Email**. Click **View email** to go to the message detail page. On that page:

- Click **Unlock Record** to make the message editable.
- Click **Delete** if you want to discard the draft.
- Click **Approve/Reject** in the Approval History related list to approve or reject the message.
- Click **Reassign** to assign the approval to another supervisor.

If you approve the message, it's sent to the customer. If you reject it, you have the option of writing a note explaining why. This note appears above the publisher on the case page when the agent clicks **Email**, along with a notice that the draft has been rejected.

SEE ALSO:

Work with Draft Emails in Case Feed

Customize Emails with the Rich Text Editor in Case Feed

The rich text editor lets you customize the emails you send to customers. Use it to format text, add bulleted or numbered lists, and add images and links.

Accessing the Editor

The rich text editor appears when you click **Email**, or **Answer Customer** and then **Email**, in the publisher on the Case Feed. You won't see the editor if:

- Your administrator hasn't enabled it.
- You used the plain text editor the last time you wrote an email in Case Feed. Just click the toggle icon ⬚ to switch to rich text.

Tips on Using the Rich Text Editor

- The rich text editor in is available only for the Email action.
- If you enter HTML and other kinds of markup in the editor, it won't render when you send a message.
- To delete a message, click ⊗ .

Use Quick Text in Case Feed

Quick Text helps you respond to customers and update cases more quickly. Insert pre-written messages, such as greetings and common troubleshooting steps, into customer communications like emails and portal posts. You also can insert pre-written notes into case status changes and call logs. In Case Feed, you can use Quick Text with the Email, Portal, Change Status, and Log a Call actions.

> 📝 **Note:** Only Quick Text messages assigned to the channel for the action you're working with are available in that action. For example, only messages assigned to the Email channel are available in the Email action.

1. Choose the Email, Portal, Change Status, or Log a Call action.

2. In the body of the action, type ;;.
   If you've used Quick Text before, then a list of Quick Text messages appears, with the messages you've used most recently at the top. If this time is the first time you've used Quick Text, then no messages appear.

3. To see more messages, type a word or phrase.
   A list of messages that include those words appears.

4. To see the title and full text of a message, click it once or highlight it using the arrow keys on your keyboard.
   The full message appears at the bottom of the Quick Text list.

5. To select a message, double-click it or highlight it and press ENTER.
   If the message you select contains merge fields, they are resolved when you add the message.

Chat with Customers in Live Agent

Live Agent is a chat solution that's fully integrated with the rest of Salesforce, making it easy for you to access all the information you need about your customers in a single workspace.

IN THIS SECTION:

[Live Agent for Support Agents](#)

Welcome to Live Agent for support agents! Live Agent is a comprehensive chat solution that makes it easy for you to support customers.

[Live Agent for Support Supervisors](#)

Welcome to Live Agent for support supervisors! Live Agent is a comprehensive chat solution that makes it easy for your agents to support customers. With Live Agent's supervisor tools, you can easily monitor your agents' activities, assist your agents in chats, and view data on your agents' chat sessions.

Live Agent for Support Agents

Welcome to Live Agent for support agents! Live Agent is a comprehensive chat solution that makes it easy for you to support customers.

As a support agent, you assist dozens of customers with their support issues every day. Live Agent is a chat solution that's fully integrated with the rest of Salesforce, making it easy for you to access all the information you need about your customers in a single workspace. In addition, Salesforce leverages the power of the Service Cloud, giving you access to important tools like a knowledge base and pre-defined support messages, that let you assist your customers and close cases more quickly.

Whether you're a seasoned veteran or new to Live Agent, there are several tools at your disposal that make it easy to assist multiple customers at the same time with chat. Let's get started.

IN THIS SECTION:

[Assist Customers with Chat](#)

Use Live Agent to quickly help your customers solve issues.

[Transfer Chats to an Agent, Skill, or Button](#)

Live Agent chats can be transferred to another agent, skill, or button so your customers always receive the highest-quality help from the most relevant sources.

[View Customer Records](#)

Salesforce automatically creates some records when a chat ends. These records store information about chat customers and their interactions with agents.

SEE ALSO:

[Live Agent for Support Supervisors](#)

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

Assist Customers with Chat

Use Live Agent to quickly help your customers solve issues.

Using Live Agent in the Salesforce console gives you access to several other Service Cloud products that let you assist customers in a comprehensive way.

IN THIS SECTION:

Change Your Live Agent Status

Change your Live Agent status to control when you're available to receive new and transferred chats.

Chat with Customers

Accept incoming chat requests to begin chatting with customers.

Access Customer Details During a Chat

When you accept a chat request, a details tab for that chat opens automatically. The details tab includes information about the visitor and lets you look up records related to the chat, such as contacts and cases.

Send Quick Text Messages in Chats

Send pre-written messages to chat customers to send common messages more quickly.

Transfer Files During a Chat

Give customers the ability to upload and transfer files during a chat so they can easily share more information about their issues.

Attach Articles to Live Agent Chats

Use the Knowledge One widget to find articles that help solve customer issues during chats.

Attach Records to Chat Transcripts

Search for or create records to attach to a chat transcript as you chat with customers.

Block Unwanted Chat Customers

You can block chats from troublesome customers right from the Salesforce console. For example, if a customer is using abusive language or sending spam messages, you can block that user from starting a new chat.

End a Chat Session

End a chat session after you've finished chatting with a customer and updating the records related to their chat.

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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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

Change Your Live Agent Status

Change your Live Agent status to control when you're available to receive new and transferred chats.

In Live Agent, you can set your online status to online, away, or offline. When you exit Live Agent, your status automatically changes to offline and any active chat sessions end.

1. Click the Live Agent footer widget to open the chat monitor.

2. Click the drop-down arrow in the upper right corner of the chat monitor to view your status options.

3. Select your status.

IN THIS SECTION:

[Live Agent Statuses](#)

Live Agent statuses define how you can interact with customers while you're online, away, or offline.

Live Agent Statuses

Live Agent statuses define how you can interact with customers while you're online, away, or offline.

Status	Description
Online	You can receive and accept incoming chats and transfers.
Away	You can continue any chat sessions you've already started, but you can't accept incoming chats or transfers.
Offline	You can't accept incoming chats or transfers, and no chats can be routed to you.

Chat with Customers

Accept incoming chat requests to begin chatting with customers.

When you receive a new chat or transfer request, the pending request appears in your chat monitor. You can see the deployment or website the chat came from, the customer's name (if it's available), and the number of minutes the request has been waiting to be answered.

You can chat with several customers at the same time. Each chat sessions opens in a separate primary tab.

1. In the chat monitor, click **Accept** on the chat request.
   The chat log opens in a new primary tab.

2. Type your message to the customer in the message field.

3. Click **Send** or hit ENTER on your keyboard to send your message to the customer.

4. Click **End Chat** when you're done assisting the customer.

   If the customer ends the chat first, a notice appears in the chat log.

SEE ALSO:

    Send Quick Text Messages in Chats

    Attach Articles to Live Agent Chats

    Transfer Chats

    Transfer Files During a Chat

    Attach Records to Chat Transcripts

    End a Chat Session

EDITIONS

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
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

Access Customer Details During a Chat

When you accept a chat request, a details tab for that chat opens automatically. The details tab includes information about the visitor and lets you look up records related to the chat, such as contacts and cases.

- To search for a record, type a name in the relevant box in the Related Entities section of the

  page, then click 🔍 . To associate a record you find to the chat, select it from the search results list and click **Save**.

  In older organizations, you could access records and visitor details from the Related Entities panel during chats. However, starting with Summer '14, the Related Entities panel in the details tab isn't available for new Live Agent customers. Existing customers will continue to have access to the Related Entities panel.

- Once you associate an existing record to the chat, click the name of the record to open it in a new tab.

- To create a new record, click **New Case**, **New Lead**, **New Contact**, or **New Account**.

Send Quick Text Messages in Chats

Send pre-written messages to chat customers to send common messages more quickly.

Quick Text lets you respond to customers more efficiently by letting you insert predefined messages, such as greetings or common troubleshooting steps, into your chat messages.

📝 **Note:** If you don't have access to Quick Text, contact your Salesforce admin.

1. While chatting with a customer, type ;; in the message field.
   A list of Quick Text messages appears. The messages you've used most recently appear at the top of the list.

2. To see additional Quick Text messages that are available, type a word or phrase.
   A list of messages that include those words appears.

3. To see the title and full text of a message, click it once or highlight it using the arrow keys on your keyboard.
   The full message appears at the bottom of the Quick Text list.

4. To select a message and add it to your chat, double-click it or highlight it and hit ENTER on your keyboard.

5. To send the message, click **Send** or hit ENTER on your keyboard.

Transfer Files During a Chat

Give customers the ability to upload and transfer files during a chat so they can easily share more information about their issues.

For example, if a customer is receiving an error when they try to complete a process, they can upload and transfer a screenshot of the error message to the agent.

Before a customer can upload a file, you must associate the chat with a record, such as a case or a contact. Since the chat transcript isn't created until you end the chat, you can't attach a customer's file directly to the transcript during the chat.

1. Click ⬡ to search for or create a record to attach to the chat.

2. Click the file transfer icon (⬡).

   📝 Note: A customer can't upload a file until you initiate the file transfer by clicking the file transfer icon. This helps prevent customers from uploading unsolicited or potentially dangerous files into the chat.

3. Select the record you chose in the first step to attach the transferred file to.
   The customer receives a prompt to upload their file to the chat window. The file can't exceed 5 MB.

4. When the customer has sent the file through the chat, click the link in the chat log to view the file.

Attach Articles to Live Agent Chats

Use the Knowledge One widget to find articles that help solve customer issues during chats.

The Knowledge One widget is only available if your Salesforce org uses Knowledge and your Salesforce admin has included the tool in your Salesforce console app.

1. When chatting with a visitor, click an article from the list in the Knowledge One widget. A tab with the full text of the article opens.

2. To search for a specific article in the list, type a word or phrase in the text box in the widget and click [Q] or press ENTER.

   - Alternatively, click [Q] at the top of the widget to search all articles, including those not in the list. The main widget search gives you the option of limiting your results to specific types of articles.

   - To filter your search results, click **Filters** and choose how you want to restrict your search.

3. When you find the article you want, click [▾], then click **Share**.
   The text of the article appears in the chat text box.

4. Click **Send** or press ENTER on your keyboard to send the article to the visitor.

   📝 Note: You can send articles to visitors only if your admin has set up a Chat Answer field on articles. If this field isn't set up, you can view articles but can't include them in chats.

Attach Records to Chat Transcripts

Search for or create records to attach to a chat transcript as you chat with customers.

Find existing records or create new ones to associate with a transcript as you chat with customers. For example, you can create a new case based on the customer's issue, or search for the customer's existing contact record and attach these records to the transcript for later reference. You can attach standard or custom records to your chat transcripts.

1. While chatting with a customer, click 🔗 to attach a record to the transcript.

    📝 **Note:** You can only attach one of each type of record to a chat transcript. For example, you can't attach more than one case to a single transcript.

2. To search for an existing record:

    a. Click the search icon (🔍) in the records window next to the type of record you want to search for.

    b. Type the name of the record and hit ENTER.
       The record opens in a new tab.

    c. Click the attach icon (🔗) again.

    d. Select the check box next to the record you searched for to link it to the chat transcript.

3. To create a new record:

    a. Click the create icon (➕) next to the type of record you want to create.

    b. Complete the information in the new record and save it.
       The record will automatically link to the transcript once the record is created.

4. After you complete the chat with the customer, exit the chat.

5. If prompted, click **Save**.
   The records you linked are now attached to the transcript. You can access them from the transcript's detail view.

SEE ALSO:
   [Live Agent Transcripts](#)

Block Unwanted Chat Customers

You can block chats from troublesome customers right from the Salesforce console. For example, if a customer is using abusive language or sending spam messages, you can block that user from starting a new chat.

Blocking a chat ends the chat and blocks any new chat requests coming from that user's IP (Internet Protocol) address.

If your Salesforce org is receiving many spam chats from a particular region, your administrator can block entire ranges of IP addresses.

1.
In the interaction pane, click the icon.

2. (Optional) Enter a comment explaining why you're blocking this visitor.

3. Click **Block**.

When you click **Block** , you immediately end the chat, and the visitor sees a notification that an agent ended the chat. If multiple agents are engaged in a conference, **Block** immediately ends the conference, and the other agents are also notified.

If you don't see the icon in your console, contact your Salesforce admin to enable it. Only a Salesforce admin can unblock an IP address.

End a Chat Session

End a chat session after you've finished chatting with a customer and updating the records related to their chat.

After you end a chat with a customer, the primary and secondary tabs related to that chat remain open in your console. Close them to save your work and free up space to take on more chats.

1. Close the primary tab for the chat.
2. If prompted, click **Save**.

Transfer Chats to an Agent, Skill, or Button

Live Agent chats can be transferred to another agent, skill, or button so your customers always receive the highest-quality help from the most relevant sources.

Just as you forward an email or pass a case to another agent, you can transfer a Live Agent chat. Transferring is useful when a customer has an issue that another agent can solve, or requires an agent with a particular skill. How the chat gets to the next agent depends on the kind of transfer you use.

There are three types of transfers: Transfer to Agent, Transfer to Skill, and Transfer to Button. To ensure that your customers get help as quickly as possible, certain chat transfer types can exceed agents' configured capacity. You can set agent capacity through the Live Agent Configuration, or the Presence Configuration if your organization uses Omni-Channel.

Type of Transfer	Scenario	Method of Transfer	Can Exceed Configured Agent Capacity?
Transfer to Agent	You want to transfer the chat to Agent Jane, because she's the perfect fit for the case.	A chat request is sent to Agent Jane. If she accepts the request, the chat is transferred	Yes

Type of Transfer	Scenario	Method of Transfer	Can Exceed Configured Agent Capacity?
		to her, and your chat workspace closes.	
Transfer to Skill	You want to forward the chat to an agent who has the skill "billing specialist."	A chat request is sent to all agents assigned to the skill, and the chat is transferred to the first agent to accept it.	Yes
Transfer to Button	You want to transfer a chat from the sales queue to the service queue.	The chat is transferred to an available agent assigned to the selected button or queue.	No

When chats are transferred directly to an agent or skill group, the transferred chats are allowed to exceed the accepting agent's capacity. This means that agents always receive a chat request, even if they're handling the maximum allowed number of chats. If the transfer request is rejected or times out, the original agent can try another recipient or transfer method.

Chats routed from buttons or queues always respect the configured agent capacity. So, agents assigned to that button or queue don't receive the transfer request—or any other chat requests—until they have open capacity. But don't worry: customers still won't get stuck waiting for another agent. When a chat is sent to the next queue, it's added into the list of incoming chats by its age, so it will appear higher up than brand-new chat requests.

When an agent accepts a transferred chat, the records attached to the chat transcript, like a case or contact, open alongside the chat in the workspace. The accepting agent has the information to start assisting the customer right away, without having to search for related records. These records are also completely up-to-date, as the previous agent is prompted to save any changes when the transfer is initiated.

Note: If the accepting agent doesn't have permissions to view one or more of the attached objects, those items won't open in the transferred workspace.

IN THIS SECTION:

Transfer Chats

You can transfer chat sessions to other agents when a customer needs extra help with an issue, or to make room for new requests.

Send a Chat Conferencing Request

As wise as support agents are, sometimes a single support agent doesn't have all the information that's required to solve a customer's problem. Chat conferencing lets you invite one or more agents into your customer chats. That way, your agents can turn boring chats into veritable support parties for your customers—all without disrupting the flow of conversation! Send a chat conferencing request to ask another agent to join you in a customer chat.
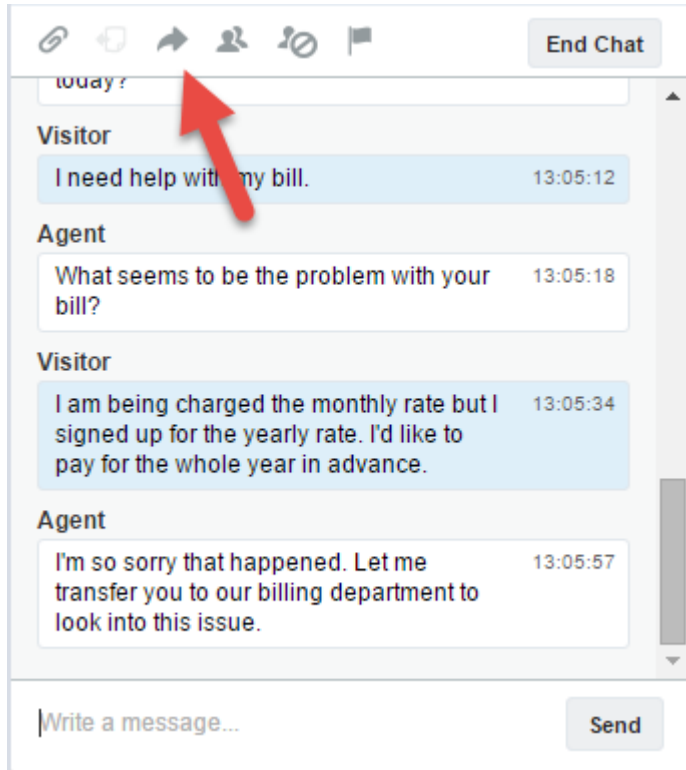
Request Help with a Chat

When you need help with a chat, you can raise a virtual flag to alert a supervisor. Supervisors are alerted that you need help, and they can respond directly via the console.

Transfer Chats

You can transfer chat sessions to other agents when a customer needs extra help with an issue, or to make room for new requests.

1. While chatting with a customer, click **Transfer**.

2. Select a transfer option from one of the menus.

> 📝 **Note:** There are options for each type of transfer that's enabled for your Salesforce org. If you don't see the option you need, ask your administrator to add it for you.

3. (Optional) Write a message for the agent receiving the chat. This message is part of the chat request to provide context for the next agent.
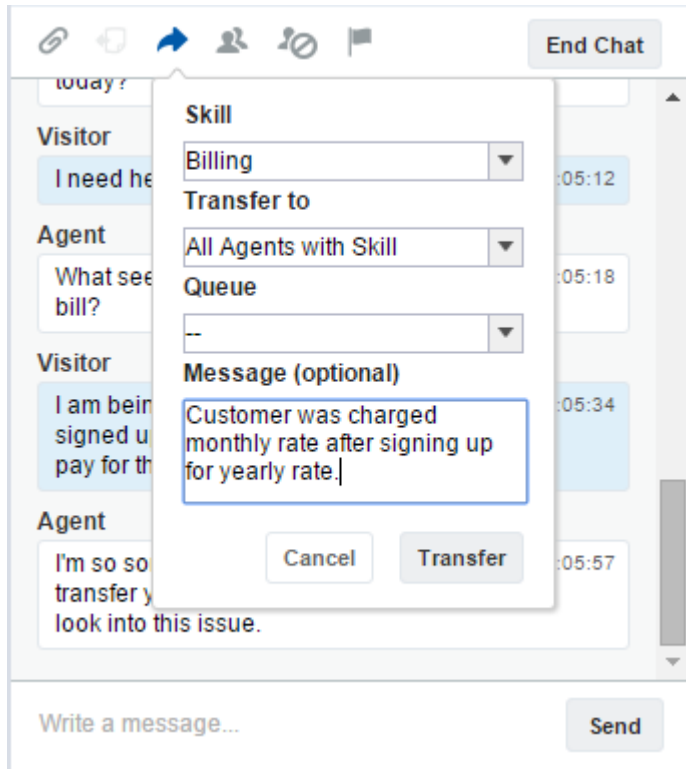
4. If the transfer is accepted, your chat and any associated records automatically close (don't worry, you'll be prompted to save your changes if you haven't already). If it's rejected, you can try again with another recipient or transfer method.

Send a Chat Conferencing Request

As wise as support agents are, sometimes a single support agent doesn't have all the information that's required to solve a customer's problem. Chat conferencing lets you invite one or more agents into your customer chats. That way, your agents can turn boring chats into veritable support parties for your customers—all without disrupting the flow of conversation! Send a chat conferencing request to ask another agent to join you in a customer chat.

> **Note:** You can conference in a single agent, or send a request to all agents and the first to accept will join the conference. You can conference multiple agents into a chat, but you need to send each request individually.

1. While you're chatting with a customer, click 👥 .

2. Select the skill group of the agents that you want to transfer into the chat.

3. Select whether to send the conference request to all agents with that skill or to a specific agent.

4. Click **Conference** to send the conference request.

   If the agent accepts the conference request, you see a notification in the chat log, and that agent can start chatting with you and the customer. If the agent declines the request, you see a notification above the chat log. The customer receives a notification when an agent joins or leaves a conference.

5. If you decide to exit the conference, click **Leave**, and then click **Leave** again.

   If the other agent leaves the conference, you'll see a notification in the chat log.

Any saved and attached records will open for other agents who join the conference. But only the originating or longest-attending agent will be able to attach other records. If the longest-attending agent attaches or removes records during the conference, other agents won't see these changes in their workspaces.

For more about transferring chats and workspaces, see Transfer Chats.

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

To enable chat conferencing:
- Enable Live Agent Chat Conference

Request Help with a Chat

When you need help with a chat, you can raise a virtual flag to alert a supervisor. Supervisors are alerted that you need help, and they can respond directly via the console.

1. In the interaction pane, click the 🚩 icon.

2. Enter a message briefly explaining what help you need.

3. Click **Raise Flag**.

Either you or a supervisor can lower the flag when your issue is resolved.

If you don't see the 🚩 icon in your console, contact your Salesforce admin to enable it.

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

View Customer Records

Salesforce automatically creates some records when a chat ends. These records store information about chat customers and their interactions with agents.

These records are mostly used internally to provide an audit trail about your customers and their chats with agents. However, you can access these records yourself if you ever need them.

1. To access customer records in the Salesforce console, select the type of record you want to view from the Salesforce console navigation list.

   A list of those records will appear in the main window.

IN THIS SECTION:

Live Agent Session Records

Every time your agents log in to Live Agent, a Live Agent session record is automatically created. These 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.

Live Agent Visitor Records

Every time an agent chats with a customer, Salesforce automatically creates a visitor record that identifies the customer's computer.

Live Agent Transcripts

A Live Agent transcript is a record of a chat between a customer and an agent. Salesforce automatically creates a transcript for each chat session.

Live Agent Session Records

Every time your agents log in to Live Agent, a Live Agent session record is automatically created. These 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.

Use Live Agent sessions to find and edit information about your support agents' chats with customers. For example, you can create a list called "Today's Sessions" to view chat activity that occurred in one day.

You can associate session records with cases, accounts, contacts, and leads or link them with other objects through custom lookup fields.

> 📝 **Note:** If you have the correct permissions, you can create, view, edit, or delete session records, just like other record types in Salesforce. However, session records are meant to provide a paper trail for the chats between your agents and customers, so we don't recommend tampering with these records in most cases.

> 🛑 **Important:** Live Agent session records don't include chats routed with Omni-Channel. Information about chats routed with Omni-Channel can be found in Agent Work records.

Live Agent Visitor Records

Every time an agent chats with a customer, Salesforce automatically creates a visitor record that identifies the customer's computer.

Each new visitor is associated with a session key, which Salesforce creates automatically. A session key is a unique ID that is stored in the visitor record and on the visitor's PC as a cookie. If a customer participates in multiple chats, Salesforce uses the session key to link the customer to their visitor record, associating that record to all related chat transcripts.

> 📝 **Note:** If you have the correct permissions, you can create, view, edit, or delete visitor records, just like other record types in Salesforce. However, visitor records are meant to provide a paper trail that associates your customers with their chat transcripts, so we don't recommend tampering with these records in most cases.

Live Agent Transcripts

A Live Agent transcript is a record of a chat between a customer and an agent. Salesforce automatically creates a transcript for each chat session.

When a chat ends successfully—that is, when the chat is ended by a customer or an agent—the chat transcript is created as soon as the agent closes the chat window and any related tabs.

If a chat is disconnected or experiences another error, Salesforce still creates a chat transcript for it, though it takes up to 30 minutes to creates the transcript after the chat is disconnected.

You can associate a transcript with cases, accounts, contacts, and leads, or you can link it to other objects.

> 📝 **Note:** If you have the correct permissions, you can create, view, edit, or delete chat transcripts, just like other record types in Salesforce. However, chat transcripts are meant to provide a paper trail for the chats between your agents and customers, so we don't recommend tampering with these records in most cases.

IN THIS SECTION:

Live Agent Transcript Fields

Live Agent transcript fields help you track information about your agents' chats with customers.

Live Agent Transcript Events

Live chat transcript events automatically track events that occur between your agents and customers during chats.

Live Agent Transcript Fields

Live Agent transcript fields help you track information about your agents' chats with customers.

A Live Agent transcript 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
Abandoned After	The amount of time in seconds an incoming chat request went unanswered by an agent before the chat was disconnected by the customer
Account Name	The name of the account associated with the transcript
Agent Average Response Time	The average time that it took an agent to respond to a chat visitor's message
Agent Maximum Response Time	The maximum time it took an agent to respond to a chat visitor's message
Agent Message Count	The number of messages an agent sent during the chat
Agent Skill	The skill associated with the live chat button used to initiate the chat
Body	The transcribed chat between an agent and a visitor
Browser	The type and version of the browser used by the visitor
Browser Language	The visitor's browser language selection
Case	The case associated with the chat
Chat Button	The chat button that the visitor clicked to initiate the chat
Chat Duration	The total duration of the chat in seconds
Contact Name	The name of the contact that participated in the chat Note that contacts and visitors are not the same. See Live Chat Visitor for more information.
Created By	The user who created the transcript, including creation date and time (Read only)
Created Date	The date and time the transcript was created (Read only)
Deployment	The deployment from which the visitor initiated the chat

Field	Definition
End Time	The time the chat ended
Ended By	Indicates whether the visitor or the agent ended the chat
Last Modified By	The user who last modified the transcript, including date and time (Read only)
Last Modified Date	The date and time the transcript was last modified (Read only)
Lead	The name of the lead that was generated by the chat or discussed during the chat
Live Chat Transcript	Unique, numerical identifier automatically assigned to the transcript. Administrators can modify the format and numbering for this field. Transcript numbers usually increase sequentially, but sometimes they can skip numbers in a sequence.
Live Chat Visitor	Unique, numerical identifier automatically assigned to the visitor. Administrators can modify the format and numbering for this field. Visitor numbers usually increase sequentially, but sometimes they can skip numbers in a sequence. Note that visitors and contacts are different: a visitor might be a contact, but this is not a requirement, and there is no relationship between contacts and visitors.
Location	The visitor's geographic location. Either the city and state, or city and country (if the visitor is located outside of the United States).
Network	The visitor's network or Internet Service Provider.
Owner	The name of the transcript owner. By default, the owner is the user who originally created the transcript (for example, the agent who answered the chat). You can select a different user as the owner, or assign the transcript to a queue. When assigning transcripts to other users, make sure those users have the "Read" permission on live chat transcripts.
Platform	The user's operating system
Referring Site	Site the visitor was on before they came to your website. For example, if the visitor used Google to search for your support organization's website, the referring site is Google.
Request Time	The time that the visitor initially requested the chat
Screen Resolution	The screen resolution used by the visitor
Start Time	The time that the agent answered the chat request

Field	Definition
Status	Completed or Missed. A missed chat was requested but not answered
Supervisor Transcript Body	Contains the whisper messages from supervisors
User Agent	A string that identifies the type of browser and operating system the visitor used
Visitor Average Response Time	The average time that it took a visitor to respond to an agent comment
Visitor Maximum Response Time	The maximum time it took a customer to respond to an agent's message
Visitor IP Address	The IP address of the computer that the visitor used during the chat
Visitor Message Count	The number of messages a visitor sent during the chat
Wait Time	The total amount of time a chat request was waiting to be accepted by an agent

Live Agent Transcript Events

Live chat transcript events automatically track events that occur between your agents and customers during chats.

You can edit live chat transcripts to track events that occur between your agents and customers during live chats. You can add the following events to a live chat transcript:

Event	Description
Chat Requested	Visitor requested a chat
Queued	Chat request was placed in queue
Routed (Push)	Chat request was routed to agent
Routed (Choice)	Chat request was routed to all available, qualified agents
Accepted	Chat request was accepted by agent
Critical Wait Alert Time Reached	Agent failed to respond to the customer's message before reaching the critical wait alert time
Critical Wait Alert Cleared	Agent responded to the customer's message after the critical wait alert was received
Transfer Requested	Agent requested chat transfer
Transfer Accepted	Chat transfer was accepted by agent
Transfer Request Canceled	Chat transfer request was canceled by the agent who sent the request

Event	Description
Transfer Request Declined	Chat transfer request was declined by the agent who received the request
Transferred to Button	Chat was transferred to a button
Transfer to Button Failed	Chat transfer to button was unsuccessful
Chat Conference Requested	Agent sent a request to start a conference
Chat Conference Canceled	Conference request was canceled
Chat Conference Declined	Conference request was declined by an agent
Agent Joined Conference	An agent joined the conference
Agent Left Conference	An agent left the conference
File Transfer Requested	A file transfer was requested
File Transfer Canceled by Agent	File transfer was canceled by an agent
File Transfer Canceled by Visitor	File transfer was canceled by the visitor
File Transfer Succeeded	File transfer was successful
File Transfer Failed	File transfer failed
Canceled (Blocked)	An attempted chat was blocked via an IP blocking rule
Blocked by Agent	An agent blocked an active chat (creating an IP blocking rule)
Declined (Manual)	Chat request was declined by agent
Declined (Time-Out)	Chat request timed out while assigned to agent
Canceled (No Agent)	Chat request was canceled because no qualified agents were available
Canceled (No Queue)	Chat request was canceled because there was no room in queue
Canceled by Visitor	Visitor clicked **Cancel Chat**
Agent Left	Agent left chat
Visitor Left	Visitor left chat
Ended by Agent	Agent clicked **End Chat**
Ended by Visitor	Visitor clicked **End Chat**
Other	Another event occurred

Live Agent for Support Supervisors

Welcome to Live Agent for support supervisors! Live Agent is a comprehensive chat solution that makes it easy for your agents to support customers. With Live Agent's supervisor tools, you can easily monitor your agents' activities, assist your agents in chats, and view data on your agents' chat sessions.

As a support supervisor, you oversee your employees to ensure that they provide the best customer support possible. Live Agent is a chat solution that's fully integrated with the rest of Salesforce, making it easy for you to access the information you need about your agents and their chat activity in a single workspace.

Whether you're a seasoned veteran or new to Live Agent, there are several tools at your disposal that make it easy to support and monitor your chat agents as they work with customers. Let's get started.

IN THIS SECTION:

The Live Agent Supervisor Panel

The Live Agent supervisor panel is your one-stop shop to find information about your department's chat buttons and chat agents. From the supervisor panel, you can monitor agents' chat activities as they chat with customers and view customer traffic on specific chat buttons, all in real time. The supervisor panel is conveniently located in the Salesforce console, so it's easy to access it without switching out of the app.

Assign Skills to Agents

Assign skills to your agents as the expertise of your team evolves.

Report on Live Agent Sessions

Gain insight into your agents' chat activities by building reports about Live Agent chat sessions.

SEE ALSO:

Live Agent for Support Agents

The Live Agent Supervisor Panel

The Live Agent supervisor panel is your one-stop shop to find information about your department's chat buttons and chat agents. From the supervisor panel, you can monitor agents' chat activities as they chat with customers and view customer traffic on specific chat buttons, all in real time. The supervisor panel is conveniently located in the Salesforce console, so it's easy to access it without switching out of the app.

IN THIS SECTION:

Access the Supervisor Panel

Access the supervisor panel conveniently from the Salesforce console to easily monitor your agents' chat activity.

Agent Status List

The agent status list in the supervisor panel gives you access to real-time information about your agents' chat activity.

Queue Status List

The queue status list in the supervisor panel gives you access to real-time information about your organization's chat buttons and queues.

Monitor Your Agents' Chats

View your agents' chats from the supervisor panel as they help customers. You can monitor agents' performance and give them real-time feedback and help as they serve customers.

Access the Supervisor Panel

Access the supervisor panel conveniently from the Salesforce console to easily monitor your agents' chat activity.

1. To access the supervisor panel in the Salesforce console, select **Live Agent Supervisor** in the console's navigation list.
   The supervisor panel appears in the main console window, giving you access to real-time information about your Salesforce org's chat buttons and agents.

Agent Status List

The agent status list in the supervisor panel gives you access to real-time information about your agents' chat activity.

Agent Detail	Description
Agent Name	The name of the agent. 📝 Note: If a red flag appears next to the name, the agent has requested help. Respond via the chat detail module (far right).
Status	The agent's Live Agent status.
Action	The actions you can take to change the agent's status.
No. Chats in Progress	The number of chats that an agent is engaged in.
No. Requests Assigned	The number of pending chat requests that are currently assigned to the agent.

Agent Detail	Description
Time Elapsed Since Login	The amount of time the agent has been logged in to Live Agent.
Time Elapsed Since Last Accept	The amount of time since the agent last accepted a chat request.
Message to Supervisor (optional)	The private message that the agent sent with a help flag.

Expand each agent's name to see details about the customers they're chatting with.

Customer Detail	Description
Visitor Name	The name of the customer, if available.
IP	The IP address of the customer's device.
Network	The customer's network, if available.
Browser	The type of internet browser the customer is using to connect to their chat window.
City	The city the customer is chatting from.
Country	The country the customer is chatting from.
Duration	The amount of time the customer has been engaged in a chat with the agent.
Action	The actions you can take to view the customer's chat with the agent.

SEE ALSO:

Live Agent Statuses

Queue Status List

The queue status list in the supervisor panel gives you access to real-time information about your organization's chat buttons and queues.

Queue Detail	Description
Button Name	The name of the chat button.
ID	The unique Salesforce ID of the chat button.
Queue Length	The number of chats that are waiting to be assigned to an agent.
Longest Wait	The longest amount of time a customer chat has waited to be connected to an agent.

Monitor Your Agents' Chats

View your agents' chats from the supervisor panel as they help customers. You can monitor agents' performance and give them real-time feedback and help as they serve customers.

1. In the Agent Status list, click ⊕ to expand the information about the agent whose chat you want to view. If an agent has requested help, you see a red flag next to the name and a private message (far right) if the agent entered one.

2. To view a chat, click **View** in the Action column of the chat you want to monitor.

   The chat monitor opens in the Agent Status list.

3. To send a private message to an agent as the agent is chatting with a customer, type your message in the message field and press **Enter**.

   The agent can see your message in the chat log, but the message is invisible to the customer.

When you finish monitoring your agent's chat, click ⊕ again to collapse the chat monitor.

To remove a flag after you've provided help, click **Lower Flag**.

SEE ALSO:

[Agent Status List](#)

Assign Skills to Agents

Assign skills to your agents as the expertise of your team evolves.

1. In Setup, enter *Skills* in the `Quick Find` box, then select **Skills**.

2. Click the name of the skill you want to assign.

3. Click **Edit**.

4. Select either the profiles (recommended) or individual users who have this skill.

5. Click **Save**.

If you don't have access to the Skills page, ask your Salesforce administrator about enabling this permission. Only your administrator can create skills.

Report on Live Agent Sessions

Gain insight into your agents' chat activities by building reports about Live Agent chat sessions.

You can create a custom report type for Live Agent chat sessions and use it to run reports on your agents' sessions using the Report Builder. These Live Agent session reports can provide insight about your agents' chat activities—for example, whether or not your agent team is able to handle all chat requests from your customers.

1. Create a custom report type using Live Agent Sessions as the primary object.

2. Create a new Live Agent report using the Report Builder.

3. Customize your report to include the columns of information you want to feature.

4. Save or run the report.

SEE ALSO:

Live Agent Session Records

Call Customers on the Phone

Phone calls are one of the easiest ways to reach your customers.

A Salesforce administrator sets up a call center that integrates existing telephone systems with Salesforce. After this integration is set up, the admin adds users to the call center. Once it's all done, Salesforce users can make telephone calls right from Salesforce.

IN THIS SECTION:

What's a Softphone?

Edit Your Personal Softphone Settings

Answer a Call Using a Softphone

Get to Know Your Softphone Features

What's a Softphone?

A softphone is a customizable call-control tool that appears to users assigned to a call center. A softphone's functionality and user interface are determined by the Salesforce admin.

⊘ **Important:** CTI Toolkit, also known as the Desktop CTI, is retired. The CTI Toolkit is no longer supported, and adapters built on the CTI Toolkit don't work. To continue using CTI functionality, migrate to Salesforce Open CTI.

SEE ALSO:

Get to Know Your Softphone Features

Edit Your Personal Softphone Settings

You can control personal softphone settings within Salesforce. To change your settings, from your personal settings, enter `Softphone` in the `Quick Find` box, then select **My Softphone Settings**.

The following settings are available:

Setting	Description
`Automatically log in to your call center when logging into Salesforce`	Select this option if you want Salesforce to use saved login information to automatically log you in to your softphone.
`If only one record found on incoming call`	Choose one of the following options to specify how a record should be displayed when it is the only one that matches an incoming call:
	• `Always open the record automatically`. This option displays the record in the main Salesforce window, overwriting whatever was there before. All unsaved changes from your previous record are lost.
	• `Never open the record automatically`. This option does not display the matching record. To view it you must click on the record's link in the softphone.

SEE ALSO:

Get to Know Your Softphone Features

Logging In to the Softphone

Tip sheet: Getting Started with your SoftPhone

Answer a Call Using a Softphone

When logged in to a softphone, you can receive a call when:

- The call originates from a queue and your call center state is set to Ready for Calls
- The call is dialed directly to your extension and you are not already on a call

You can tell that you have an incoming call if you see a flashing red button and the words "Incoming Call," "Incoming Transfer," or "Incoming Conference" next to the name of a telephone line in your softphone.

Details about the call, if any, are displayed just above the **Answer** button, and typically include the phone number of the caller and the number that the caller dialed to reach you. When the caller's phone number can be matched with a number in an existing Salesforce record, a link to that record is also displayed. Likewise, if your call center prompts callers to enter an account number or other data before being connected with a representative, your softphone searches for records that contain that information and automatically displays links to matching results.

To answer an incoming call, you can:

- Click **Answer** in the softphone.
- Use your physical telephone set to pick up the call.

When you answer a call, the `Call Duration` clock starts ticking, and your call center state is automatically set to Busy. If you do not answer the call, the system forwards it to another user and your call center state is automatically set to Not Ready for Calls.

Once you have answered a call, you can:

- Log comments and associate Salesforce records with the call
- Put the caller on hold
- Transfer the call to another call center user
- Conference another call center user into the call
- End the call

If your softphone supports multiple lines and you answer Line 2 while speaking on Line 1, Line 1 is automatically put on hold.

📝 **Note:** Some Salesforce CRM Call Center features might not be available with your softphone because of customizations that have been made for your organization. See your administrator for details.

💡 **Tip:** *Screen pops* are pages that display when incoming calls match the phone number of an existing Salesforce record. The following table describes when screen pops display (they can only display when your call center state is set to Ready for Calls):

Screen Pops On	Display	Don't Display
Edit pages		✅
Detail pages	✅	
Detail pages when inline editing is in use		✅
Edit pages and detail pages in the Salesforce Console	✅	
Outbound calls	✅	

Creating Call Logs in the Softphone

Every external call that you make or receive with a softphone automatically generates a call log activity record. You can view these call logs in the Activity History related list of any Salesforce record that is associated with the call or by running a report. Automatically generated call log records include values for:

- The call center user who received or initiated the call

- The phone number of the contact who called or who was called by the call center user

- The date on which the call took place

- The duration of the call, in seconds

- Whether the call was inbound or outbound

- The call center system's unique identifier for the call

You can associate up to two records, edit the subject, and add comments to a call log while the call is underway. To do so:

1. Associate up to two the records with the call log:

   - When you view or create a contact, lead, or person account, a `Name` drop-down list appears in the call log. Use this list to select a single contact, lead, or person account record to associate with the call.

   - When you view or create any other type of Salesforce record, a `Related to` drop-down list appears in the call log. Use this list to select a single record of any other type to associate with the call.

     📝 Note: Custom object records can only be associated with a call log if the custom object tracks activities.

   By default, the most recently viewed records are selected in the `Name` and `Related to` lists unless you manually choose a different record. The records that you choose in these lists will include the call log in their Activity History related lists once the call ends. These records are also displayed with the call if it is transferred to or conferenced with another Salesforce CRM Call Center user.

2. Edit the `Subject` and `Comments` fields with information about what happened during the call.

After the call ends, the call log is automatically saved as a completed task. You can quickly access the saved call logs for calls that were just completed by expanding the Last N Calls section of the softphone. Up to three of your last calls are displayed in this list with your most recent call displayed first:

- To modify a recent call log, click **Edit** next to the call log's `Subject` field.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create a call log:
- Member of a call center

- To view a saved call log, click the call log's `Subject`.
- To view a record that is associated with a call log, click the name of the record.

To view a list of all calls that you've made or received in the past day, click **My Calls Today**. This link opens the My Calls Today report in the Reports tab.

> **Note:** Some Salesforce CRM Call Center features might not be available with your softphone because of customizations that have been made for your organization. See your administrator for details.

SEE ALSO:

> Get to Know Your Softphone Features
>
> Wrapping Up a Call Using the Softphone
>
> Tip sheet: Getting Started with your SoftPhone

Putting a Caller on Hold Using the Softphone

Salesforce CRM Call Center allows you to put any caller on hold so that the caller can't hear you speaking. To put a caller on hold, click **Hold** in the softphone line that is currently active. The `Hold Time` clock that shows how long the caller has been waiting automatically starts, and the line light icon (⬤) begins to blink yellow.

- Callers are automatically put on hold whenever you initiate a call transfer, dial a number on a second line, or initiate a conference call.
- If you click **Hold** while on a conference, your line becomes mute but other conference participants can still speak to one another.

To resume the call, click **Retrieve from Hold**. If you want to end the call without retrieving the caller from hold, click **End Call**.

> **Note:** Some Salesforce CRM Call Center features might not be available with your softphone because of customizations that have been made for your organization. See your administrator for details.

SEE ALSO:

> Get to Know Your Softphone Features
>
> Tip sheet: Getting Started with your SoftPhone

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To put a caller on hold:
- Member of a call center

Transferring a Call Using the Softphone

To transfer a call to another call center user or to an external phone number:

1. Attach any relevant Salesforce records to the call that you want to transfer. For example, if you created a case for the call, save it, and make sure that it is selected in one of the `Related To` fields of the current call log. By doing this, the user to whom you are transferring the call will have access to the case in his or her softphone.

2. Click **Transfer** in the softphone line that you want to transfer. You remain on the line with your first caller and a new dial pad becomes active.

3. Use the dial pad, your keyboard, or the call center directory to enter the phone number of the person to whom the call should be transferred.

4. Click **Initiate Transfer**. Your first caller is automatically put on hold while you are on the call with the destination number. If a number you dial is busy, a message appears and you have the option to dial again or cancel the call.

5. When you are ready to transfer your first caller to the destination number, click **Complete Transfer**. If you no longer want to transfer the call, click **Cancel Transfer**.

Once you complete a transfer, your line is immediately freed and you return to the Ready for Calls state.

SEE ALSO:

    Get to Know Your Softphone Features

    Wrapping Up a Call Using the Softphone

    Creating Call Logs in the Softphone

    Tip sheet: Getting Started with your SoftPhone

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To transfer a call:
- Member of a call center

Making a Conference Call Using the Softphone

To initiate a conference call with another call center user or an outside phone number:

1. While on a call, click **Conference** in the softphone line that is currently active. Your caller is automatically put on hold and a new dial pad becomes active.

2. Use the dial pad, your keyboard, or the phone directory to enter the phone number of the person who you want to include in the conference.

3. Click **Initiate Conference**. Your first caller remains on hold while you are on the call with the destination number. If a number you dial is busy, a message appears and you have the option to dial again or cancel the call.

4. Once you have connected with the second caller and are ready to start the conference, click **Complete Conference**. The second caller joins the first on your original telephone line and all three of you can speak freely to one another. If you no longer want to conference the call after dialing the second number, click **Cancel Conference** to hang up on the second caller and return to your original caller.

> 📝 Note:
> - If you click **Hold** while on a conference, your line becomes mute but other conference participants can still speak to one another.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To initiate a conference call:
- Member of a call center

• Some phone systems limit the number of callers who can be conferenced on a single line. See your administrator for details.

SEE ALSO:

[Get to Know Your Softphone Features](#)

[Putting a Caller on Hold Using the Softphone](#)

[Tip sheet: Getting Started with your SoftPhone](#)

Wrapping Up a Call Using the Softphone

When you are ready to end a call:

1. [Update the associated call log](#). For example, if you created a case or viewed a contact while you were on the call, verify that they are selected in one of the `Related To` fields of the log, and use the `Comments` text box to enter any notes about the call.

   Call logs are not created for internal calls.

2. Click **End Call** in the active softphone line or use your physical phone set to hang up. This terminates the call and frees the line.

3. If wrap up codes are not enabled, your call center state is set back to Ready for Calls and the log for your call is automatically saved.

4. If wrap up codes are enabled, your [call center state](#) is set to Wrap Up and a set of reason codes are displayed in the softphone. While in this state you cannot receive any incoming calls.

   a. Select the reason code that best represents the outcome of the call.

   b. Optionally make any additional modifications to your call log.

   c. Click **Done**. Your call center state returns to Ready for Calls, and the log for your call is automatically saved.

All saved call logs are placed in the Last N Calls section of the softphone for quick reference. You can review details of these call logs by clicking any of the associated links:

• The `Subject` link (for example, "Call 6/01/2006 12:34 PM") opens the call log details page.

• Either of the `Related To` links opens the detail page for the specified record.

📝 Note: Some Salesforce CRM Call Center features might not be available with your softphone because of customizations that have been made for your organization. See your administrator for details.

SEE ALSO:

[Get to Know Your Softphone Features](#)

[Tip sheet: Getting Started with your SoftPhone](#)

Get to Know Your Softphone Features

The Salesforce CRM Call Center softphone appears in the left sidebar of your Salesforce window or in the footer of the Salesforce console. You can use the softphone to:

- Log in to your call center

- Modify your call center state to show whether you are ready to receive a new call

- Dial a phone number by using the built-in softphone, or by clicking the 📞 icon next to any phone number associated with a contact, lead, activity, or account

- Look up a phone number in your custom call-center directory

- Answer a phone call from another call center user or an external number

- Put a caller on hold

- Initiate a conference call with another call center user or an external number

- Transfer a phone call to another call center user or an external number

- Add comments to or associate Salesforce records with an automatic call log to quickly record information related to a call

- Edit personal Salesforce CRM Call Center settings to customize the behavior of your softphone

📝 **Note:** Some Salesforce CRM Call Center features might not be available with your softphone because of customizations that have been made for your organization. See your administrator for details.

IN THIS SECTION:

Logging In to the Softphone

Changing Your Call Center State

Making a Call Using the Softphone

Using the Call Center Directory

SEE ALSO:

Wrapping Up a Call Using the Softphone

Tip sheet: Getting Started with your SoftPhone

Logging In to the Softphone

Salesforce CRM Call Center requires you to first log in to Salesforce and then to log in separately to your organization's phone system. The phone system login is located in the sidebar and only appears if you are assigned to a call center in Salesforce.If a phone system login does not appear, contact your administrator.

Depending on the phone system that your organization uses, the login prompts you to enter your user ID, password, and other credentials. Once you have entered these values, click **Log In** to complete the connection to your phone system.

To automatically log in to your phone system without having to click the **Log In** button:

1. From your personal settings, enter `Softphone` in the `Quick Find` box, then select **My Softphone Settings**.

2. Select `Automatically log in to your call center when logging into Salesforce`. Once you have logged in to your phone system, Salesforce remembers your login information and automatically makes a connection to your phone system whenever you log in to Salesforce.

   📝 Note: If you explicitly log out of the phone system at any time while you are logged in to Salesforce, automatic log in is turned off for the remainder of your Salesforce session. To re-enable automatic log in, log out of Salesforce and then log back in.

After logging in to a phone system, your call center state is automatically set to Not Ready for Calls. If you want to receive calls, you must change your call center state to Ready for Calls.

SEE ALSO:

   Get to Know Your Softphone Features

   Tip sheet: Getting Started with your SoftPhone

Changing Your Call Center State

While logged in to Salesforce CRM Call Center, there may be times when you do not want to receive calls on your softphone, or when you need to step away from your desk. To avoid receiving calls when you do not want them, you can set your call center state next to the 🧑 icon in the softphone. Possible values for call center state include:

Call Center State	Description
Ready for Calls	You are not currently on a call, and you are prepared to receive the next direct or queued call.
Not Ready for Calls	You are not currently on a call, and you are not prepared to receive the next queued call. In this state you can still receive calls that are dialed directly to your extension.
On a Call	You are currently connected to a caller and cannot receive either a direct or a queued call.

Call Center State	Description
Wrap-Up	You are currently on a call, and you wish to go directly to the Not Ready for Calls state when the call is complete.
Log Out	You want to log out from your call center phone system and remain logged in to Salesforce. After you select this option, Salesforce CRM Call Center automatically closes the connection to your call center and displays the softphone login screen.

When you first log in to Salesforce CRM Call Center, your call center state is automatically set to Not Ready for Calls. You must choose Ready for Calls from the drop-down list before you can receive any calls.

📝 **Note:** Some Salesforce CRM Call Center features might not be available with your softphone because of customizations that have been made for your organization. See your administrator for details.

SEE ALSO:

> Get to Know Your Softphone Features
>
> Logging In to the Softphone
>
> Making a Call Using the Softphone
>
> Wrapping Up a Call Using the Softphone
>
> Tip sheet: Getting Started with your SoftPhone

Making a Call Using the Softphone

In Salesforce CRM Call Center there are three ways to make a call:

- Dialing a number manually
- Using the call center directory
- Using click-to-dial

While on a call, you can also make a call on a second phone line by clicking **New Line**. The new line allows you to enter a new phone number while remaining connected to your original caller. Once you click **Dial**, your original call is placed on hold, and your new call begins.

If you make a call while your call center state is set to Ready for Calls, your state moves directly to Not Ready, and you must enter Not Ready reason codes.

To end a call that you just dialed, click **End Call**. Some phone systems don't allow you to end a call from a softphone before it is answered. In these cases, an **End Call** button isn't displayed, and you must use your physical phone set to terminate the call.

If a number you dial is busy, a message appears and you have the option to dial again or cancel the call.

📝 **Note:** Some Salesforce CRM Call Center features might not be available with your softphone because of customizations that have been made for your organization. See your administrator for details.

IN THIS SECTION:

> Making a Call by Dialing a Number Manually

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To make a call:
- Member of a call center

Making a Call Using the Call Center Directory

Making a Call Using Click-to-Dial

SEE ALSO:

Get to Know Your Softphone Features

Putting a Caller on Hold Using the Softphone

Making a Conference Call Using the Softphone

Transferring a Call Using the Softphone

Wrapping Up a Call Using the Softphone

Tip sheet: Getting Started with your SoftPhone

Making a Call by Dialing a Number Manually

To make a call in Salesforce CRM Call Center by manually dialing a number:

1. In the softphone, click the name of the open line that you want to use. This action opens the dial pad for that line.

2. Enter the phone number that you want to dial by clicking the number buttons on the dial pad, or by typing numbers on your keyboard.

3. Click **Dial** or press the Enter key on your keyboard.

📝 Note: Some Salesforce CRM Call Center features might not be available with your softphone because of customizations that have been made for your organization. See your administrator for details.

SEE ALSO:

Get to Know Your Softphone Features

Making a Call Using the Call Center Directory

Making a Call Using Click-to-Dial

Tip sheet: Getting Started with your SoftPhone

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To make a call:
- Member of a call center

Making a Call Using the Call Center Directory

To make a call in Salesforce CRM Call Center using the call center directory:

1. In the softphone, click the name of the open line that you want to use. This action opens the dial pad for that line.

2. Click 🔍 next to the dial pad to open your call center directory.

3. Use the directory to locate the number that you want to dial.

4. When you have found the number, click the name associated with the number to automatically enter the number into the dial pad.

5. Click **Dial** or press the Enter key on your keyboard.

📝 Note: Some Salesforce CRM Call Center features might not be available with your softphone because of customizations that have been made for your organization. See your administrator for details.

SEE ALSO:

Get to Know Your Softphone Features

Making a Call by Dialing a Number Manually

Making a Call Using Click-to-Dial

Tip sheet: Getting Started with your SoftPhone

Making a Call Using Click-to-Dial

To make a call directly from the phone field of a contact, lead, activity, or account using Salesforce CRM Call Center:

1. Locate the number that you want to dial in a contact, lead, activity, or account.

2. Click the 📞 button to the right of the number. The number is automatically dialed in the first open softphone line.

   - A number that has already been clicked cannot be clicked again for five seconds.
   - The 📞 button does not appear next to fax numbers.

📝 Note: Some Salesforce CRM Call Center features might not be available with your softphone because of customizations that have been made for your organization. See your administrator for details.

SEE ALSO:

Get to Know Your Softphone Features

Making a Call by Dialing a Number Manually

Making a Call Using the Call Center Directory

Tip sheet: Getting Started with your SoftPhone

Using the Call Center Directory

Every call center has an associated call center directory that includes the name and number of every user that belongs to that call center, as well as other phone numbers that are related to records in your system.

To use your call center directory:

1. In the softphone, click the name of the open line that you want to use. This action opens the dial pad for that line. Click 🔍 next to the dial pad to open your call center directory.
2. Search the call center directory for a phone number:
    a. In the **Pick an object** drop-down, choose the type of record that you want to search. Any object with a phone number field is included in this list.
    b. In the **Search** text box, type all or part of the name for which you are searching.
    c. Click **Go** to view a list of only those records that include your search text.
3. When you find the phone number that you want, click its associated record name to automatically enter the number into the softphone.
4. Click **Dial** to make the call.

SEE ALSO:

Get to Know Your Softphone Features

Making a Call Using the Softphone

Making a Conference Call Using the Softphone

Transferring a Call Using the Softphone

Tip sheet: Getting Started with your SoftPhone

Reply to Portals and Web Communities

Respond to your customers in a portal or web community. You can view community activity and answer community questions.

IN THIS SECTION:

Post on Cases and Community Questions with the Community Action in the Case Feed
The Community action in the case feed is your default option for responding to customers on cases that originated from a community or customer portal.

Viewing Community Activity for Ideas and Questions
Activity statistics, such as how many posts you've made and how many likes you've received in Ideas and Questions appear on your profile page so that others can learn about your participation in the community.

Ideas Overview

Answers Overview

Using Chatter Answers

Using the Chatter Answers Q&A Tab

Post on Cases and Community Questions with the Community Action in the Case Feed

The Community action in the case feed is your default option for responding to customers on cases that originated from a community or customer portal.

To post on cases in a customer portal or community:

1. Click **Answer Customer** on the Case Feed page.

2. Click ▾ and select **Community**.
   Depending on how your administrator has set up Case Feed, you may be able to click **Community** without first having to click **Answer Customer**.

3. Enter the message to the customer.

4. If you're working on a case that was escalated from a question in Chatter Questions or Chatter Answers, choose who you want your post to be visible to:

   - Select **Customer Only** to post your answer as a private reply, or **Everyone** to post it as a public reply.

   - Select **Customer Case** to make a post visible to all internal and external users with access to the case, or **Community Question** to post a public answer on the community user's question. If you select **Customer Case** and your Salesforce administrator has enabled the community case feed, you'll be creating a Chatter post instead of a case comment.

5. Optionally, select `Send Email` to send a message to the customer letting them know that a reply to their question has been posted to the case.

   ✎ Note: This option is only available if your administrator has enabled it, and if the customer you're replying to is associated with the case and has a valid email address. If your organization uses the community case feed and email notifications for

Chatter case posts are enabled, users are automatically notified by email about public posts on their cases and this option doesn't appear.

6. Optionally, attach a Knowledge article to the post.

7. Click the button to publish your post.

📝 **Note:** If the community case feed is enabled in your organization, you can change the visibility of case posts after they are published. For details, see Expose or Hide a Published Post or Email in the Community Case Feed.

SEE ALSO:

Send and Reply to Email from Case Feed

Case Feed Overview

Viewing Community Activity for Ideas and Questions

Activity statistics, such as how many posts you've made and how many likes you've received in Ideas and Questions appear on your profile page so that others can learn about your participation in the community.

Click your name anywhere around the application to view your profile. If available, you can also click the Profile tab or *Your Name* > **My Profile** at the top of the page. View other people's profiles by clicking their name.

Community Activity appears on the Overview tab of your profile and shows how your activity stacks up to other people's. You can also evaluate the activity of other members of the community when you look at their profile.

When Chatter Answers is enabled for your organization, the total numbers for the following activities appear on your profile page:

- Questions you've asked
- Questions you've answered
- Questions you've solved with a best answer

Click **Questions** to navigate back to the Q&A tab.

When `Reputation` in Ideas is enabled by your administrator, the total numbers for the following activities appear on your profile page:

- Ideas you've created
- Comments you've received
- Comments and ideas you've voted on

Click **Ideas** to navigate back to the Ideas tab.

Ideas Overview

Ideas is a community of users who post, vote for, and comment on ideas. An Ideas community provides an online, transparent way for you to attract, manage, and showcase innovation.

> 💡 **Tip:** Salesforce offers its own Ideas community for Salesforce users to submit product feedback and suggest new features. To visit, go to http://ideas.salesforce.com.

Ideas Terminology

The following terminology is used for Ideas:

Category, Ideas

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. For example, if your ideas zone has the focus "Improvements to our clothing line," then you might set up categories such as "Shirts," "Jackets," and "Slacks." Each organization has one common set of categories that can be added or removed from each zone. An administrator defines separate categories for their ideas and answers zones.

Comment

Comments are plain text responses to posted ideas that enable discussions about the ideas. On the Ideas tab, the Comments subtab lists the comments that have most recently been submitted. On the detail page of an idea, comments are sorted in chronological order from oldest to newest.

Community

Communities are customizable public or private spaces for employees, end-customers, and partners to collaborate on best practices and business processes.

Community Expert

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.

Demote

If you dislike an idea, you can click **demote** to subtract 10 points from its overall score and decrease the idea's overall popularity ranking. You cannot demote the same idea more than once, and after you demote an idea you cannot promote it. An idea can have negative overall points if more users demote the idea than promote it.

Half-life

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. This setting affects all zones in your organization.

Idea

Ideas are suggestions posted by the members of an ideas community and are organized by zones. For example, if the focus of a particular zone is "Ideas for car features," an appropriate idea for that zone might have the title "Insulated cup holders that keep your beverage hot or cold." Or, if the focus of a particular zone is "Ideas for our company's employee benefits," an appropriate idea for that zone might have the title "On-site day care."

Idea Themes

Idea Themes provide a forum in which you invite community members to post ideas about specific topics so that community members can solve problems or propose innovations for your company.

Point

A point is a unit of measurement that represents the popularity of an idea. Each vote for an idea is worth ten points (promote adds 10 points and demote removes 10 points). An idea's total number of points displays to the left of the idea.

Popular Ideas

On the Popular Ideas subtab, ideas are sorted by an internal calculation that reflects the age of an idea's positive votes. Regardless of an idea's static total number of points, ideas with newer positive votes display higher on the page than ideas with older positive votes. This allows you to browse ideas that have most recently gained popularity, with less precedence given to long-established ideas that were positively voted on in the past.

Promote

If you agree with or like an idea, click **promote** to add 10 points to the idea. You cannot promote the same idea more than once and you cannot promote an idea that you have already demoted. Salesforce automatically adds your promote vote to any idea you post.

Recent Activity

Your Recent Activity page contains a summary of all the recent activity that relates to your participation within a zone. For example, this page lists all the ideas and comments you have posted to a zone as well as the ideas you have voted on. You can view your Recent Activity page by clicking your nickname located on the right side of the Ideas tab.

Status

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.

Top All Time Ideas

On the Top All-Time subtab, ideas are sorted from most number of points to fewest. This allows you to see the most popular ideas in the history of your Ideas zone.

Vote, Idea

In an ideas community, a vote means you have either promoted or demoted an idea. After you vote on an idea, your nickname displays at the bottom of the idea's detail page to track that your vote was made. You can use your Recent Activity page to see a list of all the ideas you have voted on.

Zone

Zones organize ideas and questions into logical groups, with each zone having its own focus and unique ideas and questions.

IN THIS SECTION:

Using Ideas

Idea Themes

Using Ideas

Ideas is a community of users who post, vote for, and comment on ideas. An Ideas community provides an online, transparent way for you to attract, manage, and showcase innovation. You can:

- Post ideas
- View ideas or Idea Themes
- Search for ideas
- Vote for ideas
- Comment on ideas
- View recent activity and replies
- Subscribe to syndication feeds

Each time you click the Ideas tab, the Popular Ideas subtab displays ideas in all categories. To change your current view, click one of the other subtabs like Recent Ideas or Top All-Time. Click ⊞ **List** to toggle back to the list view.

IN THIS SECTION:

Viewing Ideas

Voting on Ideas

Commenting on Ideas

Liking Comments on Ideas

Like a comment to show that you endorse it.

Deleting Ideas

Viewing Your Recent Activity Page

Subscribing to Syndication Feeds for Ideas

Posting and Editing Ideas

Merging Ideas

Tips on Using Ideas

Tips for Using the HTML Editor

SEE ALSO:

Ideas Overview

Administrator setup guide: Salesforce Ideas Implementation Guide

Viewing Ideas

The following sections describe how to view ideas:

- Accessing the Ideas Tab in Salesforce
- Accessing the Ideas Tab in a Portal
- Browsing Popular Ideas
- Browsing Recent Ideas
- Browsing Top Ideas of All Time
- Viewing Ideas by Category
- Viewing Ideas by Status
- Browsing Ideas in Other Zones
- Viewing the Details of an Idea

Accessing the Ideas Tab in Salesforce

In Salesforce, the Ideas tab is available by default in the Community app. You can select this app from the Force.com app menu in the top right corner of any Salesforce page.

Note that your administrator may have customized your profile to also display the Ideas tab in other apps. Also, your administrator may have renamed the Ideas tab to an alternate tab name.

Click 📋 **Tab** to display the Ideas tab. Click ▦ **List** to toggle back to the list view.

💡 Tip: The Zone list at the top of the Ideas tab lists all the available zones, and each zone contains its own unique group of ideas.

Accessing the Ideas Tab in a Salesforce.com Community

If your organization has created a Salesforce.com Community, your administrator can display the Ideas tab to the community by adding it to the list of selected tabs during setup of the community.

Accessing the Ideas Tab in a Portal

If your organization has portal users who have access to a Customer Portal or partner portal, your portal's administrator can display the Ideas tab on either type of portal. The ideas that display in a portal are either created through a portal or are created internally in Salesforce and published for display in a portal.

Browsing Popular Ideas

On the Popular Ideas subtab, ideas are sorted by an internal calculation that reflects the age of an idea's positive votes. Regardless of an idea's static total number of points, ideas with newer positive votes display higher on the page than ideas with older positive votes. This allows you to browse ideas that have most recently gained popularity, with less precedence given to long-established ideas that were positively voted on in the past.

Browsing Recent Ideas

The Recent Ideas subtab lists the ideas that have most recently been submitted. Newer ideas display above older ideas.

Browsing Top Ideas of All Time

The Top All-Time subtab lists the ideas with the most points. The difference between the Top All-Time subtab and the Popular Ideas subtab is that the Top All-Time subtab displays the top ideas of all time by number of points, whereas the Popular Ideas subtab uses an algorithm to display the ideas that have received the most recent positive votes.

Viewing Ideas by Category

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.

To browse ideas by category, select a category from the `View Category` drop-down list. Alternatively, click the category link at the bottom of the idea description, next to the user who posted the idea.

Viewing Ideas by Idea Themes

You can view all of the ideas that are posted to an idea theme. From the Idea Themes detail page, you can manage an idea theme and its related ideas.

Viewing Ideas by Status

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.

To view all ideas of a particular status, go to the Ideas tab and select a value from the `Status` drop-down list. Alternatively, click the status link next to an idea to view all ideas in the zone with that status.

Browsing Ideas in Other Zones

Administrators can create multiple zones with each zone having its own unique list of ideas. For this reason, it is important to verify you are viewing the correct zone when browsing ideas. To browse ideas in a specific zone, select a zone from the list of zones the top of the page.

Viewing the Details of an Idea

Click the title of an idea to open the detail page of that idea. The detail page of an idea includes the following sections:

* The details of the idea, including its full text and number of points
* The related idea theme and the zone to which it belongs.
* All comments that have been submitted for the idea
* An area for adding a new comment
* A list of the last 100 users who have voted (promoted or demoted) for the idea, sorted left to right from most recent vote to oldest vote

- If you are an administrator, the detail page lets you edit, delete, and merge ideas.

SEE ALSO:

Ideas Overview

Voting on Ideas

Commenting on Ideas

Posting and Editing Ideas

Using Ideas

Tip sheet: Using Salesforce Ideas

Voting on Ideas

In an ideas community, a vote means you have either promoted or demoted an idea.If you agree with or like an idea, click **promote** to add 10 points to the idea. You cannot promote the same idea more than once and you cannot promote an idea that you have already demoted. Salesforce automatically adds your promote vote to any idea you post.

If you dislike an idea, you can click **demote** to subtract 10 points from its overall score and decrease the idea's overall popularity ranking. You cannot demote the same idea more than once, and after you demote an idea you cannot promote it. An idea can have negative overall points if more users demote the idea than promote it.

To vote on an idea:

1. On the Ideas tab, locate an idea you want to promote or demote.

2. To add 10 points to the idea, click **promote** next to the idea. To subtract 10 points from the idea, click **demote**. After you have voted, your Nickname displays at the bottom of the idea's detail page to track that your vote was made.

> 📝 Note: When you post a new idea, you automatically cast a vote for that idea and 10 points are added to the idea's score.

SEE ALSO:

Ideas Overview

Viewing Ideas

Using Ideas

Viewing Your Recent Activity Page

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view the Ideas tab:
- Read on ideas

To view and vote for ideas:
- Read on ideas

To create ideas and add comments to ideas:
- Create on ideas

To edit ideas and edit comments on ideas:
- Edit on ideas

Commenting on Ideas

Comments are plain text responses to posted ideas that enable discussions about the ideas. On the Ideas tab, the Comments subtab lists the comments that have most recently been submitted. On the detail page of an idea, comments are sorted in chronological order from oldest to newest.

Adding Comments to Ideas

Add comments to ideas to share your thoughts and opinions with other community members:

1. On the Ideas tab, locate an idea on which you want to add a comment.

2. Click either the title of the idea or the **Comments** link below the idea description.

3. On the detail page for the idea, type your comments into the text entry area in the Add Your Comment section. You can enter up to 4,000 characters.

    If your organization has enabled the HTML editor for Ideas, the description can include HTML and reference online images. If the HTML editor is not enabled, use plain text only. .

4. Click **Post** to submit your comment.

Your newly added comment displays in the Comments related list on the idea detail page.

Editing Comments on Ideas

To edit a comment that you have submitted on an idea:

1. On the detail page of the idea, click **Edit** next to your comment.

2. Modify your comment as desired.

3. Click **Apply** to save your work.

Deleting Comments on Ideas

Deleting comments on ideas requires the "Delete" permission on ideas.

1. On the detail page of the idea, click **Del** next to your comment.

2. Click **OK**.

Viewing Recently Posted Comments

To view the comments that have most recently been posted in your Ideas community, click the Comments subtab and select a zone in which to view comments. Click the text of a comment to view the detail page of the appropriate idea.

On the Comments subtab:

-   Comments are listed in chronological order from newest to oldest.
-   The title of the idea on which the comment was posted displays above the comment.
-   The alias of the user who posted the comment displays next to the comment text.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view the Ideas tab:
-   Read on ideas

To view and vote for ideas:
-   Read on ideas

To create ideas and add comments to ideas:
-   Create on ideas

To edit ideas and edit comments on ideas:
-   Edit on ideas

- The total number of comments on the idea displays in brackets below the comment text. For example, `Comments [20]` indicates that the idea has twenty comments.

SEE ALSO:

    Ideas Overview

    Viewing Ideas

    Using Ideas

    Liking Comments on Ideas

Liking Comments on Ideas

Like a comment to show that you endorse it.

Below a comment that is associated with an idea, click **Like**.

To stop liking a comment, click **Unlike**.

Ideas counts the number of likes a comment gets. When a comment receives a like, a point is added to the comment's total score and to the reputation of the user who posted the comments.

SEE ALSO:

    Commenting on Ideas

<table>
<tr><td>EDITIONS</td></tr>
</table>

Available in: Salesforce Classic

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

Deleting Ideas

To delete an idea:

1. Click the name of an idea to open the detail page.

2. Click the **Delete** button.

3. Click **OK**.

The idea, its comments, and any child ideas are moved to the Recycle Bin. Note that undeleting an idea from the Recycle Bin also restores the idea's comments, votes, and child ideas.

SEE ALSO:

    Merging Ideas

    Posting and Editing Ideas

<table>
<tr><td>EDITIONS</td></tr>
</table>

Available in: Salesforce Classic

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

<table>
<tr><td>USER PERMISSIONS</td></tr>
</table>

To delete ideas and comments:

- Delete on ideas

Viewing Your Recent Activity Page

Your Recent Activity page contains a summary of all the recent activity that relates to your participation within a zone. To view your Recent Activity page, go to the Ideas tab and click your Nickname link on the right side of the page. To view the Recent Activity page of another member of the zone, click the community member's name that appears below any idea or comment they have posted. You can view activity for the different zones you have access to by selecting a zone from the `Zone` list.

The Recent Activity page uses the following icons to identify the various types of activity:

- 💡 identifies the ideas you have submitted.

- ☑️ identifies the ideas you have voted on.

- 💬 identifies the comments you have posted to ideas as well as the comments other users have posted to your ideas.

For additional detail, click the following links located on the left side of the Recent Activity page:

- Ideas Submitted lists the ideas you have posted to this zone. The most recent idea appears first.

- Ideas Voted On lists the ideas in this zone that you have either promoted or demoted.

- Recent Replies displays the most recent comment posted to each of your ideas, as well as the most recent comment posted to each idea you have previously commented on. This section is not displayed when viewing another community member's recent activity.

  To quickly determine the number of recent replies you have received, look next to the recent replies icon (🎉) in the upper right corner of the Ideas tab. This icon only appears when you have received a new reply.

📝 **Note:** You can't upload your own picture to replace the default image.

SEE ALSO:

  Ideas Overview

  Viewing Ideas

  Using Ideas

Subscribing to Syndication Feeds for Ideas

Syndication feeds enable users to subscribe to changes within Ideas and receive updates in external news readers. For users to be able to subscribe to Ideas syndication feeds, the following prerequisites are necessary:

- Ideas must be exposed publicly using Force.com sites.
- The `Categories` field must be enabled in Ideas. This field is enabled by default for some organizations.

To subscribe to a syndication feed, click the feeds icon () on the following Ideas pages:

- Popular Ideas subtab
- Recent Ideas subtab
- Top All-Time subtab
- Comments subtab

  This feed lists comments separately even when they belong to the same idea, whereas the Comments subtab groups comments for a single idea together and only shows the number of recent comments for that idea.

- Recent Activity page

  To subscribe to a feed that includes all the comments posted by a specific community member, click the community member's name that appears below any idea or comment he or she has posted. Then click the feeds icon on the community member's Recent Activity page. When you subscribe to another community member's Recent Activity feed, the feed only includes recent comments from that community member and no other user.

> **Note:** Child ideas (ideas that have been merged with a master idea) are not included in any feeds. Only master ideas are included.

SEE ALSO:

Ideas Overview

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view the Ideas tab:
- Read on ideas

To view and vote for ideas:
- Read on ideas

To create ideas and add comments to ideas:
- Create on ideas

To edit ideas and edit comments on ideas:
- Edit on ideas

Posting and Editing Ideas

Posting Ideas

1. Use the search box in the sidebar to search for existing ideas that match your idea. This helps reduce the number of duplicate ideas in the community. If no existing ideas match your idea, proceed to the next step.

2. Create a new idea using one of the following options:

   - On the Ideas tab, select the appropriate community from the Community list at the top of the page and click **Post Idea**.

   - From the Ideas list view, click **New Idea**, then select a community, and click **Continue**.

   - From the sidebar, select **Idea** from the `Create New` drop-down list, select a community, and click **Continue**.

3. If you're posting the idea to an idea theme, select one from the list. You can only post ideas to idea themes that exist within your community.

4. Enter a title for your idea no longer than 255 characters.

   After you enter the title, Salesforce searches the community for ideas with the same words in their title or description and then displays the top five matching ideas. If one of these ideas looks similar to your own, click that idea's title to open its detail page in a new window. From the detail page, you can read a description of the idea and vote for it instead of posting your duplicate idea to the community. If none of the ideas in the list are similar to your idea, proceed with the following steps to post your unique idea.

5. In the description area, enter the details of your idea.

   If your organization has enabled the HTML editor for Ideas, the description can include HTML and reference online images. If the HTML editor is not enabled, use plain text only. .

6. Choose one or more categories for your idea.

7. If you are an administrator, optionally choose a status for your idea. The `Status` drop-down list is only visible to administrators.

8. If enabled by your administrator, you can add an attachment to your idea:

   - Click `Browse` to locate and attach a file from your computer.

     You can attach any 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.

   - Optionally, type a title for the file. If you don't enter a title, the filename appears as the attachment's title.

9. Click **Post**.

Your new idea displays at the top of the Recent Ideas subtab, and your vote (promote) is automatically applied to the idea. Each vote is always worth 10 points.

> 💡 Tip: Use the following writing tips to make your idea easier for others to read and understand:
> - Use complete sentences.
> - Be as concise and direct as possible.
> - Check your spelling and punctuation.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view the Ideas tab:
- Read on ideas

To view and vote for ideas:
- Read on ideas

To create ideas and add comments to ideas:
- Create on ideas

To edit ideas and edit comments on ideas:
- Edit on ideas

Editing Ideas

If you have the "edit" permission on ideas, you can edit the details of an existing idea:

1. On the Ideas tab, click the title of an idea.

2. Click **Edit**.

3. Modify the title, description, category, and status (administrators only) of the idea as appropriate.

4. Click **Apply** to save your work.

Editing an idea's details does not allow you to edit the comments on an idea.

SEE ALSO:

Ideas Overview

Using Ideas

Tip sheet: Using Salesforce Ideas

Merging Ideas

Overview

As more users contribute to a zone, the number of duplicate ideas often increases. Duplicate ideas make it difficult to measure feedback because votes and comments are spread out over many similar ideas. The best way to resolve this issue is to merge duplicate ideas together so one idea becomes the master to one or more child ideas.

Note the following about merging ideas.

- Once you merge ideas they cannot be separated.

- All votes belonging to child ideas are transferred to the master idea. If the same community member votes for two ideas that are eventually merged, only the vote for the master idea is kept; the vote for the child idea is discarded.

- Users can only vote for and add comments to a master idea.

- You cannot merge ideas in separate zones.

- Deleting a parent idea automatically deletes all child ideas. Child ideas cannot be deleted individually.

- The master idea does not inherit the status and category values of its child ideas.

- When an idea is merged and becomes a child idea, the child idea still appears on the Ideas Submitted page but not on any other pages in a zone member's Recent Activity.

- Merged ideas don't appear in the list of submitted ideas on the Idea Themes detail page and aren't counted in the `Submitted Ideas` field.

- When you merge a child idea, you can no longer edit the Idea Theme field.

- A child idea that has been merged is still visible to the user who submitted the idea from the Ideas Submitted list on the user's Recent Activity page.

Merging Ideas

To locate duplicate ideas and merge them together:

1. On the Ideas tab, click the title of an idea that you want to merge.

2. On the idea's detail page, click **Find Duplicates**. Salesforce searches all the ideas within the zone and displays the five ideas with titles that most closely match the current idea's title.

3. If the Possible Duplicates list does not contain any ideas that you want to merge, enter keywords in the `Search for Duplicates` field and click **Search**. Salesforce displays a new list of possible duplicate ideas.

4. From the Possible Duplicates list, select the ideas that you want to merge.

    To view the details of a possible duplicate idea, click the idea's title. Use your browser's back button to return to the search results.

5. Click **Merge with Current Idea**.

6. Select the idea that you want to be the master idea, and click **Merge**.

7. Click **OK** to complete the merge.

Tips on Using Ideas

USER PERMISSIONS		EDITIONS
To view the Ideas tab:	Read on ideas	Available in: Salesforce Classic
To view and vote for ideas:	Read on ideas	
To create ideas and add comments to ideas:	Create on ideas	Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions
To edit ideas and edit comments on ideas:	Edit on ideas	
To create communities:	Customize Application	

Consider the following information when setting up and using Ideas:

- To monitor the activity of Ideas, you can:

    - Create a workflow rule or trigger based on the number of comments an idea receives. You cannot create a workflow rule or trigger based on an idea's vote total or vote count. You also cannot create a trigger that inserts or deletes a comment when the Idea object is updated.

    - Create a custom report based on an idea's vote score or number of comments.

- When posting an idea or comment, you can include a URL in the idea's description or comment field, but you cannot attach a file or add a note to an idea.

- Master detail relationships are not supported.

- Ideas does not support workflow tasks, outbound messages, and approvals.

- Ideas does not support custom links.

- The Ideas detail page does not contain related lists.

- The data export feature archives all your Ideas data with the exception of deleted ideas and deleted comments.

- You cannot create activities and events for Ideas.

- When using standard or custom Idea fields, note the following:

    - History tracking is not supported.

    - Field dependencies and roll-up summary fields are not supported.

    - Formula fields are not available for the Community object.

Tips for Using the HTML Editor

The HTML editor gives users WYSIWYG HTML editing capabilities, allowing them to:

- Insert an image
- Insert hyperlinks
- Change paragraph alignment
- Create bulleted and numbered lists

Implementation Tips

- HTML tags you enter into the HTML editor will display to users as text.

- In related lists, search results, and hover details, Salesforce does not display text with HTML formatting or images.

- Hyperlinks open in a new browser window when users click on them. The HTML editor supports HTTP, HTTPS, and mailto hyperlinks.

- To insert an image, click and either browse to an image file or specify the image's web address. Enter a description that appears when a user hovers over the image and when the image is not available. The image must have a URL that Salesforce can access.

- Images do not show up in list views and reports.

- You cannot disable individual features of the HTML editor. For example, you cannot disable its hyperlink and image capabilities.

- The HTML editor supports all languages that Salesforce supports.

- For security purposes, the HTML editor only allows the tags and attributes listed in Supported HTML Tags and Attributes on page 100. Salesforce automatically removes unsupported tags and attributes when you save an idea description or comment. Salesforce also removes potentially malicious HTML. Note that Salesforce does not notify users when unsupported or potentially malicious HTML is removed.

- The HTML editor does not support JavaScript or Cascading Style Sheets (CSS).

Supported HTML Tags and Attributes

The HTML editor supports the following tags:

`<a>`	`<dt>`	`<q>`
`<abbr>`	`<em>`	`<samp>`
`<acronym>`	`<font>`	`<small>`
`<address>`	`<h1>`	`<span>`
`<b>`	`<h2>`	`<strike>`
`<bdo>`	`<h3>`	`<strong>`
`<big>`	`<h4>`	`<sub>`
`<blockquote>`	`<h5>`	`<sup>`
` `	`<h6>`	`<table>`
`<caption>`	`<hr>`	`<tbody>`
`<cite>`	`<i>`	`<td>`
`<code>`	`<img>`	`<tfoot>`

`<col>`	`<ins>`	`<th>`
`<colgroup>`	`<kbd>`	`<thead>`
`<dd>`	`<li>`	`<tr>`
`<del>`	`<ol>`	`<tt>`
`<dfn>`	`<p>`	`<ul>`
`<div>`	`<pre>`	`<var>`
`<dl>`		

The above tags can include the following attributes:

`alt`	`face`	`size`
`background`	`height`	`src`
`border`	`href`	`style`
`class`	`name`	`target`
`colspan`	`rowspan`	`width`

The above attributes can include URLs that begin with the following:

- `http:`
- `https:`
- `file:`
- `ftp:`
- `mailto:`
- `#`
- `/` for relative links

Enabling the HTML Editor in Ideas

The HTML editor is enabled by default for most organizations. If your organization does not have the HTML editor already enabled, an administrator can enable it as described in Customizing Ideas Settings.

⚠ Warning: Once you enable the HTML editor, you cannot disable it.

Before enabling the HTML editor, note the following:

- Each HTML idea description has a maximum size of the 32 KB. Each comment has a maximum size of 4 KB.
- If you use the HTML editor to edit and save an idea description or comment that was in text format, Salesforce saves the description or comment in HTML format.

- In list views and search results, Salesforce displays only the first 255 characters of an idea's description or comment. This number includes HTML tags.

SEE ALSO:

Ideas Overview

Using Ideas

Commenting on Ideas

Posting and Editing Ideas

Idea Themes

Idea Themes lets you invite community members to post ideas about specific topics so that members can solve problems or propose innovations for your company. For example, to engage with your community and create excitement around the launch of a new product, you can ask members to work together to create the product's name. Community members collaborate and add ideas to the idea theme, while you monitor their activities as they vote and comment on each other's ideas until they find a winner.

When you create an idea theme, you can add pictures, videos, and other multimedia content to showcase or explain the idea that you're presenting to the community. You can also view and manage the list of ideas that have been posted to the idea theme.

IN THIS SECTION:

Using Idea Themes

Creating and Editing Idea Themes

Managing Idea Themes

SEE ALSO:

Creating and Editing Idea Themes

Using Idea Themes

Managing Idea Themes

Using Idea Themes

Click the Idea Themes tab to view, filter, moderate, and create themes from lists.

- Click **Create New View** to define your own custom list views. To edit or delete any view you created, select it from the View drop-down list and click **Edit**. If your organization has multiple communities, we recommend you add `Community` to your views so that you can see the name of the community associated with each idea theme. Adding the `Zone` field to the view also helps with managing multiple zones.

- Click `New Idea Theme` from the Idea Themes list view page or click `New` from the Recent Idea Themes list on the Idea Themes overview page to create a new idea theme.

- Click ⟳ to refresh a list that's been updated.

- Click **Edit** or **Del** to edit or delete an idea theme.

  📝 Note: Deleting an idea theme also deletes the ideas that are associated with it. Conversely, undeleting an idea theme also undeletes the ideas that are associated with it.

SEE ALSO:

Creating and Editing Idea Themes

Idea Themes

Managing Idea Themes

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view the Idea Themes tab:
- Read on Idea Themes

To create Idea Themes:
- Create on Ideas

Creating and Editing Idea Themes

You can use the Idea Themes tab in both the application and the console to create and edit Idea Themes for the communities that you manage.

1. Click **New Idea Theme** from the Idea Themes list view page or click **New** from the Recent Idea Themes list on the Idea Themes overview page.

2. Select a zone for the idea theme and click `Continue`.

3. Select the idea theme's `Status`.

4. Select a category for the theme.

5. Add a title for the idea theme.

6. Optionally, enter a description of the theme.

   Use the HTML editor to format your text or add an image or video.

7. Click `Save`.

SEE ALSO:

    Idea Themes

    Using Idea Themes

    Managing Idea Themes

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view the Idea Themes tab:
- Read on Idea Themes

To create Idea Themes:
- Create on Ideas

Managing Idea Themes

From the Idea Themes detail page, you can manage an idea theme and its related ideas. As an administrator, you can perform the following tasks:

- `Edit`, `Delete`, or `Clone` an idea theme.

- `Edit` or `Delete` ideas that have been submitted to the idea theme.

- Move an idea from one idea theme to another in your zones.

  You can do this by editing the name of the idea, which removes the idea from the current idea theme and gives you the opportunity to select a different idea theme.

- View the number of ideas that have been submitted for the idea theme. Merged ideas don't appear in the list of submitted ideas on the Idea Themes detail page and aren't counted in the `Submitted Ideas` field.

- Create an idea and post it to the idea theme in which you're working.

SEE ALSO:

    Creating and Editing Idea Themes

    Using Idea Themes

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view the Idea Themes tab:
- Read on Idea Themes

To create and edit Idea Themes:
- Create on Ideas

Answers Overview

📝 **Note:** Answers is scheduled for retirement in all Salesforce orgs as of Spring '18 release. For more information, see Chatter Answers to Retire in Spring '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 Spring '18.

Answers Terminology

The following terms are used when describing answers features and functionality:

Answers

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.

Best Answer

When a member of an answers community asks a question and other community members post a reply, the asker can mark one of the replies as the best answer. The best answer then appears directly under the question (above the other replies). Identifying the best answer helps other community members with the same question quickly find the most relevant, useful information.

Community

Communities are customizable public or private spaces for employees, end-customers, and partners to collaborate on best practices and business processes.

Data Category for Answers

On the Answers tab, *data categories* allow users to classify questions in an answers zone. For example, if you have a zone for hardware products, your data categories may include laptops, desktops, and printers. Zone members can quickly browse within a specific category to find answers to their questions. Administrators can use data categories to control access to questions.

Idea

Ideas are suggestions posted by the members of an ideas community and are organized by zones. For example, if the focus of a particular zone is "Ideas for car features," an appropriate idea for that zone might have the title "Insulated cup holders that keep your beverage hot or cold." Or, if the focus of a particular zone is "Ideas for our company's employee benefits," an appropriate idea for that zone might have the title "On-site day care."

Question

An issue posted to an answers community. When a community member asks a question, other community members post replies to help resolve the question.

Reply

The response to a question in an answers community. When community members reply to a question, the person who asked the question can mark one of the replies as the best answer to resolve and close the question.

Vote, Reply

In an answers community, a vote means you either like or dislike a reply to a question.

Zone

Zones organize ideas and questions into logical groups, with each zone having its own focus and unique ideas and questions.

Icon Descriptions

Icon	Description
✔	A question that has been resolved. To resolve a question, the person who asked the question chooses a reply as the best answer.
4	A question that community members have replied to. For example, this icon represents a question with four replies. If a question has no replies, a "0" appears in this icon.
💬	A reply to a question.
✔	A reply that has been marked as the best answer to a question.

IN THIS SECTION:

Using Answers

Using Answers

📝 **Note:** Answers is scheduled for retirement in all Salesforce orgs as of Spring '18 release. For more information, see Chatter Answers to Retire in Spring '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 Spring '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.

On the Answers tab you can:

- Ask a question
- Find an answer to a question
- Reply to a question
- Vote for a reply
- Identify a reply as the best answer to your question
- View all of your questions and replies
- Convert a reply into an article in the knowledge base
- Escalate a question to a case

EDITIONS

Available in: Salesforce Classic

Answers is available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

USER PERMISSIONS

To view the Answers tab:
- Read on questions

To ask and reply to questions:
- Create on questions

To vote for replies:
- Read on questions

The right side of the answers home page provides a snapshot of recent activity by showing the most recently asked and the most recently replied questions, as well as questions that have been open for more than a week.

Only administrators have full read, create, edit, and delete permissions for answers. Standard and portal users can delete their own questions and replies if no one has replied or voted.

IN THIS SECTION:

Asking a Question

SEE ALSO:

Answers Overview

Asking a Question

> **Note:** Answers is scheduled for retirement in all Salesforce orgs as of Spring '18 release. For more information, see Chatter Answers to Retire in Spring '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 Spring '18.

To ask a question:

1. From the Answers tab, enter your question and click **Ask**.

   Salesforce searches the titles and descriptions of the other questions in the zone and lists ones that are similar to yours. If your question has already been asked, click the question title to view the replies that other zone members have posted to that question.

   Alternatively, click **Start Over** to clear the similar questions results and ask another question.

2. If your question has not already been asked, click **Continue**.

3. Enter a description of your question. Use the HTML editor to format your text or upload an image.

4. Select a category for your question. If you do not assign a category, community members may have difficulty finding your question, as they must use search or view all questions in the community.

5. Click **Post Question**.

EDITIONS

Available in: Salesforce Classic

Data categories and answers are available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

USER PERMISSIONS

To view the Answers tab:
- Read on questions

To ask and reply to questions:
- Create on questions

To vote for replies:
- Read on questions

After asking your question, wait for community members to post replies. Then you can choose a reply as the best answer to resolve your question.

Creating Questions from the Questions Tab

Note: Answers is scheduled for retirement in all Salesforce orgs as of Spring '18 release. For more information, see Chatter Answers to Retire in Spring '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 Spring '18.

Note: Since your administrator determines the fields on questions, some fields might not be included in the following steps.

You can use the Questions tab in both the application and the console to ask questions of the zones that you moderate and manage. Asking community members for input or opinions is an easy way to assess interest in topics or create engagement in the community.

To post a question to the community from the Questions tab:

1. Click `New Question` from the Questions list view page or click `New` from the Recent Questions list on the Questions overview page.

2. Select a zone for your question.

3. Add a title for your question.

4. Optionally, enter a description of your question.

   Use the rich text editor to format your text or upload an image. To ensure that your images appear correctly in the feed, Salesforce recommends that they be less than 450 pixels wide.

5. Select a category for your question.

   Questions must be assigned to a category to appear in the community. Questions that don't have a category are still visible to the owner of the question, but not to other members of the community.

6. Click `Save`.

EDITIONS

Available in: Salesforce Classic

Data categories and answers are available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

USER PERMISSIONS

To view the Questions tab:
- Read on questions

To ask and reply to questions:
- Create on questions

Editing and Deleting a Question

> **Note:** Answers is scheduled for retirement in all Salesforce orgs as of Spring '18 release. For more information, see Chatter Answers to Retire in Spring '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 Spring '18.

Standard users can delete their own questions if the questions have not received replies. Once a question receives a reply, the owner of the question can no longer delete it. As the Salesforce administrator, you can edit or delete any question posted to a community. For example, you may want to monitor your answers community and edit or delete questions that contain inappropriate content or offensive language.

To edit or delete a question:

1. Click the question title to view the question detail page.

2. Click **Edit** or **Delete** at the top of the page. When editing a question, you can change the title or description and select a different category for the question. When deleting a question, the question (and all associated replies) goes to the Recycle Bin.

Another way to prevent offensive language is to create a validation rule that prevents users from entering specific words when asking a question.

To create validation rules, from the object management settings for Chatter Answers question and Chatter Answers reply, go to Validation Rules.

EDITIONS

Available in: Salesforce Classic

Answers is available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

USER PERMISSIONS

To edit any question:
- Edit on questions

To delete any question:
- Delete on questions

Finding and Viewing Questions

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There are a couple ways to find a question:

- Browse all questions within a community or category.

- Search for a question using the search field on the Answers tab. This field searches the title and description fields for both questions and replies and displays matching results.

Once you've found your question, click the question title to view the question detail page, which lists all the replies for the question. The question detail page lists the number of community members who liked and disliked each reply, and also shows the best answer to the question (if one has been chosen).

From the question detail page, you can:

- Reply to the question.

- Vote for a reply.

- Choose a reply as the best answer. You can only choose a best answer if you asked the question or are a Salesforce administrator.

If a question has already been resolved, you can click **Mark as Not Answered** above the question to re-open it.

EDITIONS

Available in: Salesforce Classic

Data categories and answers are available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

USER PERMISSIONS

To view the Answers tab:
- Read on questions

To ask and reply to questions:
- Create on questions

To vote for replies:
- Read on questions

- Sort replies by
  - Newest—Shows the most recently posted replies at the top of the list.
  - Oldest—Shows the oldest replies at the top of the list.
  - Most Votes—Shows the replies with the greatest number of "likes" and "dislikes" (added together) at the top of the list.

SEE ALSO:

Answers Overview

Using Answers

Browsing Questions within a Zone or Category

📝 **Note:** Answers is scheduled for retirement in all Salesforce orgs as of Spring '18 release. For more information, see Chatter Answers to Retire in Spring '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 Spring '18.

To view all questions within a zone or category, go to the Answers tab and click the zone name or category that appears below the *Get an Answer* heading.

Browsing Questions within a Zone

After clicking the zone name to view all questions within that zone, you can:

- Ask a question.
- Filter questions so you only see the open or resolved questions. A question is considered resolved when the person who asked the question selects one of the replies as the best answer. Community members can continue to post replies and vote for replies even when the question has been resolved.
- Sort questions by:
  - Recent Activity—Shows the questions that have the most recent replies at the top of the list
  - Newest—Shows the questions that have been most recently asked at the top of the list
  - Oldest—Shows the oldest questions at the top of the list
- Click **Reply** below a question to post a reply.
- Click a category to view all the questions associated with that category.

  All the categories within your zone appear under the zone name at the top of the page.

The question icons identify whether the question has been resolved or is still open.

Browsing Questions within a Category

When community members ask a question, they associate a single category with their question to make it easier to find within the community. To browse all questions associated with a category, click the category name to display the category detail page.

You can click on a category from the following locations:

EDITIONS

Available in: Salesforce Classic

Data categories and answers are available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

USER PERMISSIONS

To view the Answers tab:
- Read on questions

To ask and reply to questions:
- Create on questions

To vote for replies:
- Read on questions

- When viewing a question, the categories associated with that question appear below the question description.
- When browsing questions within a zone, all the categories in the zone appear below the zone name.
- On the answers home page, all the categories in the zone appear below the zone name.

From the category detail page, you can:

- Ask a question that is automatically associated with the category you are viewing.
- View all questions associated with that category, or filter the questions so you only see the open or resolved questions. A question is considered resolved when the person who asked the question selects one of the replies as the best answer. Community members can continue to post replies and vote for replies even when the question has been resolved.
- Sort questions by:
  - Recent Activity—Shows the questions that have the most recent replies at the top of the list
  - Newest—Shows the questions that have been most recently asked at the top of the list
  - Oldest—Shows the oldest questions at the top of the list
- Click **Reply** below a question to post a reply.

The question icons identify whether the question has been resolved or is still open.

SEE ALSO:

  Answers Overview

Replying to a Question

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To reply to a question:

- If you're viewing a list of questions within a community or category, click **Reply** next to question you want to respond to. Enter your reply in the editor and click **Reply**.
- If you're viewing the details of a question, enter your reply in the space provided at the bottom of the page, and click **Reply**.

After you reply to a question:

- Community members can vote on whether they like dislike your reply.
- The person who asked the question can choose your reply as the best answer.

SEE ALSO:

  Answers Overview

  Voting for a Reply

  Choosing the Best Answer to a Question

  Escalating a Question to a Case

Editing and Deleting a Reply

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Standard users without the "edit" and "delete" permissions on the answers object cannot edit or delete their replies. However, as the Salesforce administrator, you can edit or delete any reply posted to a community. For example, you may want to monitor your answers community and edit or delete replies that contain inappropriate content or offensive language.

To edit or delete a reply:

1. Click the question title to view a list of all replies for the question.

2. Click **Edit** or **Delete** next to the reply you want to change or remove. When deleting a reply, the reply goes to the Recycle Bin.

Another way to prevent offensive language is to create a validation rule that prevents users from entering specific words when posting a reply.

To create validation rules, from the object management settings for Chatter Answers question and Chatter Answers reply, go to Validation Rules.

EDITIONS

Available in: Salesforce Classic

Answers is available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

USER PERMISSIONS

To edit replies:
- Edit on questions

To delete replies:
- Delete on questions

Voting for a Reply

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When you vote on a reply, you contribute to the answers community by identifying the replies that contains the most helpful (and unhelpful) information. When other community members look for an answer to a question, they can quickly look at the number of "likes" and "dislikes" a reply has received and make a more informed decision about which reply to read.

In addition, the more votes a reply receives the easier it is for the person who asked the question to choose a reply as the best answer.

When viewing a question, review the replies and click **Like** to voice your approval of a reply or **Dislike** if a reply contains incorrect or unhelpful information. Your vote (either a +1 or −1) is included in the Like or Dislike total for that reply. You can't vote for your own reply and you can only vote once for each reply.

SEE ALSO:

Answers Overview

Using Answers

Replying to a Question

EDITIONS

Available in: Salesforce Classic

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USER PERMISSIONS

To view the Answers tab:
- Read on questions

To ask and reply to questions:
- Create on questions

To vote for replies:
- Read on questions

Choosing the Best Answer to a Question

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After you ask a question, you should monitor the replies posted by other community members and eventually choose one of the replies as the best answer. The best answer is highlighted directly below the question so it's easy to find, which helps community members quickly identify the most useful resolution to the question.

Only Salesforce administrators and the person who asked the question can mark a reply as the best answer.

To choose the best answer:

1. From the Answers tab, find your question and click its title.

2. Decide which reply is the best answer, and click **Choose as Best Answer**.

   To identify the best answer, look at the votes ("likes" and "dislikes") for each reply. The reply with the most "likes" probably contains the most useful information. If a question has many replies, try sorting the replies by **Most Votes** so the replies with the most likes and dislikes appear at the top of the list.

After you choose a best answer:

- The question is marked as "resolved". Community members can continue to post and vote on replies for resolved questions.

- If another reply that you like better is posted in the future, simply choose that reply as the best answer to replace the old best answer.

- You can remove the best answer status of the reply at any time. Removing the best answer status from a reply makes it a regular reply.

SEE ALSO:

Creating an Article from a Reply

Replying to a Question

Voting for a Reply

Viewing Your Questions and Replies

> 📝 **Note:** Answers is scheduled for retirement in all Salesforce orgs as of Spring '18 release. For more information, see Chatter Answers to Retire in Spring '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 Spring '18.

Once you become an active community member, you can view a list of all the questions you asked and replies you posted by clicking **My Questions & Replies** at the top of any page in the Answers tab.

When viewing a list of your questions, you can quickly identify which questions you resolved and which questions are still open. (Resolved questions have a best answer.) You can sort your questions by:

- Newest—Shows your most recently asked questions at the top of the list
- Recent Activity—Shows your most recently asked questions and your questions that have the most recent replies at the top of the list
- Oldest—Shows your oldest questions at the top of the list

When viewing a list of your replies, the question title appears as a link followed by your reply. You can sort your replies by:

- Newest—Shows your most recently posted replies at the top of the list.
- Oldest—Shows your oldest replies at the top of the list.
- Most Votes—Shows your replies that have received the greatest number of "likes" and "dislikes" (added together) at the top of the list.

The following table describes the icons displayed on the page:

Icon	Description
	A question that has been resolved. To resolve a question, the person who asked the question chooses a reply as the best answer.
	A question that community members have replied to. For example, this icon represents a question with four replies. If a question has no replies, a "0" appears in this icon.
	A reply to a question.
	A reply that has been marked as the best answer to a question.

SEE ALSO:

Answers Overview

Asking a Question

Replying to a Question

Creating an Article from a Reply

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In an answers community, you may want to turn a particularly helpful answer into an article in your knowledge base. To create an article:

1. Click the question title to view a detail page showing the question and its replies.

2. On the reply you want to add to the knowledge base, click **Promote to Article**.

3. Edit your article. The fields that appear depend on the default article type assigned to replies, but the following is true for all article types:

    - The `Title` field contains the title of the question.

    - The `Summary` field contains the reply.

    - You can make new data category selections for the article. Unlike answers, articles support multiple category groups.

    > **Note:** An administrator can change the article type and assignee.

4. Click **Save**. The original reply now has a status message indicating its association with an article. When the article is published, the message on the reply includes a link to the article.

SEE ALSO:

Answers Overview

Publish Articles and Translations

Escalating a Question to a Case

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If a question remains unresolved or its reply isn't satisfactory, administrators and trusted community members can escalate the question to a case. 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.

> **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.

To escalate a question to a case:

1. Click the question title.

2. On the question detail page, click **Escalate to Case**. This button only appears if an administrator has configured the appropriate case settings.

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.

SEE ALSO:

    Asking a Question

    Create Cases

EDITIONS

Available in: Salesforce Classic

Answers is available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

USER PERMISSIONS

To view the Answers tab:
- Read on questions

To ask and reply to questions:
- Create on questions

To create cases:
- Create on cases

Using Chatter Answers

USER PERMISSIONS

To view questions:	Read on questions
To ask and reply to questions:	Create on questions
To view cases:	Read on case
To change cases:	Edit on case
To manage Chatter Answers (Customer Portal) users:	Edit Self-Service Users
To ask a private question:	Read on account

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

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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 Spring '18.

Chatter Answers lets you work with questions and cases that originate from customers in a zone. Once a customer posts a question to the zone, you or other customers can reply. Questions are converted to cases when they're marked `Private`, or after a time specified by your administrator.

With Chatter Answers, you can:

- Reply to questions converted to cases.

- Create custom views for cases converted from questions by filtering on `Case Origin`.

- Upload a photo to your profile so that customers can see who you are.

- Work with Chatter Answers users, who are essentially Customer Portal users.

- Assign the Chatter Answers User feature license to portal users who don't self-register so that they can access your community.

- Use the Q&A tab to moderate questions and to:

  - Review lists of questions.

  - Answer questions or add replies to questions.

  - Escalate a question to a case.

  - Delete questions or replies.

  - Select best answers for questions.

  - Promote helpful replies to Salesforce Knowledge articles.

> **Note:** 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.

> **Tip:** 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.

IN THIS SECTION:

Questions Home

Searching for Questions and Answers in the Chatter Answers Q&A Tab

Search the Chatter Answers Q&A tab to find questions and replies, best answers, and Salesforce Knowledge articles that can help find answers quickly. Searching in the Q&A tab might help you avoid posting redundant questions.

Choose the Best Answer to a Question

Replying to Chatter Answers Email Notifications

When you receive an email notification, you can post a response back to the community by replying to the email.

SEE ALSO:

Using the Chatter Answers Q&A Tab

Chatter Answers Terminology

Questions Home

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The Questions tab lets you view, search, filter, moderate, and create questions from lists.

- Search for questions by typing two or more letters of a question in the Search All Questions box. As you type, questions that match your search terms appear.

- Select predefined list views from the View drop-down list. Some predefined lists from which you can filter questions include:

    - Questions with Best Replies

    - Questions without Best Replies

- Click **Create New View** to define your own custom list views. To edit or delete any view you created, select it from the View drop-down list and click **Edit**.

- Click New Question from the Questions list view page or click New from the Recent Questions list on the Questions overview page to create a new question.

- Click ⟳ to refresh a list that's been updated.

- After you select a question from the list:

    - Type an answer or comment and click **Answer Customer & Zone** to reply to customers.

    - Click ⌄ and choose:

        - **Delete** to delete the question from the community.

        - **Escalate to Case** to create a case from the question.

        - **Edit** to edit the fields in an existing question.

    - Click ⌄ on one of the question's replies and choose:

        - **Delete** to delete the reply from the community.

        - **Promote to Article** to add the reply as a draft article to the knowledge base (available if it's set up by your administrator).

        - **Edit** to edit the fields in an existing reply.

    - If the question is private, meaning only support agents can view and answer it, you can click the case link to view the case automatically associated with the question.

Note: The Questions tab is intended for Chatter Answers, but you can also use it to view questions from the answers feature.

SEE ALSO:

Questions Home

Searching for Questions and Answers in the Chatter Answers Q&A Tab

Search the Chatter Answers Q&A tab to find questions and replies, best answers, and Salesforce Knowledge articles that can help find answers quickly. Searching in the Q&A tab might help you avoid posting redundant questions.

Note: Chatter Answers is scheduled for retirement in all Salesforce orgs as of Spring '18 release. For more information, see Chatter Answers to Retire in Spring '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 Spring '18.

1. In the Q&A tab, enter your question in the search box.

2. Click the magnifying glass to view matching questions and articles from within the zone.

   If enabled, Salesforce Knowledge articles appear in the results, as well.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

USER PERMISSIONS

To view questions:
- Read on questions

Searches in the Chatter Answers Q&A tab can be filtered to show questions based on:

- **All Questions** shows all questions in the zone, as well as Salesforce Knowledge articles, when enabled.
- **Unanswered Questions** shows all questions that don't have replies.
- **Unsolved Questions** shows all questions that don't have a best answer.
- **Solved Questions** shows all questions that have a best answer, as well as Salesforce Knowledge articles, when enabled.
- **My Questions** shows all questions you've asked and are following.

You can then sort the results based on the following options:

- **Date Posted** sorts questions with the most recently asked questions appearing first.
- **Recent Activity** sorts questions with the most recent replies and comments appearing first.
- **Most Popular** sorts questions that have received the most likes, upvotes, and followers appearing first.

Note: From the header search box at the top of the page you can search more objects than from within the Q&A tab. Global searches by internal users return results from all questions that are available within the organization. Searches performed by all other users in Salesforce Communities return results from the questions that are available within the community.

Choose the Best Answer to a Question

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After you ask a question, you should monitor the replies posted by other community members and eventually choose one of the replies as the best answer. The best answer is highlighted directly below the question so it's easy to find, which helps community members quickly identify the most useful resolution to the question.

Only Salesforce administrators and the person who asked the question can mark a reply as the best answer.

To choose the best answer:

1. From the Q&A tab, find your question and click its title.

2. Decide which reply is the best answer, and click **Choose as Best Answer**.

   To identify the best answer, look at the votes ("likes" and "dislikes") for each reply. The reply with the most "likes" probably contains the most useful information. If a question has many replies, try sorting the replies by **Most Votes** so the replies with the most likes and dislikes appear at the top of the list.

After you choose a best answer:

- The question is marked as "resolved". Community members can continue to post and vote on replies for resolved questions.
- If another reply that you like better is posted in the future, simply choose that reply as the best answer to replace the old best answer.
- You can remove the best answer status of the reply at any time. Removing the best answer status from a reply makes it a regular reply.

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Available in: Salesforce Classic

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USER PERMISSIONS

To view questions:
- Read on questions

To ask and reply to questions:
- Create on questions

Replying to Chatter Answers Email Notifications

When you receive an email notification, you can post a response back to the community by replying to the email.

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EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

When you receive email notifications related to a question, you can conveniently reply directly from your email and the reply appears as an answer on the Q&A tab. You'll receive an email notification for the following events:

- Someone answers a question you've asked or are following.
- Customer support or a moderator selects a best answer for a question you've asked or are following.

> **Note:** To reply to email notifications, your administrator must enable email replies on the Chatter Answers Settings page.

Consider these tips when sending email replies:

- Replies must be sent from the email address specified on your profile. If you use email aliases or email forwarding services that send replies from a different email address, your replies won't be processed.

- If replies contain your personal email signature, the signature text is treated as part of your comment. Default signatures inserted by mobile devices, such as `Sent from my iPhone`, are automatically removed from replies. Before replying, delete custom signatures and any extra text you don't want posted to the community.

- Attachments in replies are ignored.

- Posts that include rich text or other types of markup appear as plain text in the body of the email notification.

- Automated messages such as "out of office" responses are ignored by the system.

- Before replying, check the email address that displays in the `To` field of your email. Valid addresses contain tokens, or long character strings, both before and after the @ symbol, such as `w8t27apy1@j321imd9gbs.d8rx.d.chatter.salesforce.com`. Some email applications may automatically use the `From` address from the original email, such as `ReplyToQ&A@<your.company>.com`, which is not a valid address for receiving replies. If you see this shortened address in the `To` field of your reply email, replace it with the valid reply-to address in the email header information. For example, in an application such as IBM® Lotus Notes®:

  1. Open the original email.

  2. Click **View** > **Show** > **Page Source**.

  3. In the `ReplyToQ&A` section, copy the email address that looks like:
     `w8t27apy1@j321imd9gbs.d8rx.d.chatter.salesforce.com`.

  4. Paste the reply-to address in the `To` field of your reply email.

Using the Chatter Answers Q&A Tab

> **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Spring '18 release. For more information, see Chatter Answers to Retire in Spring '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 Spring '18.

Chatter Answers is a self-service and support community where users can post questions and receive answers and comments from other users or your support agents. Chatter Answers brings together Case, Questions and Answers, and Salesforce Knowledge articles in a unified experience.

Chatter Answers lets your customers:

- Post, browse, and reply to questions using the Q&A tab.
- Delete their own questions and replies.
- Flag questions and replies as spam, hateful, or inappropriate.
- Receive emails when their questions are answered or when best answers are chosen for questions they're following.
- Collaborate publicly or privately with support agents to resolve issues related to open cases.
- Search and review articles from Salesforce Knowledge.
- Like a post or Salesforce Knowledge article to help determine its popularity.
- Upload photos of themselves to their user profiles.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

USER PERMISSIONS

To view questions:
- Read on questions

To ask and reply to questions:
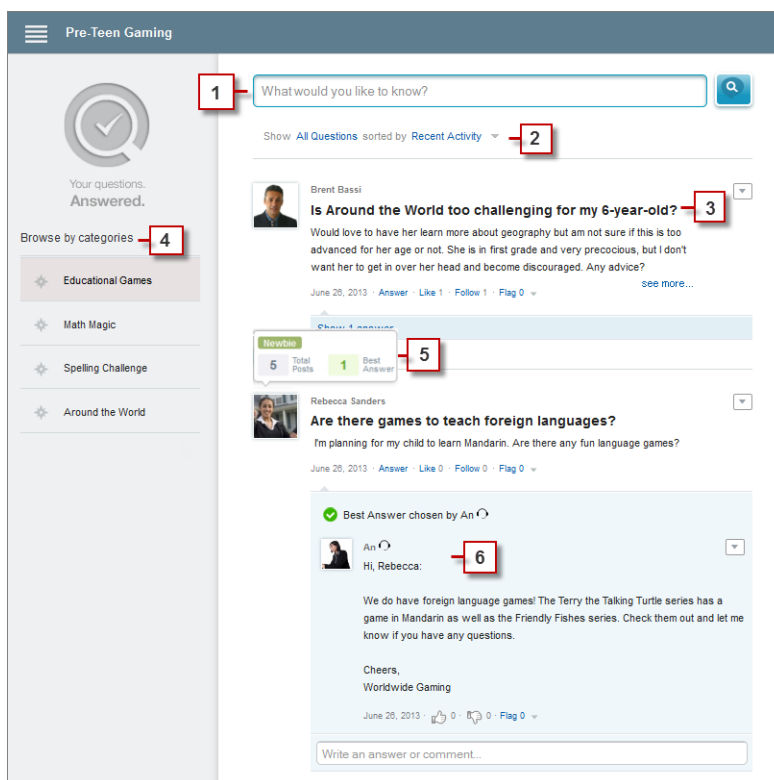- Create on questions

To view cases:
- Read on case

To change cases:
- Edit on case

- View other users' total number of posts and number of replies marked as best answers by others.

1. **Search**: Customers can search for existing questions before they post their own.

2. **Filter** and **Sort**: Community members and support agents can select different viewing options for questions in the feed.

   Searches in the Chatter Answers Q&A tab can be filtered to show questions based on:

   - **All Questions** shows all questions in the zone, as well as Salesforce Knowledge articles, when enabled.
   - **Unanswered Questions** shows all questions that don't have replies.
   - **Unsolved Questions** shows all questions that don't have a best answer.
   - **Solved Questions** shows all questions that have a best answer, as well as Salesforce Knowledge articles, when enabled.
   - **My Questions** shows all questions you've asked and are following.

   You can then sort the results based on the following options:

   - **Date Posted** sorts questions with the most recently asked questions appearing first.
   - **Recent Activity** sorts questions with the most recent replies and comments appearing first.
   - **Most Popular** sorts questions that have received the most likes, upvotes, and followers appearing first.

3. **Question**: Customers can post a question to the community for help. Other members of the community can post answers or follow the question to receive email notifications on subsequent posts.

4. Browse by Category: If categories are enabled in the community, members can click the category name to show questions related to that category.

5. **Reputation**: Community members can earn points and ratings that display on hover over their photos in the feed

6. **Comment**: Community members and support agents can comment on the question, and the customer or agent can select a comment as the best answer.

Chatter Answers lets service organizations:

- Create multiple communities and organize them into different zones, with each zone having its own focus and questions.
- Brand and customize communities.
- Give agents the opportunity to respond to customers publicly or privately.
- Automate the creation of cases from questions using an Apex trigger and workflow rules.
- Deflect customer inquiries through participation.
- Encourage participation by publicly displaying user statistics.
- Moderate questions and answers from the Q&A tab in the internal Salesforce application or from the community.

A customer's question is typically answered on the Q&A tab using one of these processes:

Question Answered by a Similar Question with a Best Answer	Question Answered by the Members within the Community	Question Answered by a Support Agent	Question Answered by a Salesforce Knowledge Article
1. A customer types a question or keyword into the Chatter Answers Q&A tab and clicks **Post Your Question**.	1. A customer types a question or keyword into the Chatter Answers Q&A tab and clicks **Post Your Question**.	1. A customer types a question or keyword into the Chatter Answers Q&A tab and clicks **Post Your Question**.	1. A customer types a question or keyword into the Chatter Answers Q&A tab and clicks **Post Your Question**.
2. A similar question with a best answer appears in search results.	2. No similar questions display in search results.	2. No similar questions display in search results.	2. A similar Salesforce Knowledge article with an answer displays in search results.
3. The customer selects that question, and views the answer.	3. The customer continues to enter a description of the question and clicks **Post to Community** to post a public question.	3. The customer continues to enter a description of the question and selects **Post Privately to Representative** to post a private question.	3. The customer selects the article, and views the answer.
	4. A community member or support agent reads the question and adds a comment, which answers the customer's question.	4. The private question is converted to a case.	
		5. A support agent reads the case and adds a private comment, which answers the customer's question.	

IN THIS SECTION:

SEE ALSO:

Chatter Answers Terminology

> 📝 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Spring '18 release. For more information, see Chatter Answers to Retire in Spring '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 Spring '18.

The following terms are used when describing Chatter Answers features and functionality.

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Answers

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.

Article

Articles capture information about your company's products and services that you want to make available in your knowledge base.

Best Answer

When a member of an answers community asks a question and other community members post a reply, the asker can mark one of the replies as the best answer. The best answer then appears directly under the question (above the other replies). Identifying the best answer helps other community members with the same question quickly find the most relevant, useful information.

Flag

An icon that users can click on a question or reply to report it as spam, hateful, or inappropriate.

Follow

A subscription to a question that lets you receive emails when someone answers or comments on a specific question.

Like

To show support or indicate quality or usefulness for a question, answer, or knowledge article.

Popular

Each question's popularity is based on the number of users who **Like** it within a certain amount of time.

Question

An issue posted to an answers community. When a community member asks a question, other community members post replies to help resolve the question.

Question, Private

An issue posted to an answers community, but marked **Private** so that only support agents can view and respond to it.

Reply

The response to a question in an answers community. When community members reply to a question, the person who asked the question can mark one of the replies as the best answer to resolve and close the question.

Topics

The sidebar that lists data categories from which your customers can browse questions and replies. For example, if you have a zone for hardware products, your topics may include laptops, desktops, and printers.

Vote, Reply

In an answers community, a vote means you either like or dislike a reply to a question.

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EDITIONS

Available in: Salesforce Classic

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Zones

Zones organize ideas and questions into logical groups, with each zone having its own focus and unique ideas and questions

SEE ALSO:

Using the Chatter Answers Q&A Tab

Create and Verify Service Agreements

Use entitlements and service contracts to represent service agreements.

IN THIS SECTION:

Work with Entitlements

Entitlements help you determine if your customers are eligible for support so you can create support records like cases or work orders for them.

Work with Service Contracts

Service contracts in Salesforce represent a customer support agreement between you and your customers. You can use them to represent warranties, subscriptions, service level agreements (SLAs), and other types of customer support.

Work with Contract Line Items

Contract line items are specific products covered by a service contract, not by a general contract. You can only use contract line items if your Salesforce org uses products.

Work with Entitlements

Entitlements help you determine if your customers are eligible for support so you can create support records like cases or work orders for them.

IN THIS SECTION:

Entitlements and Entitlement Processes

Entitlements are units of customer support in Salesforce, such as "phone support" or "web support." They're typically used to represent terms in service agreements.

Guidelines for Working with Entitlements

Entitlements in Salesforce specify whether a customer is entitled to customer support. Learn how to perform common actions on entitlements.

Verify Entitlements

Each entitlement in Salesforce is associated with a specific account. Verify that a customer is entitled to customer support before you create or update a case or work order.

Entitlements: Terms to Know

Learn useful terms related to entitlement features in Salesforce.

Entitlement Fields

Entitlements have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Entitlements and Entitlement Processes

Entitlements are units of customer support in Salesforce, such as "phone support" or "web support." They're typically used to represent terms in service agreements.
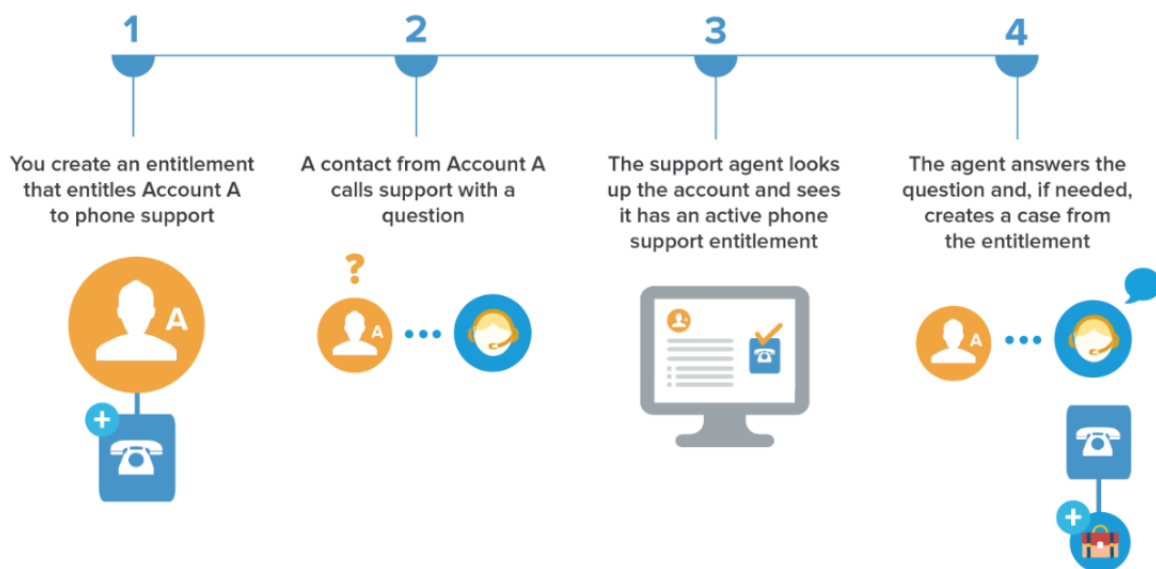
You can associate entitlements with accounts, assets, contacts, and service contracts. For example, a phone support entitlement can be added to an account. When a contact from that account calls your service department, support agents can quickly verify that they're entitled to phone support.

Determining Whether a Customer is Entitled to Support

1. You create an entitlement that entitles Account A to phone support
2. A contact from Account A calls support with a question
3. The support agent looks up the account and sees it has an active phone support entitlement
4. The agent answers the question and, if needed, creates a case from the entitlement

You can use entitlements on their own or as part of *entitlement processes*. Entitlement processes are timelines that contain all the steps that agents must complete to resolve a support record. To represent more complex service-level agreements in Saleforce—with features like renewal processes and multiple service levels—you can use *service contracts* and *contract line items*.

View and manage entitlements in Salesforce from the Entitlements tab. Depending on how entitlements are set up, you can also use the Entitlements related list on accounts, contacts, assets, or service contracts.

> **Note:** In Lightning Experience, the Entitlements related list isn't available on Contacts.

SEE ALSO:

Guidelines for Working with Entitlements

Entitlements: Terms to Know

Guidelines for Working with Entitlements

Entitlements in Salesforce specify whether a customer is entitled to customer support. Learn how to perform common actions on entitlements.

Viewing Entitlements

You can view entitlements on the Entitlements tab or the Entitlements related list on:

- Accounts
- Assets
- Contacts

    📝 **Note:** In Lightning Experience, the Entitlements related list isn't available on Contacts.

- Service contracts

📝 **Note:** In Lightning Experience, the Entitlements related list isn't available on Contacts.

To view entitlements that are associated with a particular account, contact, asset, or service contract, go to the Entitlements related list on the record.

💡 **Tip:** Has the console in your org been set up to include entitlements? If so, click the Console tab to view and edit entitlements and their associated records in one place.

Creating Entitlements

You can create and edit entitlements from the Entitlements tab or the Entitlements related list on accounts, assets, or service contracts.

Your business may have its own processes for how to link entitlements to customers in Salesforce. The simplest approach is to create an entitlement on the customer's account via the Entitlements related list. Then, use the entitlement for every contact on the account. Keep in mind that when you create a contact on an account, the contact doesn't automatically inherit an entitlement from the account. Your admin may set up automation that creates an entitlement for new contacts on an account.

📝 **Note:**
- You can add existing entitlements to contacts or products, but you can't create entitlements from a contact or product record.
- Click **Clone** on an entitlement to quickly create an entitlement from an existing one.

Deleting Entitlements

You can delete entitlements on the entitlement's detail page, the Entitlements related list, or the Entitlements tab. Deleting an entitlement moves it to the Recycle Bin. Any notes, attachments, or activities associated with the entitlement are also deleted. If you undelete the entitlement, the associated items are undeleted.

📝 **Note:** You can't delete an entitlement with an open case or work order.

Sharing Entitlements

You can't share entitlements. Entitlements use the same sharing model as the account they're associated with.

Associating a customer with an entitlement doesn't share the entitlement with them. For customers to be able to see their entitlements, entitlements must be set up in your external community.

SEE ALSO:

Verify Entitlements

Each entitlement in Salesforce is associated with a specific account. Verify that a customer is entitled to customer support before you create or update a case or work order.

What to Verify	Where to Verify It	Steps To Verify
Whether at least one contact on a specific account is entitled to support	Account detail page	1. View the account. 2. Confirm that the entitlement is on the Entitlements related list.
Whether a specific contact is entitled to support Contact detail page	Contact detail page	1. View the contact. 2. Confirm that the entitlement is on the Entitlements related list. 📝 Note: In Lightning Experience, the Entitlements related list isn't available on Contacts.
Whether specific assets (purchased products) are entitled to support	Asset detail page	1. Locate the asset from a related list or an assets list view on the Products tab. 2. Click the asset name. 3. Confirm that the entitlement is on the Entitlements related list.
Whether a service contract includes a specific entitlement	Service Contract detail page	1. Click the Service Contracts tab. 2. Click the service contract name. 3. Confirm that the entitlement in question is

What to Verify	Where to Verify It	Steps To Verify
		on the Entitlements related list.

After you verify an entitlement, click **New Case** on the entitlement's detail page to create a case associated with the entitlement. The case automatically includes the correct entitlement, account, contact, and asset information. Alternatively, you can add an entitlement to an existing case using the `Entitlement Name` lookup field on the case.

SEE ALSO:

Guidelines for Working with Entitlements

Entitlements: Terms to Know

Learn useful terms related to entitlement features in Salesforce.

Entitlement

A unit of customer support in Salesforce, such as "phone support" or "web support." It's typically used to represent terms in warranties. You can associate entitlement with accounts, assets, contacts, and service contracts. View entitlements from the Entitlements tab or the Entitlements related list on accounts, assets, contacts, and service contracts.

> Note: In Lightning Experience, the Entitlements related list isn't available on Contacts.

Entitlement Contact

Contacts who are entitled to customer support—for example, a named caller. The Contacts related list on an entitlement shows which contacts are eligible for that entitlement. You can remove or add contacts directly from the related list, or by updating the contact record itself. Your business may not allow you to provide support to customers unless they are a contact on the entitlement.

> Note:
> - Contacts on an account don't automatically inherit the account's entitlements. Depending on your business processes, you may need to create a separate entitlement for each contact on an account. You can also set up an Apex trigger that automatically assigns an entitlement to a contact when you create the contact.
> - Entitlement contacts don't have page layouts, search layouts, buttons, links, or record types.
> - The same visibility and sharing settings that apply to the parent account apply to contacts. Associating a contact with an entitlement doesn't share the entitlement record with the contact or the related community user.

Entitlement Template

Predefined terms of customer support that can be quickly added to products in Salesforce. For example, you can create entitlement templates for phone or web support so users can easily add entitlements to products purchased by customers.

> Note: In Lightning Experience, the contact related list isn't available on Entitlements.

Entitlement Management

A collection of Salesforce features that help you provide the correct service levels to your customers. It includes:

- *Entitlements,* which let support agents determine whether a customer is eligible for support.
- *Entitlement processes,* which are 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.

Depending on your business needs, you may decide to use all of these features or just a few of them.

Service Contract

A customer support agreement between you and your customers. Service contracts in Salesforce can represent warranties, subscriptions, service level agreements (SLAs), and other types of customer support. View service contracts in the Service Contracts tab or on the Service Contracts related list on accounts and contacts.

Contract Line Item

Specific products covered by a service contract. View contract line items in the Contract Line Items related list on service contracts (not contracts!). You can only use contract line items if your org uses products.

📝 Note: Schedules aren't available for contract line items, and community users can't access them.

Entitlement Process

A timeline that includes all the steps (milestones) that support agents must complete to resolve a support record. Each process includes the logic needed to determine how to enforce the correct service level for your customers. Entitlement processes come in two types: Case and Work Order.

Not all entitlements need processes. For example, a simple entitlement might just state that a customer is eligible for phone support 24/7. If you need to add time-dependent steps or service levels to that definition—for example, if you want a supervisor to be notified by email when a customer's case goes unresolved for two hours—you need an entitlement process.

Milestone

A required step in your entitlement process. Milestones are metrics that represent service levels to provide to each of your customers. Examples of milestones include First Response and Resolution Time on cases.

Milestone Action

A time-dependent workflow action that occurs on a milestone in an entitlement process. For example, you might add the following actions to a milestone:

- Send an email alert to certain users one hour before a first response milestone is scheduled to expire
- Update certain fields on a case one minute after a first response is completed

There are three types of milestone actions:

- *Success actions* are triggered when a milestone is completed
- *Warning actions* are triggered when a milestone is about to be violated
- *Violation actions* are triggered when a milestone is violated

You can automate tasks, email alerts, field updates, and outbound messages for each action type.

SEE ALSO:

Entitlements and Entitlement Processes

Entitlement Fields

Entitlements 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 Name`	The account associated with the entitlement. Every entitlement must be linked to an account.
`Asset Name`	The asset associated with the entitlement. Products represent the items your company sells (for example, a laptop case), whereas assets represent the specific products your customers have purchased (the laptop case purchased by John).
`Business Hours`	The entitlement's supported business hours. To learn more about business hours on entitlements, see How Business Hours Work in Entitlement Management.
`Per Incident`	Lets you limit the number of cases the entitlement supports. Use this field if your service agreements with your customers are based on number of cases (as opposed to number of days or other criteria). Otherwise, you probably don't need it. ⓘ Note: This option is not available for work orders.
`Cases Per Entitlement`	The total number of cases the entitlement supports. This field is only available if `Per Incident` is selected.
`Contract Line Item`	The contract line item (product) associated with the entitlement.
`End Date`	The last day the entitlement is in effect. This field is blank unless you set up an Apex trigger or quick action to populate it. For example, you can create a quick action that sets the `End Date` to 365 days after the `Start Date`.

Field	Description
Entitlement Name	The entitlement's name.
	We recommend using a descriptive name, such as *Phone Support*. This helps users better understand entitlements when they see them on related lists for accounts, contacts, and assets.
Operating Hours	The operating hours that the entitlement's work orders should respect. This field is visible only if Field Service Lightning is enabled.
Service Contract	The service contract associated with the entitlement.
	To quickly find a service contract in the lookup dialog box, select criteria from the `Filter by` fields. Admins can set lookup filters to restrict filter values and results.
Start Date	The first day the entitlement is in effect.
	This field is blank unless you set up an Apex trigger or quick action to populate it. For example, you can create a quick action that sets the `Start Date` to the date when the `Status` changes to *Active*.
Entitlement Process	The entitlement process associated with the entitlement.
	Entitlement processes are timelines that include all the steps (milestones) that your support team must complete to resolve cases. Each process includes logic to determine how to enforce the correct service level for your customers.
Remaining Cases	The number of cases the entitlement can support. This field decreases in value by one each time a case is created with the entitlement.
	This field is only available if `Per Incident` is selected.
Status	The entitlement's status.
	Status is determined by your Salesforce org's current system date and the entitlement's `Start Date` and `End Date`. The status is:
	• Active if the system date is equal to or later than the `Start Date` and equal to or earlier than the `End Date`.
	• Expired if the system date is later than the `End Date`.
	• Inactive if the system date is earlier than the `Start Date`.
Status Icon	Represents the entitlement's status with one of the following icons:
	• ✅ Active
	• ❌ Expired
	• ◻ Inactive

Field	Description
Type	The type of entitlement, such as Web or phone support.
	Admins can customize this field's values.

SEE ALSO:

Entitlements: Terms to Know

Work with Service Contracts

Service contracts in Salesforce represent a customer support agreement between you and your customers. You can use them to represent warranties, subscriptions, service level agreements (SLAs), and other types of customer support.

Service contracts are an advanced entitlement feature. Use them if:

- You want to define specific service levels for your customers, such as warranties, subscriptions, and service level agreements.
- Your customers' entitlements are renewed at the contract level. In other words, your business processes allow you to create an entitlement for a customer only if they have an active service contract.

View and manage service contracts in Salesforce from the Service Contracts tab. Depending on how service contracts are set up, you can also use the Service Contracts related list on accounts and contacts.

EDITIONS

Available in Salesforce Classic

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

IN THIS SECTION:

Guidelines for Working with Service Contracts

Service contracts are agreements between you and your customers for a type of customer support. Learn how to perform basic actions on service contracts.

Service Contract Fields

Service contracts have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

SEE ALSO:

Guidelines for Working with Service Contracts

Service Contract Fields

Guidelines for Working with Service Contracts

Service contracts are agreements between you and your customers for a type of customer support. Learn how to perform basic actions on service contracts.

Viewing Service Contracts

View service contracts from the Service Contracts tab or on the Service Contracts related list on accounts and contacts. To view a service contract's details, click the service contract name. You can see associated entitlements, contract line items, field update history, and more.

The Service Contracts related list on an account or contact shows all the service contacts associated with that item.

> 💡 **Tip:** If service contracts have been set up in the console, click the Console tab to find, view, and edit service contracts and their associated records in one place.

Creating Service Contracts

You can create and edit service contracts from:

- The Service Contracts tab
- The Service Contracts related list on accounts and contacts

We recommend linking each service contract to an account in Salesforce. Then, you can create entitlements on the service contract and assign the entitlements to contacts associated with the account.

> 💡 **Tip:**
>
> - Click **Clone** on a service contract to quickly create a new service contract from an existing one.
> - Use the `Parent Service Contract` field and Child Service Contracts related list to make one service contract the parent of another. This helps you represent complex contracts.
> - Entitlements reflect terms in a service contract, and a service contract may be associated with multiple entitlements. Link an entitlement to a service contract via the Entitlements related list on the service contract or the `Service Contract` lookup field on the entitlement.

Deleting Service Contracts

You can delete service contracts from the service contract's detail page or the Service Contracts related list.

Deleting a service contract moves it to the Recycle Bin. Any notes, attachments, activities, or contract line items associated with the service contract are also deleted. If you undelete the service contract, the associated items are undeleted.

> 📝 **Note:**
>
> - You can't delete service contracts with active or expired entitlements. If you want to delete a service contract with entitlements—for instance, because there's a problem with the service contract—add its entitlements to another service contract first, then delete it.
> - If you delete a service contract with both a parent service contract and child service contract(s), keep in mind that its parent and children will no longer be linked in a service contract hierarchy.

Sharing Service Contracts

You can use sharing rules to grant extra access to service contracts beyond what your organization's default sharing model allows. However, you can't make the sharing model more restrictive than the default model.

EDITIONS

Available in Salesforce Classic

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

USER PERMISSIONS

To view service contracts:
- Read on service contracts

To edit service contracts:
- Edit on service contracts

To create or clone service contracts:
- Create on service contracts

To delete service contracts:
- Delete on service contracts

To see who has access to a service contract, click **Sharing** on the service contract's detail page. This takes you to the sharing detail page. There, you can:

- View a list of who has access to the service contract.
- Click **Add** to grant access to the record for other users, groups, roles, or territories. You can only share service contracts with users who have the "Read" permission on service contracts.
- Create, edit, and delete manual sharing rules.
- Define a custom view to filter the list of users with access to the service contract.

Transferring Service Contracts Between Users

You may need to transfer multiple service contracts to a user. To do this, click the Service Contracts tab and click **Transfer Service Contracts** in the Tools section.

SEE ALSO:

Work with Service Contracts

Service Contract Fields

Service Contract Fields

Service contracts 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 Name	The account that purchased or owns the service contract.
Activation Date	The day the service contract first went into effect.*
Approval Status	An approval process status field. If your business has an approval process for service contracts, this field indicates the current stage of the approval process.
Billing City	City portion of billing address. Up to 40 characters are allowed.
Billing Country	Country portion of billing address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Billing State	State or province portion of billing address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Billing Zip	Zip or postal code portion of billing address. Up to 20 characters are allowed.

Field	Description
Contact Name	The contact associated with the service contract. Select from the drop-down list.
Contract Name	Name of the service contract. Depending on your business needs, you may want to include the name of the customer, the contract end date, the type of product covered by the contract, or other information.
Contract Number	Auto-generated number identifying the service contract. (Read only)
Created By	User who created the service contract. (Read only)
Created Date	The date the service contract was created.*
Currency	The currency for all amount fields in the service contract. Available only for organizations that use multiple currencies. You can't change the currency on a service contract that has contract line items.
Description	Description of the service contract. Up to 32 KB of data are allowed in this field. Try to include information that helps agents understand the coverage provided by the service contract. For example, "This contract entitles the customer to a first response within 2 hours and a case resolution within 24 hours."
Discount	Weighted average of all contract line item discounts on the service contract. Can be any positive number up to 100. (Read only)
End Date	The last day the service contract is in effect.* This field is blank unless you set up an Apex trigger or quick action to populate it. For example, you can create a quick action that sets the End Date to 365 days after the Start Date.
Grand Total	Total price of the service contract plus shipping and taxes. (Read only)
Last Modified By	User who most recently changed the service contract. (Read only)
Line Items	Number of contract line items (products) on the service contract.
Parent Service Contract	The service contract's parent service contract, if it has one. 💡 Tip: View, create, and delete a service contract's child service contracts in the Child Service Contracts related list.
Root Service Contract	The top-level service contract in a service contract hierarchy. Depending on where a service contract lies in the hierarchy, its root may be the same as its parent. (Read only)

Field	Description
Service Contract Owner	The assigned owner of the service contact.
Shipping and Handling	Total shipping and handling costs for the service contract.
Shipping City	City portion of primary mailing or shipping address. Up to 40 characters are allowed.
Shipping Country	Country portion of primary mailing or shipping address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Shipping State	State or province portion of primary mailing or shipping address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Shipping Street	Primary mailing or shipping street address of account. Up to 255 characters are allowed.
Shipping Zip	Zip or postal code portion of primary mailing or shipping address. Up to 20 characters are allowed.
Special Terms	Any terms that you have agreed to and want to track in the service contract.
Start Date	The first day the service contract is in effect.* This field is blank unless you set up an Apex trigger or quick action to populate it. For example, you can create a quick action that sets the Start Date to the date when the Status changes to Active.
Status	The status of the service contract. Status is determined by your organization's current system date and the service contract's Start Date and End Date. The status is: • Active if the system date is equal to or later than the Start Date and equal to or earlier than the End Date. • Expired if the system date is later than the End Date. • Inactive if the system date is earlier than the Start Date.
Status Icon	Represents the service contract's status with one of the following icons: • ✅ Active • ❌ Expired • ☑ Inactive
Subtotal	Total of the service contract line items (products) before discounts, taxes, and shipping are applied. (Read only)

Field	Description
Tax	Total taxes for the service contract. This is a currency field, so enter the amount, not percentage. For example, enter *$10.50*.
Term (months)	Number of months that the service contract is in effect.
	This field is independent of the `Start Date` and `End Date` values. Depending on how your business uses service contracts, you may choose to hide the `Term` field or set up data validation that populates the `End Date` when a `Term` is specified, for example.
Total Price	Total of the contract line items (products) after discounts and before taxes and shipping. (Read only)

*Service contracts have four date fields. `Created Date` is the date the service contract was created in Salesforce, so it's the earliest of the dates. `Activation Date` is the date that it was first activated for an account or customer. Finally, `Start Date` represents the date the service contract was put into effect or last renewed, while `End Date` is the last date the service contract is in effect. `Start Date` and `End Date` are blank by default, but you can create Apex triggers that populate these fields based on other service contract fields like `Status`.

SEE ALSO:

Guidelines for Working with Service Contracts

Contract Line Item Fields

Work with Contract Line Items

Contract line items are specific products covered by a service contract, not by a general contract. You can only use contract line items if your Salesforce org uses products.

A service contract's line items are listed in the Contract Line Items related list.

📝 **Note:** Schedules aren't available for contract line items, and community users can't access them.

👁 **Example:** You can create a service contract that covers products X, Y, and Z, and then create entitlements on the service contract that are assigned to contacts on a particular account. When one of the contacts calls support, the agent checks whether the entitlement associated with the service contract is active. If it's active, the agent can provide support for any of the products (represented by the contract line items) covered by the service contract.

IN THIS SECTION:

Guidelines for Working with Contract Line Items

Contract line items are specific products covered by a service contract. Learn how to perform basic actions on contract line items.

Contract Line Item Fields

Contract line items have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Guidelines for Working with Contract Line Items

Contract line items are specific products covered by a service contract. Learn how to perform basic actions on contract line items.

Viewing Contract Line Items

To view a contract line item, navigate to the service contract that covers it. The Contract Line Items related list shows all the line items associated with a service contract. Click the contract line item to view its associated entitlements, history, and more.

> Note: You can't create custom list views for contract line items.

Adding Contract Line Items to a Service Contract

You can add line items to a service contract from the Contract Line Items related list on the service contract's detail page.

1. Click **Add Line Item** in the Contract Line Items related list.

2. Select a price book if prompted. If only the standard price book is activated, it's automatically assigned to the service contract.

3. Select one or more products from the list, or search for a product and then click the product name.

4. Enter the attributes for each product. Your admin may have customized this page to include fields specific to your business.

5. Enter the Sales Price for the product. The Sales Price defaults to the List Price specified in the price book assigned to the opportunity. If your user permissions allow it, you can override this value. You might want to give a discount, for example.

6. Enter the number of products at this price in the Quantity box.

7. Click **Save**.

> Tip: Use the `Parent Contract Line Item` field and Child Contract Line Items related list to make one line item the parent of another. This helps you represent complex products with multiple components.

Deleting Contract Line Items

You can delete contract line items from the contract line item's detail page or the Contract Line Items related list on a service contract.

Deleting a contract line item moves it to the Recycle Bin. Any notes, attachments, or activities associated with the contract line item are also deleted. If you undelete the contract line item, the associated items are undeleted.

Sharing Contract Line Items

You can't share contract line items. Sharing for contract line items is inherited from service contract sharing. For example, users with the "Read" permission on service contracts inherit the "Read" permission on contract line items.

SEE ALSO:

Contract Line Item Fields

Contract 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
Asset Name	The asset associated with the contract line item. The asset can't be updated if the line item is associated with any maintenance asset records.
	Products represent the items your company sells (for example, a laptop case), whereas assets represent the specific products your customers have purchased (the laptop case purchased by John).
Created By	User who created the contract line item. (Read only)
Created Date	The date the contract line item was created.
Description	Description of the contract line item. Up to 32 KB of data are allowed in this field. Only the first 255 characters display in reports.
Discount	Discount you apply to the contact line item. You can enter a number with or without the percent symbol and you can use up to two decimal places.
End Date	The last day the contract line item is in effect.
	This field is blank unless you set up an Apex trigger or quick action to populate it.
Last Modified By	User who most recently changed the contract line item. (Read only)
Line Item Number	Auto-generated number that identifies the contract line item. (Read only)
List Price	Price of the contract line item (product) within the price book including currency. (Read only)

Field	Description
Parent Contract Line Item	The contract line item's parent line item, if it has one. 💡 **Tip:** View, create, and delete a contract line item's child line items in the Child Contract Line Items related list.
Product	The name of the contract line item (product) as listed in the price book.
Quantity	Number of units of the contract line item (product) included in the service contract. The value must be 1 or greater.
Root Contract Line Item	The top-level contract line item in a contract line item hierarchy. Depending on where a line item lies in the hierarchy, its root might be the same as its parent. (Read only)
Sales Price	Price to use for the contract line item. By default, the Sales Price for a contract line item (product) added to an opportunity or quote is the line item's List Price from the price book. However, you can update it.
Service Contract	The service contract associated with the contract line item.
Start Date	Start date of the contract line item. This field is blank unless you set up an Apex trigger or quick action to populate it.
Status	The status of the contract line item. Status is determined by your organization's current system date and the contract line item's `Start Date` and `End Date`. The status is: • Active if the system date is equal to or later than the `Start Date` and equal to or earlier than the `End Date`. • Expired if the system date is later than the `End Date`. • Inactive if the system date is earlier than the `Start Date`.
Status Icon	Represents the contract line item's status with one of the following icons: • ✅ Active • ❌ Expired • ☑ Inactive
Subtotal	The contract line item's sales price multiplied by the quantity.

Field	Description
Total Price	The contract line item's sales price multiplied by the quantity minus the discount.

SEE ALSO:

Service Contract Fields

Guidelines for Working with Contract Line Items

Access Knowledge

Work with articles and solutions to resolve issues and help your customers be successful.

IN THIS SECTION:

Work with Salesforce Knowledge

Create and manage your company information and securely share it when and where it is needed.

Work with Solutions

Use solutions to provide detailed descriptions and resolutions of customer issues.

Work with Salesforce Knowledge

Create and manage your company information and securely share it when and where it is needed.

IN THIS SECTION:

Work with Articles and Translations

The Article Management tab is your home page for working with articles throughout the publishing cycle as they are created, assigned to collaborators, translated, published, archived, and deleted.

Search Articles and External Sources on the Knowledge Tab

Use a single search to find all your resources at once.

Create and Edit Articles

You can create or edit an article from the Knowledge tab or Article Management tab. If you're creating an article, you may need to select the article type and language. If you're editing a published article or translation, choose whether to leave it published while you work on a draft copy, or whether to remove the original article from publication and work on it directly. If you work on a copy, publishing the copy replaces the last published version of the article. If you work on the original article, it is unavailable in the channels until you republish it.

Publish Articles and Translations

Publishing articles and translations makes them visible in all channels selected. If you publish an article that has translations, all translations of the article are published as well.

Translate Articles Within Salesforce Knowledge

If your organization translates Salesforce Knowledge articles internally, you can enter the translation from the translation detail page.

Archive Articles and Translations

Archiving removes published articles and translations that are obsolete so they no longer display to agents and customers on your organization's Salesforce Knowledge channels.

Salesforce Knowledge Article Versions

Article versions allow you to save an older version of a published article and then see which version of the article is associated with a case. To save the previous version, select the `Flag as new version` checkbox when publishing a new version. The previously published version is saved and the new version is published with the next sequential version number as an identifier.

Delete Articles and Translations

You can delete articles and translations on the Article Management tab or the detail page of the article or translation. Deleting permanently removes articles from the knowledge base. You can delete draft articles, draft translations of articles, or archived articles, but not published articles or translations.

Articles or Knowledge Tab

Find out which Salesforce Knowledge tab you are using and what you can do on each.

Work with Articles and Translations

The Article Management tab is your home page for working with articles throughout the publishing cycle as they are created, assigned to collaborators, translated, published, archived, and deleted.

Agent's need the correct permissions on an article's article type and article actions to complete some tasks. For more information see, Assign Article Actions to Public Groups.

To specify which articles appear in the list view, use the following options in the sidebar:

- In the View area, select Draft Articles, Published Articles, or Archived Articles. You can filter draft articles by those assigned to you or those assigned to anyone (all draft articles for your organization).
- If applicable, click the Translations tab in the View area, and select Draft Translations or Published Translations. You can filter draft translations by those assigned to you, those assigned to a translation queue, or those assigned to anyone (all draft translations in your organization).
- To refine the current view, first select an article language filter and then enter a keyword or phrase in the `Find in View` field. The `Find in View` field is inactivated for archived articles.
- In the Filter area, choose a category from a drop-down menu to filter the current view.

To modify which columns display, click **Columns**. The following columns are available depending on what is selected in the view area:

Column	Description	View
Action	Displays the actions available for the article or translation.	All articles and translations
All User Ratings	Average ratings from users of your internal Salesforce organization, Customer Portal, partner portal, and your public knowledge base.	Published and archived articles and published translations
Archived Date	Date the article was archived.	Archived articles
Article Number	Unique number automatically assigned to the article.	All articles and translations
Article Title	Click to view the article.	All articles
Assigned to	The user who is assigned work on the article.	Draft articles and translations
Assignment Details	Instructions for the assignment.	Draft articles and translations
Assignment Due Date	Date to complete work on the article. If the date has passed, it displays in red.	Draft articles and translations
Created Date	Date the article was written.	Draft articles and translations
Customer Ratings	Average ratings from users on the Customer Portal and the public knowledge base.	Published and archived articles and published translations

Column	Description	View
Language	The language an article is translated into.	Draft and published translations
Last Action	The date and type of the last action taken on a translation.	Draft and published translations
Last Modified by	Last person to update the article.	Draft articles and translations
Last Modified Date	Last date the article was edited.	All articles and translations
Most Viewed by all Users	Average views from users of your internal Salesforce organization, Customer Portal, partner portal, and your public knowledge base.	Published and archived articles and published translations
Most Viewed by Customers	Average views from users on the Customer Portal and the public knowledge base.	Published and archived articles and published translations
Most Viewed by Partners	Average views from users on the partner portal and the public knowledge base.	Published and archived articles and published translations
Partner Ratings	Average ratings from users of your partner portal and public knowledge base.	Published and archived articles and published translations
Published Date	Date the article was published.	Published articles and translations
Source Article	The original article before translation. Click the article title to view the article.	Draft and published translations
Translated Article	The title of the translated article. Click the translation title to edit the translation.	Draft and published translations
Translation Status	Status in the translation cycle. Hover over the icon to view the status for each translation. If a translation has been published, there are separate tabs for draft and published translations.	Articles submitted for translation
Type	The article's type, such as FAQ or Product Description, that determines what information the article contains.	All articles
Validation Status	Shows whether the content of the article has been validated.	All articles and translations, when enabled
Version	The article's version. Hover over the version number to view details about other versions of the article.	All articles

On the Article Management tab, you can:

- Find an article or translation by entering a search term or using the category drop-down menu.
- Create an article by clicking **New**.

- Publish an article or translation by selecting it and clicking **Publish...**. If you have the "Publish Articles" article action and an approval process is set up for an article, you see both **Publish...** and **Submit for Approval** buttons.

- Modify an article or translation by clicking **Edit** next to it.

- See how an article or translation appears for end users by clicking **Preview** next to it. From the `Channel` drop-down menu you can choose any channel where an article is visible except the public knowledge base.

  📝 **Note:** Voting and Chatter information is not available when previewing a Knowledge article.

- See a list of an article's or translation's other versions by clicking its version number.

- Change the owner of an article or translation by selecting it and clicking **Assign...**.

  📝 **Note:** All draft articles must have an assignee.

- Send an article or translation to the Recycle Bin by selecting it and clicking **Delete**.

- Archive a published article or translation by selecting it and clicking **Archive...**.

- Submit articles for translation by selecting them and clicking **Submit for Translation**. You can set dues dates for each language and assign it to another agent or a queue for export to a translation vendor.

- Go directly to the Setup pages for exporting and importing articles for translation with **Export Articles for Translation** and **Import Article Translations** in the Related Links area.

SEE ALSO:

Search Articles and External Sources on the Knowledge Tab

USER PERMISSIONS		EDITIONS
To view articles:	Read on the article type	Available in: Salesforce Classic, Lightning Experience
To create articles:	Manage Articles AND Read and Create on the article type	Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.
To edit draft articles:	Manage Articles AND Read and Edit on the article type	Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.
To edit published or archived articles:	Manage Articles AND Create, Read, and Edit on the article type	
To delete a draft, published, or archived article:	Manage Articles AND Read, Edit, and Delete on the article type	
To create and edit external data sources:	Customize Application	

Use a single search to find all your resources at once.

1. Enter your search terms in the Search box.

   You can use search wildcards and operators in your search terms. If your organization has any auto-complete options enabled, you can select from the suggestions.

   📝 Note: In the auto-complete drop-down, article titles have a paper icon while the keywords have a magnifying glass icon.

2. Click the search icon or press **Enter** on your keyboard.

3. Optionally, select filters to refine your search results.

   Depending on the source you are searching, filter by language, data category, article status, article type, and article validation. Click **Reset** to return all filters to their default setting.

   - When `All` is selected, you can filter by language and data category, depending on what your organization supports.
   - When `Articles` or `My Draft` is selected you can filter by:
     - Article status: Published, Draft, and Draft Translations
     - Language: Values depend on those supported in your org
     - Data categories: Values depend on those created in your org
     - Article type: Values depend on those created in your org
     - Validation Status: No Filter (all articles), Not Validated (articles that are not validated), Validated (validated articles), and any other values supported in your org such as in review

- When an external source is selected, there are no filters, and the general article information displayed is controlled by your external object search layout.

4. For articles, you can sort by:

- Published Date
- Best Rating
- Most Viewed
- Title: A to Z
- Title: Z to A

5. View information by clicking the article or external source title. Below the title you can find general article information such as: new article indication, article number, article type, validation status, last published date, article view comparison, and article rating comparison.

6. Use the drop down by each article to follow or unfollow, edit, publish, and delete an article, depending on your permissions.

IN THIS SECTION:

Promote Articles in Search Results

Associate keywords with articles to optimize search results in Salesforce Knowledge. Users who search for these keywords see the article first in their search results. Promoted search terms are useful for promoting an article that you know is commonly used to resolve a support issue when a user's search contains certain keywords.

Article Search Results

How search works for articles depends on your use of search options, search terms, wildcards, and operators. Salesforce Knowledge search uses the same custom search algorithms that are available throughout Salesforce, which include mechanisms such as tokenization, lemmatization, and stopword lists, to return relevant search results.

SEE ALSO:

Promote Articles in Search Results

Article Search Results

Complete Guide to Salesforce Knowledge

Promote Articles in Search Results

Associate keywords with articles to optimize search results in Salesforce Knowledge. Users who search for these keywords see the article first in their search results. Promoted search terms are useful for promoting an article that you know is commonly used to resolve a support issue when a user's search contains certain keywords.

Articles must be in published status for you to manage their promoted terms.

1. In the Article Management tab, select **Published Articles** in the View section, and then click the title of the published article that you want to promote for a search term.

2. In the Promoted Search Terms related list, click **New Promoted Term**.

3. Enter the keywords that you want to associate with the article.

    - You can associate the same term with multiple articles. If the user's search matches the promoted term, all associated articles are promoted in search results, ordered by relevancy.

    - The maximum number of characters per promoted term is 100. For best results matching users' search terms, limit each promoted term to a few keywords.

4. Click **Save**.

👁 **Example:** For example, if an article addresses a common support issue such as login problems, you can associate the terms *password* and *password change*. Article search matches a promoted term whenever all keywords within the term occur within the user's search terms, in any sequence. Each keyword must match exactly. For example:

  - The promoted term *password* matches a search for `change password`.

  - The promoted term *password change* matches a search for `how do I change my password` but doesn't match `forgot password`.

  - The promoted term *password* doesn't match a search for `change passwords`.

Consider these limitations and general limits when you use promoted search terms.

- Your organization can create a maximum of 2,000 promoted terms. For best results, use them selectively, which means create a limited number of promoted terms and a limited number of promoted articles per term.

- If your organization translates articles into multiple languages, each promoted term is associated with one article version and the article version's language. If you need equivalent promoted terms to be associated with each translation, you must specify promoted terms for each translation. For example, associate change password with an English language article version and changer mot de passe with a French language article version.

- The end user's language setting determines the scope of the article search. Search results exclude article versions and any associated promoted terms that are not in the user's language.

SEE ALSO:

  [Article Search Results](#)

  [Search Articles and External Sources on the Knowledge Tab](#)

  [Complete Guide to Salesforce Knowledge](#)

Article Search Results

How search works for articles depends on your use of search options, search terms, wildcards, and operators. Salesforce Knowledge search uses the same custom search algorithms that are available throughout Salesforce, which include mechanisms such as tokenization, lemmatization, and stopword lists, to return relevant search results.

Many factors influence the order in which articles appear in the results list. Salesforce evaluates your search terms and your data to move more relevant matches higher in your list of results. Some of these factors include:

Operators

When you don't specify an operator in your article search, the search engine determines the best operator to use.

Many searches use "AND" as the default operator. When you search for multiple terms, all the terms must match to generate a result. Matching on all terms tends to produce search results that are more relevant than searches using the "OR" operator, where matches on any of the search query terms appear in the results.

If the search engine doesn't return any results that match all the terms, it looks for matches using the "OR" operator. With the "OR" operator, the search engine boosts documents that contain more terms from the search query, so that they appear higher in the results list.

Frequency

This algorithm calculates the frequency with which a term appears within each article. The algorithm then weighs them against each other to produce the initial set of search results.

Relevancy

Articles that are frequently viewed or that are frequently attached to cases appear higher in the results. Article ownership and recent activity also boost an article in the results list.

Proximity of Terms

Articles that contain all the keywords in a search are ranked highest, followed by articles with fewer keywords, followed by articles with single keyword matches. Terms that are closer together in the matched document, with few or no intervening words, are ranked higher in the list.

Exact Matches

Matches on exact keywords are ranked higher than matches on synonyms or lemmatized terms.

Title Field

If any search terms match words in an article title, the article is boosted in the search results.

Token Sequence

If the search term is broken up into multiple tokens because it contains both letters and numbers, the system boosts results based on the same sequence of tokens. That way, exact matches are ranked higher than matches on the tokens with other tokens in between.

SEE ALSO:

Promote Articles in Search Results

Search Articles and External Sources on the Knowledge Tab

Complete Guide to Salesforce Knowledge

Create and Edit Articles

You can create or edit an article from the Knowledge tab or Article Management tab. If you're creating an article, you may need to select the article type and language. If you're editing a published article or translation, choose whether to leave it published while you work on a draft copy, or whether to remove the original article from publication and work on it directly. If you work on a copy, publishing the copy replaces the last published version of the article. If you work on the original article, it is unavailable in the channels until you republish it.

> 🖊 **Note:** When applying categories, choose the categories that a user would naturally look for as they navigate. Users only find an article if they select its explicitly applied category, the parent of that category, or a child of that category.

Once your article is complete, you can assign it to another agent to edit or review the article, publish the article directly, or submit the article for approval. If you have the "Publish Articles" article action and an approval process is set up for an article, you'll see both **Publish...** and **Submit for Approval** buttons..

IN THIS SECTION:

Smart Links to Salesforce Knowledge Articles
Smart linking from one article to another.

SEE ALSO:

Smart Links to Salesforce Knowledge Articles

Complete Guide to Salesforce Knowledge

Smart Links to Salesforce Knowledge Articles

Smart linking from one article to another.

Smart links automatically adjust when the name or URL of an article is changed. For example, when the URL Name of an article is changed, Salesforce Knowledge automatically updates the article's URL based on the channel, adds the site prefix for a public knowledge base, and adds the community name for the community portal. There are two ways to create a smart link in the rich text editor to a Salesforce Knowledge article within another article:

- Search for the article.
- Enter the article URL.

(!) **Important:** Smart links are based on the channels they are in. Therefore, you can't add a smart link to an article in another channel. For example, an article on your public knowledge base can't link to an article only published in your internal channel.

IN THIS SECTION:

Smart Links to Salesforce Knowledge Articles Through Search
Smart linking from one article to another using the Link Article dialog in the rich text editor.

Smart Links to Salesforce Knowledge Articles with URLs
Smart linking from one Salesforce Knowledge article to another by manually entering the article URL in the rich text editor.

SEE ALSO:

Smart Links to Salesforce Knowledge Articles Through Search

Smart Links to Salesforce Knowledge Articles with URLs

Create and Edit Articles

Complete Guide to Salesforce Knowledge

Smart Links to Salesforce Knowledge Articles Through Search

Smart linking from one article to another using the Link Article dialog in the rich text editor.

When creating or editing an article, you can use a keyword search to create a smart link in a rich text area field.

1. Place your cursor where you'd like to place the link.

2. Click the link icon, [icons] .

   The Link Article dialog appears.

3. Optionally, select which language to search.

   If no language is selected, Salesforce Knowledge returns those articles in your knowledge base's default language that are related to your keyword search.

4. Optionally, select the publish status type to search.

   - Online (default if no publish status is selected)

   - Draft

   - Draft translations (if your knowledge base supports multiple languages)

5. Enter article keywords into the search bar.

6. Click the search icon at the end of the search bar.

   The top 20 related articles display.

7. Select the article to reference in a smart link from the article list.

   > ⛔ **Important:** Smart links are based on the channels they are in. Therefore, you can't add a smart link to an article in another channel. For example, an article on your public knowledge base can't link to an article only published in your internal channel.

8. Optionally, click **Go to Article** to view the article in another window and ensure that it is the correct reference.

9. Optionally, click the Target tab and select where the referenced article displays.

   - **Not Set**: Opens the linked article in the same frame as it was clicked.

   - **Frame**: Opens the linked article in a designated frame.

   - **New Window (_blank)**: Opens the linked article in a new window or tab.

   - **Topmost Window (_top)**: Opens the linked article in the full body of the window.

   - **Same Window (_self)**: Opens the linked article in the same frame as it was clicked.

   - **Parent Window (_parent)**: Opens the linked article in the parent frame.

10. Click **OK**.

   > 📝 **Note:** Smart links add more characters than what is displayed. If you see an error that you have surpassed the character limit, have your administrator increase the limit.

SEE ALSO:

EDITIONS

Available in: Salesforce Classic, Lightning Experience

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 articles:
- Manage Articles

  AND

  Read and Create on the article type

Smart Links to Salesforce Knowledge Articles with URLs

Smart linking from one Salesforce Knowledge article to another by manually entering the article URL in the rich text editor.

When creating or editing an article, you can manually create a smart link in a rich text area field.

1. Highlight the content or place your cursor where you'd like to place the link.

2.
   Click the link icon, .

3. Select Link Type **URL**.

4. Select Protocol **<other>**.

5. Enter the article URL as: `/articles/[language]/[articleType]/[URLName]`.

   For example, for an English article in a multiple language knowledge base, of article type FAQ, with a URL Name of About-Passwords the article URL is: `/articles/en_US/FAQ/About-Passwords`. Add a language only if your Salesforce Knowledge base supports multiple languages.

   > 🚫 **Important:** Smart links are based on the channels they are in. Therefore, you can't add a smart link to an article in another channel. For example, an article on your public knowledge base can't link to an article only published in your internal channel.

6. Optionally, click the Target tab and select where the referenced article displays.

   - **Not Set**: Opens the linked article in the same frame as it was clicked.
   - **Frame**: Opens the linked article in a designated frame.
   - **New Window (_blank)**: Opens the linked article in a new window or tab.
   - **Topmost Window (_top)**: Opens the linked article in the full body of the window.
   - **Same Window (_self)**: Opens the linked article in the same frame as it was clicked.
   - **Parent Window (_parent)**: Opens the linked article in the parent frame.

7. Click **OK**.

   > 📝 **Note:** Smart links add more characters than what is displayed. If you see an error that you have surpassed the character limit, have your administrator increase the limit.

SEE ALSO:

EDITIONS

Available in: Salesforce Classic, Lightning Experience

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

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USER PERMISSIONS

To create articles:
- Manage Articles

  AND

  Read and Create on the article type

Publish Articles and Translations

Publishing articles and translations makes them visible in all channels selected. If you publish an article that has translations, all translations of the article are published as well.

You can publish an article or translation from the Article Management tab or the article's or translation's detail page. To publish, you need the publish permission on an article's article type and the "Publish Articles" or "Publish Translated Articles" article action to publish an article or translation.

When publishing articles keep the following in mind.

- You can choose to publish directly or schedule publishing for a future date. Articles you scheduled for publication later continue to appear in the Draft Articles filter, now with the pending icon (🕐) next to the article title. To see the publication date, hover over the icon.

  💡 **Tip:** To cancel a scheduled publication, click **Cancel Publication** on the article or translation detail or edit page.

- If your organization has implemented approval processes, you need the same permissions and actions to publish an article after it has been approved. Approval processes aren't available for translations.

- An article in an approval process might be sent to a queue to be published even if it is scheduled to publish immediately. This happens when the article is very large, there are many active languages, or there are many other articles to publish at that time. To mitigate performance issues, the article is sent to a queue until it can be published successfully, usually within minutes. Also, note that the `Last Modified By` field shows **Automated Process** as the last user to modify the article.

- If the draft being published is a working copy of a currently published article, it is published as a new version of the original.

- For articles and translations that have already been published, select the `Flag as new version` checkbox to make the new article icon (✳) display next to your article in the selected channels. Readers from these channels can see that this article has been modified since the last time they've read it. This checkbox is not available when you publish an article for the first time, as the icon displays by default for new articles.

- If you assign an article that is scheduled for publication, you also cancel the scheduled publication.

- Scheduling a publication removes any assignment information. The user who scheduled the publication is assigned to the article.

- Conflicts might occur when different agents perform actions on the same articles simultaneously. Depending on who performs the action first, the articles will not be available for subsequent users though the articles still display momentarily in the articles list. Performing an action on these articles results in a conflict error.

- If you have the "Publish Articles" article action and an approval process is set up for an article, you see both **Publish...** and **Submit for Approval** buttons.

SEE ALSO:

[Complete Guide to Salesforce Knowledge](#)

EDITIONS

Available in: Salesforce Classic, Lightning Experience

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.

Translate Articles Within Salesforce Knowledge

If your organization translates Salesforce Knowledge articles internally, you can enter the translation from the translation detail page.

Depending on the status of your translation and the article actions assigned to you, you can do the following from the translation detail page.

Action	Description	Article Status
Archive	Archiving removes published translations that are obsolete so they no longer display to agents and customers on your organization's Salesforce Knowledge channels.	To archive a translation, archive its master article.
Assign...	Assigning changes the owner of the translation.	Draft translations
Delete	Deleting a translation permanently removes it from the knowledge base. 📝 Note: You can't undelete a draft translation.	Draft translations
Edit	Editing modifies the translation's content or properties.	Draft and published translations
Preview	Previewing shows how the translation appears to end users. 📝 Note: Voting and Chatter information is not available when previewing a Knowledge article.	Draft and published translations
Publish...	Publishing translations makes them visible in all channels selected.	Draft translations

1. Click the **Article Management** tab and select **Translations** in the View area.

2. Select **Draft Translations**.

   📝 Note: You can also edit a published translation. It reverts to draft status until you republish it, although you can choose to keep the existing version published while you update it.

3. Optionally, change the `Assigned To` filter to view articles that are not assigned to you for translation.

For example, you might want to view articles assigned to a translation queue.

4. Click **Edit** next to the article and language you want to translate.

5. Enter your translation.

6. Click **Save**.

SEE ALSO:

Complete Guide to Salesforce Knowledge

Archive Articles and Translations

Archiving removes published articles and translations that are obsolete so they no longer display to agents and customers on your organization's Salesforce Knowledge channels.

You can archive published articles and translations on the Article Management tab. You can choose to archive either real time (now) or schedule the archival.

Articles you're archiving now move directly to the Archived Articles view. Articles you scheduled for archiving later continue to display on the Published Articles view, now with the pending icon (🕐). Hover over the icon to see the archive date. On the archive date, the article automatically moves to the Archived Articles view.

📝 Note:

- Conflicts might occur when different agents perform actions on the same articles simultaneously. Depending on who performs the action first, the articles will not be available for subsequent users though the articles still display momentarily in the articles list. Performing an action on these articles results in a conflict error.

- If you edit a published article that is scheduled for archiving, you also cancel the archiving.

- If an article has a published translation with a draft version, on archive, the draft version is deleted. Published translations are archived along with the article.

💡 Tip: To cancel a scheduled archive, click **Cancel Archive** on the article detail page.

SEE ALSO:

Complete Guide to Salesforce Knowledge

Salesforce Knowledge Article Versions

Article versions allow you to save an older version of a published article and then see which version of the article is associated with a case. To save the previous version, select the `Flag as new version` checkbox when publishing a new version. The previously published version is saved and the new version is published with the next sequential version number as an identifier.

When an article is attached to a case and a new version of the article is published, the version attached to the case as being outdated. For example, if Version 2 is attached to a case and a third version is published, the article attached to the case becomes Version 2 (outdated). This notation ensures that there is a permanent record of which content was associated with the case.

When you click the version number in the Article View, and the Article or Translation Detail pages, you see the Version History list. In this list you can:

- View the list of archived versions.
- To view a version, click its title.
- Expand the version to view its field change history (if you have history tracking enabled for the article type and for fields).

By default, the system stores up to ten versions of an article, plus any versions that are attached to cases.

When several versions of an article exist, you can restore an older version and republish it. Click `Revert to Draft Version` to copy the archived version's content into a draft article, then republish it as a new version. You can also restore the older version of any associated translations at the same time.

> **Note:** When there is an existing draft for the article, the option to revert isn't available.

You can delete an older, outdated version of a published article by selecting `Delete This Version` from the article detail page. If you delete an article version associated to a case, it is no longer be attached to the case. Translated article versions depend on the master language article. If the master language version is deleted, the translated versions are also deleted.

Versions also appear in custom reports, allowing you to find and read the article version attached to a case.

SEE ALSO:
    Complete Guide to Salesforce Knowledge

Delete Articles and Translations

You can delete articles and translations on the Article Management tab or the detail page of the article or translation. Deleting permanently removes articles from the knowledge base. You can delete draft articles, draft translations of articles, or archived articles, but not published articles or translations.

> **Note:**
> - To delete published article and translations, first remove them from publication by choosing edit or archive.
> - When a user without delete access cancels the editing on published article, the newly created article draft is not deleted automatically.

Deleting articles moves them to the Recycle Bin, where you can undelete them if you change your mind. If you delete an article with translations, the translations are also moved to the Recycle Bin. However, if you delete a single translation, you can't undelete it. Deleting an article or translation may fail if another user or the system simultaneously modifies it while the deletion is being processed. You receive an error message when this occurs.

> **Note:**
> - Conflicts might occur when different agents perform actions on the same articles simultaneously. Depending on who performs the action first, the articles will not be available for subsequent users though the articles still display momentarily in the articles list. Performing an action on these articles results in a conflict error.
> - If you delete a draft article that is a working copy of a currently published article, the original published version is not affected but the draft version is permanently removed. It does not go to the Recycle Bin. You can edit the published version to work again on a draft copy.
> - When a user without delete access cancels editing a published article, the newly created article draft is not deleted automatically.

SEE ALSO:

Complete Guide to Salesforce Knowledge

EDITIONS

Available in: Salesforce Classic, Lightning Experience

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.

Articles or Knowledge Tab

Find out which Salesforce Knowledge tab you are using and what you can do on each.

There are two tabs for searching Salesforce Knowledge articles: the Knowledge tab or the Articles tab. The one you use depends on when your organization started using Salesforce Knowledge or if it adopted the Knowledge tab.

The Knowledge tab

If the search bar is at the top of the main frame of the page you are using the Knowledge One on the Knowledge tab.

The Knowledge tab merges functionality of the old Articles tab and the Article Management tab and uses federated search to search all your resources at once. On the Knowledge tab, you can:

- Search all your Salesforce Knowledge articles and any of your external data sources, such as Microsoft® SharePoint®.
- Filter articles by language and data categories.
- Sort articles by published date, rating, most viewed, and title.
- Use the **Create Article** drop-down to select an article type and create an article.
- Use the drop-down by each article to follow or unfollow, edit, publish, and delete an article, depending on your permissions.

  Note: For information on article permissions see Knowledge Article Access.

Also, when you use case feed, the Knowledge tab layout is applied to the article sidebar.

  Note: Community members without the Knowledge One permission cannot access Knowledge through Communities. They also can't access Knowledge in communities via the Salesforce1 mobile browser and downloadable apps.

To switch to the Knowledge One and the Knowledge tab, have your administrator add the `Knowledge One` permission to your profile or permission set.

The Articles tab

If the search bar is in the left-side panel of the page you are using the Articles tab.

The Articles tab presents a list of your Salesforce Knowledge published articles. On the Articles tab, you can:

- Search for published articles
- View published articles
- Create an article
- Customize how the article information is displayed

SEE ALSO:

Complete Guide to Salesforce Knowledge

Work with Solutions

Use solutions to provide detailed descriptions and resolutions of customer issues.

IN THIS SECTION:

Solutions Overview

Searching for Solutions

Displaying and Selecting Solutions

Viewing Solution Lists

Creating Solutions

Reviewing Solutions

Deleting Solutions

Categorizing Solutions

Setting Multilingual Solution Statuses

Solutions Home

Solution History

Solution Fields

Solutions FAQ

Solutions Overview

A solution is a detailed description of a customer issue and the resolution of that issue. Solution managers, administrators, and users with the appropriate permissions can create, review, and categorize solutions. They can also publish solutions to the Self-Service portal and make solutions public.

The Solutions tab displays a home page that lets you quickly locate and manage solutions. If your organization uses solution categories, you can browse for and find solutions by category. You can also sort and filter solutions using standard and custom list views.

Administrators, and users with the "Import Solutions" permission, can import solutions.

> 📝 **Note:** By default, solutions are created and displayed in text format. Administrators can enable HTML solutions so that all solutions are displayed in HTML format and created using an HTML editor.

SEE ALSO:

Solutions Home

Tips on Writing Solutions

Tip sheet: Tips & Hints for Solutions

Administrator setup guide: Solutions Implementation Guide

Searching for Solutions

You can find solutions by:

- Searching from the Cases Tab
- Searching from the Solutions Tab
- Browsing for Solutions
- Searching Using Global Search
- Create a Custom List View in Salesforce Classic

When you search for solutions, all standard text fields on solutions are searched, as well as the following custom field types:

- Auto-number
- Text
- Text area
- Long text area
- Email
- Phone
- Any field set as an external ID

Be aware of these behaviors in solution searches:

- Solution Search returns solutions that include all or any of your keywords. For example, searching for `data loader` may return results with just *data*, just *loader*, or both keywords in any order. Items that include more of your keywords are listed higher in results, and items that contain your keywords as a phrase or near each other are also listed higher.
- Solution Search can stem—or find variants of your search terms. For example, searching for `creating` finds solutions containing *create*, *created*, and *creating*.

> **Note:** This behavior applies only to the type of word you search for: a search for a noun matches variants of the noun form, a search for a verb matches variants of the verb form, and so on.

- You can use search wildcards and operators to improve your Solution Search results.
- If any search terms match words in a solution title, the solution is boosted in the search results.
- The numbers displayed in parentheses and brackets alongside search results indicate the number of matching solutions found. For example, if you search for `Truck` and *Truck (35)* displays, then your organization has 35 solutions with the term *Truck*.

Searching from the Cases Tab

1. On a case detail page in the Solutions related list, enter keywords related to a possible solution in the search box. You can use search wildcards and operators in your query.

2. If your organization uses categories, select a category in which to search.

3. Click **Find Solution**. The search returns a list of relevant solutions.

   - Click column headings to sort the results in ascending or descending order.
     - Sorting applies across all search results for a particular object, including those on subsequent pages.
     - You can't click on column headings for multi-select picklist fields because you can't sort the multi-select picklist field type.

   - 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.

   - If solution summaries and inline category breadcrumbs are enabled for your organization, search results display up to 150 characters of the solution details and up to 150 characters of the category trail to which the solution belongs.

   - Note that if HTML Solutions is enabled, all tags and images are removed from solution details.

   - If suggested solutions is enabled, click **View Suggested Solutions** to view relevant solutions using a formula that automatically scores the relevancy of each solution to the particular case via word frequency, word proximity, case similarity, and related solutions.

4. If search results filters are enabled for your organization, you can filter the search results. Click the **Show Filters** link in the appropriate results related list, enter the filter criteria, and click **Apply Filters**.

Searching from the Solutions Tab

1. On the Solutions tab, enter keywords related to a possible solution in the search box at the top of the page. You can use search wildcards and operators in your query.

2. If your organization uses categories, select a category in which to search.

3. Click **Find Solution**. The search returns a list of matching records.

   Click column headings to sort the results in ascending or descending order.

   > **Note:** Sorting applies across all search results for a particular object, including those on subsequent pages. You can't click on column headings for multi-select picklist fields because you can't sort the multi-select picklist field type.

   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. If solution summaries and inline category breadcrumbs are enabled for your organization, search results display up to 150 characters of the solution details and up to 150 characters of the category trail to which the solution belongs. Note that if HTML Solutions is enabled, all tags and images are removed from solution details.

4. If search results filters are enabled for your organization, you can filter the search results. Click the **Show Filters** link in the appropriate results related list, enter the filter criteria, and click **Apply Filters**.

5. From the list, select a record to jump directly to that record. If you do not find a matching record, browse for a relevant solution using categories.

The fields you see in search results are determined by the search layout defined by your administrator and by your field-level security settings (available in Professional, Enterprise, Unlimited, Performance, and Developer Editions only).

Browsing for Solutions

1. In the Browse Solutions section of the Solutions tab, click a solution category to view a list of solutions in that category and its subcategories.

2. Optionally, use the drop-down list to sort the solutions by category, most commonly used, or recently updated.

3. Select a record from the results to jump directly to that record.

Searching Using Global Search

1. Enter your search terms in the header search box.

You can use search wildcards and operators in your query.

2. Select **Search Options...** from the drop-down and select `Solutions` to narrow your search results.

3. Click **Search**.

SEE ALSO:

    Solving Cases

Displaying and Selecting Solutions

USER PERMISSIONS		EDITIONS
To view solutions:	Read on solutions	Available in: Salesforce Classic
To attach a solution to a case:	Read on solutions and cases AND Edit on cases	Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions
To change unpublished solutions:	Edit on solutions	
To delete unpublished solutions:	Delete on solutions	
To change published solutions:	Manage Published Solutions	
To delete published solutions:	Manage Published Solutions	

Displaying Solutions

When you have located a solution, either by searching from a case or from the solutions home or list pages, click the solution title to display detailed information. If hover details are enabled, hover over any lookup field on the detail page to view key information about a record before clicking into that record's detail page.

Viewing Solution Updates and Comments (Chatter)

Display a Chatter feed of updates, comments, and posts about the solution.

Selecting Solutions

To attach the solution to your case, click **Select** from the solution detail page or the search results list. The solution is automatically added to the case. The **Select** option is available only if you searched for a solution from within a case, or you searched for solutions to add to your Self-Service portal Home page.

Editing and Deleting Unpublished Solutions

Users with the "Edit" permission on solutions can update unpublished solutions by clicking **Edit**, changing the necessary fields, and then clicking **Save**. To delete an unpublished solution, a user with the "Delete" permission on solutions can click the **Delete** button.

> **Note:** If HTML Solutions is enabled for your organization, and you open a text solution with the HTML editor and save it, the solution will become an HTML solution.

Editing and Deleting Published Solutions

The ability to edit and delete published solutions is restricted to users who have the "Managed Published Solutions" permission, such as solution managers and administrators.

> **Note:** Translated solutions inherit the record type of the master solution from which they are translated. You cannot change the record type of translated solutions.

Solution Related Lists

Below the solution details is information related to the solution, including a history of changes to the solution, open and closed activities, attachments, related cases, translated solutions, and the categories to which the solution belongs. The related lists you see are determined by your personal customization, and by any customization your administrator has made to page layouts or your permissions to view related data.

> **Note:** The size limit for a file attached to a solution is 5 MB. You cannot upload solution attachments with the following file extensions: htm, html, htt, htx, mhtm, mhtml, shtm, shtml, acgi.

> Hover over the links at the top of a detail page to display the corresponding related list and its records. If Chatter is enabled, hover links display below the feed. An interactive overlay allows you to quickly view and manage the related list items. Click a hover link to jump to the content of the related list. If hover links are not enabled, contact your Salesforce administrator.

Printing Solutions

To open a printable display of the record details, in the top-right corner of the page, click **Printable View**.

> **Note:** If HTML solutions is enabled for your organization, any HTML formatting applied in your solution details will appear in the Printable View.

To return to the last list page you viewed, click **Back to list** at the top of the solution detail page. If your organization has enabled collapsible page sections, use the arrow icons next to the section headings to expand or collapse each section on the detail page.

SEE ALSO:

[Solution History](#)

[Solution Fields](#)

[Creating Solutions](#)

[Categorizing Solutions](#)

Viewing Solution Lists

The Solutions list page displays a list of solutions in your current view. To show a filtered list of items, select a predefined list from the `View` drop-down list, or click **Create New View** to define your own custom views. To edit or delete any view you created, select it from the `View` drop-down list and click **Edit**.

- Click a solution title to view the detail. Click **Edit** or **Del** to change the solution or move it to the Recycle Bin.

- If Chatter is enabled, click ➕ or ✖ to follow or stop following a solution in your Chatter feed.

- Click **New Solution** or select **Solution** from the Create New drop-down list in the sidebar to create a solution.

SEE ALSO:

Solutions Overview

Creating Solutions

You can create a solution in the following ways:

- Create a solution from the sidebar or Solutions tab:

  1. Select **Solution** from the Create New drop-down list in the sidebar, or click **New** next to **Recent Solutions** on the solutions home page.

     If multilingual solutions is enabled for your org, you can create a translated solution by clicking **New** on the Translated Solutions related list of the master solution. Translated solutions inherit the record type of the master solution from which they are translated. You cannot change the record type of translated solutions.

  2. If multilingual solutions is enabled for your org, select the language for the solution from the `Language` picklist.

     The languages available are the languages supported by Salesforce. The `Language` picklist excludes languages already used in the master solution or in other translated solutions associated with the master solution.

  3. Enter the solution title, details, and any other information.

     💡 Tip: In solution searches, if any search terms match words in a solution title, the solution is boosted in the search results. Thus, it's a good idea to write a solution title with relevant words that users are likely to use in searches.

     If HTML Solutions is enabled for your org, you can enter solution details in an HTML editor. The HTML editor allows you to use a toolbar to insert images and format the text and paragraphs in your solution.

  4. Click **Save**.

> **Note:** Images in HTML solution details don't show up in list views and reports.

- Create a new solution while closing a case:

    1. Choose **Close Case** on a case detail page, or click **Save & Close** while editing a case.

    2. Enter the title and details under **Solution Information**, and check `Submit to knowledge base` to submit the solution for review by your solution managers.

    3. Click **Save**.

IN THIS SECTION:

Tips on Writing Solutions

SEE ALSO:

Solution Fields

Reviewing Solutions

Categorizing Solutions

Tips on Writing Solutions

To assist users in solving their cases, it is important to write good solutions. Review the guidelines below, and also see the *Tips & Hints for Solutions* document.

Reusable

- Include all facts and symptoms of the problem.

- Include any necessary analysis or troubleshooting ideas.

- Include a concise, accurate description of the cause and resolution of the problem.

- Include only one cause and one resolution per solution. If there are a number of steps to the resolution, number each step and put it on a separate line.

- Make sure the text is clear and in the language of the intended audience—both customer support users and your customers.

- Make sure the title properly describes the problem or question.

- Associate as many relevant solutions to a particular case as possible to increase the usefulness of the suggested solutions feature. Suggested solutions are found using a formula that automatically scores the relevancy of each solution to a particular case via the number of times the solution is related to similar cases.

> **Note:** Use a consistent format to ensure that all solutions are reusable. You can determine the best format for your organization, but make sure each solution contains a title, the symptoms of the problem, the cause of the problem, and the resolution to the problem.

Findable

- Make sure the solution can be found by multiple troubleshooting paths and by different people who will describe problems in different ways.

- Make sure the solution is unique and can exist as a discrete piece of knowledge.

- Make sure the solution is meaningful to your organization and is worth sharing with your customers.

- Make sure the solution includes words that customers use so that when they log their own cases via the Self-Service Portal or the Customer Portal, the suggested solutions feature can return useful results based on word frequency. For example, if customers use

the word "hub" for "router," include "hub" in the solution to increase the likelihood of it being returned in the results of suggested 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.

Technically Accurate

- Make sure the solution is accurate and up-to-date.
- Make sure the level of technical detail is appropriate for the intended audience.

Sample Solution

This example provides a clear solution to a specific problem.

```
How do I change an account's billing information?

Problem-Users aren't sure how to change an account's billing information, such as the
credit card number or payment type.
Solution-Change billing information in the active contract on the account.
1. Open an account by clicking its name on the Accounts home page or an Accounts related
list.
2. Scroll to the Contracts related list and click Edit next to the active contract on the
 account.
3. Enter the correct billing information.
4. Click Save.
```

SEE ALSO:

Creating Solutions

Reviewing Solutions

Solution managers, administrators, and users with the "Edit" permission on solutions can review existing solutions. Solution managers, administrators, and users with the "Manage Published Solutions" can publish solutions.

1. Click **Edit** on the solution detail page.

2. Edit the necessary information, and change the `Status` to Reviewed.

3. Check `Visible in Self-Service Portal` to make the solution available in your organization's customer Self-Service portal and Salesforce Customer Portal.

    > **Note:** 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.

4. Optionally, check `Visible in Public Knowledge Base` to also make the solution available to users accessing public solutions.

    This field only applies to solutions, not articles in the public knowledge base.

5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To review solutions:
- Edit on solutions

To publish solutions:
- Manage Published Solutions

For organizations with multilingual solutions, if you modify a master solution that has translated solutions, the Translated Solutions Status page displays. From there, you can adjust the statuses of translated solutions and notify users to update those translations.

SEE ALSO:

Solution Fields

Creating Solutions

Categorizing Solutions

Deleting Solutions

To delete a solution, click **Del** next to the solution on the solutions list page, or click **Delete** on the solutions detail page. The **Del** link is displayed only for solution managers, administrators, and users with the "Manage Published Solutions" or "Delete" permission on solutions.

When you delete a solution, all related history and attachments are also deleted. The solution is moved to the Recycle Bin. Associated cases are not deleted with the solution, but the case associations are removed and are not restored if you later undelete the solution.

For organizations with multilingual solutions enabled:

- Deleting a master solution does not delete the translated solutions associated with it. Instead, each translated solution becomes a master solution.

- Deleting a translated solution removes the association with its master solution.

- Undeleting a master or translated solution from the Recycle Bin does not restore its associations with other master or translated solutions. You can manually restore the associations by modifying the `Master Solution` lookup field on the edit page of translated solutions.

- After deleting a translated solution, you can create a new translated solution in the same language. However, you will not be able to undelete the original translated solution from the Recycle Bin until you delete the second translated solution.

SEE ALSO:

Solutions Overview

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To delete unpublished solutions:
- Delete on solutions

To delete published solutions:
- Manage Published Solutions

Categorizing Solutions

Use solution categories to group similar solutions together. Each solution can belong to more than one category. Once your solutions are categorized, you can browse for and find solutions by category from the Solutions tab or when solving a case. Customers can also browse published solutions by category in public solutions, the Self-Service portal, and the Customer Portal.

Administrators, and users with the "Manage Categories" permission, can categorize solutions prior to enabling solution categories for the entire organization. Once solution category browsing is enabled, all users with the appropriate permissions can categorize solutions.

If multilingual solutions is enabled for your organization, translated solutions inherit solution categories from their master solutions. The categories on a translated solution are synchronized with the categories on the master solution. To modify a translated solution's categories, you have to modify the categories of its master solution.

1. View the solution you want to categorize.

2. Click **Select Categories** in the Solution Categories related list.

    This related list is not visible unless your administrator has defined and enabled categories.

3. In the solution category hierarchy, click **Select** to add a category to the solution. Repeat until you have added all applicable categories.

    We recommend that you limit the number of categories to which a solution belongs. If you put solutions into only the most relevant categories, they will be easier for users and customers to find.

    If necessary, click **Deselect** to remove a category from the solution.

4. Click **Save**.

To later remove a category from a solution, click **Del** in the Solution Categories related list on the solution detail page.

📝 Note: You can create a custom report on solution categories. However, solution category information is not available in list views.

SEE ALSO:

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To categorize solutions:
*   Edit on solutions

Setting Multilingual Solution Statuses

After you modify a master solution, you can adjust the statuses of each translated solution associated with it and notify users to update those translations, if necessary:

1. Choose a status for the translated solution from the `Status` picklist. For example, Draft, Reviewed, or Duplicate. The picklist values available for you to choose from are set by your administrator.

2. Select the `Out of Date` checkbox to indicate that the master solution has been updated and that the translated solution may need translating. The translated solution will be marked `Out of Date` on the Translated Solution related list of the master solution.

3. Select the `Send Notification` checkbox if you want the last active user who created or modified the solution to receive an email notifying them that the master solution has been updated and that the translated solution may need translating.

   The user displayed in the `Notification Recipient` column will receive the email. Email notices are system-generated and cannot be modified. The email notification is in the language of the notification recipient.

4. Click **Save**.

SEE ALSO:

   Solution Fields

Solutions Home

Clicking on the Solutions tab displays the solutions home page.

- Under **Find Solutions**, enter keywords to search for a solution. If your organization uses categories, optionally select a category in which to search. 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.

- In the **Browse Solutions** section, click a category name to view a list of solutions in that category and its subcategories.

- To show a filtered list of items, select a predefined list from the `View` drop-down list, or click **Create New View** to define your own custom views. To edit or delete any view you created, select it from the `View` drop-down list and click **Edit**.

- In the **Recent Solutions** section, select an item from the drop-down list to display a brief list of the top solutions matching that criteria. From the list, you can click any solution name to go directly to the solution detail. Toggle the **Show 25 items** and **Show 10 items** links to change the number of items that display. The fields you see are determined by the "Solutions Tab" search layout defined by your administrator and by your field-level security settings (available in Professional, Enterprise, Unlimited, Performance, and Developer Editions only). The Recent Solutions choices are:

Recent Solutions Choice	Description
Recently Viewed	The last ten or twenty-five solutions you viewed, with the most recently viewed

Recent Solutions Choice	Description
	solution listed first. This list is derived from your recent items and includes records owned by you and other users.

- In the **Recent Solutions** section, click **New** to create a solution.
- Under **Reports**, click any report name to display that report. The Solution List report allows you to report on any solution field.

SEE ALSO:

Solutions Overview

Creating Solutions

Searching for Solutions

Solution History

The Solution History related list of a solution detail page tracks changes to the solution. Any time a user modifies any of the standard or custom fields whose history is set to be tracked on the solution, a new entry is added to the Solution History related list. All entries include the date, time, nature of the change, and who made the change. Modifications to the related lists on the solution are not tracked in the solution history.

SEE ALSO:

Solutions Overview

Solution Fields

EDITIONS

Available in: Salesforce Classic

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

Solution Fields

A solution has the following fields, listed in alphabetical order.

Field	Description
Created By	User who created the solution including creation date and time. (Read only)
Language	The language in which a solution is written. Available for organizations with multilingual solutions enabled.
Master Solution	The solution with which a translated solution is associated and from which its title and details are derived. Available for organizations with multilingual solutions enabled.

EDITIONS

Available in: Salesforce Classic

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

Field	Description
Master Solution Details	Detailed description of the master solution from which a translated solution's details are derived. (Read only)
	Available for organizations with multilingual solutions enabled.
Master Solution Title	Title of the master solution from which a translated solution's title is derived. (Read only)
	Available for organizations with multilingual solutions enabled.
Modified By	User who last changed the solution fields, including modification date and time. This does not track changes made to any of the related list items on the solution. (Read only)
Open Case Detail	Link to printable view of the case that was used to create the solution. Displays only if the solution was created when the case was closed. Displays only when editing a solution. (Read only)
Out of Date	Checkbox that indicates that a translated solution's title and details may need translating to match the title and details of the master solution with which it is associated.
	Available for organizations with multilingual solutions enabled.
Public	**Note:** Before Spring '14, this field was called `Visible in Self-Service Portal`.
	Indicates the solution is available in the Self-Service Portal and Customer Portal.
	If Communities is enabled in your organization, this field specifies whether a solution is visible to external users in communities.
Solution Details	Detailed description of the solution. Up to 32 KB of data are allowed.
	Solution details are either displayed in text or HTML, depending on how your organization is set up.
	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.
Solution Number	Automatically generated identifying number. (Read only) Administrators can modify the format and numbering for this field.
Solution Title	Title of the solution describing the customer's problem or question.
Status	Status of the solution, for example, Draft, Reviewed. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.
Visible in Public Knowledge Base	Indicates the solution is a public solution.
	This field only applies to solutions, not articles in the public knowledge base.

Field	Description
Custom Links	Listing of custom links for solutions set up by your administrator.

SEE ALSO:

[Creating Solutions](#)

[Displaying and Selecting Solutions](#)

Solutions FAQ

IN THIS SECTION:

[What is a solution manager?](#)

[Why are solutions used?](#)

[What is the difference between a solution and a FAQ?](#)

[How can I write good solutions?](#)

[What should I look for when I review solutions?](#)

[What are the Visible in Self-Service Portal and Visible in Public Knowledge Base checkboxes on a solution?](#)

What is a solution manager?

A solution manager can edit, delete, and make solutions visible in the Self-Service Portal and Customer Portal and visible in public solutions. Typically, these individuals are product experts with excellent written communication skills and advanced knowledge in a particular area of your product. To designate one or more users as solution managers, your administrator can assign those users to the Solution Manager profile when creating or editing the users' personal information.

SEE ALSO:

[Solutions FAQ](#)

Why are solutions used?

Solutions provide a quick means to identify and resolve a customer issue. By capturing customer issues and structuring findable, reusable solutions, your customer support team can leverage existing knowledge to provide answers to issues that have been solved previously, increasing customer satisfaction and your team's productivity.

SEE ALSO:

[Solutions FAQ](#)

What is the difference between a solution and a FAQ?

A FAQ serves mostly as a useful tip for how the product or service is supposed to work. Solutions answer customer questions when the product or service is not working as expected. Because customers' expectations may not always be accurate, a solution may describe

how the product or service is supposed to work (very similar to a FAQ), help troubleshoot a problem, or provide a work-around to a bug or product limitation.

SEE ALSO:

Solutions FAQ

How can I write good solutions?

A good solution is reusable, easy to find, and technically accurate. For more information, download Tips & Hints for Solutions.

SEE ALSO:

Solutions FAQ

What should I look for when I review solutions?

Solution managers can use these guidelines when reviewing solutions:

1. **Structure:** The solution should include a clear title, the symptom(s), cause, and resolution.
2. **Language:** The solution should be clear and easy to read in the language of the customer.
3. **No Customer-Specific Information:** Solutions should never contain customer-specific information.
4. **Technically Accurate:** The solution should accurately and effectively solve the problem posed by the customer.
5. **Professional:** Check for spelling and correct sentence structure.
6. **Sensitivity:** The solution should not contain any confidential or proprietary information that you wouldn't want a competitor to read.

SEE ALSO:

Solutions FAQ

What are the Visible in Self-Service Portal and Visible in Public Knowledge Base checkboxes on a solution?

The `Visible in Self-Service Portal` and `Visible in Public Knowledge Base` checkboxes, when selected, indicate that a solution is available for external use on your organization's Self-Service Portal and Customer Portal and public solutions. Solutions available for external use are regarded as published.

Visible in Public Knowledge Base only applies to solutions, not articles in the public knowledge base.

📝 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:

Solutions FAQ

Agent Console

The Agent console in the console tab makes it easier to find related information with less switching between pages.

✒️ **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 set up the Agent console to display the information most important to your work according to your business needs. Before setting up or using the Agent console, review Agent console terminology.

SEE ALSO:

Agent Console FAQ

Displaying the Agent Console

Navigating within the Agent Console

Tip Sheet: Using the Console

Agent Console Concepts

Review the following terminology used to describe the components of the Agent console:

Frames

Separate sections of the console, each displaying a different record, list view, or other page.

List View

The console's top frame, which is a list view of records based on specific criteria. The list views you can select to display in the Console tab are the same list views defined on the tabs of other objects. You cannot create a list view within the console.

Detail View

The Agent console's center frame, which is the detail page view of any record selected from any of the console's other frames. The detail view displays the same page layouts defined for the object's detail pages. When a record is displayed in the detail view, it is highlighted in the list view.

Mini View

The Agent console's right frame which displays the records associated with the record displayed in the detail view. The fields displayed in the mini view are defined in the mini page layouts by an administrator. The mini view does not display if the record in the detail view does not have any records associated with it.

Sidebar

The Agent console's left frame, which displays recent items, the Recycle Bin, and other components, just like the sidebar displayed on every Salesforce page. To show or hide the sidebar in the console, click the border of the left frame.

Related Objects

Objects chosen by an administrator to display in the Agent console's mini view when records of a particular type are shown in the console's detail view. For example, when a case is in the detail view, an administrator can choose to display an associated account, contact, or asset in the mini view.

Mini Page Layouts

A subset of the items in a record's existing page layout that administrators choose to display in the Agent console's Mini View and in Hover Details. Mini page layouts inherit record type and profile associations, related lists, fields, and field access settings from the page layout.

Console Layout

Objects chosen by an administrator to display in the list view frame of the Agent console. For example, if an administrator adds cases to a console layout, then users whose profiles are assigned to that console layout can see list views of cases in the console's list view frame.

SEE ALSO:

Agent Console

Displaying the Agent Console

Navigating within the Agent Console

Tip Sheet: Using the Console

Navigating within the Agent Console

What you click in the Agent console determines which frame a record displays in.

In the detail view, clicking:

- Buttons or links on the record displays the record in the detail view.
- **Email this page** (✉) displays a link to the record in an email.
- **Link to this page** (🔗) displays the record and the URL of the record in a new browser window.
- **Printable View** (🖨) displays a printable view of the record in a popup window.
- **Customize Page** (✎) allows you to customize the display of related lists in the detail view of the record.
- **Help for this page** (❓) displays an online help page for the record.

In the mini view, clicking:

- Links displays the record in the detail view. Associated records display in the mini view.
- **View** displays the entire record in the detail view.
- **Edit** displays a mini edit page in the mini view.

  To edit a field not displayed on the mini edit page, click **View** to display the entire record in the detail view, and then click **Edit** from the detail view.

- **Show more** below a related list displays more of the records included in the related list in the mini view. **Show more** displays an additional five records every time you click it, up to a maximum of 100.

  📝 Note: The mini view does not display if the record in the detail view does not have any records associated with it.

In the list view, clicking:

- A link displays the record in the detail view.
- **Refresh** reloads the list view with any updates that have occurred to the records since you began viewing the list.

- A column heading sorts that column in ascending order. Click the heading a second time to sort in descending order.
- A letter at the bottom of the list view filters your list view records by the letter.
- **fewer** or **more** at the bottom of the list view displays a shorter or longer list.
- **Previous Page** or **Next Page** at the bottom of the list view displays the previous or next page of items on the list.
- For more information, see Using the Agent Console List View.

In the sidebar, clicking:

- The border of the left frame opens the sidebar in the console. Click the border of the left frame a second time to hide the sidebar.
- A record under `Recent Items` displays the record in the detail view.
- **Calendar** displays the calendar in the detail view.
- **Recycle Bin** displays the Recycle Bin in the detail view.

> 💡 Tip: Clicking the back or forward buttons on your browser cycles you through pages in the console. You will not immediately exit the console by clicking them.

> 📝 Note: Not all pages open within the console. For example, clicking **Printable View**, **Check Spelling**, **Help for this Page**, lookup icons, email addresses, and custom links set to open in a new browser window all open outside of the console in a new browser window or popup.
>
> Drag-and-drop editing is not available for calendar views in the .

SEE ALSO:
    Agent Console FAQ
    Agent Console
    Agent Console Concepts
    Displaying the Agent Console
    Using the Agent Console List View
    Tip Sheet: Using the Console

Displaying the Agent Console

You can start using the Agent console after your administrator has set it up as described in Agent Console.

To display the Agent console, click the Console tab. To exit the console, select any tab.

No data displays in the console if the selected list view does not contain any records.

> 📝 Note: You can only access the Agent console if your administrator has assigned your user profile to a console layout and granted you access to the Console tab. You can customize your display to make the Console tab visible in your tab sets.

SEE ALSO:
    Agent Console FAQ
    Agent Console
    Navigating within the Agent Console
    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

Using the Agent Console List View

The Agent console's list view allows you to quickly perform actions within Salesforce without leaving the console.

Display list views

From the drop-down list in the top left of the list view frame, select an object, and then a list view of the object to display in the console's list view frame. You cannot create a list view within the console.

Click **Refresh** to reload the list view with any updates that have occurred to the records since you began viewing the list. The refresh button automatically changes colors when record updates have occurred.

Records italicize in the list view when you edit them in the detail view. This shows you the records you have edited.

Search

Enter keywords in the search box above the list view and click **Go!** to use advanced search across all the searchable records you can access in your organization. Terms in an advanced search are treated as separate words rather than a phrase and can be found in different indexed fields within a record. So, searching for *Pat Powers* in advanced search will find a contact named "Pat P Powers," as well as a contact named "Pat Smith" with an email address of "smith@powers.com.".Search results display in the detail view.

Create records

From the New drop-down list, select any object to create a new record. New record pages display in the detail view.

View recent items

From the Recent Items drop-down list, you can choose to display any of the 10 records you most recently viewed. Recent items display in the detail view.

Perform mass actions

Select the checkbox next to items in the list view, and from the Mass Action drop-down list, choose the action you want to perform on all the selected records.

If you perform a mass action on more than 200 records while using Internet Explorer, you might be automatically logged out of Salesforce.

📝 Note: No data displays in the console if the selected list view does not contain any records.

SEE ALSO:

Agent Console

Agent Console Concepts

Displaying the Agent Console

Navigating within the Agent Console

Tip Sheet: Using the Console

Agent Console FAQ

- How is the Console tab different from other tabs in Salesforce?
- How do I view the Agent console?
- Why do I only see the list views of certain objects in the Agent Console?
- Can I view more than one Agent console?
- Is the Agent console the same thing as the Salesforce console?

How is the Console tab different from other tabs in Salesforce?

The Console tab is just like other tabs in Salesforce except that the console can display records from several different Salesforce tabs all on one Console tab. This specialized display is called the Agent console, and it allows you to have all the information you need on one tab when interacting with Salesforce. By using the Agent console in the Console tab, you can quickly find, view, and edit records, such as cases, accounts, and contacts, with fewer clicks and without switching back and forth between screens.

SEE ALSO:

Agent Console FAQ

How do I view the Agent console?

You can view the Agent console by clicking the Console tab. You can only access the Agent console if your administrator has assigned your user profile to a console layout and granted you access to the Console tab. You can customize your display to make the Console tab visible in your tab sets.

SEE ALSO:

Agent Console FAQ

Why do I only see the list views of certain objects in the Agent Console?

The list views of objects you can display in the Agent console are defined by your administrator in the console layout assigned to your user profile.

SEE ALSO:

Agent Console FAQ

Can I view more than one Agent console?

No. You can only view one Agent console. However, your administrator can customize many different Agent console layouts to display a variety of objects in the Agent console's list view, and then assign those console layouts to different user profiles to satisfy business needs for different users.

SEE ALSO:

> Agent Console FAQ

Is the Agent console the same thing as the Salesforce console?

No. The Salesforce console improves on the Agent console by providing you with more advanced options and technologies.

SEE ALSO:

> Agent Console FAQ

Use Social Customer Service

Use social customer service to engage your customer on social media.

IN THIS SECTION:

Manage Social Posts

A social post is a Salesforce object that represents a post on a social network such as Facebook or Twitter.

Manage Social Personas

A social persona is a Salesforce object that represents a contact's profile on a social network such as Facebook, or Twitter.

Social Action Tips

Use the social action on the case or lead feed to respond to social posts. Choose an appropriate message type when composing a response. For example, you can choose to reply with a direct message on Twitter rather than a public tweet.

We recommend that the layout of the social action includes the following fields, at minimum.

Field	Description
In Reply To	The social post you are replying to and its content. Use the Reply, Retweet, and Comment links in the feed to add content to a specific item in the feed.
Managed Social Account	You must have access to the managed social account by a profile or permission set. Use the drop-down to change to another account you have access to.
Message Type	By default the message type is set to Reply for inbound posts. Use the drop-down to change to another valid message type.
Content	All outbound content must be unique for the interaction, you can't send the same content in the same conversation. All Twitter replies must start with a handle: @[social handle].

If your posts require approval before they are sent, you can click **Submit for Approval** to start the review process. You can **Recall** it before it is approved or rejected. If a post is rejected, you can **Retry** a rewritten post. When your post is approved, it is automatically published.

Here are some tips for working with social networks.

- You can like, unlike, view source, and delete social media from the case feed while in Lightning Experience.

- URLs in a social post are turned into clickable links.

- When deleting posts, consider that Twitter Direct Messages behave like to emails. For example, the sender can delete their direct message from a conversation view. However, receiver has that direct message in their conversation view until they choose to delete it.

- Speaking of Twitter Direct Messages, Twitter has a preference to "Receive Direct Messages from Anyone". Therefore, depending on if this permission is set on the recipient's or your account, you may not have to follow each other to direct message.

- If your Twitter settings allow you to receive direct messages from anyone, you can send deep links to invite users to direct message conversations. To send a deep link direct message invitation, paste this link into your outbound message:
  ```
  https://twitter.com/messages/compose?recipient_id={your Twitter account's numeric user ID}
  ```
  You can find your twitter account's numeric ID on twitter.com by going to **Your Twitter User** > **Settings** > **Your Twitter Data**. Twitter handles the URLs and the rendering in their native clients.

- Agents can use the **View Source** link to go to the inbox of the social network they're logged in to.

- In Salesforce1, agents can see and reply to social content from mobile devices.

- Only change the Status picklist field on social posts if you are working with outbound posts. If an agent manually sets the status on the inbound social post detail page, the social posts in the case feed may not match. We recommend removing the Status field on the inbound social post detail page layout. For example, if you change the Status of an inbound post to Sending, the Reply link in the case feed item disappears until you change the status back to None.

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. Agents can use the feeds to see the content that they are replying to, see star ratings, reply to reviews, like posts and comments, send posts, comments, replies, and private messages, respond privately to comments, and delete posts managed by your social accounts. To use these features, you need the Editor or Moderator role for your Facebook page, but we recommend the Admin role as a best practice.

Here are tips for dealing with some possible error messages.

Message	Action
You can't send a direct message to this Twitter user because the user is not following you.	Use a reply to ask the Twitter user to follow your managed social account. Once they are following you, send them a direct message.
Whoops! You already said that... Change your message and try again.	You can't post the same text twice. Change your content and send again.
Your content is too long.	Reduce your content to 140 characters or less. For Twitter replies, the handle is included in the character count.
Twitter replies must begin with a handle.	The content field for a Twitter reply must be in the form: @[sender's handle] message text. Ensure that there is a space between the sender's handle and your message.
Your response message type must be compatible with the original post's message type.	Change the message type to match the original message.
Your login to Social Studio has failed. The username or password may be incorrect. Update your credentials or reset your password.	An administrator must edit the Social Studio credentials on the Social Media settings page. Note: When an administrator makes a copy of or refreshes a Sandbox organization, a new organization is created, with a new ID, making the Social Studio login invalid.
Your post did not send.	We recommend creating a workflow to notify the case owner that an attempt to send a response via Twitter has failed.

SEE ALSO:

Complete Guide to Social Customer Service

Manage Social Posts

A social post is a Salesforce object that represents a post on a social network such as Facebook or Twitter.

The Social Posts tab or object is a collection of information about a post from a person or company on a social network, such as Twitter or Facebook. The available information for a post varies depending on the social network. You can view and manage social posts.

> 📝 **Note:** For inbound posts, setting a Status picklist value on the social post detail page does not stay with the post, as this field is for outbound posts only.

1. Click the **Social Posts** tab.

2. Optionally, select a view.

   The list defaults to those recently viewed. Select a `View` or create one to filter the list of posts. If your organization has moderation enabled, select **Social posts without case** to view and either create a case for or ignore posts. You can also create a view to fit your needs.

3. Click the social post name you'd like to manage or click **New Social Post** to create a post.

   If you selected a view, you can click **Edit** or **Del** (delete) as appropriate.

   > 📝 **Note:** On the Social Post tab, you can only create, edit, and delete posts in your Salesforce organization, not on the social networks.

4. To manage posts without cases, select the posts you'd like to either create a case for or ignore and click **Create Case** and **Ignore** as appropriate.

   For example, an agent can ignore a Facebook post of "I love you guys!" as it does not warrant a case.

   If you are using the Social Customer Service Starter Pack, you can enable case moderation on the Social Accounts tab in Setup, see Enable Social Customer Service. To enable moderation through Social Studio see, Enable Moderation for Social Customer Service.

5. If you have Approvals enabled, Social Posts tab has a `Social posts pending approval` list view that allows you to review multiple pending posts and approve or reject them as desired.

   > 📝 **Note:** Once approvals are enabled, the Approve Posts and Reject Posts buttons remain on the Social Posts tab. However they don't work for inbound and posts not needing approval.

   > 💡 **Tip:** If you approve a post from the Social posts pending approval list view and a system interruption, session timeout, or other unexpected issue prevents the post from being published on the intended social network, an error message displays on the individual case only, not on the list view. To help honor any commitments, your company may have regarding response times on social networks, after approving posts from the list view, we recommend checking the posts' statuses to ensure that they were sent successfully and don't need to be resent.

On the social post detail page you can:

- View, edit, and create the post's content and information.

  > 📝 **Note:** The information varies depending on the social network the persona is from.

  Don't forget to click **Save** to save changes or create a post.

- If your organization has moderation enabled, you can create a case for a post or ignore it if it does not warrant a case.

- Delete the post in your Salesforce organization.

> **Note:** Social posts are not deleted when their parent record, usually a case, is deleted. Similarly, if a social post is associated with an account, contact, or lead through the polymorphic Who field, deleting any of those related records does not affect the social post.

You can reply to a social post from the case or lead feeds only, not the Social Posts tab.

SEE ALSO:

Manage Social Personas

Social Action Tips

Complete Guide to Social Customer Service

Manage Social Personas

A social persona is a Salesforce object that represents a contact's profile on a social network such as Facebook, or Twitter.

The Social Personas tab or object is a collection of publicly available information about a person or company from Twitter or Facebook. A Persona is relative to the social network and there can be multiple personas attached to a single contact. You can edit or delete a persona but you can't manually create a social persona from Salesforce. The personas are created from public information on social networking sites. You can view and manage your social persona records like other records in Salesforce.

> **Note:** Social persona fields many have maximum character lengths set by standard or custom Salesforce limits. For example, the first name field is limited to 40 characters. If a social persona with a first name longer than 40 characters is created from an inbound social post, the first name is truncated at the 40th character.

1. Click the **Social Personas** tab.

2. Optionally, select a view.

   The list defaults to those recently viewed. Select **All** in the `View` drop-down to show all social personas in your organization. You can also create a view to fit your needs.

3. Click the social handle you'd like to manage.

   If you selected a view, click **Edit** or **Del** (delete) as appropriate.

   > **Warning:** If you delete a social persona through the Social Accounts and Contacts feature, all related social posts are also deleted.

On the social persona detail page you can:

- View and edit the contact's available information for that social network.

  > **Note:** The information varies depending on the social network the persona is from.

- Delete the social persona from your organization.

- Create, edit, and delete social posts.

- View which social network created the persona, in the `Source App` field. This field is set on creation and is not updateable. Social Personas created prior to the Summer '15 release do not have this field.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

Social personas and posts are available in API enabled **Professional** editions, **Enterprise**, **Performance**, and **Unlimited** editions.

USER PERMISSIONS

To install and deploy Social Studio for Salesforce:

- Customize Application

Warning: There is no field level security and you can't control who can create, read, edit, or delete Social Personas. Anyone in your organization can see all the data on a Social Persona object.

SEE ALSO:

Manage Social Posts

Social Action Tips

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